



WORKSHEET

Client Containment Gate

Use this worksheet before responding to a chaotic client situation.

Use this worksheet when you feel activated, frustrated, responsible, overinvested, or tempted to rescue. The goal is to slow the reaction, evaluate the structure, and choose the next contained action.

SITUATION SETUP

Client / situation

Date

What happened? Write one sentence.

Why does this feel activating right now?

1 CHECK

Check yourself before checking the client.

Score each item from 0-10.

Physical energy	_____ / 10
Mental clarity	_____ / 10
Emotional intensity	_____ / 10
Urgency level	_____ / 10
Resentment level	_____ / 10
Rescue impulse	_____ / 10
Desire to overexplain	_____ / 10
Desire to prove value	_____ / 10

If emotional intensity, urgency, resentment, rescue impulse, desire to overexplain, or desire to prove value is 7 or higher, pause before responding.

Reset phrase:

"I am activated. I need containment before strategy."

What do I need before I respond?

2 FILTER

Evaluate whether the client system can hold progress.

D Defined Pass Fail

Is the request, role, scope, authority, or next step clearly defined?

R Resourced Pass Fail

Do they have the money, people, time, authority, and buy-in to support the request?

A Aligned Pass Fail

Are words, behavior, leadership, and follow-through aligned?

I Insured Pass Fail

Are agreement, payment, boundaries, scope, IP, and ownership protected?

N Non-chaotic Pass Fail

Can the system hold progress without broadcasting urgency and confusion?

3 TIER

Choose the response the structure can actually support.

Failed DRAIN checks: ____ / 5

Failed Checks	Response Tier	What It Means
0-1	Proceed	Normal engagement is reasonable.
2	Contain	Clarify conditions before more investment.
3	Restrict	Limit exposure; no extra strategy or rescue work.
4-5	Pause / Reset / Exit	The system cannot currently hold the work.

Selected tier

What this tier means for my next response

What I will NOT do from this tier

4 CONDITION

Turn frustration into structure.

What am I feeling?

What is the missing condition?

Before I continue, I need:

Who owns the next step?

What will I not do until the condition is met?

Before I continue, I need _____. Until then, I will not _____.

Response Builder

Choose the script that best matches the situation. Edit it so it is clear, calm, and true.

SCOPE UNCLEAR

"Before we move further, I want to make sure we are not building on ambiguity. The next step is to define the scope, owner, timeline, and decision-maker."

URGENCY WITHOUT STRUCTURE

"I understand this feels urgent. To move quickly without creating more confusion, we need to lock the next decision and assign ownership first."

PAYMENT OR AGREEMENT NOT HANDLED

"Before I can continue, we need to finalize the agreement and payment structure. Once that is complete, I can move forward."

SYSTEM CANNOT HOLD THE WORK

"The opportunity is real, but the structure is not stable enough yet. I recommend we simplify the scope and rebuild the foundation before expanding execution."

My final response draft

5 DECOMPRESS

Clear the load before you re-engage.

Facts only. What happened?

Which DRAIN checks failed?

Defined Resourced Aligned Insured Non-chaotic

Where do I feel the load in my body?

What emotion is present?

What condition must exist before I continue?

What is the smallest clear next action?

What will restore capacity?

Pattern Reflection

Use this page after repeated checks with the same client or situation.

Which DRAIN check keeps failing?

What is the repeated missing condition?

Where am I overinvesting before structure is proven?

What boundary needs to become standard?

I am responsible for the quality of my contribution. I am not responsible for the client's capacity to receive it.

The Client Containment Gate is an educational and practical decision-support framework. It is not therapy, medical advice, legal advice, financial advice, or a substitute for professional care. Use your judgment and consult qualified professionals when a situation requires legal, clinical, financial, or safety support.