

The Partner-Fit Scorecard

25 Evaluation Questions

Money and risk

1. What do you take home today, all in?

2. What's the minimum your household needs, and what happens below that?

3. What's the most financial stress you've been under, and what did you do?

4. What debt and personal guarantees are you carrying right now?

5. If we had a two-hundred-thousand-dollar profit year, what should happen to it?

6. If we skipped distributions for six months, what would that do to your household?

Time horizon and enough

7. What year do you intend to stop working full time?

8. What does the agency need to be worth to you by then?

9. What size and shape of agency is “enough” for you?

10. What offer would you sell for, and what would you never sell for?

Conflict and decisions

11. Tell me about the last time you told a boss or peer something they didn't want to hear.

12. Tell me about a decision that went against you. What did you do in the next forty-eight hours?

13. How do you want us to break a tie we can't resolve?

14. Which decisions do you expect to make alone?

15. What should happen if one of us stops carrying our end?

Character and track record

16. Tell me about a time you lost money on purpose to keep a promise.

17. What's something still running today that you built?

18. Who's the best person you ever developed, and where are they now?

19. What's the hardest thing you've ever had to tell a client?

20. What would you change about my agency in your first ninety days?

Entanglements and household

21. What other businesses, boards, side clients or investments are you part of?

22. What agreements are you currently bound by, and can I see them?

23. Who else has expectations about your time or money?

24. What does your spouse or partner think about this, in their words?

25. What's the thing you're worried about that you haven't said yet?
