Partnership Playbook ## A Guide to Using the Assessment Checklists for Better Partnership Decisions --- ## Introduction: Partnership as a Practice, Not a Event Most people treat partnership decisions as a one-time event: "Should we become partners?" You make that decision, commit, and then hope everything works out. This playbook is based on a different premise: **Partnership is an ongoing practice, not a one-time decision.** It requires assessment at multiple stages—before you commit, and then regularly throughout the relationship. This guide walks you through how to use both the **Business Partnership Assessment Checklist** (for pre-partnership evaluation) and the **Partnership Health Check** (for ongoing re-evaluation). It explains when to use each, how to interpret the results, and what to do with what you learn. The goal is simple: **Make better partnership decisions by surfacing truth early and maintaining honesty throughout.** --- ## Part 1: Before You Become Partners ### When to Use the Pre-Partnership Checklist Use the **Business Partnership Assessment Checklist** when: - You're seriously considering becoming partners (co-founders, business partners, M&A partners) - You've had initial conversations but haven't yet committed - You want to understand real compatibility before making a major decision - You want to avoid surprises that could have been surfaced earlier **Do not use it as:** - A final veto tool (it's diagnostic, not prescriptive) - A way to avoid a decision (it surfaces issues, but doesn't tell you whether to proceed) - A replacement for legal/financial due diligence (it's about people and working styles, not contracts) ### The Pre-Partnership Process: Step by Step **Step 1: Prepare (Individual)** Before meeting with your potential partner, complete the checklist on your own. This takes 45-60 minutes. - Answer all questions honestly about yourself - Answer all questions about how you perceive your potential partner (based on conversations, observations, what others have told you) - Don't overthink it—first instinct is usually accurate **Step 2: Exchange and Review (Individual)** Have your potential partner complete the same checklist independently. Don't discuss until both are finished. When you both have completed it: - Review your own answers first - Review your partner's answers about themselves - Review your partner's answers about you - Note

where you see big gaps **Step 3: Compare (Together)** Meet and go through each section together. For each section: 1. **Share what you see as working well** - Start here. Identify complementarity and strengths. 2. **Compare self-assessments** - How does each person see themselves? Are they self-aware? 3. **Compare partner assessments** - How does each person see the other? Are you experiencing each other accurately? 4. **Identify gaps** - Where do you disagree? What does that gap tell you? 5. **Discuss the implications** - Is this a misunderstanding? A real difference? A red flag? **Step 4: Categorize Issues (Together)** For each gap or concern, decide: - **Green flag** - This is actually a strength. We complement each other here. - **Yellow flag** - This is a difference, but it's manageable. We can work with this. - **Red flag** - This is concerning. We need to understand this better or we need to reconsider. **Step 5: Make a Decision (Together)** Based on your comparison: - **Proceed with confidence** - You understand each other, you're aligned on values, and you're ready to commit. - **Proceed with caution** - There are some yellow flags, but you believe you can navigate them. Agree on how you'll address them. - **Do not proceed** - There are red flags that suggest fundamental incompatibility. It's better to know this now than after you've committed. ### Red Flags That Suggest You Should Reconsider - Your potential partner refuses to complete the checklist honestly - Your potential partner becomes defensive about the results - Your potential partner dismisses your concerns as unimportant - Major gaps in how you see each other (they think they're collaborative; you think they're domineering) - Fundamental misalignment on values, risk tolerance, or definition of success - Your potential partner has a pattern of failed partnerships and blames everyone else - Your potential partner is unwilling to acknowledge their own role in past setbacks ### Green Flags That Suggest You Should Proceed - Both people complete the checklist honestly and thoughtfully - Both people can acknowledge gaps without becoming defensive - You agree on what's working well and what your complementarity is - You can identify specific yellow flags and agree on how to address them - Your potential partner can acknowledge their own patterns and is committed to improvement - You have a shared vision for what success looks like - You trust each other enough to

have difficult conversations --- ## Part 2: After You Become Partners ### When to Use the Re-Evaluation Checklist Use the **Partnership Health Check** when: - You've been partners for a while (3 months, 6 months, 12 months—whatever makes sense for your situation) - Something feels off and you want to diagnose what's happening - You want to check in on how the partnership is actually functioning - You're considering whether to continue, adjust, or exit the partnership - You want to address issues before they become relationship-ending problems **Do not use it as:** - A replacement for regular communication (it's a diagnostic, not a substitute for ongoing dialogue) - A weapon in a conflict (it's for understanding, not for proving who's right) - A way to avoid making a decision (it surfaces issues, but you still have to decide what to do) ### The Re-Evaluation Process: Step by Step **Step 1: Decide to Re-Evaluate (Together)** Before starting, agree together that you're going to do this. Make it clear that this is not about blame or judgment—it's about understanding how the partnership is actually working. If one person is reluctant, that's important information. Discuss why before proceeding. **Step 2: Complete Independently (Individual)** Each person completes the checklist on their own. This takes 60-75 minutes. - Answer questions about how things are actually working (not how you think they should work) - Answer questions about how things have changed since you started (better, same, or worse) - Be honest about what's working well AND what's not working - Don't try to be fair or balanced—report your actual experience **Step 3: Review Individually (Individual)** Before meeting, each person should: - Review their own answers - Identify the biggest gaps or concerns - Note where things have improved or deteriorated - Think about what needs to change **Step 4: Compare (Together)** Meet and go through each section. For each section: 1. **Share what's working well** - Start here. Acknowledge what you're doing right. 2. **Compare self-assessments** - How does each person see themselves? Have they changed? 3. **Compare partner assessments** - How does each person see the other? Are perceptions accurate? 4. **Identify gaps** - Where do you see things differently? 5. **Identify trends** - Is anything getting better or worse? 6. **Discuss what needs to change** - What specific adjustments would help? **Step 5: Categorize Issues (Together)** For

each issue or gap, decide: - **Fixable** - We can identify what needs to change and we're both willing to make those changes. - **Manageable** - This is a difference, but we can work with it if we're intentional about it. - **Fundamental problem** - This reflects a core misalignment that we're not sure we can fix. **Step 6: Make a Decision (Together)** Based on your comparison, decide: - **Stay the course** - The partnership is working well. Continue with minor adjustments. - **Adjust and recommit** - There are issues, but they're fixable. Agree on specific changes and commit to trying them. - **Serious reconsideration** - There are fundamental problems. You need to decide whether to invest in fixing this or whether it's time to exit. ### What to Do With the Results **If you decide to stay the course:** - Celebrate what's working well - Continue regular communication - Schedule the next re-evaluation in 6-12 months - Don't become complacent—partnership health requires ongoing attention **If you decide to adjust and recommit:** 1. Identify 2-3 specific changes you're committing to 2. Agree on how you'll know if the changes are working 3. Agree on who will do what and by when 4. Schedule a follow-up check-in in 4-6 weeks to see if the changes are taking hold 5. Schedule a full re-evaluation in 3-6 months 6. Hold each other accountable to the changes **If you decide on serious reconsideration:** 1. Get external help (mediator, coach, advisor) to assess whether this can be fixed 2. Be honest about whether both people want to fix it 3. If you decide to exit, do it thoughtfully and professionally 4. If you decide to stay, commit fully to rebuilding trust --- ## Part 3: Interpreting the Results ### Understanding Gaps A gap is where you see something differently than your partner sees it. Gaps are not good or bad—they're data. **Types of gaps:** **Gap Type 1: Misunderstanding** - You think your partner is dismissive; they think they're listening carefully - You think you're collaborative; they think you're domineering - **What to do:** Discuss what's actually happening. Often these gaps close with better communication. **Gap Type 2: Real Difference** - You're risk-averse; your partner is risk-tolerant - You want to move fast; your partner wants to be thorough - You're focused on people; your partner is focused on results - **What to do:** Acknowledge the difference and decide how to navigate it. Complementarity often comes from real differences. **Gap

Type 3: Red Flag** - Your partner thinks they listen to feedback; you experience them as dismissive - Your partner thinks they're disciplined about capital; you see them spending recklessly - Your partner thinks they're collaborative; you see them making unilateral decisions - **What to do:** This requires serious conversation. Either the gap closes through better understanding, or it suggests fundamental incompatibility. ### Understanding Trends A trend is whether something is getting better, staying the same, or getting worse. **Positive trends (getting better):** - You're becoming more open to each other's input - You're handling conflict more effectively - You're learning from setbacks and adjusting - You're becoming more transparent about problems - You're treating each other with more respect **Concerning trends (getting worse):** - You're becoming less open to each other's input - You're handling conflict less effectively - You're making the same mistakes repeatedly - You're becoming less transparent - You're treating each other with less respect **Stable trends (staying the same):** - You're maintaining the same level of communication - You're managing conflict about the same way - You're learning at about the same pace - You're maintaining the same level of trust **What to do:** Positive trends suggest the partnership is healthy. Concerning trends suggest you need to make changes. Stable trends are fine if they're at a healthy level, but concerning if they're at a problematic level. ### The "What's Working Well" Section This section is just as important as the problem areas. It tells you: - What you're doing right (so you can keep doing it) - Where you complement each other (so you can leverage those strengths) - Whether you're acknowledging each other's contributions (which indicates health) If you can't identify what's working well, that's a red flag. Healthy partnerships have things that are working. --- ## Part 4: Common Patterns and What They Mean ### Pattern 1: One Person Sees Themselves Very Differently Than Their Partner Sees Them **What it looks like:** - They think they're open to feedback; you experience them as dismissive - They think they're collaborative; you experience them as controlling - They think they're disciplined; you experience them as reckless **What it means:** - Either they lack self-awareness, or you're misunderstanding them - This is the most common source of partnership friction **What to do:** - Have a specific

conversation: "When I suggest X, I experience you as dismissive. Can you help me understand what's happening from your perspective?" - Listen carefully to their answer - If they can explain it in a way that makes sense, it's probably a misunderstanding - If they dismiss your concern or blame you, it's probably a real pattern ### Pattern 2: Both People Agree on the Problem, But One Person Won't Acknowledge Their Role **What it looks like:** - You both agree the partnership is struggling - But one person blames external factors or the other person - They won't acknowledge their own contribution to the problem **What it means:** - This person may not have the capacity to learn and adjust - This is a fundamental problem with the partnership **What to do:** - Be direct: "I notice you're describing the problem as something I'm doing or something external. What's your role in this?" - If they can't or won't acknowledge their role, this is a serious red flag - This pattern suggests the partnership won't improve because one person isn't willing to change ### Pattern 3: Things Are Getting Better Over Time **What it looks like:** - You're both learning from experience - You're becoming more open to each other's input - You're handling conflict more effectively - You're treating each other with more respect **What it means:** - The partnership is healthy - You're both committed to making it work - You have the foundation for a strong long-term partnership **What to do:** - Keep doing what you're doing - Continue regular re-evaluations to maintain health - Don't become complacent—ongoing attention is required ### Pattern 4: Things Are Getting Worse Over Time **What it looks like:** - You're becoming less open to each other's input - You're handling conflict less effectively - You're making the same mistakes repeatedly - You're treating each other with less respect **What it means:** - The partnership is deteriorating - Something needs to change, or the partnership won't survive - This is urgent **What to do:** - Get external help (mediator, coach, advisor) - Be honest about whether both people want to fix this - If yes, commit to specific changes and hold each other accountable - If no, it's time to consider exiting --- ## Part 5: When to Get External Help Consider bringing in external help (mediator, coach, advisor) when: - You're identifying red flags but you're not sure what they mean - You're in serious reconsideration and you need an objective perspective - You're trying to

adjust but you're stuck in the same patterns - You're considering exiting and you need help doing it professionally - You're trying to rebuild trust after a breach External help is not a sign of failure. It's a sign of commitment to getting it right. --- ## Part 6: When to Exit It's time to consider exiting when: - You've identified fundamental misalignment and you can't find a way to bridge it - One person has checked out emotionally and won't re-engage - You're having the same conflicts repeatedly and nothing is changing - Trust has eroded to the point where you can't work together effectively - One person is unwilling to acknowledge their role in problems or make changes - You've tried to fix it and nothing is working Exiting a partnership is difficult, but staying in a partnership that isn't working is worse. Sometimes the best decision is to part ways professionally and learn from the experience. --- ## Part 7: Using This Playbook Going Forward **Timeline:** - **Pre-partnership:** Complete the Business Partnership Assessment Checklist before committing - **3 months in:** Optional check-in if something feels off - **6 months in:** First full re-evaluation using the Partnership Health Check - **12 months in:** Second full re-evaluation - **Annually:** Ongoing re-evaluations as part of your partnership practice **Frequency:** - Use the re-evaluation checklist whenever something feels off - Use it as a regular practice (annually or semi-annually) to maintain partnership health - Use it before making major decisions (expanding the business, bringing in new partners, significant changes) **Mindset:** - Treat these checklists as diagnostic tools, not judgment tools - Approach the process with curiosity, not defensiveness - Remember that gaps are data, not failures - Focus on understanding, not on proving who's right - Use the results to make better decisions together --- ## Final Thoughts Partnership is one of the highest-stakes decisions you can make. Yet most people spend more time evaluating a car purchase than evaluating a potential business partner. This playbook, combined with the two assessment checklists, gives you a structured way to make better partnership decisions. It's not a guarantee of success—no tool can guarantee that. But it dramatically increases your odds by surfacing truth early and maintaining honesty throughout. The best partnerships are those where both people are willing to look honestly at how things are working and make adjustments

when needed. Use this playbook to create that kind of partnership. ---

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