Advisor/Consultant Consideration Checklist

10 questions to help you choose the right advisor, understand the investment, and protect the business you've worked hard to build.

Advisor / firm _____ Date _____

THE 10-QUESTION CHECKLIST

Check each item as you evaluate the fit.

- ☐ **01 Relevant experience**
  Have they worked with businesses of my size and complexity?
- ☐ **02 Understand first**
  Do they ask thoughtful questions before offering solutions?
- ☐ **03 Credible track record**
  Can they explain their work and provide relevant references?
- ☐ **04 Whole-business view**
  Can they connect finances, operations, strategy, and leadership?
- ☐ **05 Integrity**
  Will they tell me the truth, even when it is uncomfortable?
- ☐ **06 Clear scope**
  Are the fees, deliverables, timelines, and responsibilities clear?
- ☐ **07 Shared accountability**
  Do I know what they will do and what my team must do?
- ☐ **08 Measure progress**
  What early signs of progress and longer-term outcomes will we review?
- ☐ **09 Fair terms**
  Do I understand confidentiality, conflicts, cancellation, and exit terms?
- ☐ **10 Trial and review**
  Can we start with defined work and an agreed review point?

Before you commit, get clear on these three things.

The most important problem I need to solve: _____

The first evidence that the work is helping: _____

Our agreed review date: _____

A trial doesn't have to be free. It means a defined scope, clear expectations, and a review point. Strong business relationships are built through understanding, judgment, and follow-through.