

# Partner Assessment Checklist

Use this checklist to assess whether your vendors are functioning as true partners – aligned with your mission, invested in your success, and actively contributing to your long-term goals.

## Foundations of the Relationship

- ☐ We selected this vendor based on more than just price. We considered values, culture, and team alignment.
- ☐ There was a clear, intentional onboarding process that defined expectations and communication norms.
- ☐ Roles and responsibilities are clearly outlined on both sides.
- ☐ We have the right internal team members paired with the right vendor contacts.

## Trust & Transparency

- ☐ We have regular debriefs or feedback loops to address what's working and what's not.
- ☐ They are open about challenges, mistakes, and how they'll solve them.
- ☐ They consistently bring forward solutions, not just problems.
- ☐ They understand and prioritize our audience and objectives.

## Shared Goals & Accountability

- ☐ Success is measured beyond deliverables – impact, experience, and strategic value are part of the conversation.
- ☐ They take shared ownership of outcomes, including setbacks.
- ☐ We engage in honest conversations about value, growth, and improvement.
- ☐ They actively help us achieve organizational goals, not just execute tasks.

## Evolving the Relationship

- ☐ We regularly evaluate the relationship (e.g., every 2–3 years) to assess fit, innovation, and value.
- ☐ They proactively share insights, trends, and suggestions that help us grow.
- ☐ They've earned the right to test new ideas with us, and we treat those trials as mutual opportunities.
- ☐ They've introduced innovations or custom solutions that moved the needle for us.

### Scoring Suggestion:

- ✓ Check most or all boxes? You likely have a true partner.
- ⚠ Check fewer than half? It may be time to realign or reassess.

**projection**