

Use the following questions to get to know your prospective partner both personally and professionally.

These questions are designed to be answered individually by both of you prior to the meeting, and then you are encouraged to sit down and share the answers with each other. You're looking for philosophical congruence and tactical complements.

1. Why did you choose this profession?

2. Why did you decide to form a team, who are working team members, and what critical roles do they fulfill?

3. What is your succession timeline? Do you want to retire or move into senior emeritus status¹ for some period of time?

4. What is the plan to integrate you into the practice and with the clientele?

5. What are the 3-5 things that you do in the practice that have the greatest impact on productivity and growth?

6. What will be (have been) your greatest challenges in working within a team structure?

7. How are decisions made on the team on issues such as guiding the evolution of the practice and dealing with short-term and long-term business challenges?

8. What is the current team meeting structure (e.g., daily huddles, weekly strategy and semiannual developmental meetings)?

9. Are there any particular niche markets that have contributed to your success and productivity?

10. Is there anything else you need to know?