

Fit–Trust–Flexibility Diagnostic Checklist

Purpose:

This diagnostic helps agency leaders quickly and objectively decide whether a strained partner is worth running through a Partnership Reset or should be replaced immediately.

It reduces emotion-driven decisions, aligns your leadership team, and ensures you're weighing capability, trust, and adaptability before taking action.

1. Fit – Are They Still Built for Your Needs?

- ✓ They still deliver **80% or more** of your core capability needs.
 - ✓ Their skills align with your current client demands and service mix.
 - ✓ They can support at least one planned growth area in the next 12 months.
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2. Trust – Will They Act in Your Best Interest?

- ✓ You believe they will put your agency's success first, even under pressure.
 - ✓ They take accountability for mistakes without deflecting blame.
 - ✓ They share critical updates before problems escalate.
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3. Flexibility – Can They Adapt Quickly?

- ✓ They've successfully adapted to at least one major change in scope or process in the last year.
 - ✓ They can reallocate resources to meet urgent needs without major disruption.
 - ✓ They respond to feedback constructively and make changes promptly.
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Scoring Guide:

- **8–9 checks:** Strong candidate for a Partnership Reset.
 - **5–7 checks:** Consider a reset, but tighten safeguards.
 - **0–4 checks:** Skip the reset—begin planning replacement.
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Pro Tip: Complete this checklist with your full leadership team to ensure the decision is based on collective insight—not one person’s frustration or bias. Keep it as part of your standard partner review process to avoid rushed, costly replacements.