

# General Contractor Compatibility Questionnaire

**Project Type:** New Build / Remodel / Addition (Circle)

**Your Name:** \_\_\_\_\_

**General Contractor:** \_\_\_\_\_

**Date Initial Appointment:** \_\_\_\_\_

## ***Instructions for Homeowner:***

*Give this questionnaire to shortlisted contractors during your initial meeting or send it ahead of time.*

*Use their answers + your observations to evaluate personality and working-style fit before reviewing detailed bids.*

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## **Section 1: Communication Style (How we'll stay in touch)**

1. How do you prefer to send project updates?  Daily text summaries  Weekly detailed email reports  Real-time app/dashboard (e.g., Buildertrend, Procore)  Phone calls  Other: \_\_\_\_\_
2. How often do you expect the homeowner to make decisions during the project?  Only at major milestones  Weekly check-ins  As needed, but I'll flag urgent decisions quickly  Other: \_\_\_\_\_
3. Rate how you handle client questions or concerns (1–5): (1 = Very patient & detailed, 5 = Prefer quick & decisive)  
\_\_\_\_\_

## **Section 2: Project Approach & Decision Making**

4. When a client is very hands-on and wants to be involved in most decisions, how do you typically respond? (Open answer)  
\_\_\_\_\_
5. When a client prefers to be mostly hands-off and trust your expertise, how do you adjust your approach? (Open answer)  
\_\_\_\_\_
6. Describe your ideal client:  
\_\_\_\_\_
7. How do you feel about clients requesting changes after construction has started?  I strongly discourage it  I expect some changes and handle them efficiently  I'm very flexible and accommodating  Other: \_\_\_\_\_

### Section 3: Problem-Solving & Pressure

8. Tell me about a recent project where something unexpected went wrong. How did you handle it and communicate with the client?  
\_\_\_\_\_
9. Rate your preferred pace of decision-making (1–5): (1 = Very deliberate & thoughtful, 5 = Fast & decisive)  
\_\_\_\_\_
10. How do you handle schedule delays caused by the client (e.g., late decisions or material selections)? (Open answer)  
\_\_\_\_\_

### Section 4: Personality & Working Relationship

11. Which statement best describes your working style? (Choose one or rank top 2)  Direct and results-focused (gets things done quickly)  Collaborative and relationship-oriented (builds strong team spirit)  Steady, patient, and consistent (reliable over long projects)  Detail-oriented and analytical (high precision and documentation)
12. On a scale of 1–5, how important is humor and a positive attitude on the job site to you?  
\_\_\_\_\_
13. What do you enjoy most about working with homeowners?  
\_\_\_\_\_
14. What frustrates you most when working with homeowners?  
\_\_\_\_\_

### Section 5: Final Thoughts

15. Is there anything else about your working style or personality that would help us determine if we're a good fit?

Provide By:



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## Scoring & Evaluation Guide (For You – The Homeowner)

After the meeting, rate the contractor on these criteria (1–5 scale):

Criteria	Score (1–5)	Notes
Communication Clarity	_____	
Responsiveness to Your Style	_____	
Patience & Emotional Intelligence	_____	
Problem-Solving Transparency	_____	
Overall Energy / Personality Fit	_____	
<b>Total Score</b>	_____ /25	

### Interpretation:

- **22–25:** Excellent potential fit
- **18–21:** Good fit — manageable differences
- **14–17:** Possible fit — requires clear boundaries
- **Below 14:** Significant style mismatch — proceed with caution

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### How to Use This Questionnaire Effectively

1. Send it to 3–5 shortlisted contractors **before** they invest time creating detailed proposals.
2. Review answers alongside their licensing, references, and insurance.
3. Use it as a discussion starter in meetings.
4. Compare responses side-by-side in your master spreadsheet.