

# **General Contractor Compatibility Questionnaire**

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

**Homeowner:** \_\_\_\_\_

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

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

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

*Give this questionnaire to shortlisted contractors during your initial meeting.*

*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

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

#### Use these to close confidently during the appointment

- ☐ Who will be my day-to-day contact on site?
- ☐ Exactly what is included in the scope and what is an allowance?
- ☐ How do you handle unexpected issues and who approves changes?
- ☐ What are the payment milestones and amounts?
- ☐ What warranties do you provide and how are warranty claims handled?
- ☐ How will you protect my home each day?

*The questions that reveal whether a contractor is organized, honest, and aligned with the homeowner's expectations.*

**1. How do you communicate during the project**

Clear communication rhythm = fewer surprises, smoother decisions, and less stress.

**2. What does your typical project timeline look like**

You're looking for sequencing, inspections, lead times, and how they handle delays.

**3. Can you walk me through your pre-construction process**

A strong GC has a defined system, not "we'll figure it out."

**4. How do you select and manage subcontractors**

Quality subs = quality work. Poor subs = rework, delays, and callbacks.

**5. What is included—and not included—in your scope**

This prevents change-order battles and protects the homeowner's budget.

**6. How do you handle change orders**

Look for transparency, documentation, pricing structure, and approval process.

**7. How do you ensure code compliance and permitting**

Charlotte inspections are strict. A GC without a process creates risk.

**8. What warranties do you provide**

Labor, materials, waterproofing, structural — get specifics in writing.

**9. How do you protect the home during construction**

Dust control, floor protection, daily cleanup, and material storage matter.

**10. What does a successful project look like to you**

This reveals alignment in expectations, quality standards, and communication style.

## **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>                | <b>_____/25</b> |       |

### **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. Compare responses side-by-side in your master spreadsheet.

Designed by Lee Burgess.  
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