

THE BACKBONE STRUCTURED REFERENCE GUIDE *A framework for reference calls that actually tell you something Backbone Technology Partners* *| charley@backbonetechnologypartners.com*

The Principle

Reference calls fail when they're generic. They succeed when they're tied directly to what the candidate told you in the interview. Every question in this guide should be adapted to reflect specific examples, situations, and claims the candidate made during your process. This is not a script to read verbatim — it's a framework to build from.

Before the Call

Review your interview notes and identify three to five specific examples the candidate gave — situations they navigated, decisions they made, outcomes they claim to have driven. These become the backbone of your reference call. You are not fishing for general impressions. You are corroborating or complicating a specific factual record.

Confirm the reference's relationship to the candidate: how long, in what context, and in what capacity did they observe this person's work? A peer reference and a direct-report reference will give you different and complementary information. Collect both when possible.

Opening the Call

Introduce yourself and the firm. Explain that you've conducted a rigorous interview process and that you're using this call to follow up on specific things the candidate shared — not to fish for general opinions. This sets the tone and signals to the reference that you're serious and structured.

"I want to be respectful of your time, so I've prepared specific questions tied to what [candidate] described during our process. I'm less interested in general impressions and more interested in whether what they told us matches what you observed."

Section 1: Context and Relationship

How long did you work with [candidate] and in what capacity?

Were you their direct manager, a peer, a direct report, or a client?

What was the business context — what was the company trying to accomplish during the time you worked together?

Section 2: Corroborating Interview Examples

For each major example the candidate gave during interviews, ask the reference a version of the following:

"[Candidate] described a situation where [brief description of what they said]. Does that match your recollection of how they approached that kind of situation?"

Follow-up probes:

- What specifically did you observe them do?
 - What was the outcome from your vantage point?
 - Was there anything about how they handled it that surprised you — positively or negatively?
 - What would they have done differently if they were doing it again?
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Section 3: Leadership and Team Dynamics

How did people who worked for this person describe the experience of working for them?

Can you give me a specific example of a moment where their leadership was tested — and what you observed?

How did they handle a situation where they had to deliver difficult news — to a team, to a board, to a client?

Did they build teams that outlasted them, or did the team dynamic depend heavily on their personal presence?

Section 4: PE-Specific Fit *(adapt for your context)*

How did they perform under time pressure and compressed timelines?

How did they respond to significant changes in direction from ownership or the board?

Were they more effective in build mode, stabilization mode, or transformation mode — and what evidence would you point to?

How did they handle situations where the data and their instincts were pointing in different directions?

Section 5: The Questions Most People Skip

What is the most important thing I haven't asked you that I should know about this person?

Is there a context or environment where this person would struggle — where they would not be set up to succeed?

If you were building a company and could hire this person, would you? What role would you put them in?

Closing the Call

Thank the reference genuinely. Ask if there's anyone else whose perspective they'd recommend — this often surfaces additional references organically, without the candidate feeling blindsided.

Note your observations immediately after the call while the conversation is fresh. Flag any gaps between what the candidate said and what the reference described. Those gaps are your follow-up questions — go back to the candidate directly, not to a third back-channel.

This guide may be shared and adapted freely. If it helps you make better hires, that's the point. Backbone Technology Partners | backbonetechnologypartners.com | (646) 515-8486