Remodeling Partner Evaluation Scorecard

Chapter 2 in *Happiness Guaranteed* describes what three different conversations actually reveal when vetting remodeling professionals, and why price alone is never the right basis for comparison. This scorecard provides you with one sheet per company, so you can focus fully on each conversation as it happens; then, compare your totals on the summary page at the end. Record your observations for each company you have a conversation with.

Score each rated criterion on a scale of 1 to 5:
1 = poor or absent; 3 = adequate; 5 = exceptional.

Use the notes section to capture specific observations while they're fresh in your mind. Complete one sheet per company, then refer to the Summary page to compare.

Company name: _____

Primary contact: _____

Part One: Research and First Impressions

Complete before your first conversation, based on your own research.

Professional portfolio photography
□ **1** □ **2** □ **3** □ **4** □ **5**

Houzz or online presence quality
□ 1 □ 2 □ 3 □ 4 □ 5

Review depth and specificity
□ 1 □ 2 □ 3 □ 4 □ 5

Team page on website	□ Yes	□ No
Industry association memberships	□ Yes	□ No
Licensing / bond verified	□ Yes	□ No

First impression notes:

Part Two: The Initial Phone Call

Responded promptly
□ 1 □ 2 □ 3 □ 4 □ 5

Call felt organized, not improvised
□ 1 □ 2 □ 3 □ 4 □ 5

Asked questions before pitching
□ 1 □ 2 □ 3 □ 4 □ 5

Listened carefully to your situation
□ 1 □ 2 □ 3 □ 4 □ 5

Clear next step proposed
□ 1 □ 2 □ 3 □ 4 □ 5

Notes from the call:

Part Three: The Virtual or Second Conversation

Asked about your why, not just the project

□ 1 □ 2 □ 3 □ 4 □ 5

Budget conversation felt honest, not evasive

□ 1 □ 2 □ 3 □ 4 □ 5

Described their process clearly

□ 1 □ 2 □ 3 □ 4 □ 5

Genuine interest in finding a good fit, not just closing the deal

□ 1 □ 2 □ 3 □ 4 □ 5

Left you feeling informed, not overwhelmed

□ 1 □ 2 □ 3 □ 4 □ 5

Notes from the virtual meeting:

Part Four: The In-Person Meeting

Conversation before tape measure
□ 1 □ 2 □ 3 □ 4 □ 5

Asked thoughtful questions about how you live
□ 1 □ 2 □ 3 □ 4 □ 5

Walkthrough felt collaborative, not transactional
□ 1 □ 2 □ 3 □ 4 □ 5

Explained design process with confidence
□ 1 □ 2 □ 3 □ 4 □ 5

Handled budget questions honestly
□ 1 □ 2 □ 3 □ 4 □ 5

Described communication systems specifically
□ 1 □ 2 □ 3 □ 4 □ 5

Addressed surprises and discovery clearly
□ 1 □ 2 □ 3 □ 4 □ 5

Did NOT pressure for a same-day signature
□ 1 □ 2 □ 3 □ 4 □ 5

Notes from the visit: