

HARBOUR ADVISOR COMPATIBILITY ASSESSMENT

NOT CURRENTLY WORKING TOGETHER

COMPARISON CHART



CATEGORY	QUESTION	YES (+)	NO (-)	POINTS
Client Services	1. They have a track record of maintaining strong, long-term client relationships.	3	-3	
	2. They approach client segmentation, service, and communication in ways that align with your own.	1	-1	
	3. They demonstrate high client retention rates, reflecting strong client satisfaction.	1	-1	
	4. They actively seek to improve client outcomes and enhance the client experience.	1	-1	
Management	5. They demonstrate effective leadership or team management in their current practice.	3	-3	
	6. They can make difficult management decisions.	1	-1	
	7. They manage workflows effectively, ensuring the teams meets client service standards.	1	-1	
	8. They inspire trust and respect among staff and colleagues.	1	-1	
Character	9. They demonstrate integrity and consistently uphold ethical standards.	3	-3	
	10. They are known for keeping commitments, even under challenging circumstances.	1	-1	
	11. They maintain professionalism and composure in interactions with clients, staff, and peers.	1	-1	
	12. They can be trusted to represent the firm with your most valued clients.	1	-1	
Business Alignment	13. They operate a business model (fee structure, services) that is compatible with yours.	3	-3	
	14. They currently work at the same firm, or transitioning to a shared platform would be seamless.	1	-1	
	15. They have a client base that complements yours without substantial overlap.	1	-1	
	16. They are willing to adjust their processes or practices to align with yours if necessary.	1	-1	
Integration	17. They use a technology stack that can integrate with yours.	3	-3	
	18. They have team members whose roles and culture are compatible with yours.	1	-1	
	19. They operate in a way that would enhance efficiency.	1	-1	
	20. They are open to addressing challenges in staff roles to ensure continuity.	1	-1	
Total				

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INTERPRETATION OF RESULTS

25 TO 30 POINTS

Your successor is highly prepared, demonstrating strong alignment with client service, leadership, business development, ownership, and character requirements. They are ready to take on leadership effectively.

20 TO 24 POINTS

A solid candidate with evident potential. They may need additional growth or alignment in specific areas to ensure readiness.

15 TO 19 POINTS

The candidate shows potential but requires significant development in several areas. Consider a structured development plan to address these gaps.

BELOW 15 POINTS

The candidate is not ready to succeed at this time. Evaluate other candidates or invest in long-term development efforts.