Clear Sky Consulting

Before You Sign

A second-opinion checklist for any significant proposal.

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A second opinion is cheap insurance against an expensive mistake. Before you commit to any significant proposal, quote or recommendation, run it through this checklist - the things that are easiest to miss when the document is in front of you and the clock is ticking.

1. Who carries the risk?

Proposals are often written so that costs, delays or things going wrong land on you rather than the other side. Trace where the risk sits if things don't go to plan - a single clause on variations, liability or termination can quietly rewrite the deal.

2. What's assumed, but not stated?

Every proposal rests on assumptions about timing, scope and what's included. The expensive ones are the assumptions never written down. Surface them, and ask whether they actually hold for you.

3. What isn't being compared?

A proposal frames itself as the obvious choice. Reintroduce the alternatives it leaves out - including doing nothing, or simply waiting.

4. What would you ask if you had a month?

Write down the questions you'd reach with unlimited time, then take the three or four that matter most back to the table. More often than not, those questions - not a flat refusal - improve the deal.

Your pre-signature checklist

- ✓ I know exactly who carries the risk if things go wrong.
- ✓ I've listed the unstated assumptions and checked they hold.
- ✓ I've compared this against the real alternatives, including waiting.
- ✓ I have my three or four questions to ask before committing.
- ✓ I'm proceeding because it's right - not because of time pressure.
