

Go / No Go Project Information Checklist

The Go / No Go decision for project pursuits is an essential facet of risk and financial management for design firms. With annual marketing costs potentially exceeding 10% of net revenue for some firms, it is important to spend those dollars wisely and give your firm the best chance to win in today's ultra-competitive environment. Additionally, the process will help facilitate success in project delivery on those commissions that you are awarded.

Implementing a formal Go/No Go Process will:

- Increase your odds of success
- Reduce your exposure to liability
- Most efficiently use your company's manpower and resources
- Enable you to make a decision more objectively than subjectively

The following template is a tool that aids in the Go / No Go evaluation. It will help guide you in collecting necessary data in key categories of client and project selection, project team capability, and other strategic factors impacting the marketing and winning of new work. The analysis of this information will facilitate efficient use of your firm's valuable marketing and overhead labor resources toward the pursuit of projects that your firm can win and then deliver successfully. While still subjective, this template will help you manage your efforts to enable a thoughtful decision for each new potential project.

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GO / NO GO

DATE: _____

GO: _____

NO GO: _____

PROJECT INFORMATION CHECKLIST

NARRATIVE

Insert + (plus) or – (minus) indicating a positive or negative element for your firm or N/A in this column ↓

Project name		N/A
Owner		N/A
Location		N/A
CLIENT INFORMATION		
Is this an existing client? If no, does the client know us?		
Client experience in project type		
Client reputation for quality projects		
Is contract fair? Will client negotiate contract terms and conditions?		
Client history of litigation		
Is there future work from this client?		
PROJECT INFORMATION		
Scope		
Size		
Funding source/status		
Budget (project, construction cost)		
Construction Method		
Schedule for selection		
Schedule for completion		
History behind project		
Source of lead		
OTHER PROJECT CRITERIA		
List the design services included		
Design association justified?		
If yes, who is the lead firm? Why?		
Are outside consultants required?		

Consultant's strategic advantage?		
Is SBE/MBE a factor?		
What is the decision-making process?		
Who are the key decision-makers?		
DEVELOPING OUR WIN STRATEGY		
Our most important message		
Who is the competition?		
How can we distinguish ourselves from the competition?		
What resources/connections do we have to help us get selected?		
Does this project contribute to the mission of the firm?		
Are our team's capabilities/experience well matched to the client's needs/expectations?		
Do we have the appropriate staff available for the project?		
What is the fee/profitability potential?		
What is the realistic probability of winning the project (%)?		
Other criteria?		
Total Number of Pluses		
Total Pluses Divided by Total # Answered		
If pluses/total items answered are: 70% = GO 50% - 69% = Consider with Care Less than 50% = NO GO		
MARKETING BUDGET		
Marketing labor		
Technical labor		
Expenses		
Total		

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