

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.



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	(EXTERNAL)	
Client experience in project type		
Client reputation for quality projects		
Financial capability		
Is contract fair? Will client negotiate contract terms and conditions?		
Client history of litigation		
CLIENT INFORMATION	(INTERNAL)	
Existing client? If no, does the client know us?		
Future work from this client?		
Culture aligned?		
PROJECT INFORMATION	(EXTERNAL)	
Scope		
Size		
Funding source/status		
Budget (project, construction cost)		
Schedule for selection		
Schedule for completion		
Construction method		
History behind project		

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Source of lead		
Politics & regulations affecting project		
PROJECT INFORMATION	(INTERNAL)	
List the design services required		
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?		
Project location		
Value proposition opportunity		
Fee/profitability potential		
WIN STRATEGY	EIGHT ESSENTIAL ELEMENTS	
Do our capabilities/experience match well with client's needs/expectations?		
Do we have the appropriate staff available?		
Who is the competition?		
Does the project contribute to the mission of the firm?		
How can we distinguish ourselves from the competition?		
Our most important message		

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What resources/connections do we have to help us get selected?		
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 50-60%=CONSIDER WITH CARE LESS THAN 50%=NO GO

MARKETING BUDGET		
Marketing labor/submittal		
Technical labor/submittal		
Expenses/submittal		
Marketing labor/interview		
Technical labor/interview		
Expenses/interview		
TOTAL		

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For more information, contact:

Andrew D. Mendelson, FAIA
Senior Vice President,
Chief Risk Management Officer
amendelson@berkleydp.com

Diane P. Mika
Vice President,
Director of Risk Management Education
dmika@berkleydp.com



berkleydp.com | 855.534.7285

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