

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
- More efficiently use your company's manpower and resources
- Enable you to make decisions more objectively than subjectively

The key items to consider in making a go/no-go decision on whether to pursue a project include external and internal client and project criteria, your own project team capabilities, and other strategic factors impacting the marketing and winning of the new work. They include:

1. External Client Considerations

These are more objective and will be the same for any firm.

Consider the client's experience with the proposed project type, their reputation, their financial capability, and their litigation history are all things that would be similar analysis factors for any firm considering a new project.

2. Internal Client Considerations

These items are more about how the client relates to your firm.

Identify whether the client is already existing or new, whether there is the potential for future work, how the client treats and respects design professionals and contractors, and how the client's company culture matches your firm's.

3. External Project Considerations

Objective data about the project.

Assess the scope and size of the project, funding status, budget, schedule, project history, and politics are all considerations for any firm.

4. Internal Project Considerations

These focus on your own team's capacity and capabilities, especially leadership at the project management level, as well as the cost of project pursuit.

Evaluate which design services are required, whether you need to add designers or consultants to your team, what added value can you provide, how (if) the project contributes to your firm's strategic plan and business/portfolio goals including the profitability potential for your firm if you win the commission—and, importantly, your firm's cost to pursue the project opportunity in personnel time (including marketing, PM/design/technical staff) and presentation submission material.

5. Your Win Strategy

This section focuses on several elements that combine for a winning strategy.

Determine whether there is a match between the client's needs and your experience, and whether (and how) you can distinguish your firm as the best choice for the client.

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Berkley DP has developed a tool that assists in the detailed evaluation of these considerations. The Go/No-Go Project Information Checklist on the following pages will help guide you in collecting the necessary data to make a well-informed decision on pursuing a project. Using this analysis tool will facilitate efficient use of your firm's valuable marketing and overhead labor resources and will help you focus on the pursuit of projects that your firm has the best chance of winning and then delivering successfully. It also includes a section for estimating the cost of the pursuit, both labor and expenses, which may impact your decision.

While still subjective, this template will help you analyze objective criteria and manage your efforts to enable a thoughtful decision for each new potential project.



If you are considering a Design-Build project, please refer to
Design-Build Go/No-Go Process and Checklist,
which has some additional specific criteria for that delivery method.
<https://www.berkleydp.com/risk-management/risk-resources/>

Go/No-Go Project Information Checklist

NARRATIVE		Insert + (plus) or – (minus) indicating a positive or negative element for your firm or NA in this column
Project Name		NA
Owner		NA
Location		NA
CLIENT INFORMATION	EXTERNAL CONSIDERATIONS	+ / – / NA
Client experience in project type		
Client reputation for quality projects		
Financial capability		
Is the contract fair? Will client negotiate contract terms and conditions?		
Client history of litigation		
Who are the key decision-makers?		
CLIENT INFORMATION	INTERNAL (FIRM) CONSIDERATIONS	+ / – / NA
Existing client? If no, does the client know us?		
Future work from this client?		
Culture aligned?		
PROJECT INFORMATION	EXTERNAL CONSIDERATIONS	+ / – / NA
Scope		
Size		
Project location		
Budget (project, construction cost)		
Schedule for selection		
Schedule for completion		
Construction method		
List the design services required		

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NARRATIVE

Insert + (plus) or – (minus) indicating a positive or negative element for your firm or NA in this column

PROJECT INFORMATION	EXTERNAL CONSIDERATIONS (continued)	+ / – / NA
History behind project		
Funding source/status		
Politics & regulations affecting project		
Source of lead		
What is the decision-making process?		
Is DBE (SB/MBE/WBE/DV) a factor?		
PROJECT INFORMATION	INTERNAL (FIRM) CONSIDERATIONS	+ / – / NA
Design association justified?		
If yes, who is the lead firm? Why?		
Are outside subconsultants required?		
Subconsultant's strategic advantage(s)?		
Our firm's value proposition opportunity		
Our firm's fee/profitability potential		
Our firm's cost to pursue the project opportunity (marketing, PM, design, tech)		
WIN STRATEGY	EIGHT ESSENTIAL ELEMENTS	+ / – / NA
1. Does the project contribute to the mission of our firm?		
2. Do our capabilities/experience match well with client's needs and expectations?		
3. Do we have the appropriate staff available?		
4. Who is the competition?		
5. How can we distinguish ourselves from the competition?		

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NARRATIVE

Insert + (plus) or – (minus) indicating a positive or negative element for your firm or NA in this column

WIN STRATEGY	EIGHT ESSENTIAL ELEMENTS (continued)	+ / – / NA
6. Our most important message		
7. What resources/connections do we have to help us get selected?		
8. What is the realistic probability of winning the project (%)?		
OTHER CRITERIA		+ / – / NA
SCORING		
Total Number of Pluses		
Total Pluses Divided by Total # Answered		%

≥70% = GO

50-60% = CONSIDER WITH CARE

<50% = NO GO

MARKETING BUDGET	NOTES	\$
Marketing labor/submittal		
Technical labor/submittal		
Expenses/submittal		
Marketing labor/interview		
Technical labor/interview		
Expenses/interview		
TOTAL		

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