

PROPOSAL/SOQ GO/NO-GO FORM AND DECISION GUIDELINES

Client:							Request Received:			
Project:							Request Routed:			
Type of Request	Letter		Roster		SOQ		Proposal		Interview	

RELATIONSHIP WITH CLIENT

1 2 3 4 5 6 7 8 9 10

None

Strong

- Is the client targeted in the marketing/BD plan?
- Did you know about this project before the RFP was released?
- Have you contacted this client within the last month?
- If it is an existing client, have you discussed our prior work?
- Does this client appreciate the value of our services?
- Does PM or firm have a strong relationship with the decision makers?

PROJECT UNDERSTANDING

1 2 3 4 5 6 7 8 9 10

Weak

Very Strong

- Do you know who the decision makers are?
- Have you talked/listened to the key decision makers about this project?
- Do you fully understand the technical requirements of this project?
- Do we know what the project driver/s is/are?
- Do we know the project issues?
- Do we know what the critical success factors are?
- Do you understand the non-technical considerations?
- Do we know the selection teams hot button issues?
- Is the location distant or close?
- How much time is there to complete the project?
- Is this a project the firm can be proud of?
- Are there any fatal flaws for the project?

PROJECT FINANCES

1 2 3 4 5 6 7 8 9 10

Tight

Plenty

- Is the project funded?
- Do we understand how the project is being funded?
- Is the budget low or high?
- Can the project be done profitably?
- Can you successfully complete the project within the budget and achieve an acceptable mark-up (circa 3.00)?

COMPETITION

1 2 3 4 5 6 7 8 9 10

Stiff

We Are Favorite

- | | |
|--|--|
| <ul style="list-style-type: none"> ▪ Do you know the key competitors for this project? ▪ Do we understand the selection process? ▪ What is our relationship with the selection team? ▪ Does our competition have the advantage? ▪ Do we know our competitors' strengths and weaknesses? ▪ Are the firm's gaps known? | <ul style="list-style-type: none"> ▪ Can we successfully compete against the other firms? ▪ Do we have a competitive edge? ▪ Do we have distinct and relevant differentiators? ▪ Will we be able to compete effectively under the conditions of the selection process? ▪ If there is a price proposal involved, are we price-competitive? |
|--|--|

QUALIFICATIONS FOR THE PROJECT

1 2 3 4 5 6 7 8 9 10

Weak

Very Strong

- | | |
|--|---|
| <ul style="list-style-type: none"> ▪ Does our likely project manager have strong related experience? ▪ Is our project manager known by the client? ▪ Does our in-house staff experience support our project manager's experience? ▪ Does our experience fulfill the client's requirements? ▪ Does the project align with our core values? | <ul style="list-style-type: none"> ▪ Are the costs of preparing the proposal and interview reasonable? ▪ Is this a wise use of our resources at this time? ▪ If we get the project, will key staff be available to work on it? |
|--|---|

RESOURCES

1 2 3 4 5 6 7 8 9 10

Low

High

- | | |
|---|--|
| <ul style="list-style-type: none"> ▪ Do the CM and PM have time available to dedicate to the proposal and interview? ▪ Is marketing available to work with the project team? ▪ Is there sufficient time to prepare the proposal? | <ul style="list-style-type: none"> ▪ Are we as strong or stronger than our competition? ▪ Are the subconsultants we need to supplement our experience available? (if so, fill in table at the bottom of page) ▪ Can we meet M/WBE requirements? ▪ Should we consider a STAR firm as part of our team? ▪ Do we know what the client believes to be the "winning team"? |
|---|--|

TOTAL SCORE: _____

SCORE: 1-25 = No-Go

26-45 = Possible Go, Need Information

46-60 = GO

Reason for No-Go:

IMPORTANT PURSUIT DETAILS

TRACKING				SCHEDULE			
Due :				Go/No- Go	Date/Time :		
Mrktg #:				Meeting:	Place:		
CM:		PM:		Proposal Production Schedule:			
Business Line:							
Courtesy Zone:							
Rates/Fees Requested?	Yes						
	No						
MARKETING BUDGET				PROPOSAL REQUIREMENTS			
Total Project Fee:				Page Limit:			
Expected Profit Margin:	%			# of Copies:			
Estimated NET Fee (- subs):				Contract Review:			
x 5% Target:				DBE Goal:			
x Probability Adjustment:	%			Delivery Requirements:			
= Marketing Budget:							

Required Approval Signature: _____