

SEVERSON & WERSON, PC

SAMPLE GO – NO GO CHECKLIST

QUESTION	YES	NO	STRATEGIC RESPONSE TO “NO”
<u>The Client</u>			
1. Have we worked with this client before?			
2. Do we know that this client is financially stable and has a good business reputation (<i>i.e.</i> , not a single-purpose, limited liability entity)?			
3. Does this client pay its bills promptly?			
4. Is this the type of project the client has worked on before both successfully and regularly?			
5. Is the client willing to spend the necessary time with you to fully discuss the project prior to preparing the proposal?			
6. Are there future opportunities with this client?			
7. Do we know who makes the final decisions for the client?			
8. Would our other clients approve of our involvement with this project?			
9. Is the client realistic about schedule and budget?			
10. Is the client realistic about project goals?			
<u>The Project</u>			
11. Do we have (or can we get) a well-defined scope of work?			
12. Will the permits and approvals be obtainable within the client’s planned time frame?			
13. Are we familiar with all the applicable regulations and technologies?			
14. Are there future opportunities for similar projects with other clients?			

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15. Is this the type of project that we have worked on before successfully and regularly?			
16. Do we have available staff experienced with this type of project?			
17. Are we sure our work load will not be strained by taking on this project at this time?			
18. Do we have at least as much chance to be selected as our competitors?			
19. Can we comply with the time schedule for completing our portion of the work?			
20. Can we provide high-quality client service on this project?			
<u>Business Considerations</u>			
21. Is this what our business and marketing plans say we should be doing?			
22. Is the selection process reasonable?			
23. Do we have a strong message that will differentiate us from the competition?			
24. Will the project be worth the marketing effort it takes to get it?			
25. Can we comply with any MBE, WBE, and/or DBE requirements?			
26. Will the client sign a contract with a limitation of liability clause?			
27. Will the contract with the client be equitable?			
28. Will the contract be free of hold-harmless and indemnity provisions?			
29. Will the contract be free of open-ended or speculative obligations?			
30. Will our fee be wholly adequate? Profitable?			

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31. Is there a good reason to take this job if we do not anticipate a profit?			
32. Will our fee be competitive?			
33. Is the owner willing to provide funds for unexpected contingencies?			
34. Are their insurance requirements typical? (If there are any special insurance requirements, you must answer “No” to this question.)			
35. Is this a project in which we should be investing our resources?			
36. Is this the best opportunity we have at this time?			

Add up the total of your “Yes” answers.

If your “Yes” score is less than 30, can you provide realistic strategies to reach 30?

If your “Yes” score is less than 20, strongly consider rejecting the project.