**RFP PURSUIT GO/NO GO CHECKLIST**

This checklist helps you decide whether your company should respond to an RFP opportunity.

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| **Project** | Click or tap here to enter text. | | | **Client** | |  | | | | | | |
| **Location** | Click or tap here to enter text. | | | **Type** | | RFI | RFP | | RFQ | RFT | | SO |
| **Scope of Work or Service** | | | Click or tap here to enter text. | | | | | | | | | |
| **Submission Deadline** | | Click or tap to enter a date. | **Questions Deadline** | | Click or tap to enter a date. | | | **Site Visit Date** | | | Click or tap to enter a date. | |
| **Why are we interested?** | | | | | Choose an item. | | | | | | | |
| **Have we read the entire RFP or at least its highlights to get an accurate understanding of what is sought?** | | | | | | | | | | | Yes  No | |
| **Do we need to follow-up with the issuer to get clarification/further information?** | | | | | | | | | | | Yes  No | |

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| 1. **CAPABILITY** | | |
|  | Can we meet the mandatory requirements? | |
|  | Can we provide the sought solution? | |
|  | The solution is our core competency | We’ve done parts of the solution |
| We have personnel who’ve done the solution | Our partners have done the solution |
| We have the skills to provide the solution despite no prior experience | |
|  | Do we have the exact experience the issuer is seeking? If not, is the issuer willing to consider “mix ‘n match” responses? | |
|  | Can we have a representative attend any mandatory site visit? | |
|  | Do we have the right certifications/accreditations? | |
| 1. **FINANCIAL** | | |
|  | Is the proper corporate approval secured, including Board approval if necessary? | |
|  | Are we financially able to pursue the opportunity and execute it if we win? | |
|  | The estimated cost/size of the opportunity is within the company’s financial threshold. If above the dollar limit: | |
| A joint venture (JV) agreement is in place | A teaming agreement as a subcontractor is in place |
|  | Can we meet the bonding and insurance requirements? | |
|  | Do we have the budget for the level of effort needed to respond to the opportunity? | |
|  | Given what is known about the opportunity and the level of effort to pursue it; if won, will it be within the company’s profitability margin expectations? (e.g., 10%; 12%)  Note: Winning a pursuit but taking a financial loss is only acceptable for legitimate strategic reasons that requires approvals from the highest levels. | |
| 1. **EXPERIENCE/CREDIBILITY** | | |
|  | Does our company/joint venture meet the required work experience? | |
|  | Do our proposed key personnel possess the required work experience? | |
|  | Do we have a good relationship with the client or its decision makers, or at the very least, not a bad relationship? | |
|  | If required, do we have the WCB recognition letter? | |
|  | If required, do we have the Health, Safety, and Environmental (HSE) historical performance? | |
| 1. **COMPETITION** | | |
|  | If competitors are known, can we be competitive in price, quality, and schedule? | |
|  | Is the playing field level – that is, no peer competitor has an advantage due to currently being on site, is local, or is an incumbent that the client is happy with? | |
|  | If known, is the issuer unhappy with the current incumbent or provider? | |
|  | Is the number of competitors small such as due to a prequalification process, large financial requirements to the vendors, or remote location? If not, do we have an advantage that a “mom and pop” local provider cannot match? | |
|  | Do we have an advantage that we can leverage that would cause the client to select us even if our price was slightly higher than a competitor? | |
| 1. **RESOURCE LIMITATIONS** | | |
|  | Can our internal resources provide a proper response by the submission deadline? This includes no scheduling conflicts with another more preferred opportunity. | |
|  | Can we use external resources to help provide a proper response by the submission deadline? (outsourced writers or other departments) | |
|  | If we win, do we have the proper resources and equipment during the opportunity’s execution period to deliver the required solution or are they committed elsewhere? | |

Any item in the Go/No Go checklist that is not checked off signifies that is it likely not in the company’s best interest to pursue the opportunity unless other factors override the gaps. Serious thought is required before consuming company funds and internal/external resources that may be better spent elsewhere.