**Bid or No Bid Checklist**

|  | Positive Indicator | Negative Indicator |
| --- | --- | --- |
| 1. Need (Pain Identified) Does the prospect have a documented requirement? Is the need central or critical to the business or prospect? Has the prospects timetable been established? Reasons for pain known? | Y Y Y Y | N N N N |
| 2. Timetable: Can we complete a winning bid or proposal? Are we likely to be able to meet the delivery timescales? Does the prospect have a realistic plan? | Y Y Y | N N N |
| 3. Cost: Does the prospect have a realistic & approved budget? Can our potential solution meet their budget? Are we likely to have a low-cost solution (vs competitors)? Can we afford the cost of bidding? \* | Y Y Y Y | N N N N |

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| --- | --- | --- |
| 4. Authority: Do we know who the power sponsor or decision makers / influencers are? Do we have a good working relationship with the power sponsor? If consultants are involved, are we co-operating with them? Do we know what the decision criteria are? | Y Y Y Y | N N N N |
| 5. Capability: Do we have the necessary skills to bid? \* Do we have the necessary skills to deliver? \* Can we meet the reasons for pain with our solution? \* | Y Y Y | N N N |
| 6. Competition: Are there less than four bidders? Is the incumbent supplier out of the running? Is our position equal to any competitor? | Y Y Y | N N N |
| 7. Solution: Do we know what our final solution will be? Does the prospect already like our solution? Is our solution respected & recognised in the market (many references)? Is it a low-risk solution? | Y Y Y Y | N N N N |

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|  | Positive Indicator | Negative Indicator |
| --- | --- | --- |
| 8. Differentiators: Does our potential solution provide us with differentiators? Can we clearly demonstrate key customer benefits to our approach? | Y Y | N N |
| 9. Strategic: Is the account one of our target majors or verticals? Is the solution domain one of our target horizontals? Can we realistically envisage winning? \* | Y Y Y | N N N |
| 10. Attitude: (to us as a supplier) Is the prospect for or at least neutral, towards us? Will the customer allocate the time to consider our solution & strengths? | Y Y | N N |

| Totals (Indicators) - Number |  |  |
| --- | --- | --- |
| Approval to bid and allocate resource | Y | N |