



Opportunity Identification and Assessment Checklist

1. Initial Opportunity Recognition

- ☐ Identify potential opportunities during routine client interactions
- ☐ Document initial details of the opportunity

2. Information Gathering

- ☐ Determine specific data needed for assessment
- ☐ Identify methods to obtain required information
- ☐ Conduct direct client meetings
- ☐ Analyze LinkedIn profiles of key decision-makers
- ☐ Review industry publications for market trends
- ☐ Explore client websites for strategic initiatives
- ☐ Attend relevant public meetings

3. Comprehensive Analysis

- ☐ Compile tangible factors (schedules, budgets, technical specifications)
- ☐ Identify intangible factors (personalities, political influences, hidden agendas)
- ☐ Create a holistic picture of the client and opportunity

4. Strategic Alignment

- ☐ Evaluate how the opportunity aligns with firm's capabilities
- ☐ Assess fit with long-term business objectives

5. Resource Assessment

- ☐ Determine required resources for pursuing the opportunity
- ☐ Evaluate current resource availability
- ☐ Identify any resource gaps

6. Return on Investment (ROI) Analysis

- ☐ Estimate potential returns from the opportunity
- ☐ Calculate projected costs of pursuit
- ☐ Determine expected ROI



7. Leadership Review

- ☐ Present gathered information to senior leadership
- ☐ Conduct formal go/no-go process
- ☐ Obtain leadership decision on pursuit

8. Strategy Development

- ☐ If pursuing, develop targeted solution based on gathered insights
- ☐ Outline initial approach for formal proposal phase

9. Continuous Reassessment

- ☐ Establish process for ongoing information gathering
- ☐ Set checkpoints to reassess opportunity as new information emerges
- ☐ Be prepared to adjust strategy based on evolving circumstances

10. Documentation and Learning

- ☐ Document the entire process and decision-making rationale
- ☐ Identify lessons learned for future opportunity assessments
- ☐ Update opportunity identification and assessment procedures as needed