



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