



## AIA Best Practices: Reality check: Assess whether a project is for you

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### Summary

Firms that aim to stay profitable are generally more selective about the projects they choose to accept. A 28-question checklist can help resist the common urge to seize each and every project that comes along and instead assess whether a specific project is the right fit. The checklist includes questions to help a firm assess a prospective client and a project's viability, profit potential, and much more.

### Removing the rose-colored glasses

It is difficult to be objective about a new project opportunity. When the focus is on winning the job, it can be difficult for a firm to step back and ask whether it really wants it. Firms that are selective are more profitable and have a higher proposal success rate. The following evaluation criteria may help provide a needed reality check.

Answer "yes," "no," "don't know," or "not applicable" to all yes/no questions; write answers for the remaining ones. To calculate a go/no-go score for the project, total the number of "yes" responses in sections A through E. Divide by the total number of questions (28), subtracting all "not applicable" questions from the total. The higher the score, the more attractive the project.

The remainder of the questionnaire may be used to evaluate the competition, the proposal process, the odds of winning the project, the cost of submitting a proposal, and the risk of the project.

#### A. Client

- Are we known to the client?
- Have we worked with this client before?\*
- Is this a former client with whom we have a good reputation?
- Will we have adequate opportunity to research the client's needs before the selection process begins?
- Do we have an inside track with the primary decision maker?

- Have we found in the past that this client has not been a problem for us?\*
- Is the client financially sound and responsible?\*
- Is the client's standard professional services contract compatible with our standard agreement?\*

## B. Project viability

- Is the project adequately funded?\*
- Is this the type of project the client has successfully completed before?\*
- Does the client have funds for unexpected contingencies?
- Is the client experienced in contracting AEC services?\*
- Is the time schedule for completion of the overall project adequate?\*
- Is the time schedule for completion of our work adequate?\*
- Does the fee correspond to the proposed scope of work?
- Is the fee adequate?\*
- Is everything the client is asking us to do professional and ethical?
- Are the insurance requirements customary and reasonable?\*

## C. Profit potential

- Can we make a reasonable profit on this job?
- Are there any reasons to take this job even if we cannot make money?

## D. Skills and experience

- Do we have the capability to perform this work?\*
- Do we have a solid track record and relevant experience in the project type?\*
- Is the project the right size for us in terms of our objectives, our ability to compete, and our ability to produce the work?\*
- If we answered "no" to any of the three questions above, do we have a strategy or other credentials to offset these disadvantages?
- If necessary, could we find a joint-venture partner or association to compete effectively?

## E. Location and available staff

- Is our location favorable in terms of the client's criteria?

- Do we have available staff experienced in this type of project?\*
- Do we have the available staff to complete the work in the client's time frame?

## F. Adherence to the marketing plan

- Does the project meet our objectives and goals?
- Does the project fit our target markets and services as defined in our marketing plan?
- Is the project within our geographic reach?
- Is the project consistent with our minimum and maximum project size objectives?
- Does the project present us with an unusual opportunity to break into a new market?
- Does the project offer repeat client potential?

## G. Competition

- Who is the likely competition?
- Do we have a chance against the competition?
- Does this project offer us an opportunity to compete on a higher level against firms with which we would like to be identified in the marketplace?
- Can we convey a strong message?
- What do we have that makes us uniquely qualified to do the job? To compete effectively?

## H. Selection process

- Do we know the selection and weighting criteria?
- Is the selection process reasonable?
- Do we know that the job is not already "wired" for another firm?
- Can we compete effectively under the conditions of the selection process?
- Can we influence changes in the selection process?

## I. Odds calculation

- Are the odds good for making the short list?
- What are the odds for being awarded the job? (If the odds of being put on the short list are 50 %, and of being selected 25 %, then the overall odds are 50 % x 25 %, or 12.5 %.)

## J. Cost to pursue

- How much sales time and effort will be required in proportion to our odds of winning?
- What are the sales costs relative to the potential profit? (If the profit will be consumed by the cost of getting the job, that alone may be reason enough not to pursue it.)

## K. Analysis of project acceptance risk

- Describe the risks to which the firm would be exposed if this project were accepted.
- What is the dollar value of these risks, in terms of the liability of the firm?
- Describe the firm's ability to control or manage the adverse consequences of these risks.

\*Indicates questions that are essential to conducting the risk analysis in Section K.

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This article corresponds to:

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