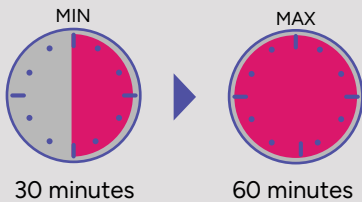




AUTHOR

Twennie Founders



PURPOSE

to establish criteria for pursuing and declining project opportunities

PARTICIPANTS

Members of a team involved in business development

EQUIPMENT

Interactive white board or Mural

ONLINE or LIVE

Both, one or the other

INDUSTRY

Any team at a stage in their development when they are ready to choose opportunities more selectively

The following exercise (and the corresponding template in Twennie library) can be used for a **Go No Go Spheres exercise**, a 30-60 minute exercise during which a team establishes a new philosophy for accepting and declining work.

Many consultants try to bring discipline to business development with forms, in this case, Go/No Go checklists and scoring systems for quantifying go and get factors like the ones you read about in the article(right). Here's the reality: most get abandoned. They're filled out once or twice, then quietly ignored and forgotten. This exercise provides an alternative.

Go No Go

a decision gate meant to evaluate project opportunities for strategic value and the capacity of a team to compete

suggested tool:



article

When To Say
No to a Project

STEP 1 choose a collaborative medium

Either have the template printed on large paper, projected onto a white wall, or use it as a background in Mural or other online planning tool. To save everyone's time, organize this well before the session starts.

STEP 2 prepare the materials

If you're using an online medium, preparation involves projecting the Mural display(right). Simply upload the Twennie template to the online medium. If you're doing the exercise the traditional way, print the display on large format paper. Make sure you have markers or sticky notes so you can place them in the correct spots.

suggested tool:



template

Go No Go
Spheres
Planning
Display

FACILITATOR TOOLS: As the facilitator, you must be prepared to keep this exercise moving swiftly. Have the materials prepared ahead of time. Understand the tasks and templates before the session. Establish ground rules and budget time based on the suggested time intervals for each step.



MAX 20 mins

STEP 3 think of your target market as a sphere

Think of your target market as a giant sphere. Imagine that all around the sphere, on latitudes and longitudes, are the areas of work in your target market, like water infrastructure, transportation, or environmental sciences | health care or schools or corporations | governments, industries, and institutions, whatever makes up the whole of the market that completes projects you will bid on and the clients who hire you.

The center of the sphere is \$0 fees. As you spread out to the outer surface, fees increase until you get to the largest projects being done in your market, behemoths of work in big cities... the monster projects that require teams of thousands. This represents the full range of work on your radar and beyond to where your growth can feasibly stretch.

Inside the sphere, starting at the center is your cloud of points: each point is a project your firm could realistically deliver and come out stronger.

Some points represent dream projects and clients. Others are solid, repeatable work. They vary in size, complexity, and strategic value. They're spread out inside the sphere forming a cloud, but there is a definite limit to each border of the point cloud, an extent at which the cloud stops. This point cloud is your dream potential. **(Your cloud doesn't have to reach the outer edges to be an ambitious dream. Think of this as the growth you can imagine for your brand in the next five years.)**

Now ask: what defines some of those points? Write these on your collaborative medium. Aim to size up the cloud by putting points at the extremes. Imagine, what's the smallest you'll accept and the largest you'll pursue? Your discipline areas? **(Don't go into exhaustive detail here. This is not a strategic planning session. It is an exercise for honing pursuit instincts.)**

- What types of clients are in that cloud? Name some of them.
- What kinds of projects in what disciplines? Name some of them, including hypothetical ones.
- What sectors are shown inside the cloud? Are they different sizes? Is growth different there?
- What size of fees? What schedule? Write these on the medium wherever you find space – this is not a form where you fill out fields.

This is your go cloud—your desirable projects. Your team should be able to list these, talk about them, know them.



STEP 4 picture a second sphere

Now picture a second sphere. **This is your get sphere**—the projects you can credibly win today based on work you've done in the past five and can present evidence for. This cloud is made up of your firm's qualifications, past performance, and demonstrated strengths. Identify the extremes from smallest to largest in fees in the respective discipline areas - no hypotheticals here, just hard evidence that you can deliver.

This point cloud will be smaller because this one represents reality. Your points won't reach as far out as in the other sphere. Take a look at where your go and get clouds overlap. The go cloud will be bigger. The get cloud will probably fit entirely inside it.

Any project point in both clouds, as long as it meets the four criteria of risk/client, delivery capacity/win potential mentioned in the article (left), is a definite go. Anything in your dream cloud that isn't in your real cloud becomes your dream pursuit list. The further those points are from the edge of your get cloud, the more extraordinary it will be for you to win it.

That's not saying you won't win. If you're strategic about it, you'll hire someone whose resume has some points on the outside of your present get cloud, ones that take you closer to the point where that opportunity sits. You'll highlight the relevance of the ones inside your cloud so that the client can more easily see the connection. You'll partner with a firm that has more points inside that part of the cloud.

STEP 5 wrap up

This exercise is for honing your non-quantitative senses so that you can conduct a go/no go with no forms and no scores.

Use this as a team exercise every six months or every year during strategic planning. You might consider doing this exercise during a multi-disciplinary business development meeting as an alternative to reviewing a list of leads. Then in the months following, use terms like, *is it in both our go and get clouds? If it's not in our get cloud, how do we extend our cloud so it does?*

Use this exercise to map your go list and your get reality. You might even consider keeping the Mural or interactive white board containing the rough notes. Peek at it now and then to refresh your pursuit imagination. Look at it the next year and see how your get cloud has expanded.

suggested tool:



article

When To Say
No to a Project



IF YOU ARE THE FACILITATOR

If your team is new to this exercise, the role of facilitator becomes critical.

Here are some tips from other facilitators who have led this exercise:

Help people arrive prepared; Too often, teams walk into a meeting not knowing what's expected of them. To prevent this, send out a preparation email in advance. This email should highlight key tasks completed during the exercise.

Maintain momentum; Whether you're leading peers or senior team members, remember: your role is to guide the process, not to make decisions. You're not the boss. You're the facilitator. That means keeping the discussion focused, fast-paced, and productive. If you're in the room physically, stay on your feet. Sitting—or worse, typing notes onto a projected screen—can slow things down and confuse your role. Recruit someone else to take notes so you can direct the conversation. At every moment, the team should know which step they're on and who's keeping them on track. The Twennie template helps you do this.

Keep everyone on task; facilitators must prevent the group from skipping ahead. Often, technical professionals want the exercise to be over quickly, so they may try to jump to the list of relevant projects. Hold the group to the process.

Watch the clock; The session should last no more than 60 minutes. Longer sessions lead to fatigue, wasted time. If you're using a tool like Mural (or another collaboration platform), assign two note-takers. With multiple contributors placing sticky notes, the team can move more efficiently through the process.

A video goes with this exercise: Why Forms and Scoring Systems in GO/NO GO Practices So Often Fail

This video walks you through the steps of the exercise and provides background on go/no go best practices.

