

New Project Analysis

Client/Project	
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Date	
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CLIENT

Client's Business Health

- ☐ Struggling to be profitable
- ☐ Making ends meet
- ☐ Very successful business

Personal Relationship

- ☐ We've never worked together
- ☐ Referred to us
- ☐ Many successful projects together

Past Experience with Agencies

- ☐ Negative experience
- ☐ Minimal experience
- ☐ Robust experience

Perception of Us

- ☐ Production monkeys
- ☐ Necessary but expendable
- ☐ Expert in the room

Future Opportunities

- ☐ Single project, no chance more work
- ☐ Possible future projects
- ☐ Tons of potential for more work

Network

- ☐ Not many contacts
- ☐ Decent network
- ☐ Many influential relationships

Technical Knowledge

- ☐ Behind the times
- ☐ Functional with basics
- ☐ Very tech savvy

Communication

- ☐ Incoherent babble
- ☐ Good enough
- ☐ Clear, organized, and timely

Notoriety

- ☐ Don't tell anyone they're a client
- ☐ Not embarrassed but not proud either
- ☐ They'd be in our top five clients

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PROJECT

Expertise Alignment

- ☐ We've never done a project like this
- ☐ We can figure it out
- ☐ Perfect fit for our agency

Production Knowledge

- ☐ Client doesn't understand production flow
- ☐ Some related past experience
- ☐ Tons of experience with similar projects

Deadline

- ☐ Nights and weekends required
- ☐ Reasonable timeline
- ☐ Plenty of time to do it right

Decision Maker Access

- ☐ No access to decision maker
- ☐ Some occasional access
- ☐ Working directly with decision maker

Competition

- ☐ Open RFP, heavy competition
- ☐ Moderate competition
- ☐ We are the agency of choice

Risk Factor

- ☐ If we fail, their business fails
- ☐ No major risks to their business
- ☐ If we fail, their business will be fine

Portfolio Opportunity

- ☐ We would never show the work
- ☐ Possible portfolio piece
- ☐ Could be an award winner

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PRICE

Profit Potential

- ☐ Tight budget, we may lose money
- ☐ Enough profit to be worth it
- ☐ Cha-ching! Mega profit!

Fair Market Value

- ☐ Budget is lower than market value
- ☐ Industry average budget
- ☐ Budget is better than industry

Payment Terms

- ☐ Client wants to delay first payment
- ☐ Comfortable with payment terms
- ☐ Happy to pay upon receipt of invoice

Money Source

- ☐ Funded by personal cash or debt
- ☐ Funded by external debt
- ☐ Well funded, successful business

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The objective of this worksheet is to help you systematically analyze a project opportunity. The perfect project will have many green results and few reds in all three categories: client, project, and price.

Although an opportunity may have some red results, it does not mean that you shouldn't take on the project. Identifying the red flags will help you know potential pitfalls and be better equipped to anticipate and counteract them.

Select a response for each category and consider your answers carefully before embarking on your next project opportunity.



New Project Interview

Client/Project		Date	
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This worksheet provides a series of conversation starters that will help you extract valuable information about a new client/project opportunity.

- 1. Do research before the meeting to answer as much as possible.
- 2. DO NOT ask any questions you may have answered in your research.
- 3. Be genuinely interested and take notes during the meeting.
- 4. After the meeting, analyze the opportunity using the New Project Analysis.

Opening Remarks

“Thank you for meeting with us! We are excited about the possibility of working together. We thought we’d start by talking about your business and then move on to discuss your project. How does that sound to you?”

Client Questions

- ☐ Tell us about your business.
- ☐ How long have you been in business?
- ☐ How are things going in your business right now?
- ☐ What are your biggest challenges?
- ☐ How does your company generate sales?
- ☐ What are your most successful products/services?
- ☐ How did you hear about us?
- ☐ What have you heard about our agency?
- ☐ Do you know anyone at our agency?
- ☐ Have you worked with other agencies in the past? How did that go?
- ☐ Have you had experience providing project feedback to creatives?
- ☐ What other types of projects do you outsource?
- ☐ Is your marketing budget allocated monthly, quarterly, or annually?
- ☐ What business organizations are you involved in?
- ☐ What apps do you use to run your business?
- ☐ How familiar are you with Google’s apps (Docs, Sheets, etc.)?
- ☐ Have you ever used _____ production management software?
- ☐ What do you think the perception of your business is in the market?

Project Questions

- ☐ Ask plenty of questions to extract the project scope.
- ☐ What would make this project successful for you?
- ☐ What happens to your business if this doesn’t yield the results you hope for?
- ☐ Tell us about your past experience with projects like this.
- ☐ How many other agencies are you considering for this project?
- ☐ Describe the people involved on your side. Who is the final decision maker?
- ☐ What is your deadline? Is it tied to any other marketing efforts?

Price Questions

- ☐ What is your budget for this project?
- ☐ What have you paid for projects like this in the past?
- ☐ What prices are you seeing in the other bids?
- ☐ Our payment terms are usually _____. Are you comfortable with that?
- ☐ How are you funding the project?

