



Opportunity Screening Assessment Worksheet

Name:

Date:

Title:

Questions to review	Evaluation/Response
Describe the opportunity?	
What goal(s) and objective(s) of the strategic plan and Balanced Scorecard does this proposal support?	
Is the opportunity compatible with our strategic focus? Strategic Competencies? Mission Statement?	
From a financial resource perspective what is the cost to support the proposal? How does it fit in our budget?	
From a human resource perspective who would manage the opportunity? How does the support fit with their current responsibilities? Estimate the time involved in developing and sustaining the proposal.	
Do we have the necessary management capability and capacity to support the initiative?	
What is the market need to be served?	
What is (are) the market(s) to be served? Who would benefit from this opportunity?	
How is the market need currently being met?	
What product/package improvements are	

needed/desired by market?	
Can we be cost-competitive?	
Do we have the necessary technology capabilities?	
Can we handle the operations?	
Can we handle the marketing? Do we have the appropriate distribution channels? Can we reach the appropriate targets?	
What is the current size of the market? Is it too large or too small?	
Is there a reasonable basis for a competitive advantage for us? What strategic competencies are involved?	
Is there a competitive opening? How must we position offering to obtain entry?	
Is there potential for specialty status for us? Which features or benefits will command a premium?	
Who are the most likely competitors? What will be their likely competitive response?	
Can we achieve significant/adequate market penetration? Estimate market share for 1 st and 5 th years?	
What is the expected growth rate for the market?	
What is the expected return on invested capital?	
What are the expected profit levels for the market? How quickly would we see a return?	

Are there any threats to the market?	
Is there any potential for product or service displacement?	
What is the down-side exposure to financial loss?	
Can we afford the down-side exposure?	
Overall, how strongly do you feel about going forward with this opportunity?	