The bid qualification checklist.

A practical framework for deciding which opportunities to pursue and which to let go.

Altura

Summary

Most bid teams know they should qualify opportunities before committing. Fewer have a consistent process for doing it. Even fewer start qualifying before the tender is published. This checklist gives you one.

It covers the five stages of effective qualification: setting up your framework, running the initial assessment, checking for dealbreakers, reassessing as new information arrives, and closing the loop after the outcome is known.

Use it as a team. Print it, pin it to your wall, or keep it open during your next go/no-go discussion. The goal is not to add process for its own sake. It is to make sure the team's collective knowledge is visible before you commit to weeks of work.

How to use this checklist

1. Before your first use, complete Section 1 (your framework). This only needs doing once.
2. For each new opportunity, work through Sections 2 and 3 with the relevant colleagues. Know a tender is coming? Start Section 2 early. The gaps you find become your preparation list.
3. Revisit Section 4 at each milestone (clarification round, new information, team changes).
4. After the outcome, complete Section 5. This is the step most teams skip, and it is the one that makes the biggest difference over time.

1 Set up your framework.

Do this once. Review it quarterly.

- ☐ **Define your scoring dimensions** (e.g. commercial fit, delivery capacity, competitive position, strategic alignment, financial viability).
- ☐ **Set a scoring scale (e.g. 1-to-5) with clear labels for each level**, so a 3 means the same thing to everyone.
- ☐ **Weight your dimensions.** Not every category matters equally. Delivery capacity might count for more than strategic alignment.
- ☐ **Set a pass mark.** Below this score, the default is no-go unless there is a compelling reason to override.
- ☐ **Identify your dealbreaker questions.** These are binary: if the answer is no, the team should not bid regardless of the overall score.
- ☐ **Decide who needs to be involved.** At minimum: someone from sales, bid management, and delivery.
- ☐ **Document the framework somewhere the whole team can access it.** A shared form or assessment that everyone uses, not individual spreadsheets.

> **Tip:** Keep the framework light enough that people actually use it. If it takes longer than 30 minutes to complete an initial assessment, it is too heavy.

2 Run the initial assessment.

For every new opportunity. Involve at least two perspectives.

If you know a tender is coming, start here before it is published. Teams that qualify early give themselves time to improve their position rather than just measure it.

- ☐ **Score each dimension with the full team** (or at minimum two people with different perspectives).
- ☐ **For each score, write down the reasoning.** The context behind a score matters more than the number.
- ☐ **Check the overall score against your pass mark.**
- ☐ **Flag any dimensions where the team disagreed by more than one point.** Discuss those before proceeding.
- ☐ If the tender has not been published yet: **identify the gaps** in your score and turn them into **concrete preparation actions.**

> **Tip:** A score is a starting point for conversation, not a substitute for one. If the number says go but your delivery lead looks uncomfortable, that discomfort is data too. And the earlier you have that conversation, the more you can do about it.

3 Check for dealbreakers.

Binary checks. If any answer is no, stop here.

- ☐ Do we hold every required certification, accreditation, or licence?
- ☐ Can we meet the geographic or jurisdictional requirements?
- ☐ Is there any conflict of interest (current clients, partners, personnel)?
- ☐ Can we realistically staff this project without pulling people off existing commitments?
- ☐ Does the timeline allow us to produce a competitive submission?
- ☐ Is the contract value large enough to justify the bid investment?
- ☐ Are there any legal, regulatory, or ethical concerns that would prevent us from delivering?

> **Tip:** These checks exist to prevent the averaging problem. A team can score well on most dimensions and talk themselves into proceeding, even when one critical factor should have stopped them. Dealbreakers override the overall score.

4 Reassess at each milestone.

Revisit the qualification when the picture changes.

Return to this section after each of these moments:

- ☐ After reading the full tender documents (not just the summary).
- ☐ After the clarification round or buyer Q&A.
- ☐ After learning who else is bidding.
- ☐ After any significant change in team availability or capacity.
- ☐ After any change in the buyer's requirements or timeline.

At each milestone, ask:

- ☐ Has the score changed? Update any dimensions where new information affects the assessment.
- ☐ Has a dealbreaker appeared that was not visible before?
- ☐ Has the competitive landscape shifted? Are we stronger or weaker than we thought?
- ☐ Is the team still confident this is winnable and deliverable?
- ☐ Record the updated assessment as a new version. Keep the previous one. The trajectory matters.

Tip: Watch win probability over time. If the score rises after each touchpoint, your pre-bid work is paying off. If it stays flat or drops, the team knows early rather than discovering it during the proposal sprint.

5 Close the loop.

After the outcome is known. This is the step most teams skip.

- ☐ **Record the outcome:** did you win, lose, or withdraw?
- ☐ If you lost: what were the reasons given by the buyer? Were any of them foreseeable at qualification?
- ☐ **Compare the outcome to your initial assessment.** Were there dimensions you scored too high or too low?
- ☐ Check whether any **dealbreaker questions** should have caught a risk that the outcome revealed.
- ☐ **Identify one concrete change** to your framework based on what you learned. A sharper question, a new dimension, an adjusted weight.
- ☐ **Share the findings with the team**. Not as blame, but as a way to improve the next qualification.
- ☐ **Update your framework** if the pattern repeats across multiple bids.

Tip: Over time, this feedback loop turns qualification from a gate into a strategic capability. Teams that connect early assessments to eventual outcomes build real institutional knowledge about which opportunities they win and where their blind spots are.

What this adds up to.

The goal is not to add bureaucracy to your bid process. It is to make sure the team's knowledge is visible before you commit. A consistent framework, a habit of reflecting before starting, and the discipline to connect what you decided at the start with what happened at the end.

That is what separates teams that win often from teams that bid often.

About Altura

Altura is the bid management AI software that helps tender and proposal teams run complex, multi-stakeholder bids from start to finish. Where most tools stop at helping teams organise the work, Altura executes it. Connected AI workflows analyse the full tender pack on day one, extract and assess every requirement, flag risky clauses, prepare clarification questions and check submission readiness, all grounded in your own content and traceable back to the source. Requirements, risks, owners and updates live in one shared Bid Book that stays in sync as documents change, so nothing drifts and every tender your team runs makes the next one smarter. The result is AI you can put in a bid with confidence, and a team with the time and control to focus on strategy and winning.

Learn more about how AI can help you structure your whole qualification process

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