**PROJECT APPRAISAL MATRIX**

**(SAMPLE)**

**NOTE:**

This template can help you weigh up the pros and cons of taking on a particular project.

Customise it to your own needs.

Client: Insert client nameClient contact:Insert client contact

Project short name: InsertProject code: Insert

Quotation number: **###**

Terms: Insert Date: Insert

| Item | Client criterion |  | Score\* (1-5) | Weighting\*\* | Weighted score | Notes |
| --- | --- | --- | --- | --- | --- | --- |
| 1.1 | Ability for client to pay, and pay on time | From reputation/ previous experience. |  | 2 | 0 |  |
| 1.2 | Client brand and reputation | Reputation for delivering / quality / collaboration skills / industry leaders / #nodickheads? |  | 2 | 0 |  |
| 1.3 | Sound Management | Is there a competent management team? Are they indecisive/inexperienced? |  | 2 | 0 |  |
| 1.4 | Like-mindedness | Demonstrated commitment to social and environmental responsibility? Artistic simpatico? |  | 3 | 0 |  |
| 1.5 | Loyalty | Likely to be one-off project or is it likely to lead to further work? |  | 1 | 0 |  |
|  |  |  |  | **10** | 0 |  |
| **Item** | **Project criterion** |  |  |  |  |  |
| 2.1 | Level of financial return | Does this meet our budgeted fee / daily / hourly rate? |  | 3 | 0 |  |
| 2.2 | Learning opportunities | Opportunities for R&D / or skills development. Will the project challenge/enhance existing skills and knowledge in a new way? |  | 2 | 0 |  |
| 2.3 | Enhancing Brand | Will the project contribute positively/extend our portfolio? |  | 1 | 0 |  |
| 2.4 | Partnerships and Networks | Will we extend or deepen our networks & partnerships through this project? |  | 1 | 0 |  |
| 2.4 | Opportunity to Expand Service Offering | Is there the opportunity to enhance service offering or develop new services? |  | 1 | 0 |  |
| 2.5 | Client/project team readiness | Is a competent project team assembled? Is the client structurally prepared to begin the development process? |  | 2 | 0 |  |
|  |  |  |  | **10** | **0** |  |
| **Total as percentage** | | |  |  | **0%** |  |

**NOTES:**

\* *Score*: 1 = bad, or lowest grade, 5 = excellent, or highest grade. 2.5 = neutral score. Use this if you are undecided.

\*\* *Weighting*: Adjust this column to reflect your current priority areas. For example, if you need to focus on income ($) increase the number in that line - but the total for each section needs to remain at 10, so you’d need to reduce something else.