

New here? Select **Load Demo** to explore a completed illustrative assessment, then **Reset All** when you are ready to begin your own.

PURPOSE

Commercial Opportunity Prioritization assesses one commercial opportunity at a time on **financial value** and a weighted **probability of success**, then positions and prioritises opportunities across the portfolio.

Opportunity → Financial Value → Probability of Success → Portfolio Position → Recommended Action

CLIENT VALUE

Concentrate pursuit effort and resources on the opportunities most likely to win and worth the most, with a clear recommended action for each.

HOW TO USE

1. Add an opportunity and enter its **Estimated Revenue** and **Gross Margin** (the Gross Profit is calculated).
2. Score the **seven weighted probability criteria** from 1 to 5. Each starts **Not Assessed**.
3. Set the **Recommended Action** and **Next Step**, and flag any **Major Pursuit Blocker**.
4. Review each opportunity's **Portfolio Position** and the portfolio ranking.
5. Export the client-facing record.

UNDERSTANDING THE RESULT

Probability of Success and financial value combine into a **Portfolio Position**. Ranking sequences opportunities by expected value as a reference only — it does not automatically equal the Recommended Action. A Major Pursuit Blocker prevents a Priority Pursuit recommendation until resolved.

EXPORT YOUR ASSESSMENT

Export PDF creates the client-facing assessment record, reflecting the opportunities, financials, scores and actions you entered.