

# **Public Sector Opportunity Analysis**

The  Method

Version 4.1

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## Introduction

Opportunity analysis underpins the art of making the investment decision about whether or not to bid for a Public Sector opportunity. Once the decision has been made, the analysis then forms part of the activity guide for the sales and bid teams. It points them towards the most critical tasks that must be undertaken and successfully completed before any proposal or bid document is sent to the client.

The Sixfold Method is based upon many years of experience in bidding for and subsequently winning (or losing) Public Sector contracts. It is a deceptively simple but highly effective tool. It has been developed by sales people who have used many other opportunity qualification methods and found them to have both strengths and weaknesses. This method is based upon an approach that actually works in practice and has some surprising elements of sophistication that will become apparent when the tool is used routinely to help the sales team in its quest to develop Public Sector business.

Like most things in the sales environment, the numbers and the answers from this analysis cannot be used as a black and white test of whether or not to bid for any particular opportunity. The output of the analysis will give a good indication of the value and quality of the opportunity. However, it can never replace common sense and good practical experience. Use this tool as a pointer and not as a final decision maker. Use it to give a focus upon where decisions need to be made, not to make the decisions. Use it to drill down on areas of concern or ambiguity, not to cover up a lack of foundation. Like any tool, this method is only as good as the person or team that uses it.

You may be tempted to alter some aspects of the tool to “better fit” your business. Whereas, this may enhance the value of the tool for you, do not make this decision lightly. My old sales manager always used to tell me when he brought some new idea or process into the business “Try it three times and then criticise it!” I have followed this approach to this day and I would recommend that you try this method three times too, before you try to change it. I will guarantee that if you use it three times, you will continue to use this method for many more times after that.

If you still find a compelling reason to change the tool, then please go ahead and give the changes a good workout. Please do let us know if they work for you, so that we can see if your change might benefit the others who have already embedded this approach into their businesses. However good we are, we are never so arrogant to think we too, cannot improve and we want to take any improvements forward to benefit all our clients.

I hope that this method really helps your business and I wish you every success in your next and subsequent opportunities.

**Andy Haigh**

# Public Sector Opportunity Analysis

## Position Analysis Form

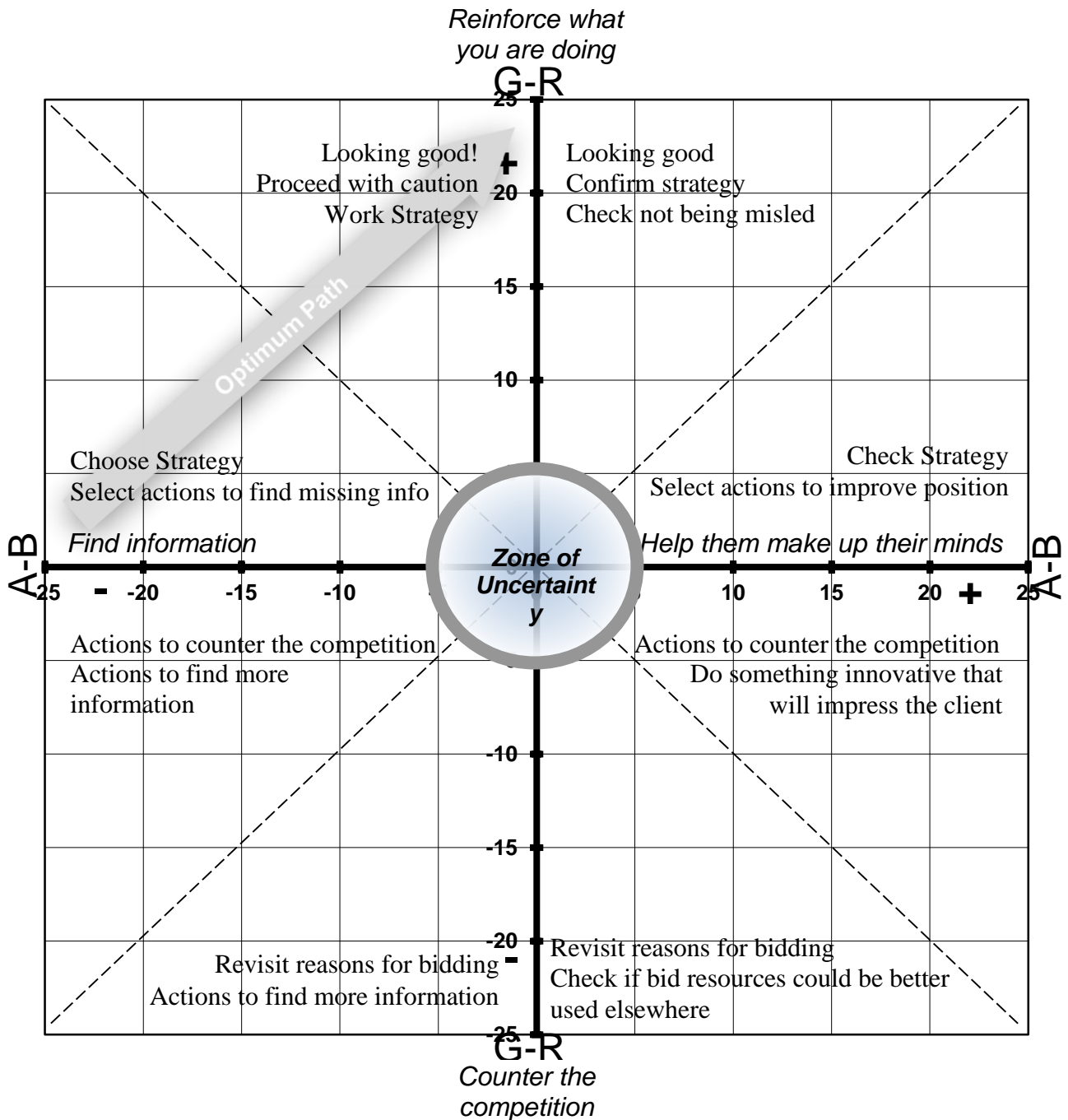
| Consider your position against that of your most serious competitor |    | Green  | Amber   | Red          | Black    |          |          |          |
|---|----|--|---|--------------|----------|----------|----------|----------|
| Client  | 1  | Client forced to proceed                             |   |              |          |          |          |          |
|   | 2  | Key individual forced to proceed                     |   |              |          |          |          |          |
|   | 3  | Budget secure and sufficient                         |   |              |          |          |          |          |
|   | 4  | End users engaged                                    |   |              |          |          |          |          |
|   | 5  | Formal decision processes and requirements finalised |   |              |          |          |          |          |
|   | 6  | Supplier preferences exist                           |   |              |          |          |          |          |
|   | 7  | Inside support                                       |   |              |          |          |          |          |
| Competition   | 8  | Alliances in place                                   |   |              |          |          |          |          |
|   | 9  | Reputation   |   |              |          |          |          |          |
|   | 10 | Credibility and track record                         |   |              |          |          |          |          |
|   | 11 | Ability to meet requirements                         |   |              |          |          |          |          |
|   | 12 | Sweet Spot   |   |              |          |          |          |          |
|   | 13 | Informal decision making process                     |   |              |          |          |          |          |
|   | 14 | Sales Strategy                                       |   |              |          |          |          |          |
| Community   | 15 | Public perception of project                         |   |              |          |          |          |          |
|   | 16 | Media presentation of project                        |   |              |          |          |          |          |
|   | 17 | Interest group's position                            |   |              |          |          |          |          |
|   | 18 | Political environment                                |   |              |          |          |          |          |
| Company   | 19 | Differentiator value                                 |   |              |          |          |          |          |
|   | 20 | Relationships in place                               |   |              |          |          |          |          |
|   | 21 | Revenue  |   |              |          |          |          |          |
|   | 22 | Profit   |   |              |          |          |          |          |
|   | 23 | Risk   |   |              |          |          |          |          |
|   | 24 | Strategic value                                      |   |              |          |          |          |          |
|   | 25 | Sales costs and availability of resources            |   |              |          |          |          |          |
|   |    | Green – Advantage to us<br>Amber – No advantage      | Red – Advantage to a competitor<br>Black – Insufficient information | <b>Total</b> | <b>G</b> | <b>A</b> | <b>R</b> | <b>B</b> |

## Activity Compass

Transfer the totals from overleaf. Note the order of the totals is different.

Find the G - R and A - B scores and plot the point on the diagram below:

|                            |              |          |              |          |
|----------------------------|--------------|----------|--------------|----------|
| Scores from table above => | <b>G</b>     | <b>R</b> | <b>A</b>     | <b>B</b> |
| Calculate =>               | <b>G - R</b> |          | <b>A - B</b> |          |



Label each point with the date and repeat during the sales campaign.

### Using the tool

1. Consider each of the 25 questions above. In each case colour in the block most appropriate to your circumstances under that heading. Use the following key:
  - a. **Green** – Colour the entire space alongside the question under the heading “Green” in a green pen when the situation you are considering is **better for you** and your company on balance than for any of the competitors.
  - b. **Amber** - Colour the entire space alongside the question under the heading “Amber” in a yellow or orange pen when the situation you are considering is **no better** for either you and your company or the competition. Use this column when you know the facts of the situation and they do not favour any competitor in particular.
  - c. **Red** - Colour the entire space alongside the question under the heading “Red” in a red pen when the situation you are considering is **better for another competitor** than you and your company.
  - d. **Black** - Colour the entire space alongside the question under the heading “Black” in a black pen when you **do not have enough information** to select either Green, Amber or Red. This is the “don’t know” option.
2. When considering the questions, consider the full scope of what should be weighed under the question heading. Look at the questions and explanations on the later pages to help formulate your thoughts. Where possible, discuss each question with the rest of your team and come to a consensus before completing the form.
3. Where questions are answered by supplied information that will be available to all competitors you must think about if any competitor may have or could create an edge in that area. An example would be under Question 3 – Budget secure and sufficient? If the client gave budget details in the ITT documentation then everyone would know the details and, at first sight “Amber” would be a correct choice. If you knew another department was planning to raid the budget for another high priority project and the competitors did not, you would choose “Green” as you could use that knowledge to put messages in your proposal to help the client head off the challenge, thus increasing the value of your proposal to the client.
4. When the form is complete, the visual impact will give you an immediate indication of the strength of your position and, after you have repeated the exercise a few times with different opportunities, you will recognise patterns that will convey even more insight.
5. Count the number of Green, Amber, Red and Black squares and put the totals in the appropriate column at the bottom of the sheet. The total of these totals must be 25. Transfer these totals to the next sheet and note the **order of the totals** is different!
6. Calculate the result of subtracting the Red squares total from the Green squares total, and the Black squares total from the Amber squares total. Enter the results, positive or negative, into the “Calculate” boxes below.
7. Plot the results of then calculation on to the Activity Compass. This will give you an even better indication of the overall value of this opportunity and show you the direction in which you are currently pointing.

## Public Sector Opportunity Analysis

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8. At the beginning of any opportunity everything is unknown and the plot will indicate the middle right. Consider actions and activities you could undertake that would alter the plotted position more towards the North (top of the graph), aiming to get to the top middle. If you move along the optimum pathway it means that everything you uncover about the opportunity is to your favour, and this is the best sales route to progress along. Otherwise you need to work out the actions you need to take to get back on the path.
9. Discuss these actions and activities with your team. Don't skimp on this step as this is where the real value emerges. Produce a detailed plan and allocate individual responsibilities to achieve the results. Plan a review session to receive feedback on progress for each of your agreed actions and activities.
10. If you are in the "Zone of Uncertainty" don't stay there. It may mean that the client may only be able to make a choice on Price and you must consider if you want to compete on these terms. Take bold and immediate steps to move out.
11. At the review session, start the process again.

### Questions

The tool is divided into four unequal areas, which serve to give a limited weighting to the areas under consideration:

- Client – examines issues concerning the client's drivers and culture
- Competition – looks at the competitive environment and some relationships
- Community – seeks information on the political environment
- Company – analyses how your company will react to the opportunity

Each has several question areas and guidance is given on the issues which could be weighed to make a decision on the colour options later in this document. Of course, one specific issue may be the clear decider – such as one competitor having an affordable capability highly significant to the client which no other competitor can offer. However, even if you suspect this to be the case, the questions and their implicit weightings in this approach will give you a better insight into the likely outcome than just accepting a clear differentiator exists.

For each of the question areas in the analysis form, use your knowledge to weight the answer. Do not guess the answer – if you don't have enough information to make a reasonably accurate choice, select the "Black" don't know option instead and put an action in hand to find out the missing information.

It is important to consider each question area from the viewpoints of:

- The Public Sector decision makers (the client)
- Each of the competitors, which may also include a Public Sector department or organisation who may want to get the business for themselves (the competitors)
- Our own business (the business)

When you have thought about all three, then make your choice of answer. Don't make any distinction between the nature of opportunity and the technical details of the product, service or deliverable that may be asked for in the Invitation to Tender. At this stage, none of these are important in terms of assessing if you should bid and what you need to do to take the bid forward. You must assume that all the competitors (including your own company) will come up with a technical solution



that they can argue meets the client's need and has its own unique features. Otherwise there is no point in their bidding!

In some areas (e.g. formal decision making processes) the information will be known to everyone and no one has an advantage as a result. These are generally "Amber" areas. However, if you feel that you or a competitor has a particular edge because of something you know and others do not, then the selection should be moved to green or red accordingly.

Examples and more detail about some of the questions you might want to consider under each of the questions headings are given below. Don't hesitate to include additional questions or information you consider might be relevant under the appropriate heading.

### **Client Questions**

#### **1. Client forced to proceed**

What is compelling the client to go ahead with this project? Can we identify what this is? Alternatively, is the information we have got indicating a project which is more desirable than essential for the client?

Is the opportunity aligned with the client's business strategy?

Is this pressure outlined in the background given in the tender documentation or something different? How do we know?

What will happen if the client does not go ahead? Will it hurt them?

Has the business case been approved? On what grounds?

Has this opportunity only arisen to validate an internal budget or to justify the spending plans for an internal department?

#### **2. Key individual forced to proceed**

Can we identify an individual in a position of power and authority in the client's organisation who will be personally damaged if the project or opportunity does not go ahead? What is their personal stake in this?

Can we identify an individual in a position of power and authority in the client's organisation whose situation will be greatly enhanced if the project goes ahead? What is their personal stake in this?

Is the individual sponsoring the project just seeking information without having any real intention to push the project forward?

Who was the author, champion or sponsor of the business case?

#### **3. Budget secure and sufficient**

Do we know what the budget is? Is it in the budget plans or Long Term Costings (LTCs)? How long has it been in the LTCs.

Is the budget "use it or lose it"?

Is it "ring fenced" or could something else come along and steal the funds?

Do we know what other things might be competing for the same funds?

Has the client actually got the cash?

Do we know who the budget holder is? Are they interested in the project or deliverable?

#### **4. End users engaged**

Are the users aware of the project or service?

Have they been consulted about the impact upon them?

Have they had any input to the specification?

Will they resist the introduction of the new systems or processes? Will it change their jobs?

#### **5. Formal decision processes and requirements finalised**

Is there a formal and detailed specification?

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Has it been signed off by the client's procurement processes?  
Do we know what the decision making process is and the timescales?  
Have we got the scoring and weighting information?  
Do we know who the decision makers will be and what the approval process is to get any contract signed?  
Are there any other parties in the procurement process who may stop a contract at the last minute e.g. legal and commercial? Who are they? Has the client involved them in the project to date?

### 6. **Supplier preferences exist**

Did the client have a supplier in mind when the invitation to tender was issued?  
Has a supplier influenced the contents of the specification or the invitation to tender? Did they write it?  
Is there an "obvious" supplier? Has the specification been written around an existing product or service set?  
Are there any potential suppliers the client does not want to win?

### 7. **Inside support**

Are there any powerful people in the client's organisation who want a particular competitor or us to win (or lose)?  
Why do they want that? What will they get out of it for their organisation and personally? Can we influence them?  
Is their bias known to others? Is their bias known to the decision makers?  
How can they be trusted?  
Have we identified communication routes to the powerful people that we or the completion can use?  
Will the powerful people be receptive to our or other messages? How do we know?

## **Competition Questions**

### 8. **Alliances in place**

Do any potential tenderers have relationships with key sub-contractors or partners who will or must be part of the solution?  
How strong are these alliances?  
How important are these alliances for this particular opportunity? Does the client believe this?

### 9. **Reputation**

What is the reputation of each of the competitors in the mind of the client? Is it true?  
What is the media profile of each of the competitors? Is it true?  
What impression do you get from researching each of the competitors (and your company) on internet news searches and other media?  
How do industry analysts rate all of the competitors?

### 10. **Credibility and track record**

How well have all of the competing parties done in the past? Does the client believe this?  
Who does the Public Sector organisation turn to for advice when they have problems in this area? Are these people responding to the Invitation to Tender?  
Is there an incumbent?  
Are any of the parties engaged in litigation with any government organisation or have they been in the past? Does it make a difference?

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How much synergy is there between the corporate culture of each competitor and the client?

### 11. Ability to meet requirements

Can we or each of the competitors actually provide what is asked for? How much will be new or require innovation to resolve?

Have we or they done it before? How often? Was it successful? Who judged the success?

How much is in our current corporate portfolio of capability and how much will have to be sub-contracted or sourced elsewhere? Will this be acceptable to the Public Sector client? Are the competitors any better off?

Are the legal and commercial terms and conditions of trade acceptable?

### 12. Sweet Spot

How close is this project or deliverable to the absolute ideal project (Sweet Spot) for us and each competing organisation?

Will the project get enthusiastic support from all members of our (or the competitor's) board throughout its lifecycle? Why?

Will this project help us and each competitor in meeting its own strategic goals?

### 13. Informal decision making process

What are the political pressures within the client's organisation? How much impact will they have?

Can we identify who the politically powerful people are? How certain is this? How do we know?

Do we know what their personal and business agendas are?

Can we communicate with them and what is the route?

Can they sway the eventual outcome? Do they want to? Why?

### 14. Sales Strategy

Do we know the sales strategy of each of the competitors?

Do we know the bid strategy of each of the competitors?

Are they being realistic?

Have we been able to choose our sales strategy based upon the competitors strategies?

How robust is our strategy? Will it work? Why?

## Community Questions

### 15. Public perception of project

Will the public consider the outcome of the opportunity to be good use of taxpayer's money?

Is there an existing expectation by the public that this project will occur?

Does it support a political manifesto?

Are any perceived public issues likely to interfere with the procurement or the project aims? How do we know?

### 16. Media presentation of project

Are the press sympathetic to the project aims?

How is the press presenting the project and the competitors to the general public?

Can the press be swayed?

Will the media present our perspective and our messages to their audience?

How can we get them to do this?

### 17. Interest group's position

What is the position of the Unions?

## Public Sector Opportunity Analysis

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Are there any interest groups or lobbyists involved? What are they arguing for? Have they got any political clout? Are they allied to us or any of the competitors?

Can an interest group alter public opinion?

### 18. Political environment

Are the Elected Politicians behind this opportunity? Why?

Is this project covered by or referenced within the government's manifesto?

Is the outcome likely to be swayed by changes in the political landscape?

How close are elections?

Is there Political capital to be made if the project goes ahead? What happens if it does not?

## Company Questions

### 19. Differentiator value

Have any of the competitors (including us) got something which will differentiate them from all other competitors and bring value to the client?

Can we or they do it?

Does the client believe it? Have we confirmed this value to the client? Does this appear to them to be truly overwhelming? How do we know?

If not us, can we do something to equal or better it?

### 20. Relationships in place

Who has personal and business relationships already established with the decision makers in the client's organisation?

Who has personal and business relationships already established with the influencers in the client's organisation?

Are these relationships relevant to this project?

Are organisations with existing relationships "locked out" of the competition?

Are there any consultants or advisors already appointed to assist the Public Sector organisation? Do they have any relevant relationships?

### 21. Revenue

Is the expected project revenue too big or too small to meet our business needs and expectation?

Is the total revenue size likely to be seen as risk to the business by the client when compared with our turnover and for each competitor?

Will the revenue occur with an acceptable cash flow profile and timescale?

### 22. Profit

Will the expected profitability meet our business requirements? How do we know?

Will the client consider our profit level acceptable (if they find out)?

Is investment needed before a return can be made? Can we do it?

Will the return be realised in an acceptable timescale?

### 23. Risk

What is the risk the project will fail?

What is the risk of the technology? How much innovation is required?

Can the client cause the service or deliverable to fail? How? What can we do to prevent this?

Who will be blamed if the deliverable fails?

What are the legal and commercial risks?

Is the client insisting on contractual penalties or guarantees?

Can we cost our risk and add this to our proposal?

### 24. Strategic value

Will winning the opportunity help achieve a strategic goal for each of the competing parties? How important is that goal to the organisation?  
Is it worth investing in the opportunity response to ensure it is won? Why?  
Who in our business confirms this?  
What other opportunities will be lost if this opportunity is pursued? What other opportunities will be lost if this project is won?  
If this opportunity is pursued or won, what other projects or opportunities might become “lock outs” or have to be abandoned?

### 25. Sales costs and availability of resources

Who will have to sign the tender off to allow it to be released to the client?  
Do we have to “sell” the opportunity internally? Who will do this?  
Are there sufficient resources available to create a quality response?  
Are sales budgets sufficient for the entire bid lifecycle?  
Are the right staff available in our team at the necessary times to achieve critical bid actions?  
Can demo and pilot equipment be made available when required?  
Do partners have to be involved in the bid? What is the quality of their input likely to be?  
Do the legal and commercial departments have sufficient time to do their job before the bid goes out?  
Are the people who have to provide the document signatures going to be available when they are needed?

## **Patterning**

One of the great values of this system of opportunity assessment is that in any business, over time recognisable patterns emerge from the answers to the 25 questions. These patterns can be strong indicators of the value of the particular opportunity. However, the patterns depend upon the nature and the culture of the person or team answering the questions. For instance, someone who takes a very strict interpretation of the questions may end up with a slightly different analysis from someone who takes a more liberal approach. Neither analysis is wrong. Making an accurate comparison between different opportunities relies, in part, on either the same level of understanding and nature of response between the opportunities or an understanding of the comparative differences.

Nevertheless, it only takes a very few rounds of analysis for these differences to become apparent. Once you are comfortable with the method, the relative patterns will begin to emerge and become more meaningful.

There are some patterns that are not so sensitive to any individual interpretation of the scores. Some of these are described below:

### ***Unknown Information***

If the total of Black squares exceeds 5, this indicates that there may be too little hard information to commit to any serious level of investment. This is automatically flagged in the Excel tool, in the “Notes” area beneath the analysis.

If there are a high number of Black squares, immediate actions should be put in hand to find out key missing information before any other investment is committed.

### ***Zone of Indecision***

If the plot ends up in the Zone of Indecision, this is an indication that there is nothing to give you any real confidence that the opportunity can be won and, perhaps there is insufficient direction or clarity within the account team. It may be that the client will only make a decision on price and you need to be sure that you want to compete in this situation.

If you find yourself in this situation then something decisive needs to be done immediately, either to make an improvement in the relationships or the solution, or to abandon the opportunity. Unless you can move away from this point you might be wasting time, money and resources which could be better used elsewhere. The difficulty you will have is that you just do not have good enough information and you don't really know!

If you find yourself in this position and then you do something which shows that you are not likely to win the opportunity, count this as a real success! You will be able to use all your talents elsewhere on something much more likely to give a return. If you can do something which improves your win chances, think yourself lucky that you did this now rather than later and capitalise upon it. Whatever you do, don't wallow in the Zone of Indecision or by default you will not win and you will squander your sales investment to little effect.

### ***Relationships***

A combination of high scores in questions 6, 7, 8, 9, 10, 13 and 20 must give you considerable confidence about how strong your relationship with the client actually is. Conversely, poor scores here are often an early pointer for eventual failure.

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If you see a negative pattern emerging, then use your resources to build and create relationships as a matter of priority. Do not let the controls the Public Sector procurement process will attempt to put in place get in your way. If you cannot make contact with the decision makers, then find out what their network of contacts is and use it to get your messages through. Think laterally about how you can use all your contacts to bring the right sort of pressure to bear and then re-evaluate your position using the tool to make sure you are making progress.

Public Sector opportunities are often won by getting the match between messages and relationships right. If you work this correctly, you will be able to snatch victory from a complacent competitor who thinks themselves in the lead.

### ***Community***

If there are many Red squares in the Community section (Questions 15 to 18) this may be sufficient to disadvantage you even though you may have superb relationships and the best solution. Public Sector organisations eventually always bow to public pressure and opinion. In this area, the best way to improve your position may be to engage with the media and invest resources into brand and solution marketing, to both the potential client and the public at large.

If you are ahead, watch out for the competitor who might be using this route to damage your position. Think about what they could do and then take measures to counter them. This will insulate your position even if the competitors do not realise their own relative weaknesses here.

### ***Conclusion***

These are a few of the myriad of patterns that will begin to emerge as you use the tool more and more. A quick way to get a feeling for the patterns is to use the tool to analyse a couple of opportunities you know that were won and a couple that you know that were lost. You will find a comparison of the results to be most instructive.

### Using the Excel Tool

The Excel\* based Opportunity Analysis tool automates some parts of the Sixfold Opportunity Qualification method. To use the tool, load it into Excel, select the “Assessment” tab and follow the process below:

1. Enter the Client organisation name, Project name and date.
2. Consider each of the 25 questions and enter a “1” into the box alongside the question under the heading below:
  - a. **Green** – Enter “1” when the situation you are considering is **better for you** and your company than the competition.
  - b. **Amber** - Enter “1” when the situation you are considering is **no better** for either you and your company or the competition. Use this column when you know the facts of the situation and it does not favour any competitor.
  - c. **Red** - Enter “1” when the situation you are considering is **better for the competition** than you and your company.
  - d. **Black** - Enter “1” when you **do not have enough information** to select Green, Amber or Red. This is the “don’t know” option.

The number will disappear and the box will immediately turn the colour selected.

3. When you have answered all 25 questions, check the column on the right of the coloured boxes. If any questions are unanswered, anything but a “1” has been entered in the box or if two selections have been made for a question, this will be highlighted. Correct these lines.
4. Print the page.
5. Select the “Results” tab and print the page on a colour printer.
6. Repeat this exercise at regular intervals during the competition. Make sure that the trends are in the direction you want. If they are not, do something to make a difference.

\* Excel is part of the Microsoft Office software suite