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| --- | --- | --- | --- | --- | --- |
| Service Line\* | Choose an item. | | Pursuit Lead\* |  | |
| **Engagement Details** | | **Select/Enter the Details** | | | **Enter Comments** |
| Client Name\* | |  | | |  |
| Is it a New or existing client for USI?\* | | Choose an item. | | |  |
| Opportunity Name\* | |  | | |  |
| Industry\* | | Choose an item. | | |  |
| Member Firm\* | |  | | |  |
| Is it an opportunity or a win for member firm\* | | Choose an item. | | |  |
| Overall size of the pursuit (In USD)\* | |  | | | <MF potential size in USD> |
| Any other member firms involved? If yes, mention MF | | Choose an item. | | | <List the member firms> |
| MSA existing between Deloitte US firm and the host Deloitte member firm\* | | Choose an item. | | |  |
| Confirmation on Client independence (Non Attest / Attest) received?\* | | Choose an item. | | | <List whether the client is Attest or Non Attest> |
| **Scope Details** | | | | |  |
| Does the scope include activities (e.g. POC / Workshops) that can potentially increase duration of the proposal submission? \* | | Choose an item. | | | <Details around proposal effort> |
| Does the Scope require Niche Skills / capabilities?\* | | Choose an item. | | | <Include the skills and mention if USI has those skills> |
| **Team Details** | | | | |  |
| Is it a capacity based or managed delivery?\* | | Choose an item. | | | <List how many resources> |
| Does the project require USI resources to travel to non-US locations? | | Choose an item. | | | <Mention countries> |
| **Other Details** | | | | |  |
| Do we have ODC requirement for Project? | | Choose an item. | | |  |
| Are there limitations of accessing member firm data at off-shore? | | Choose an item. | | |  |
| Does member firm have all the capabilities that are expected from USI? \* | | Choose an item. | | | <Mention the capabilities they lack> |
| Do we anticipate any language related issues, if the member firm is Non-English country? | | Choose an item. | | | <Mention the language required> |

*Please paste the above table in the body of the email and send it to the Regional Service Line Leader for approval to pursue*

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| **Review Details** | | |
| Lead Quality Reviewer\* |  | |
| Supporting Quality Reviewers |  | |
| Review Date(s)\* | Start Date | End Date |
| Required Field | Required Field |

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| **Review Summary** | | | | | |
|  |  | |  |  | |
| **Red** | | Reviewer has identified significant issues that need to be mitigated / addressed | |  |
| **Yellow** | | Reviewer has identified concerns that may need to be mitigated / addressed | |  |
| **Green** | | Reviewer has not identified any concerns that need to be mitigated / addressed | |  |

\* Need to be completed.

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| **Overall Rating (Mandatory)** | |
| Overall Rating\* | Choose an item. |
| Comments\* |  |

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| **Leadership**  **(Member firm Risk)** | | |
| Overall Leadership Rating | Choose an item. | |
| Deloitte MF Leadership | Choose an item. | |
| USI Leadership | Choose an item. | |
| Comments |  | |
| Sub Category | Concerns | Recommendations |
| Choose an item. |  |  |
| Choose an item. |  |  |
| Choose an item. |  |  |

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| **Solution & Deliverables (Mandatory)**  **(Solution Risk)** | | |
| Overall Solution & Deliverables Rating\* | Choose an item. | |
| Definition & Scope | Choose an item. | |
| Deliverables | Choose an item. | |
| Complexities | Choose an item. | |
| Client Environment | Choose an item. | |
| Comments |  | |
| Sub Category | Concerns | Recommendations |
| Choose an item. |  |  |
| Choose an item. |  |  |
| Choose an item. |  |  |
| Choose an item. |  |  |
| Choose an item. |  |  |

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| **Approach**  **(Solution Risk)** | | |
| Overall Approach Rating | Choose an item. | |
| Methodology | Choose an item. | |
| Operational Tools & Infrastructure | Choose an item. | |
| Verification & Validation | Choose an item. | |
| Comments |  | |
| Sub Category | Concerns | Recommendations |
| Choose an item. |  |  |
| Choose an item. |  |  |
| Choose an item. |  |  |
| Choose an item. |  |  |

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| **Staffing (Mandatory)**  **(Team Risk)** | | | | |
| Overall Staffing Rating\* | Choose an item. | | | |
| USI Staffing Model | Choose an item. | | | |
| Deloitte MF Team | Choose an item. | | | |
| Comments |  | | | |
| Sub Category | Concerns | | Recommendations | |
| Choose an item. |  | |  | |
| Choose an item. |  | |  | |
| Choose an item. |  | |  | |
| **Estimation, Planning & Timeline (Mandatory)**  **(Contract Risk)** | | | | |
| Overall Estimation, Planning & Timeline Rating\* | | Choose an item. | | |
| Estimation | | Choose an item. | | |
| Planning | | Choose an item. | | |
| Contingency | | Choose an item. | | |
| Timeline | | Choose an item. | | |
| Business Case | | Choose an item. | | |
| Comments | |  | | |
| Sub Category | | Concerns | | Recommendations |
| Choose an item. | |  | |  |
| Choose an item. | |  | |  |
| Choose an item. | |  | |  |
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| Choose an item. | |  | |  |

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| **Monitor & Control (Mandatory)**  **(Contract Risk)** | | |
| Overall Monitor & Control Rating\* | Choose an item. | |
| Project Management Office | Choose an item. | |
| Communication | Choose an item. | |
| Decision & Issue Management | Choose an item. | |
| Change Control | Choose an item. | |
| Documentation & Configuration Management | Choose an item. | |
| Contract Management | Choose an item. | |
| Comments |  | |
| Sub Category | Concerns | Recommendations |
| Choose an item. |  |  |
| Choose an item. |  |  |
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