

FREE WORKSHEET



THE PROCUREMENT-READY STARTER KIT

For Australian trade & construction businesses
chasing the \$116 billion boom

A companion to the book

PREQUALIFIED

by Paul Morffew

Brought to you by Veridian IMS · veridianims.com

Before you start: the four pillars

Every prequalification form you will ever fill in is the same four questions in different words. The gate is administrative, not technical — it rewards the provable, not the most talented. Here are the four pillars a buyer checks. Read them, then score yourself on the next page.

1. Quality

Can you prove you control your own work? Documented checks, version control on drawings, and defects caught and fixed — with a record to show for it, not just a promise.

2. Safety & Environment

Can you produce the evidence on demand? Task-specific method statements, a live risk register, incidents recorded and closed out, and waste, dust and spills managed.

3. Financial Capacity

Do the numbers say you can carry the work? Working capital, liquidity and net assets read against a buyer's formula — not a gut feel about whether you seem solid.

4. Insurance & Licensing

Right cover, right limit, right entity? Current public liability at the level the work demands, the licences your trade needs, and every policy in the exact entity that signs the contract.

SCORE YOURSELF HONESTLY

The 12-point self-check

Tick one box per line. Score 2 for "in place", 1 for "partly", 0 for "not yet", then add them up.

	IN PLACE	PARTLY	NOT YET
Quality			
1. Only the current drawing/spec version is used on site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Work is checked before it's called done, with signed records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Defects and non-conformances are logged and closed out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety & Environment			
4. High-risk tasks have specific method statements, signed on	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. The risk register is live, with recent entries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Incidents are recorded and closed; tickets and inductions current	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Waste, spills, dust and noise are managed, with evidence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Capacity			
8. We know our working capital and the contract size it supports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. We'd pass a liquidity test and have a one-page financial summary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insurance & Licensing			
10. Public liability is current, at the limit our work demands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Every licence and policy sits in the entity that signs our work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. We have a one-page map of our entities and what each holds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Your total

/ 24

Under 16? That's a normal starting point. Fix your weakest pillar first.

DO THIS ONE THIS WEEK

The entity-map exercise

The most expensive mistake in prequalification isn't missing cover — it's the right cover in the wrong name. List every entity in your group and what it holds, then confirm your licence and insurances sit in the entity that actually signs contracts.

Entity (name & ABN)	What it holds (licence, PL / PI, workers comp, bank, assets)	Signs work?

Are your licence AND insurances in the entity that signs contracts?

Yes — all aligned

No — something needs moving (fix it before you bid)

WHAT'S NEXT

You've found your gaps. Now close them.

This kit shows you where you stand. The book Prequalified shows you how to build every pillar to the standard a buyer checks — the lean quality system, the financial ratios that disqualify good businesses, the capability statement that gets you shortlisted, how to reach the primes before the work is advertised, and a 90-day plan that takes you from invisible to prequalified.

→ **Get the full book on Amazon**

Search "Prequalified" by Paul Morffew · all 9 chapters, the 90-day plan and templates

Start free with Veridian IMS

The live compliance platform that keeps you prequalified — your quality, safety, environmental and document systems in one place, ready to produce on demand.
veridianims.com