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**Proposal Coordinator Checklist**

**Remote Proposal Desk** | [www.remoteproposaldesk.com](http://www.remoteproposaldesk.com)

| **Client** |  | **RFP Name/No.** |  |
| --- | --- | --- | --- |
| **RFP/RFI Link** |  | **Solution Proposed** |  |
| **Questions Due** |  | **Edit/DP Date** |  |
| **Production Date** |  | **Proposal Due** |  |
| **Proposal Team** |  |
| **Activity/Task** | **Assigned To** | **Date Due/Complete** | **Done** |
| 1. Read & analyze RFP (identify gaps in services, red flags/concerns, threats, opportunities, questions, etc.)
 |  |  |[ ]
| 1. Create a collaboration site
 |  |  |[ ]
| 1. Identify/request SMEs/team members/resources
 |  |  |[ ]
| 1. Confirm teaming partners/subs
 |  |  |[ ]
| 1. Create project plan (outline of tasks and deadlines to get the proposal completed and submitted)
 |  |  |[ ]
| 1. Create proposal shell (copy & paste questions, requirements, RFP instructions, evaluation criteria, etc. into template)
 |  |  |[ ]
| 1. Populate the proposal template with standard content, past responses, etc.
 |  |  |[ ]
| 1. Schedule the kick-off call (invite everyone working on the proposal)
 |  |  |[ ]
| 1. Create submittal instructions
 |  |  |[ ]
| 1. Request Compliance & Contract review/Surety, etc.
 |  |  |[ ]
| 1. Request references and past performance
 |  |  |[ ]
| 1. Request production (if needed)
 |  |  |[ ]
| 1. Submit Intent to Bid
 |  |  |[ ]
| 1. Compile & submit clarification questions to client/attend pre-bid conference
 |  |  |[ ]
| 1. Send the Agenda and writer’s package to the team before the Kick-off Meeting
 |  |  |[ ]
| 1. Conduct a kick-off meeting
 |  |  |[ ]
| 1. Check for Addendums
 |  |  |[ ]
| 1. Develop new content (engage SMEs to help create content)
 |  |  |[ ]
| 1. Send a reminder that the edits are due
 |  |  |[ ]
| 1. Customize content for the specific client
 |  |  |[ ]
| 1. Send first draft to the team to review/edit
 |  |  |[ ]
| 1. Check for newly released Addendums
 |  |  |[ ]
| 1. Review the compliance matrix to ensure proposal requirements are being met
 |  |  |[ ]
| 1. Review project plan and update/modify (be sure to share changes with the team)
 |  |  |[ ]
| 1. Compile all input/edits
 |  |  |[ ]
| 1. Send second draft to team for review
 |  |  |[ ]
| 1. Check for Addendums
 |  |  |[ ]
| 1. Final edits (incorporate final edits into the master proposal document)
 |  |  |[ ]
| 1. Quality check – formatting (ensure document is correctly formatted – i.e., page numbers, attachment numbers, styles, placement of graphics, pagination, etc.)
 |  |  |[ ]
| 1. Quality check – content (final read through for flow, grammatical/spelling, and messaging).
 |  |  |[ ]
| 1. Final sign-off (Subject Line: FINAL REVIEW – DEADLINE! First line, let her know it’s the final review)
 |  |  |[ ]
| 1. Production/Ship/Hand Deliver/Email
 |  |  |[ ]
| 1. Confirm delivery
 |  |  |[ ]
| 1. Archive (include final proposal, pricing, references, past performance, SOW, etc.)
 |  |  |[ ]