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AI-generated content may be incorrect.**

**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.) | | | |  | |  |  |