

Pre-Submission RFP Checklist

INTRODUCTION

Submitting an RFP without proper review is like sending a fighter into battle without armor. This comprehensive checklist ensures your RFP is battle-ready, helping you avoid costly mistakes and maximize your chances of winning.

CONTENT QUALITY

Response Accuracy

- All questions are answered completely
- No questions are left blank without explanation
- Responses directly address the specific requirements
- Claims are substantiated with evidence or examples
- All requested information is provided
- Check for spelling mistakes.
 - Bonus tip: Run Grammarly over your responses

Compliance

- All mandatory requirements are addressed
- Compliance matrix is completed and accurate
- All required forms and certifications are included
- Regulatory requirements are addressed
- Non-compliance issues are acknowledged with alternatives

Clarity and Consistency

- Writing is clear and professional
- Industry jargon is used appropriately or avoided
- Terminology is consistent throughout
- Voice and tone are consistent
- Content flows logically

Competitive Differentiation

- Unique selling propositions are highlighted

- Competitive advantages are clearly articulated
 - Solution benefits (not just features) are emphasized
 - Customer results and outcomes are quantified
 - Win themes are reinforced throughout
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TECHNICAL ELEMENTS

Document Formatting

- Document follows client's required format
- Font and spacing are consistent
- Headers and footers are correct
- Page numbering is accurate
- Margins meet requirements
- Document adheres to page limitations

Graphics and Visuals

- Images are high-resolution and professional
- Charts and graphs are clearly labeled
- Visual elements support the narrative
- All graphics have captions where appropriate
- Colors conform to brand guidelines and are accessible

Structure and Navigation

- Table of contents is accurate with correct page numbers
 - Section headings match the RFP structure
 - Cross-references are accurate
 - Appendices are properly labeled and referenced
 - Executive summary provides a compelling overview
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QUALITY CONTROL

Editorial Review

- Spelling is correct throughout
- Grammar is correct

- Punctuation is appropriate
- No incomplete or run-on sentences
- No copy-paste errors or artifacts
- No track changes or comments visible
- All placeholders replaced with actual content

Factual Accuracy

- Company details are accurate
- Team qualifications are current
- Case studies and references are verified
- Pricing and financial information is accurate
- Technical specifications are correct
- Implementation timelines are realistic

SME Validation

- Technical content reviewed by subject matter experts
 - Financial content approved by finance team
 - Legal content approved by legal counsel
 - Executive summary approved by leadership
 - Product claims verified by product team
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SUBMISSION READINESS

Document Finalization

- File format matches requirements (PDF, Word, etc.)
- File size is under submission limits
- File naming follows client conventions
- All required signatures are obtained
- Document is secured appropriately (if required)

Submission Requirements

- Correct number of copies prepared
- Required electronic media (USB, etc.) prepared
- Submission deadline confirmed
- Submission method confirmed (online portal, email, physical delivery)
- Delivery receipt mechanism in place

Post-Submission Plan

- Team notified of successful submission
 - Follow-up communications prepared
 - Team prepared for potential clarification questions
 - Debrief scheduled to capture lessons learned
 - Win/loss analysis process in place
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EXECUTIVE APPROVAL

Final Review

- Final proposal reviewed by proposal manager
 - Final proposal approved by sales lead
 - Pricing and terms approved by appropriate authority
 - Risk assessment completed
 - Go/no-go decision reconfirmed
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NOTES

Use this space to document specific reviewer comments, outstanding issues, or client-specific requirements.

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