

RFP Response Checklist

1. Opportunity Intake

- Review full RFP package for completeness
- Log opportunity in CRM or tracking system
- Identify submission deadlines (questions, intent to bid, final submission)
- Gather all required attachments and supplemental documents
- Confirm submission method (portal, email, physical delivery)

2. Bid/No-Bid Qualification

- Assess strategic fit with company goals
- Evaluate competitive landscape
- Confirm internal capacity and resources
- Review budget alignment and profitability
- Identify risks and blockers
- Document final bid/no-bid decision and approvals

3. Kickoff & Strategy Alignment

- Hold internal kickoff meeting
- Assign proposal manager and contributors
- Define win themes and value propositions
- Identify customer pain points and differentiators
- Outline compliance requirements
- Establish timeline and responsibilities

4. Content Planning

- Create annotated outline based on RFP structure
- Identify reusable content vs. net-new content
- Gather resumes, case studies, certifications, and references
- Request SME input and supporting materials
- Build compliance matrix to track requirements

5. Drafting the Response

- Write executive summary aligned to customer priorities
- Develop technical, management, and staffing sections
- Ensure all requirements are addressed directly and clearly
- Integrate visuals, charts, and tables where helpful
- Maintain consistent tone, formatting, and branding

6. Pricing & Financials

- Confirm pricing model (fixed, T&M, hybrid)
- Validate cost assumptions with finance team
- Prepare pricing tables and narratives
- Review for accuracy and alignment with technical solution
- Ensure all required pricing forms are completed

7. Compliance & Quality Review

- Conduct team review (early content check)
- Conduct second team review (final strategic review)
- Validate compliance matrix line-by-line
- Check formatting, page limits, and required structure
- Proofread for clarity, grammar, and consistency
- Confirm all attachments and forms are included

8. Final Assembly

- Convert documents to required formats (PDF, Word, etc.)
- Verify naming conventions and file sizes
- Ensure hyperlinks, bookmarks, and navigation work (if required)
- Prepare cover letter and signed forms
- Package final submission according to instructions

9. Submission

- Upload or deliver final package before deadline
- Capture confirmation of receipt
- Log submission in internal systems
- Notify leadership and contributors

10. Post-Submission Follow-Up

- Prepare for potential clarifications or presentations
- Archive final proposal and supporting materials
- Conduct internal lessons-learned review
- Update content library with reusable sections
- Track award timeline and follow up as needed