

Proposal Checklist

Proposals are marketing or sales tools, and as such, they are used in many different kinds of communication situations to either fulfill a need or create one. Often, proposals follow a very rigid format specified by the customer. At other times, you must determine the structure and content yourself. In either case, use the following checklist, both as you plan and write the proposal and as you revise and edit it, to ensure that you have produced the most complete and effective proposal possible.

Planning and Early Writing Stages

- Have you complied with every requirement set forth in the request for proposals?
 - Create an RFP compliance checklist.
 - Identify the client's key issues.
 - Identify your primary audience and make yourself aware of additional potential audiences.

- Can you write a coherent and thematically integrated proposal?
 - Define a coherent and compelling theme based on the client's key issues.
 - Develop an outline that incorporates both the theme and the RFP requirements.
 - Write a first draft of the executive summary before you write the rest of the proposal, to reiterate the focus and theme.
 - Consider whether document design strategies such as storyboards will be useful to help you clarify the work.
 - Consider which information may best be represented or emphasized in sidebars or callouts.

Writing and Follow-up Stages

- Are your themes stated as persuasively as possible?
- Can you strengthen your thematic emphasis by strengthening the use of equivalence chains throughout the document?
- Have you used language keyed to the customer's level of understanding?
- Is your proposal laid out in an easy-to-read, attractive format?
- Do your sidebars or callouts get the job done?
 - Well designed
 - Concise
 - Consistent
 - Appropriately formatted
 - Written in the active voice

- Have you allowed enough time to carefully proofread the proposal?
- Have you planned for appropriate follow-up?