

RFP Response Kickoff Meeting Checklist

Are you uncertain how to guide your team when starting your next big RFP response? Use this checklist to keep your RFP Kickoff Meetings on track. For a closer look at how to best manage your RFP responses, be sure to check out our ebook titled "The Ultimate Guide to Proposal Management and Interviews" found on the [PlanGrid Resource Center](#).

Project Name	
Client	
Project Location	
Due Date of RFP	
Due Date of Questions	
Project Team	<ul style="list-style-type: none">• RFP Lead:• Project Executive:• Project Manager• Superintendent:• Estimator:• Project Engineer:• Principal-in-Charge (if needed):• Other:
Architect/Designer	
Source of RFP	
Competitors	

Client's Priorities	
Other Important Items	
Differentiators/ Win Themes	<ul style="list-style-type: none"> • Relationship With Company • Relationship with Team • Previous Project Site Experience • Regional Experience • • •
Submission Format	<ul style="list-style-type: none"> • Email Submission • Web Portal Submission • Hard Copy Submission (Quantity:____) • Flash Drive • Compact Disk • • •
Proposal Schedule (Internal)	<p>Strategy Meeting</p> <p>Draft Content Complete from Team Members</p> <p>Draft Content Complete from Proposal Manager/Marketing</p> <p>Draft Proposal Completed</p> <p>Draft Sent Out For Review</p> <p>All Edits Returned to Proposal Manager</p> <p>On Screen Page Flip of Electronic Submission/ Page Flip of Printed Proposal (if required)</p> <p>Final Proposal Ready for Submission</p>