

Ultimate Proposal Management and Interview Checklist

RFP responses can be stressful, but if your team follows these straightforward steps it's possible to increase project win rates and easily scale your proposal process as your organization grows. For more information, check out our ebook titled "The Ultimate Guide to Proposal Management and Interviews" on the [PlanGrid Resource Center](#).

RFP Response Stage

- 1. Read and Distribute the RFP:** Ensure everyone on your team thoroughly reads the RFP.
- 2. Go/No-Go Decision:** Quickly decide if your firm is well positioned to pursue the project.
- 3. Kickoff Meeting**
 - Hold a kickoff meeting 24 to 48 hours after deciding the project pursuit is a 'go' decision.
 - Discuss differentiators and win themes your firm brings to the project.
 - Choose your project team.
 - Assign responsibilities with firm internal deadlines to your proposal team.
 - Decide if you have any questions for the client about the RFP.
- 4. Write the Proposal**
 - The proposal manager should complete and distribute the responsibility matrix detailing team responsibilities and deadlines decided in the kickoff meeting.
 - The proposal manager authors some content and delegates the rest. Sections may include: cover letter, executive summary, resumes, project descriptions, technical narrative, schedule and schedule narrative, organizational chart, financial details and safety narrative.
 - The RFP lead coordinates the cost proposal with the estimating team, holding a formal review 24 to 48 hours prior to the RFP due date.

5. **Proposal Review:** 24 to 48 hours prior to RFP due date the draft proposal should be reviewed by the proposal manager, project executive and principal-in-charge.
6. **Proposal Finalization:** Once all feedback has been received, make any necessary changes and prepare for submission.
7. **Proposal Submission:** Submit your proposal to the client in the format indicated in the RFP requirements.
 - *Electronic Submission:* Submit 24 hours prior to due date and time.
 - *Hard Copy Submission:* If required, submit ship or hand deliver in advance of the due date and time with a backup plan in place to ensure delivery.

Interview Stage

1. **Shortlisted for Interview:** If the client likes your proposal, you will likely be shortlisted with other contractors for an in-person review of your proposal.
2. **Distribute Information:** Your proposed project team will need to participate, so distribute the RFP and your proposal to them immediately upon notification of being shortlisted.
3. **Interview Strategy Meeting:** Include senior team members, the RFP lead and proposal manager to discuss the best strategy for the interview team.
4. **Interview Preparation:** Bring the team together to discuss the project and agreed upon strategy to ace the interview.
5. **Interview Rehearsal:** Conduct a mock interview followed by real questions the client may have for your team. Provide feedback as appropriate to the project team members.
6. **Conduct the Interview**
7. **Debrief:** Once the interview is over, gather as a team with the proposal manager to discuss how it went. Document what went well and what did not to better prepare for future interviews.
8. **Win!**