

Developing Winning Proposals: A Pre-proposal Checklist

Contributed by Frank Stasiowski, FAIA, excerpted and adapted from *Architect's Essentials of Winning Proposals*

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SUMMARY

Writing a winning proposal involves selecting a proposal manager who can effectively sell the firm's services, skillfully coordinate the firm's effort, and intuitively think like the firm's client. Asking (and answering) important questions about a firm's staff, coordination efforts, and communication protocols will help to fine-tune the proposal planning process.

CHOOSING THE TEAM LEADER

Proposal writing is a marketing activity. Ideally, the proposal manager will also be the project manager if the proposal succeeds. Some project managers, however, lack the skills to write good proposals or may be too deep into the "doing" mindset of a project manager to cultivate the "selling" mindset of marketing.

The ideal proposal manager thinks intuitively and creatively, has no vested interest in the way projects have been done in the past, understands the technical aspects of a project well enough to sell the firm convincingly, and can think like a client. The proposal manager develops the proposal plan, manages the preparation effort, helps select the proposal team, defines the scope of work, and prepares the fee budget. The following checklist may help firm principals and proposal managers in the proposal planning process:

Staff

- Has a proposal manager been designated?
- Does the proposal manager clearly understand the responsibilities and tasks of the position?
- Has a proposal team been selected?
- If yes, are the selected individuals available and willing to work on the proposal?
- Do we need the assistance of upper management to assemble the best proposal team?

Coordination

- Will the firm be ready when the RFP arrives?
- Have arrangements been made to reproduce and distribute the RFP to all members of the proposal team, the project team, and senior management upon arrival?
- Have the pages of the complete RFP been consecutively numbered (by hand) to allow for quick and easy reference among the proposal team members?
- Have the copies been three-hole punched for easy loose-leaf binding?
- Have graphic standards been established for the proposal?
- Have page limitations been communicated to all members of the team involved with writing?
- If the proposal team is large and dispersed, have arrangements been made to assemble the team in a single location or to facilitate collaboration by teleconference or other means?
- Are all facilities and equipment needed to produce the proposal available?
- If not, can the necessary facilities or equipment be leased as needed at a reasonable cost?

Communication

- Have communication protocols been established among proposal team members and participating outside consultants?
- Have document and information distribution protocols been established among proposal team members and participating outside consultants?
- Are the client communication protocols established and understood by all proposal team members?

ABOUT THE CONTRIBUTOR

Frank Stasiowski, FAIA, is founder and president of PSMJ Resources. Stasiowski is a consultant to the building and design industry and the author of numerous books and publications about management.

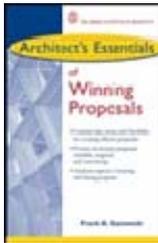
RESOURCES

More Best Practices

The following AIA Best Practices provide additional information related to this topic:

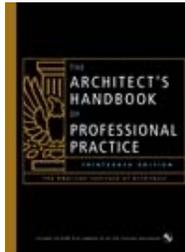
- 05.03.02 The Go/No-Go Decision: A Project Evaluation Checklist
- 05.03.03 The Reality Check: More Project Evaluation Criteria
- 06.02.01 The Client Interview: A Sample Questionnaire

For More Information on This Topic

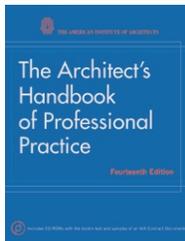


This article is excerpted and adapted from *Architect's Essentials of Winning Proposals*, by Frank Stasiowski, FAIA. Written by a leading expert in the field, this valuable resource presents a complete, organized approach to writing, designing, and presenting proposals that grab clients' attention, stand out from the crowd, and win contracts.

See also "Seeking the Project," by Howard J. Wolff, *The Architect's Handbook of Professional Practice*, 13th edition, Chapter 7, page 155.



See also the 14th edition of the *Handbook*, which can be ordered from the AIA Bookstore by calling 800-242-3837 (option 4) or by email at bookstore@aia.org.



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Keywords

- Practice
- Marketing
- Request for Proposals