



AIA Best Practices: Checklist: Final exams for winning proposals

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

Summary

There is nothing worse than pulling an all-nighter on a proposal, only to see the client discredit it for niggling errors that should've, could've, and would've been caught during a final check. The institution of a last-minute, never-to-be-omitted-for-any-reason-ever final scan of a proposal can help firms avoid this sometimes costly and always embarrassing scenario. This checklist might help the final reviewer spot-check a few of a proposal's key details. Helpful proposal submission tips are included, too.

Repeal Murphy's Law

Preparing proposals is a labor-intensive, time-consuming task. Whether firms have several months or several days to complete a proposal, most find themselves working on proposals right up to the final deadline for submission. It's a work habit that virtually guarantees errors. Even small errors in a proposal can convey a powerfully negative message to a prospective client.

It's unlikely that the tendency to work on a proposal up to the last minute will ever change, but a final last-minute check can be built into the process. Incorporate this step, and do not omit it for any reason.

The final reviewer of the proposal should be someone who is alert, detail-oriented, and unfamiliar with the proposal. That person can use the following checklist to look for trouble and to focus on small, nitpicky details:

- Client's name and proper names spelled correctly.
- All pages present and in order.
- Correct sequence of page and section numbers.
- Correct page references in the table of contents.
- All required contents indicated in the request for proposals (RFP) included.
- All key resumes included.
- All photographs and diagrams with appropriate captions or titles as well as correct references to such images in the text.

- Cover letter signed, as are all forms requiring a signature.
- All pages oriented properly.
- Business cards included.
- Correct number of copies provided and copies numbered correctly.

Proposal submission tips

- Provide one-third more copies than the client requests. If the client should need more copies in the future, they may make their own copies, which are likely to be of inferior quality, particularly if the proposal has color.
- If the RFP requires electronic submission, provide paper copies also, to ensure the printed quality.
- Deliver the proposal in person if at all possible.
- Contact the client after the submission deadline to confirm receipt of your proposal and to offer to answer any questions.

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About AIA Best Practices

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This article corresponds to:

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 Chapter 06 – Marketing and Business Development
 Section 05 – Qualifications, Proposals and Interviews