final document review

This checklist supports a final document review. The purpose of final document review is to examine the proposal by independent reviewers who emulate the customer’s evaluation team. It includes independent assessment of the entire proposal, its readiness and responsiveness to the solicitation, and its effectiveness in conveying strategy, themes, and discriminators, as well as ghosting the competition. This is a comprehensive checklist and can be tailored for the situation.

Reviewers can either make notes on a copy of the bid or, in more formal reviews, complete a comment form. In either case, compile all findings into one set of recommendations.

The final document review should answer the following questions:

Executive Summary

* Does the executive summary connect your solution to the customer’s business vision?
* Does the executive summary link the customer’s needs to the proposal solution?
* Does the executive summary counter potential major objections?
* Does the executive summary name the customer more than the bidder?

Themes and Strategies

* Does the proposal effectively present our offer? Is it persuasive? Does it sell?
* Does every section have a [theme statement](http://bok.apmp.org/glossary/theme-statement/)? Does that theme statement tie features to benefits? Is it specific? Is it quantifiable? Does the theme statement answer the question “So what?”?
* Does each section explain what is being offered and how it benefits the customer?
Will the customer be convinced?
* Does the proposal emphasize our strengths? Minimize our weaknesses?
Ghost the competition?

Organization

* Do all sections have summaries that link the customer’s needs to the proposed solution?
* Do all sections, subsections, and major topics have headings?
* Are informative headings used effectively?
* Are the most important ideas stated first in sections, subsections, and paragraphs?
* Are details, facts, and data placed in the middle of sections, subsections, and paragraphs?

Visuals

* Does the proposal contain enough visuals?
* Do the key visuals reflect the strategy? Do they illustrate the major features
and benefits of the offer?
* Are all visuals clear and uncluttered? Do they convey a single, strong, principal message?
* Do the visuals stand alone?
* Does each visual have an [action caption](http://bok.apmp.org/bok/graphics-and-action-captions/%22%20%5Ct%20%22_blank%22%20%5Co%20%22Graphics%20and%20Action%20Captions)? Do the action captions state the principal message of the visual and link a key [feature](http://bok.apmp.org/glossary/feature/) with its benefit?

Appearance and Packaging

* Do the pages have a clean, professional appearance?
* Does the proposal use lists and headings? Is there plenty of white space, especially around key ideas and facts?
* Is the proposal packaged professionally? Does it reflect the image of your organization?

Accuracy and Clarity

* Are the facts correct? Are the data accurate?
* Is every claim supported? Is there an appropriate amount of supporting data?
Is the technical presentation credible? Are the claims believable? Proven?
* Is the [writing clear and to the point](http://bok.apmp.org/bok/writing-clearly/%22%20%5Ct%20%22_blank%22%20%5Co%20%22Writing%20Clearly)? Do all of the sentences make sense the first time you read them? Are any statements vague or confusing? Misleading?
* Is the writing concise? Crisp? Not wordy? Can any words or sentences be removed?
* Have extraneous words, sentences, paragraphs, visuals, facts, or supporting data been eliminated? Can anything else be eliminated?

Price

* Is our price supported by a value proposition?
* Is our price clearly stated? Justified? Credible?

Consistency

* If the proposal was written by a team, are the parts of the proposal consistent with one another?
* Does the proposal sound as though one person wrote it?