CHECKLIST FOR INTERNAL LESSONS LEARNED REVIEW

This template supports an internal lessons learned review. The purpose of this review is to provide feedback (both positive and negative) for improving the capture and proposal processes. The focus is on capitalizing on activities that are particularly effective and identifying and implementing changes to those that need improvement.

Prepare for the review by commenting on phases of the engagement in which you were a direct participant. When developing your input, consider the following aspects of processes, support, and activities:

* Adequacy of tools and documented techniques
* Competency and training of team to do the tasks required
* Clarity of roles and responsibilities
* Adaptation and tailoring of the process to the opportunity
* Timing and appropriateness of activities
* Workload and staffing
* Resources, support, and funding
* Effectiveness of reviews
* Integrity of decision gates
* Supporting documentation for the process and opportunity
* Performance and execution of the team with respect to documented standards

| Process or Activity | Comments  |
| --- | --- |
| Opportunity assessment |  |
| Bid pursuit decision |  |
| Opportunity planning (general) |  |
| Capture team leadership |  |
| Opportunity intelligence |  |
| Customer analysis |  |
| Competitor analysis |  |
| Strategy and win themes |  |
| Call plans and action follow-up |  |
| Development of baseline solution  |  |
| Collaboration with customer on requirements |  |
| Determination of price-to-win |  |
| First draft executive summary |  |
| Teaming and subcontractors |  |
| Opportunity plan review |  |
| Competitor review |  |
| Bid/no-bid decision |  |
| Proposal planning |  |
| Updates for solution and price |  |
| Finalization of teaming and subcontracting |  |
| Proposal management plan preparation |  |
| Proposal team member identification |  |
| Updates to executive summary |  |
| Receipt and analysis of final RFP |  |
| Bid validation decision |  |
| Proposal development |  |
| Preparation for kickoff meeting |  |
| Preparation of content plan worksheets with themes and requirements assignments |  |
| Finalization of proposal team |  |
| Kickoff meeting |  |
| Bidder’s conference with Q&A |  |
| Freezing of solution |  |
| Development of compliance matrices |  |
| Development of content plans |  |
| Proposal strategy review |  |
| Development of proposal contentand graphics |  |
| Final document review |  |
| Business case review |  |
| Proposal submittal |  |
| Lessons learned |  |
| Harvesting of reusable content |  |
| Response to customer questions |  |
| Orals or demonstrations |  |