Proposal Editing Checklist

Complete this checklist while editing each proposal draft. With "Track Changes" on, only correct errors in grammar, word usage, conciseness, clarity, and fact. Query all errors and recommendations regarding structure, messaging, and client focus. For errors that occur throughout a document (e.g., lack of benefits-focused callouts, proper navigation), provide an example of a possible revision for the first occurrence and then note each subsequent occurrence.

		✔
Step One: Compliance and Responsiveness. *Read through the RFP requirements, comparing them to the proposal contents.*		✔
Compliance	Does each part of the proposal match the order and content requested in the RFP?	
	Does the proposal format, length, and structure comply with RFP requirements?	
Responsiveness	Does each proposal response directly answer the RFP question up front?	
	Does each response completely answer the RFP question?	
Step Two: Executive Summary. *Read the executive summary in the following order: value statement, section headings, graphics/action captions, callouts, and body text.*		✔
Structure	Is there one central value proposition?	
	Is an understanding of the prospect's needs made clear and explicit?	
	Is there a summary of the solution and how it will benefit the prospect?	
	Are the top two to four differentiators highlighted?	
	Is the executive summary limited to two pages or less?	
Differentiation	Are the benefits of the differentiators made explicit?	
	Are callouts used to emphasize the key prospect benefits?	
Streamlining	Can any content be cut without disrupting the persuasive messaging?	
Step Three: Key Value Components. *Skim the remaining proposal, examining only value statements, graphics/action captions, section headings and callouts.*		✔
Messaging	Does each component support the executive summary's central value proposition?	
	Does each component highlight a true differentiator?	
Value Statements	Are value statements included for each major proposal section, where applicable?	
Graphics/Action Captions	Are graphics used to illustrate relationships or processes?	
	Are tables used to clarify relationships and complex information?	
	Do all graphics and tables have figure numbers and action captions?	
	Do all action captions highlight a differentiator and its benefit to the prospect?	
Section Headings	Are primary headings navigation-friendly (e.g., Executive Summary, Fees)?	
	Are secondary headings persuasive, each connecting to a prospect benefit?	
Callouts	Are a reasonable number of callouts used throughout (average one per page)?	
	Does each callout highlight one of the top two to four differentiators?	
	Does each callout include the benefit of the differentiator being highlighted?	

Helping organizations stand out from the competition.

Step Four: Flow and Organization. *Read lightly through the text, focusing on broader organization, navigation and prospect focus.*		✓
Organization	Is the strongest evidence given first in each section, followed by the next strongest?	
	Is each section numbered? Does the numbering follow that included in the RFP?	
	Can any content be cut without disrupting the persuasive messaging?	
Navigation	Do sections with multiple subheadings start with introductory navigation?	
	Do subheadings mirror the navigation provided in the section's first paragraph?	
	Are sections, paragraphs, and sentences logically sequenced?	
Step Five: Readability and Word Choice. *Read through the text again, this time more closely. Insert "tracked" revisions for clarity, precision, emphasis, and style.*		✓
Word Choice	Any misplaced or dangling modifiers?	
	Any faulty parallelism in bulleted lists?	
	Are jargon and acronyms necessary? Are they defined clearly upon first reference?	
Consistency	Are terms (e.g., client name, practice name) consistent from section to section?	
	Is the tense consistent from section to section? Paragraph to paragraph?	
	Review formatting and style usage for consistency and small mistakes.	
Sentence Length and Structure	Revise passive into active voice.	
	When a sentence's main verb is "to be," replace it with a strong verb.	
	Break apart long or run-on sentences, as well as long dependent clauses.	
	Can any long lists in text be formatted as bullets?	
Confusing Elements	Any redundant phrases or sections?	
	Any incomplete thoughts?	
	Any errors in logic or incorrect cause/effect relationships?	
	Any wrong client/industry names?	
Simplicity	Are words and sentence structures clear and simple?	
	Is each section as brief as possible?	
	Is content concrete and specific, avoiding the use of clichés?	
Step Six: Formatting and Proofing. *Make one last pass through the document, finalizing the text, formatting, headers, footers, and table of contents.*		✓
Text	Run an automated grammar and spelling check.	
	Check for awkward line and page breaks.	
Headers and Footers	Review headers and footers, including page numbering, for consistency.	
Table of Contents	Update the table of contents. Are all key sections and subsections shown?	
Save and Forward	Save the document and forward it to the appropriate party for review.	