



Tips and tools
FOR THE WRITING WORLD

Field Guide to Shredding an RFP

You just got a new RFP — a request for proposal. Now what? As a proposal manager, you've got a finger on every aspect of the proposal: writing, editing, layout, and graphic design. You're scheduling meetings, helping the team strategize, and researching the client. As a multi-hat wearer, figuring out where to start can be overwhelming.

The most important first step is also the simplest: Read the RFP! Don't start anything until you've carefully read through the requirements and fully understand what is being asked. Follow the steps below to organize your proposal for success.

1. READ THE RFP.

- Print a copy and highlight important info as you go.
- Make note of unclear areas.
- Use page markers or sticky notes to call out mandatory requirements.

2. COPY AND PASTE THE RFP INTO YOUR COMPLIANCE MATRIX.

- Take your time and go line by line.
- Don't type. Use CTRL+C and CTRL+V to make sure you don't miss crucial information or type a phone number incorrectly.
- Note that if you're using proposal automation software, you may be able to dispense with cutting and pasting and simply import your RFP directly into the software.
- For ideas on how to make a comprehensive compliance matrix, reference APMP's Body of Knowledge.

3. MAKE A LIST OF QUESTIONS FOR THE CLIENT AND YOUR TEAM.

- Are there conflicting areas in the RFP?
- Are there unclear submission instructions?
- Is there a requirement that could eliminate your team right away?

4. ADD PRELIMINARY WRITING ASSIGNMENTS TO THE COMPLIANCE MATRIX.

- Who is leading the team?
- Do you know which subject matter experts will be involved?
- Will there be subcontractors sending information?

5. CREATE A SCHEDULE.

- Note all the dates mentioned in the RFP: pre-bid meetings, question due date, proposal deadline, etc.
- Mark holidays and PTO days.
- Choose tentative dates for color team reviews.

6. PREP FOR THE KICKOFF MEETING.

- Create an agenda.
- Invite all stakeholders — this includes C-level executives, opportunity/capture managers, subcontractors, and writers, to name a few.
- Disseminate the RFP, compliance matrix, and any other related documents to your team.

By completing these steps, you're starting your team off on the right foot to win the next bid. Good luck!

