RFP pre-submission checklist

RFP: [buyer, number, title] · Due: [date, time, time zone] · Internal deadline: [date]

Run it at least one business day before the due date. ★ = fatal if missed in most formal RFPs (can make the bid non-responsive). Tick each box, or write N/A.

A. Compliance with instructions

☐ **1.** Every addendum and amendment received, read and acknowledged as required *(Proposal manager)* ★

☐ **2.** Response follows the prescribed outline and numbering *(Proposal manager)*

☐ **3.** Every requirement in the compliance matrix has a response location *(Proposal manager)* ★

☐ **4.** Page limits met per volume or section *(Coordinator)* ★

☐ **5.** Font, margin and file-format rules followed *(Coordinator)*

☐ **6.** Mandatory minimum qualifications met and evidenced *(Proposal manager)* ★

☐ **7.** Answers to the buyer's Q&A reflected in the response *(Proposal manager)*

☐ **8.** Price kept out of non-price volumes if required *(Coordinator)* ★

B. Content quality

☐ **9.** Every question answered; no blanks, "TBD" or placeholders *(Writers)* ★

☐ **10.** Each answer responds to the question asked, not a nearby one *(Reviewers)*

☐ **11.** Yes/No questions answered Yes or No first, then explained *(Reviewers)*

☐ **12.** Partial compliance stated honestly with the gap and plan (examples) *(SMEs)*

☐ **13.** Win themes appear in the executive summary and key sections (guide) *(Proposal manager)*

☐ **14.** Claims are backed by proof (reference, metric, certificate) *(Reviewers)*

☐ **15.** Technical answers checked by the SME who owns them *(SMEs)*

☐ **16.** Security answers match current policies and evidence *(Security lead)*

☐ **17.** No other customer's name anywhere (search the files) *(Coordinator)*

☐ **18.** Buyer's name, RFP number and title correct throughout *(Coordinator)*

☐ **19.** Terminology consistent (product names, buyer's terms) *(Editor)*

☐ **20.** Commitments (dates, SLAs, deliverables) are ones you can keep *(Sales lead)*

☐ **21.** Executive summary written last and matches the final response *(Proposal manager)*

C. Pricing and commercial

☐ **22.** Buyer's price form used without structural changes *(Finance)* ★

☐ **23.** Every price cell completed; totals recalculate correctly *(Finance)* ★

☐ **24.** Price matches the scope, staffing and schedule in the technical volume *(Finance + PM)*

☐ **25.** Assumptions and exclusions stated *(Finance)*

☐ **26.** Price validity period meets the RFP's minimum *(Finance)* ★

☐ **27.** Contract exceptions listed where the RFP requires, approved by legal *(Legal)* ★

D. Forms, signatures and attachments

☐ **28.** All required forms completed (certifications, representations, questionnaires) *(Coordinator)* ★

☐ **29.** Signatures from an authorized signer, dated *(Executive)* ★

☐ **30.** Notarization, if required *(Coordinator)* ★

☐ **31.** Insurance certificates, licences, registrations attached as required *(Coordinator)*

☐ **32.** Résumés for named key personnel attached and matched to requirements *(PM)*

☐ **33.** References with current contact details (with permission) *(Sales lead)*

☐ **34.** Security evidence (SOC 2 report or bridge letter, pen test summary) attached if requested (evidence checklist) *(Security lead)*

E. Formatting and production

☐ **35.** Cover page and cover letter complete and correct *(Coordinator)*

☐ **36.** Table of contents updated; page numbers correct *(Coordinator)*

☐ **37.** Headers and footers show the RFP number and your company name *(Coordinator)*

☐ **38.** Cross-references point to the right sections *(Editor)*

☐ **39.** Tracked changes accepted and comments removed *(Coordinator)* ★

☐ **40.** File metadata (author, previous customer names) cleaned *(Coordinator)*

☐ **41.** Files named as instructed and under any size limit *(Coordinator)* ★

☐ **42.** Proprietary-information markings applied as the RFP specifies *(Legal)*

F. Submission

☐ **43.** Portal account working; upload tested before the deadline day *(Coordinator)* ★

☐ **44.** Submitted before the deadline (check time zone), or hard copies delivered with the right number of copies *(Proposal manager)* ★

☐ **45.** Confirmation received and saved; submitted files archived *(Coordinator)*

Checked by: _____ Date: _____ Confirmation saved: ☐