



FOUNDATION (Infrastructure & Setup)

Establish the backbone of your proposal library—this determines usability and scalability.

- Centralized storage system selected (SharePoint, OneDrive, Google Drive, etc.)
- Standardized folder structure created (by service area, content type, and contract type)
- Naming conventions established (e.g., Client_Project_ContentType_Version_Date)
- Version control process defined (draft, final, approved, archived)
- Access permissions assigned (BD, proposal team, SMEs, leadership)
- Content tagging system implemented (NAICS, agency, contract type, keywords)
- Search functionality tested and optimized
- Master index or content inventory created



PAST PERFORMANCE LIBRARY (Your #1 Win Driver)

Build a structured, reusable, and evaluator-focused repository.

Minimum of 5–10 high-quality past performance write-ups developed

Each entry includes:

Scope / Problem statement

Solution (specific to your role and differentiators)

Results (quantifiable metrics: %, \$, timelines, outcomes)

Relevance clearly identified (size, scope, complexity, environment)

NAICS codes and service areas tagged

Customer/agency identified and categorized

Both short (paragraph) and long (1–2 page) versions created

CPARS ratings and references documented (if available)

Strength statements developed for each project (aligned to evaluation criteria)

Past performance mapped to common PWS requirements



TECHNICAL CONTENT (Modular & Reusable)

Develop modular content blocks that can be tailored quickly.

- Staffing approach module developed
- Recruitment and retention strategy included
- Transition plan template created (30/60/90-day or phased approach)
- Quality Control Plan aligned to QASP requirements
- Risk management framework established (risk identification, mitigation, tracking)
- Service execution workflows documented (process-driven delivery)
- Tools, systems, and technologies identified and standardized
- Continuous improvement approach included
- Performance metrics and KPIs defined

COMPLIANCE TOOLS (Evaluator-Focused Structure)

Ensure every proposal starts compliant—not fixed later.

- Section L compliance matrix template created
- Section M alignment column included (evaluation criteria mapping)
- Annotated outline template developed
- Standard response structure aligned to evaluation factors
- Win themes and strength statements embedded into templates
- Requirements traceability built into workflow
- Page limits, formatting, and submission requirements tracked
- Color team review structure defined (Pink, Red, Gold)
- Compliance checklist included for final review



CORPORATE CONTENT (Tailorable & Consistent)

Maintain strong, branded, and adaptable core messaging.

- Corporate overview developed (tailorable by agency/mission)
- Core capabilities statement created and categorized
- Key differentiators clearly defined and documented
- Management approach narrative developed
- Mission, vision, and values aligned to GovCon messaging
- Socioeconomic certifications included (WOSB, 8(a), SDVOSB, etc.)
- NAICS codes and capabilities mapped
- Branding consistency maintained (tone, voice, visuals)

KEY PERSONNEL (Ready-to-Deploy Talent Content)

Ensure personnel content is compliant and ready to insert.

- Updated resumes in federal-compliant format
- Role-based summaries created (PM, SME, Analyst, etc.)
- Certifications and licenses documented
- Security clearances tracked (if applicable)
- Availability and commitment statements prepared
- Labor categories aligned to contract requirements
- Multiple resume versions tailored (DoD vs civilian, IDIQ vs standalone)
- Org charts/templates available



BOILERPLATE (Strategic, Not Generic)

Build reusable content that strengthens—not weakens—your proposal.

- QA/QC plan developed and aligned to contract requirements
- Cybersecurity language included (CMMC, NIST 800-171, etc.)
- Safety plan documented
- Staffing policies and procedures included
- Diversity, equity, and inclusion (if applicable) addressed
- Environmental/sustainability practices included (if relevant)
- Subcontracting/teaming approach documented
- All boilerplate reviewed for relevance and competitiveness

GOVERNANCE (Sustainability & Continuous Improvement)

Keep your library current, accurate, and competitive.

- Content owners assigned for each section
- Quarterly review schedule established
- Win/loss lessons learned incorporated
- New contract awards added to library
- Regulatory updates tracked (FAR, DFARS, CMMC, etc.)
- Version updates logged and archived
- Content quality reviews conducted regularly
- Feedback loop established between BD, capture, and proposal teams