Every detail matters when bidding for a new contract. Use this checklist to ensure your proposal is complete, accurate, and professional — and win more work as a result.

1. Have you gathered the necessary resources?

☐ Download the project files (including drawings, specifications, and other scope documents).

☐ Organize the files by project name and store them in a shareable location so you can collaborate with your team.

2. Is there a form template?

☐ If not, list out the key instructions and take note of important information like due date, accreditations, abnormal specifications, etc.

3. Is the proposal easy to read?

☐ Make sure that all of your responses are clear and concise, avoiding unnecessary jargon.

☐ Make sure responses follow a logical structure (e.g. using headings and graphs when applicable).

4. Have the requirements been addressed?

☐ Make sure the full scope of work is included in your proposal, including materials and labor.

☐ Back up your responses to evaluation criteria with concrete evidence: “show” instead of “tell.”
5. Has all the requested information been supplied?

☐ Check your information against the bid specification documents (policies, certificates, etc.).

☐ Double-check that you have the most recent addenda attached.

☐ Make sure that the bid documents are signed off as instructed.

6. Are you meeting the deadline?

☐ Make arrangements in advance for timely delivery of the proposal using the method requested.

7. Have you looked for other GCs bidding for the same project? [Bid Board Pro Users Only]

☐ For competitively bid projects, check to see which other GCs are bidding on the same project to increase your chances of winning the job.

8. Have you followed up?

☐ Track your follow-ups manually or set reminders using your bid management platform.