|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Client name | | | | | Proposal due date | | | | | | | |
|  | | | | |  | | | | | | | |
| Key client contact | | | | | Client partner | | | | | | | |
|  | | | | |  | | | | | | | |
| Client phone number | Client fax number | | | | Engagement manager | | | | | | | |
|  |  | | | |  | | | | | | | |
| *Explain not applicable (N/A) answers in the Comments section. For “Fixed Price” projects Scope and Deliverables should be clearly defined. For “Time & Materials” projects, this is not as critical. This content applies for both PowerPoint and Word proposals.* | | | | | | | | | | | | |
| **Proposal Content** | | **Yes** | | | | **N/A** | | **Comments** | | | | |
| 1. Introduction | | |  |  | |  |  | | | | |
| 1. Background | | |  |  | |  |  | | | | |
| 1. Objective(s) | | |  |  | |  |  | | | | |
| 1. Scope of Work | | |  |  | |  |  | | | | |
| 1. Approach and Deliverables | | |  |  | |  |  | | | | |
| 1. Benefits | | |  |  | |  |  | | | | |
| 1. Project Organization | | |  |  | |  |  | | | | |
| 1. Project Team | | |  |  | |  |  | | | | |
| 1. Client Participation (Your Involvement and Responsibilities) | | |  |  | |  |  | | | | |
| 1. Ensight Qualifications | | |  |  | |  |  | | | | |
| 1. Proposed Fees and Payment Conditions | | |  |  | |  |  | | | | |
| 1. Confidentiality of the Assignment | | |  |  | |  |  | | | | |
| 1. “Force Majeure” | | |  |  | |  |  | | | | |
| 1. Validity of the Proposal | | |  |  | |  |  | | | | |
| 1. General Terms and Conditions | | |  |  | |  |  | | | | |
| 1. Client acceptance | | |  |  | |  |  | | | | |
| Appendices | | |  |  | |  |  | | | | |
| New record created to Time Sheet Application | | |  |  | |  |  | |  |  |  |
| **Actions to Complete Proposal** | | | **Yes** |  | | **N/A** | | **Comments** | | | |
| Engagement Work Plan completed | | |  |  | |  |  | | | | |
| Budget calculated | | |  |  | |  |  | | | | |
| Engagement team availability reviewed | | |  |  | |  |  | | | | |
| Subcontracting/ secondment issues covered | | |  |  | |  |  | | | | |
| Lead partner review completed | | |  |  | |  |  | | | | |
| Second-partner review completed | | |  |  | |  |  | | | | |
| Proposal approved and signed | | |  |  | |  |  | | | | |
| Document Distribution Record completed | | |  |  | |  |  | | | | |
| Proposal filed in work papers | | |  |  | |  |  | | | | |
| Engagement Summary and Risk Assessment completed | | |  |  | |  |  | | | | |
|  | | |  |  | |  |  | | | | |
| **Items to Double-Check** | | | **Yes** |  | | **N/A** | **Comments** | | | | |
| Style of proposal appropriate | | |  |  | |  |  | | | | |
| Proposal well written | | |  |  | |  |  | | | | |
| Proposal well organized | | |  |  | |  |  | | | | |
| Proposal thoroughly proofread | | |  |  | |  |  | | | | |
| Addresses checked | | |  |  | |  |  | | | | |
| Number of copies determined | | |  |  | |  |  | | | | |
| Submission date checked | | |  |  | |  |  | | | | |
| No unnecessary jargon | | |  |  | |  |  | | | | |
| Cover letter | | |  |  | |  |  | | | | |