

PROPOSAL CHECKLIST

SBIR Technical Proposal Preparation

- IDENTIFY PROPOSAL TEAM**
- Identify Proposal Manager.
- Download Solicitation.
- Create Preliminary Outline
 - Select Section Writers/Managers
- Identify a room to be used as “war room”. Minimize non-proposal activities in this room if possible.
- Create proposal schedule, identifying all required tasks.
- SEGREGATE SOLICITATION**
- Segregate the Solicitation into different sections and post them individually.
- Create a requirements matrix based on the technical and program requirements.
- Create an evaluator’s compliance matrix based on the solicitation evaluation criteria.
- Post (on wall in War Room, on line, etc.)
- THEME AND OUTLINE**
- Hold Strategy session to finalize proposal approach.
- Create a Proposal outline based on the solicitation requirements. (SBIRs are simple, the format is supplied in the solicitation.) Clearly identify which sections respond to which requirements.
- Update Theme
- Create program schedule, identifying tasks and WBS. Ensure plan supports strategy, and solicitation requirements.
- Confirm all requirements covered by sections in outline.
- STORYBOARDS**
- Create storyboard forms for each section
- Identify section themes
- Identify key artwork.
- PINK TEAM REVIEW**
- Hold a pink team storyboard review. Use management, non-proposal writers, and outside personnel as reviewers.
- Create updated outline showing themes and figures.

- Post the sections for review (either printed copy on a wall or online collaboration). Comments should be posted.
- Integrate into Red Team review copies. Do not worry about format.
- **RED TEAM REVIEW**
- Hold a Red Team review, minimum of three non-proposal participants.
- **PROPOSAL SUBMISSION**
- Incorporate Red Team comments and create final review copy.
- Format
- Proposal manager review. It's too late for major changes. Looking for errors (i.e., typos, spelling). One final check to ensure that all solicitation requirements are met.
- Check SBIR proposal checklist. Ensure cost proposal is within allowed limits and is in identical format to government online form.
- Submit.