

# Your Proposal Success Plan

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## A Checklist for Small Business Empowerment



Your RFP response is your voice in the room—make it matter. This checklist is designed to streamline your proposal process, maximise the use of practical tools, and showcase what sets you apart.

Follow these tips to strengthen your position and improve your chances of winning any RFP.

## 1 Understand the RFP requirements

### **Read thoroughly**

Carefully read the RFP document to understand all requirements, evaluation criteria, and submission guidelines.

### **Highlight key points**

Identify the most critical elements that the client is looking for. Focus on how your business meets or exceeds these needs.

## 2 But first, comply

### **Know the requirements**

Closely read the RFP to build a ‘compliance checklist’ of documents you must submit and other compliance requirements so you can tick these off as you progress.

### **Make the submission easy to evaluate**

Ensure you place all your compliance content in the right place and order within your submission based on what the RFP asks for. Try to see this through the eyes of the client/evaluator.

## 3 Craft a compelling executive summary

### **Focus on value**

Clearly state how your business will solve the client's problem or meet their needs - better than your competitors can.

### **Highlight your Unique Selling Points**

What sets your business apart – that matters to your client? Include this in the executive summary.



I highly recommend nFold to any organisation looking for a dedicated, skilled proposal and pitch partner. Their professionalism, expertise, and commitment to delivering top-notch results are remarkable.

**Nichol Luttig**  
**Senior Technical Manager**  
**EIMS Africa**



## 4 Plan your proposal strategy

### Set clear objectives

What are you aiming to achieve with this proposal? Define your goals clearly.

### Assign roles

If you have a team, assign specific sections to individuals based on their strengths.

### Create a timeline

Establish a timeline with key milestones to ensure timely completion of the proposal.

## 5 Tailor your proposal

### Customise content

Avoid generic responses. Tailor your proposal to address each client's specific needs and pain points.

### Use the client's language

Mirror the language and terminology used in the RFP to show alignment with the client's priorities.

### Structure to win

Ensure your proposal headings and structure respond directly to the client's evaluation criteria and requirements.

## 6 Leverage tools and templates

### Use a proposal template

Create and reuse a professional template to ensure a consistent structure and save time.

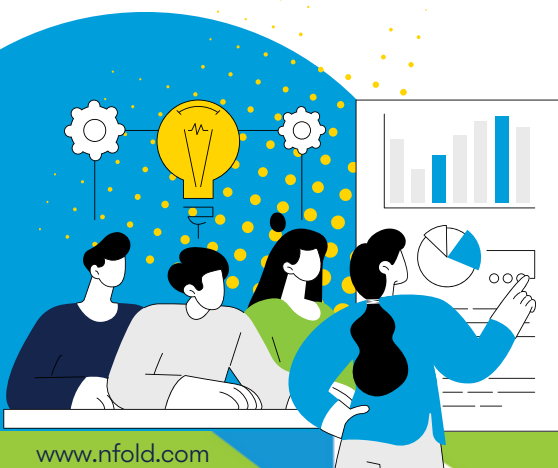
### Create a content library

Build a repository of excellent standard responses, case studies, and references that you can quickly adapt for each proposal.

## 7 Focus on pricing and value

### Be transparent

Clearly outline your pricing structure and emphasise the value your service or product provides.



"nFold's expertise has assisted us in delivering high-impact pitches, board packs, and proposals. They have consistently demonstrated an exceptional ability to write, edit, design, and support document printing with precision and creativity.

Their agile approach has allowed us to meet tight deadlines and adapt quickly to our industry's fast-paced demands. I wholeheartedly recommend them."

**Tsatsi Rankapole**  
**Primedia**

## 8 Include strong visuals

### Use graphics wisely

Incorporate charts, infographics, and images to make your proposal more engaging and easily understood.

### Maintain consistency

Ensure that all visuals are consistent in style and support the narrative of your proposal.

## 9 Edit and proofread

### Check for errors

Typos and grammatical errors can undermine your professionalism. Proofread carefully.

### Ensure clarity

Ensure your proposal is clear, concise, and easy to read.

### Peer review

Have someone else review your proposal for clarity and effectiveness.

## 10 Submit on time

### Confirm submission

Ensure the client received your proposal.

### Stay engaged

Follow up with the client to show interest and ask if there are any questions.

By adopting the Proposal Success Plan, small businesses will enhance their proposal process, demonstrate professionalism, and clearly communicate their value to potential clients.

This ensures your business stands out in the competitive landscape, paving the way for growth and success.

### TALK TO US



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