

## Workbook: Crafting Proposals That Win Strategic Planning Projects - A Comprehensive Checklist

This workbook is a structured checklist designed to help you refine your proposal for strategic planning projects. Each checklist item is a critical question with a sample answer to guide you. Before sending out your proposal, ensure every item is checked off to maximize your chances of success.

---

### Instructions

- Use this checklist to evaluate your proposal.
  - Answer each question thoughtfully, tailoring the response to your specific project.
  - Do not send your proposal until every item has been checked off.
- 

### Checklist Questions

#### 1. Have you clearly identified the client's primary problem?

- **Sample Answer:** The client is experiencing inconsistent alignment across departments, hindering their ability to meet strategic goals.
  - **Your Answer:**
- 
- 

#### 2. Does your proposal outline specific, measurable outcomes?

- **Sample Answer:** We will increase cross-departmental collaboration by 25% within the first six months.
  - **Your Answer:**
- 
- 

#### 3. Have you articulated your unique value proposition?

- **Sample Answer:** Our methodology integrates stakeholder engagement and predictive analytics, setting us apart from competitors.
- **Your Answer:**

**4. Is your executive summary compelling and concise?**

- **Sample Answer:** The executive summary highlights the client's challenges, our tailored solution, and projected results in under 300 words.
  - **Your Answer:**
- 
- 

**5. Does your methodology align with the client's strategic objectives?**

- **Sample Answer:** Our step-by-step approach ensures alignment with the client's objective of sustainable growth.
  - **Your Answer:**
- 
- 

**6. Have you included relevant case studies or examples?**

- **Sample Answer:** Case study: Increased operational efficiency by 30% for a similar client in the same industry.
  - **Your Answer:**
- 
- 

**7. Have you addressed potential client objections?**

- **Sample Answer:** To address budget concerns, we offer a phased implementation plan.
  - **Your Answer:**
- 
- 

**8. Have you detailed project milestones and deliverables?**

<https://stratplanning.ca> | <https://manusharma.ca> | <https://linkedin.com/in/sharmamanu>

- **Sample Answer:** Key milestones include project kickoff, mid-point evaluation, and final strategy presentation.

- **Your Answer:**
- 
- 

**9. Is your proposal visually clear and well-structured?**

- **Sample Answer:** The proposal uses headings, bullet points, and visuals to enhance readability.

- **Your Answer:**
- 
- 

**10. Does your proposal include a strong call to action?**

- **Sample Answer:** We encourage the client to schedule a meeting by [specific date] to discuss next steps.

- **Your Answer:**
- 
- 

**11. Have you customized your proposal to the client's specific industry or context?**

- **Sample Answer:** The proposal addresses unique challenges in the healthcare sector, such as regulatory compliance.

- **Your Answer:**
- 
- 

**12. Have you highlighted the multi-level value your solution provides?**

- **Sample Answer:** Organizational: Sustainable growth; Departmental: Streamlined operations; Individual: Better resource utilization.

- **Your Answer:**
-

**13. Have you ensured the budget and timeline are realistic and clearly stated?**

- **Sample Answer:** The project will be delivered in six months at a total cost of \$50,000.
  - **Your Answer:**
- 
- 

**14. Have you proofread and polished your proposal?**

- **Sample Answer:** The document has been reviewed for clarity, grammar, and consistency.
  - **Your Answer:**
- 
- 

By ensuring you can confidently check off each item on this list, you'll deliver a proposal that is both polished and persuasive. Take the time to address every question, and align your answers with the client's priorities to create a winning proposal.