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Checklist

AI Readiness Checklist for Proposal & RFP Software

AI readiness begins with structure. Assess your content, governance, and processes first, because AI scales what already exists, whether efficient or flawed.

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AI does not fix disorganization. It scales it. Before evaluating any AI software for proposals, organizations need to assess whether their content, structure, governance, and processes are ready to support it. True AI readiness is not about having more data. It is about having structured, traceable, governed information that a system can reliably interpret, anchor to, and improve. This checklist is designed to help you evaluate your current state, identify structural gaps, and determine whether AI will accelerate your team's performance or simply automate existing inefficiencies.

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1. Taxonomy & Information Architecture

Goal:

AI cannot reason over disorganization. Structure determines output quality.

Structure & Classification

- [ ] Do we have a documented, governed content taxonomy?
- [ ] Are capabilities standardized with a single approved naming convention?
- [ ] Are requirements classified by type (technical, management, staffing, evaluation, etc.)?
- [ ] Are compliance standards indexed separately from narrative guidance?
- [ ] Is past performance tagged by customer, NAICS, contract type, scope, and outcomes?
- [ ] Are content relationships mapped (capability → proof → SME → contract reference)?

Advanced Readiness Signals

- [ ] Is taxonomy machine-readable (metadata, tags, structured fields)?
- [ ] Are themes and keywords frequency-aware or prioritized?
- [ ] Is content mapped to evaluation criteria categories?

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2. Content Quality, Modularity & Retrieval

Goal:

AI amplifies what exists. Poor inputs scale poor processes.

Modularity & Reuse

- [ ] Is reusable content modular and component-based (not buried in narrative PDFs)?
- [ ] Are sections reusable at the paragraph or proof-point level?
- [ ] Are boilerplate statements separated from differentiators?

Proof & Evidence

- [ ] Can we quickly retrieve substantiated proof tied to a capability?
- [ ] Are quantitative results isolated and searchable?
- [ ] Are citations and references linked to source artifacts?

Message Consistency

- [ ] Are win themes formally defined and reusable?
- [ ] Are approved value propositions documented?
- [ ] Is customer language tracked and applied intentionally?

Quality Controls

- [ ] Is readability measured consistently (e.g., Flesch-Kincaid or similar)?
- [ ] Is tone/voice standardized?
- [ ] Are style guides enforced programmatically or manually?

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3. Compliance, Traceability & Risk Management

Goal:

AI must reduce risk,
not introduce it.

Requirement Handling

- [ ] Can we clearly distinguish requirements from evaluation factors?
- [ ] Are mandatory vs. scored elements identified?
- [ ] Is requirement extraction repeatable and validated?

Traceability

- [ ] Can we trace claims back to source evidence?
- [ ] Is there a documented linkage between requirement → response → proof?
- [ ] Are regulatory clauses indexed and searchable?

Change Control

- [ ] Can we detect amendment-driven changes systematically?
- [ ] Is reusable content version controlled?
- [ ] Are we able to identify where a clause appears across the library?

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4. Data Governance & Lifecycle Management

Goal:
Governance prevents AI drift.

Ownership & Accountability

- [ ] Is there a defined content owner?
- [ ] Are SME approvals documented?
- [ ] Is responsibility for updates assigned?

Lifecycle

- [ ] Is outdated content routinely retired?
- [ ] Are certifications, clearances, and registrations centrally maintained?
- [ ] Is contract vehicle status tracked and updated?

Standards Enforcement

- [ ] Are naming conventions enforced?
- [ ] Are metadata fields required (not optional)?
- [ ] Is audit logging enabled?

Knowledge Retention

- [ ] Is SME knowledge documented rather than tribal?
- [ ] Are lessons learned captured post-submission?

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5. Process & Operational Readiness

Goal:

AI fails when broken processes scale.

- [ ] Is there a documented content development workflow?
- [ ] Are proposal phases clearly defined (capture, draft, review, red team, etc.)?
- [ ] Are handoffs structured?
- [ ] Do we know where bottlenecks occur?
- [ ] Is review feedback captured systematically?
- [ ] Are evaluation debrief insights incorporated into future content?

6. AI Tool Evaluation (Presale Considerations)

This shifts from “Can AI write a first draft?” to “Will it integrate with reality?”

Architecture & Integration

- [ ] Can we quickly retrieve substantiated proof tied to a capability?
- [ ] Does it integrate with your content repositories? Is that necessary?
- [ ] Can it preserve document structure and outline hierarchy?

Grounding & Explainability

- [ ] Can outputs be anchored to source material?
- [ ] Does it show traceable sourcing for generated content?
- [ ] Can it distinguish between stored content and newly generated content if the platform contains a repository?

Governance Controls

- [ ] Does it support permissioned content access?
- [ ] Are audit logs available?
- [ ] Can content be restricted by contract type or classification?

Operational Fit

- [ ] Does it align to proposal phases?
- [ ] Can it support deterministic scoring alongside generative drafting?
- [ ] Does it reduce SME burden rather than increase it?

Scoring Model

0 Not present	1 Informal/inconsistent
2 Documented but not enforced	3 Enforced and measurable

Score each section independently to calculate both:

- Section maturity
- Overall readiness index

Maturity Interpretation

Level 1 – Reactive (0–20%)

Content is document-based, SME-dependent, and largely tribal. AI will create noise.

Level 2 – Structured but Fragile (21–40%)

Taxonomy exists but is inconsistently applied. AI may help drafting, but it increases compliance risk.

Level 3 – Controlled & Searchable (41–60%)

Governed content, indexed requirements, and defined reuse patterns. AI becomes productivity-enhancing.

Level 4 – Traceable & Measurable (61–80%)

Evidence-linked claims, amendment tracking, and scoring alignment. AI improves quality and defensibility.

Level 5 – Operationally Optimized (81–100%)

Structured data architecture, enforced governance, deterministic + generative alignment, measurable win feedback loops.