



CLIENT INTAKE, COMPLETED ONCE

The Fact Pack

Fill this once. Everything written for you traces back to it.

You are not writing your bid here. You are giving us the facts we are permitted to use. Anything not on this form does not appear in your submission, and if a solicitation asks for something you have not given us, it comes back to you marked as a gap rather than filled in with a guess.

Rough is fine. Approximate values, *about 2019*, and *I will check the exact number* are all fine answers. What is not fine is a figure neither of us can stand behind, because it ends up in a document that you sign.

Time to complete, about twenty minutes, and you do it once. Updates after that are a line or two.

What happens to this. Every sentence written about your firm carries a reference to a line on this form. When the package comes back it includes a provenance ledger: every claim in the response, and the fact it came from. You can check the whole thing without reading the whole thing.

Pricing is never taken from this form. Rates, margins and totals are yours, and the draft comes back with the pricing grid blank.

THREE THINGS THAT WILL NOT HAPPEN

We will not invent a fact about your firm. We will not set your price. We will not quote you a win rate, because we do not have one.

Completed by	
Date	

SECTION ONE

Who you are

Legal entity name, exactly as registered	
Trading name, if different	
State of formation, and year	
Principal office address	
UEI, and SAM registration status with expiry	
Small business status, and the NAICS codes you bid under	
Set aside certifications held, with dates 8(a), SDVOSB, WOSB, HUBZone	
Any debarment, suspension, or contract terminated for default	

Only what you actually hold. A certification claimed and not held is a false statement on a federal submission, and it is signed by you rather than by us.

SECTION TWO

Past performance

The single most valuable section, because evaluators score it. Give three to five, most relevant first. For each one: **client**, scope in one line, period, approximate annual value, why it is relevant, and a contactable reference.

1

2

3

4

5

Also tell us

Any cure notices, terminations, or CPARS ratings you are willing to have quoted.

If a contract went badly, say so here. We would far rather know than have an evaluator find it.

SECTION THREE

Licences, certifications and insurance

Trade or professional licences, with state and number	
Company certifications ISO, and any industry specific scheme	
Insurance carried General liability, automobile, workers compensation, professional, pollution	
Bonding capacity, if you carry it	

SECTION FOUR

Key staff

For each person you would put on a bid: **name, role, years of experience, licences and certifications held, and anything an evaluator would score.**

1	
2	
3	
Total headcount	
How you cover absence	

SECTION FIVE

How you actually operate

Standard coverage, or shift pattern	
Emergency or call out response time you will commit to	
Systems you use Scheduling, maintenance management, quality control	
Safety record OSHA recordable rate, EMR, citations	
Quality: do you have a written quality control plan	
Equipment and vehicles you own	

Numbers in this section are the ones evaluators most often check against a reference call. **An approximate figure you can stand behind beats a precise one you cannot.**

SECTION SIX

Things you will not say

Tell us what is off limits. Clients you cannot name, figures you will not disclose, claims you are not comfortable making. **This list is treated as binding.**

SECTION SEVEN

What you do not have

The most useful box on this form. List what you know you are missing: certifications you lack, past performance in a category, staff you would have to hire on award.

This is not a weakness audit. It is how gaps get flagged early, rather than surfacing the night before a deadline.

CLOSING

What happens next

Send this back with the solicitation you are chasing. The same day you will receive the exact number of separate binding requirements inside it, the tier that places it in, and the price band. That answer is free and nothing is attached to it.

Once you say go, the package comes back as five documents: the full response, the compliance matrix, the coverage report, the provenance ledger, and the pricing grid left blank for your numbers. A second verification pass runs before any of it reaches you, and it is not the pass that produced the work.

Then we walk the coverage report with you line by line, including every gap that was flagged and could not be closed. You price it, you sign it, and you submit it. The submission is yours and it stays yours.

What we do not take on. Work carrying export controlled or classified material, or requiring a security clearance to read.

That is a firm line, and it is about who is permitted to handle the material rather than about capability. Every solicitation is screened before anything else happens.

The terms, in one line. Pay per delivered bid, no prepayment, cancel at any time, one revision round included, and a named human answers.

Not per month and not per seat, unless a monthly arrangement is what you actually want.



RETURN TO

business@sterlingproposals.com

Sterling Proposals LLC, Wyoming, United States. This form is stored only as the working file for your own bids, it is never shared, and it is deleted on request.