

Client Development / Client Services Activity Responsibilities and Information

(Form must be completed to initiate Marketing preparation activities – fill in all that apply)

Project Type

- Proposal
 Statement of Qualification or RFI

Proposal Team:

Proposal Manager: _____
Other Team Members: _____

PSG's Project Participation Structure:

- Lead
 Sub-Contractor:
To: _____
 Joint Venture: Participants / Roles: _____

If Lead, Sub-Contractors Used? Yes No

General Proposal Information:

Client: _____

- Scope of Services: OM&M Other: _____
Facility Type: W DS REM
 WW CS GW
 SD PW IPP
 TS IND Other: _____

Size of Facility: _____

Facility Process: _____

Est. Contract Value: _____

Contract Length: _____

Due Date and Time: _____

Shipping Date: _____

Standard Form Contract

Client Form Contract

Other Issues: _____

Client Delivery:

Hand Deliver

By Whom? _____

Federal Express

Other: _____

Number of Client Copies: _____

Number of Internal Bound Copies: _____

Deliver to: _____

Number of Stapled Copies: _____

Deliver to: _____

Proposal Preparation Information:

Personnel Responsible for: Writing/Signing Cover Letter _____
Writing Executive Summary _____
Writing Operating Plan _____
Providing Pricing Information _____

Special Requirements: Bid Bond? Yes No

Performance Bond? Yes No

Separate Bid/Proposal? Yes No

Graphics Requirements: Client Logo? Yes No

Project Pictures? Yes No

Please Indicate Preferences:

Azurix Featured Projects: _____

Transition Team and Technical Personnel: _____

Previous Proposal(s) to Reference: _____