

Proposal Compliance Matrix

What Is a Proposal Compliance Matrix?

A Proposal Compliance Matrix is a structured table that maps every solicitation requirement to the exact location in your proposal where it is addressed. It helps ensure nothing is missed, improves evaluator confidence, and reduces the risk of disqualification for non-compliance.

When to Use This

- Government RFPs, RFQs, IFBs
- Corporate and enterprise RFPs
- Any solicitation with detailed instructions or mandatory requirements

How to Use This Template (Instructions)

1. Review the entire solicitation
 - Focus on Sections L (Instructions), M (Evaluation Criteria), and Attachments.
2. List every requirement
 - Include forms, narratives, page limits, formatting rules, and certifications.
3. Mark mandatory vs optional
 - Mandatory items must be included or the proposal risks rejection.
4. Assign response locations early
 - This keeps proposal writers aligned and prevents duplication.
5. Track status
 - Use “Complete/In Progress/Missing” to manage progress.
6. Review before submission
 - Confirm every “Mandatory = Yes” item is marked “Complete.”

Common Mistakes This Matrix Prevents

- Missing mandatory forms
- Exceeding page limits
- Overlooking attachments
- Misaligning content with evaluation criteria
- Last-minute compliance scrambling

How Quin-Z Uses Compliance Matrices Differently

At QZC, compliance matrices are not just checklists, they are active proposal management tools. We tie requirements directly to evaluation criteria, flag risk areas

early, coordinate with pricing, technical, and admin teams, use matrices to support bid/no-bid decisions, and integrate compliance tracking into CRM workflows for visibility.

Note: *The tool provided below is designed to support planning and may be adapted based on business goals and opportunity type.*

Proposal Compliance Matrix (Sample Template)

This compliance matrix is a live management and verification tool. All mandatory items must be verified against the final solicitation prior to submission.

<u>Solicitation Section</u>	<u>Requirement/Instruction</u>	<u>Mandatory (Y/N)</u>	<u>Response Location</u>	<u>Status</u>	<u>Owner</u>	<u>Verification Complete</u>	<u>Notes</u>
Section L.1	Submit completed SF-1449	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume I – Forms	Complete	Contracts Lead	<input type="checkbox"/> Yes <input type="checkbox"/> No	Signed by authorized officer
Section L.2	Technical Approach (10 pages max)	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume II – pp. 3–12	Complete	Technical Lead	<input type="checkbox"/> Yes <input type="checkbox"/> No	Meets page limit
Section L.3	Past Performance (3 projects)	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume III – pp. 2–6	In Progress	PM/BD	<input type="checkbox"/> Yes <input type="checkbox"/> No	Awaiting reference confirmation
Section L.4	Key Personnel Resumes	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume II – Appendix A	Complete	HR/PM	<input type="checkbox"/> Yes <input type="checkbox"/> No	Meets experience thresholds
Section M.1	Understanding of Scope	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume II – p. 4	Complete	Technical Lead	<input type="checkbox"/> Yes <input type="checkbox"/> No	Aligned with evaluation criteria
Section M.2	Pricing Schedule	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume IV – Pricing	In Progress	Finance	<input type="checkbox"/> Yes <input type="checkbox"/> No	Final review pending
Attachment B	Insurance Certificate	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume I – Attachments	Missing	Admin	<input type="checkbox"/> Yes <input type="checkbox"/> No	Request sent to broker
Attachment C	DBE Utilization Plan	<input type="checkbox"/> Yes <input type="checkbox"/> No	Volume I – Attachments	Optional	Compliance	<input type="checkbox"/> Yes <input type="checkbox"/> No	Not required for this bid

Note: This matrix should be initiated immediately upon solicitation release and maintained throughout proposal development.