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Let's talk compliance

Compliance the essence of a winning proposal

Notes on the webinar hosted 1 March 2023 by
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Two core elements of a winning proposal

- 1 Compliance
- 2 Responsiveness

Some advice to help you...

- Stephen Covey “7 Habits of Highly Effective People”

- Habit 1: Be Pro-active
- Habit 2: Begin with the end in mind

To learn more about this visit: <https://www.franklincovey.com/the-7-habits/>

- Apply this to proposal management

- Be pro-active – find out as much as possible about an opportunity and a client before the RFP lands on your desk.
 - Pain-points, needs, how to align your offer
- Begin with the end in mind – when the RFP lands on your desk prepare
 - Proper Planning Prevents Poor Proposals





Essence of a winning proposal

- Communicate the value and benefits of your solution clearly and effectively
- Address compliance
- Be responsive

- Include the following:
 - Highlight how your proposal addresses the specific needs and goals of the client
 - Demonstrate your expertise and qualifications
 - Outline a clear and realistic plan for implementation and success
- A winning proposal should be:
 - Well-organised
 - Visually appealing
 - Tailored.



What is compliance?

- Proposal compliance is a process that ensures your submission meets all the stated requirements
- Include all the required information and documentation
- Format and present your proposal in the correct way.

Compliance

The act of meeting stated customer requirements.

APMP definition



What are the six compliance best practices?

1. Begin to cultivate responsiveness long before the RFP release
2. Thoroughly review and clearly understand the client's bid request
3. Prepare a comprehensive compliance matrix for every bid
4. Submit a response matrix with your proposal
5. Address non-compliance
6. Maintain a customer focus.

REMEMBER

**SUBMIT
ON TIME**

Overcome this challenge by starting your proposal preparations early, set milestones for deliverables, work with proposal experts.



According to the APMP a compliance matrix is a tool for managing response preparation and demonstrating compliance to the customer.

Use a compliance matrix

- Purpose of a compliance matrix – making it easy for the evaluator to find what they need to see
- Use a comprehensive compliance matrix
- Add it after the executive summary
- Show how you comply and where you provided the proof of compliance
- Prepare the compliance matrix early
- Shred the RFP line by line – look for shall, must, will statements
- Tailor it to fit the client and circumstances
- Use a spreadsheet
- Follow the client's lead – use their numbering if possible
- Keep it updated throughout the proposal process
- Submit it with your proposal
- Apply responsiveness techniques
- Use the compliance matrix as a selling tool.

Common pitfalls and misconceptions

- Compliance and responsiveness are not the only factors that clients consider
- A fully compliant proposal does not guarantee a win
- Remember to highlight your discriminators, benefits and develop a winning price
- Never assume all the requirements are listed – READ THE ENTIRE RFP.



Compliance and responsiveness might not win you the opportunity but **NON-COMPLIANCE CAN LOSE IT FOR YOU.**