

CREATE **Advanced** 45 MIN · UPDATED 2026-09-30

Build an RFP compliance matrix.

Map every requirement in an RFP to your response, owner, status and risk level so nothing gets missed before submission.

MICROSOFT 365

Word

Excel

WORKS WITH

Claude

Copilot

Business Outcome

Zero missed RFP requirements, and a clear audit trail of who owns each response item.

Workflow Steps

Step 1: Extract every requirement from the RFP

Copilot

Claude

Have Copilot pull every "must," "shall," and "required" statement out of the RFP document into a structured list — this catches requirements buried in dense sections a manual read might skim past.

Step 2: Build the matrix

Excel

Turn the extracted list into a working tracker with columns for response status, owner, and risk.

PROMPT

Extract every requirement from this RFP (every "must," "shall," and "required" statement) into an Excel table with columns: Requirement, Section Reference, Response Status (Not Started/Drafted/Complete), Owner, and Risk Level.

Step 3: Assign owners immediately

Excel

Fill in the Owner column for every single row before you move on to anything else, even with a placeholder name to refine later – sort the Table by Owner afterward and confirm no row shows blank. An unassigned requirement is statistically the one that gets missed, because nobody's watching it.

Step 4: Review the matrix against the RFP one more time before submission

Word and Excel

Automated extraction can miss a requirement embedded in a table or footnote – do one manual pass against the original document as a final check.

✓ Check the work

- Do one manual read of the RFP against the matrix to catch anything extraction missed.
- Confirm every "Complete" status actually has a corresponding response drafted, not just marked done.
- Check high-risk items got real attention, not just a status update.

Expected Outcome

A compliance matrix listing every RFP requirement with its response status, owner and risk level.

Want help rolling this out across your team? **Go to Liminals.Tech** 📄