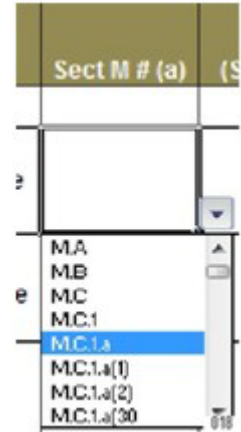


## Mapping to Section M and C

**NOTE:** For this document, we use the typical terms of Section C, L, and M. Your Request for Proposal may not use these naming conventions. However, most all proposals will give you the Proposal Instructions (Sec L), Evaluation Criteria (Sec M) and the Product/Service Work Requirements (Sec C). For the purposes of training, we use the names Sec C, L, and M but the system works with any type of data that you need to respond to.

Mapping to Section M simply means assigning any Section M criteria to the Proposal Paragraph Headings that they specifically talk to. You simply need to use the Drop Down command in the cell to choose the appropriate Section M number.

To start mapping Section M, you should print off a copy of Section M from the tab marked Section M in the Workbook. (If your screen is large enough to view the worksheets side by side, you can also just place an "x" in the first column to signify that you have mapped to this requirement.) This will allow you to check off the items you have mapped as you begin to use them. If there are any Evaluation Criteria left over when you finish mapping Section M, you might want to go back and add a new lower level section to your outline and title it with a corresponding title. For instance, if the RFP Section L had a requirement for Highly Qualified Key Personnel, you might have a Section Numbered 1.2 Qualified Key Personnel. But then Section M says that the resumes of the key personnel are limited to two pages. You didn't even see the word resume in Section L, but now it is a requirement in Section M. You should insert a row below the row with 1.2 Qualified Key Personnel and add a new number and title of: 1.2.1 Key Personnel Resumes.



**IMPORTANT NOTE:** Inserting Rows **MUST** be done by using the commands on the Proposal Manager Ribbon. These commands not only insert rows, but also copy key formulas into the appropriate cells so that the worksheet functions properly. If you need multiple rows, just click the command multiple times.

After you have printed out Section M, start at the top of your Outline and use the Drop Down selection tools. Choose the Sec M reference number that aligns with that particular section of your proposal. Typically, there will be only one Section M criteria per individual outline of the proposal. If you need to assign more than one Section M criteria to the same proposal paragraph, you can add a Section M criterion by using the Second Column of Section M drop downs. The key is to keep all Section M criteria on the same row as the Proposal Paragraph Number and Title. **Another suggestion would be to make another lower level paragraph in the outline that specifically talks to the second Section M criteria.**

Continue mapping Section M until you have reached the bottom of the outline. Review the printed outline to ensure that you have checked off each Section M criteria. If there is a Section M criteria that you have not mapped to a specific proposal paragraph, review your work and

either create a new proposal paragraph number and title or map the criteria as a second Section M criteria to an existing paragraph.

There are two columns for entering Section M Numbers. This is for the rare case that you want to map two Evaluation Criteria to the same paragraph. If for some strange reason, you would want to attempt to cover more than 2 Evaluation Criteria in the same paragraph, we suggest you mention this in the Other Contents column. However, you can hand paste the information from the Section M tab into the cells provided if you need to. You can also develop a 3<sup>rd</sup> column of Sec M Criteria by duplicating the current columns. In this case, you would need to label the headings with a “c” to distinguish the columns. You would also need to tailor your Compliance Matrix, Storyboard, and Individual Document Creator to pull in those columns into the documents.

### **Mapping to Section C**

Mapping to Section C is done the same way as Section M. However, depending on the RFP, you may or may not need to discuss every requirement from Section C.

There are five columns for entering Section C Numbers. This is for the rare case that you want to map up to 5 requirements to the same paragraph. If for some strange reason, you would want to attempt to cover more than 5 requirements in the same paragraph, we suggest you mention this in the Other Contents column. However, you can hand paste the information from the Section C tab into the cells provided if you need to. You can also develop a more columns for Sec C requirements by duplicating the current columns. In this case, you would need to label the headings with other letters such as “f, g, h, i, etc.” to distinguish the columns. You would also need to tailor your Compliance Matrix, Storyboard, and Individual Document Creator to pull in those columns into the documents.