

COMPASS ENGINE

by HorizonX LLC

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# Automation Blueprint

## Strategic Engagement Report



PREPARED FOR

**Apex Federal Solutions**



GENERATED

**June 11, 2026**

PREPARED BY

**Compass Engine · HorizonX LLC**



**SDVOSB CERTIFIED**

Service-Disabled Veteran-Owned  
Small Business



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# Executive Scorecard

## COMPASS ENGINE CONFIDENCE SCORE

82%

The Confidence Score reflects intake completeness and response specificity. It is not a validated performance metric.

### PROCESS EFFICIENCY

6/10

Current processes involve significant manual coordination and approval cycles, indicating room for improvement.

### AUTOMATION READINESS

7/10

Existing tools and platforms provide a solid foundation for automation, though integration complexities remain.

### RISK LEVEL

4/10

Risks include compliance errors and resource allocation challenges.

### QUICK-WIN POTENTIAL

8/10

Automating document coordination and approval tracking offers immediate impact.

### COMPASS RELATIVE ASSESSMENT

Compass Relative Assessment: Based on your intake profile, current state indicates opportunity for advancement toward operational best practices in proposal management and automation.

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SECTION

# Executive Summary

## SECTION 01

# Executive Summary

Apex Federal Solutions, an SDVOSB-certified firm specializing in cybersecurity, cloud modernization, IT operations, and program management services, has a significant opportunity to enhance its federal contract proposal development workflow through strategic automation initiatives. The current state, characterized by high manual labor hours and complex coordination efforts, can be optimized to potentially reduce proposal development time by up to 50%. This potential reduction is based on streamlining document coordination, compliance validations, and approval processes. By leveraging existing technologies such as Microsoft 365, Salesforce, and Power BI, Apex Federal Solutions can achieve increased proposal throughput and improved win rates.

The directional estimate for adopting an automation blueprint points towards a potential reduction in proposal preparation efforts by 30–40%, facilitating greater capacity and efficiency. This estimate is based on current intake data and subject to validation through real-world application. As Apex Federal Solutions seeks to refine its proposal operations, the following sections will provide a detailed roadmap for implementing a robust automation architecture designed to enhance efficiency and elevate performance metrics.

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02

SECTION

Workflow Current-State Map

## SECTION 02

# Workflow Current-State Map

The Federal Contract Proposal Development, Review, Approval, and Submission Workflow at Apex Federal Solutions involves multiple critical stages, each demanding precise coordination and compliance adherence. Currently, the workflow initiates with opportunity identification via platforms such as GovWin and SAM.gov, followed by a bid/no-bid assessment conducted by Business Development. After approval, a proposal manager coordinates the development process, involving subject matter experts, pricing, contracts, and compliance teams.

Key handoffs between departments, including Business Development, Proposal Management, and Technical Teams, are crucial for maintaining momentum. However, the existing process is prone to disruptions from exceptions like late solicitation amendments and delayed pricing inputs. Manual coordination of documents and compliance checks contribute significantly to the 250–400 weekly labor hours spent on proposal activities across the organization.

## COMPASS RELATIVE ASSESSMENT

Based on your intake profile, current state indicates opportunity for advancement toward operational best practices in workflow optimization and process automation.

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# 03



SECTION

## Decision Logic & Branching Rules

## SECTION 03

# Decision Logic & Branching Rules

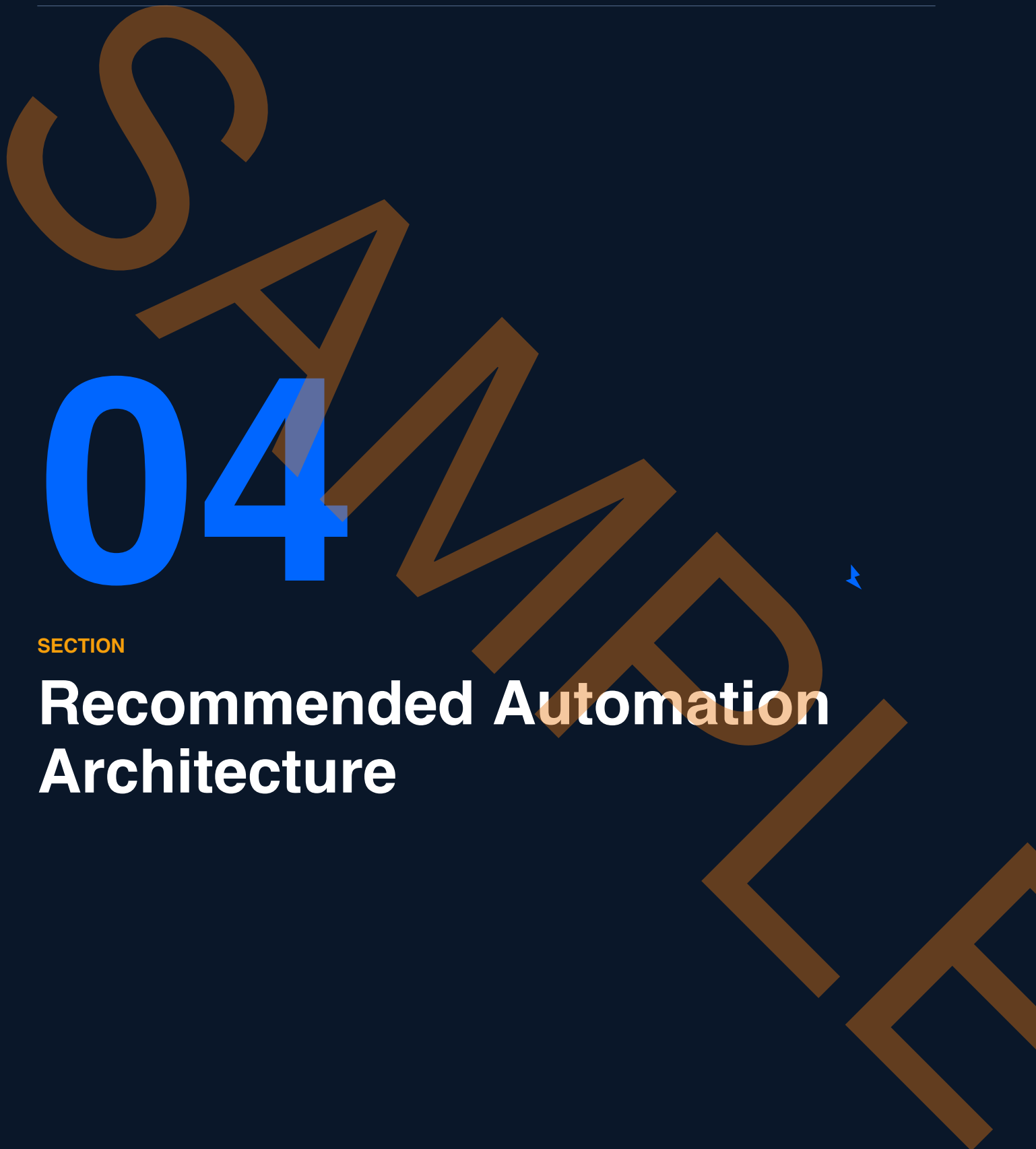
The decision logic within Apex Federal Solutions' proposal workflow includes several pivotal points that dictate the progression of proposal development. The initial bid/no-bid decision evaluates the opportunity's alignment with company capabilities, revenue potential, and win probability. Successful evaluations lead to further development, while unsuccessful ones are declined, conserving resources.

Compliance reviews serve as another crucial checkpoint, ensuring adherence to solicitation requirements. Proposals failing compliance checks undergo revisions, guided by a clear escalation path for addressing issues. Furthermore, pricing approvals are contingent upon alignment with financial targets and risk thresholds, necessitating rigorous validation processes.

Executive leadership's final review acts as the ultimate gatekeeper, determining whether proposals are fit for submission. This layered decision-making framework ensures quality and compliance but introduces potential bottlenecks, particularly in scenarios involving conflicting stakeholder feedback or resource constraints.

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# 04

SECTION

## Recommended Automation Architecture

## SECTION 04

# Recommended Automation Architecture

To enhance the efficiency of Apex Federal Solutions' proposal workflow, a multi-layered automation architecture is recommended. This architecture should focus on integrating existing tools such as Microsoft 365 and Salesforce with advanced automation platforms to streamline key processes.

- 01** **Automated Document Coordination:** Implement workflows in Microsoft SharePoint and Teams to automatically route and version control proposal documents, reducing manual effort.
- 02** **Compliance Automation:** Develop rule-based checks within Salesforce to automate compliance validation against solicitation requirements, minimizing manual error potential.
- 03** **Approval Workflow Automation:** Utilize Power Automate to establish a structured approval process, enabling real-time tracking and reducing delays.
- 04** **Dashboard & Reporting Enhancements:** Leverage Power BI to develop a centralized dashboard for proposal tracking, providing stakeholders with real-time insights into proposal status and resource allocation.

## ESTIMATED IMPACT

Directional estimate: potential reduction in development time of 10–15% based on intake profile. Actual results will vary. Streamlined processes and reduced manual effort may contribute to enhanced overall proposal throughput.

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# 05

SECTION

## System & Integration Requirements

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# System & Integration Requirements

The successful implementation of the automation architecture necessitates cohesive integration across Apex Federal Solutions' existing systems. Key integration requirements include:

- **Data Synchronization:** Ensure seamless data flow between Salesforce, Microsoft 365, and Deltek Costpoint to maintain consistency and accuracy across platforms.
- **API Utilization:** Leverage Microsoft and Salesforce APIs for automated data exchange, reducing manual data entry and potential errors.
- **Security and Compliance:** Align integrations with IT and Information Security teams to ensure compliance with company policies and regulatory standards.

To achieve these integrations, collaboration with IT and Information Security teams is vital. This ensures that the automation solutions are not only effective but also secure and compliant with federal contracting standards.

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# 06

SECTION

## Exception Handling & Edge Cases



## SECTION 06

## Exception Handling & Edge Cases

Addressing exceptions and edge cases is critical to maintaining the integrity and reliability of Apex Federal Solutions' proposal workflow. Common exceptions such as late solicitation amendments, unavailable subject matter experts, and compliance deficiencies require structured mitigation strategies.

- 01** Exception Management Framework: Implement a framework within ServiceNow to log, track, and resolve exceptions, ensuring accountability and timely resolution.
- 02** Resource Allocation Contingencies: Develop contingency plans for resource allocation, allowing for rapid reprioritization in response to unexpected changes or delays.
- 03** Enhanced Communication Protocols: Establish clear communication channels across teams using Microsoft Teams for quick dissemination of critical updates and resolution strategies.

These measures will help Apex Federal Solutions mitigate disruptions and maintain workflow continuity, even in the face of unforeseen challenges.

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07

SECTION

# Implementation Plan & Sequencing

## SECTION 07

# Implementation Plan & Sequencing

The implementation of the recommended automation architecture for Apex Federal Solutions should follow a phased approach, ensuring a smooth transition and minimal disruption to ongoing operations.

## Discover (0–30 Days)

- Map current processes and identify specific automation opportunities.
- Engage stakeholders to align goals and expectations.

## Design (30–60 Days)

- Develop detailed automation workflows and define integration points.
- Collaborate with IT and Information Security for system alignment.

## Deploy (60–90 Days)

- Implement automation solutions and conduct initial user training.
- Monitor implementation and gather feedback for iterative improvements.

## Scale (90–120 Days)

- Optimize automated workflows based on feedback.
- Expand automation to additional processes and explore further enhancements.

### KEY INSIGHT

These recommendations are strategic frameworks based on intake data. Implementation should be reviewed and validated by qualified operational and technical leadership prior to deployment.

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# 08



SECTION

## ROI Model & Success Metrics

## SECTION 08

# ROI Model & Success Metrics

The proposed automation initiatives for Apex Federal Solutions aim to deliver substantial improvements in efficiency, accuracy, and throughput. The ROI model focuses on key metrics such as reduced labor hours, faster cycle times, and increased proposal win rates.

- Directional estimate: potential reduction in proposal preparation effort of 30–40% based on intake profile. Actual results will vary. If realized, this may enhance capacity and reduce overhead costs.
- Decrease in cycle times by 25–35%, potentially leading to more agile proposal processes.
- Improvement in compliance accuracy, reducing submission errors and increasing on-time performance.

By tracking these success metrics, Apex Federal Solutions can gauge the effectiveness of the automation blueprint and make data-driven decisions for future enhancements.

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## Effort vs Impact – Quick Wins



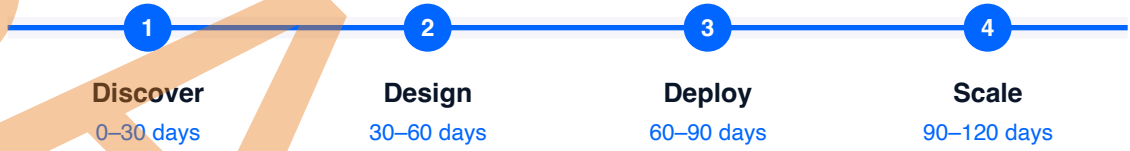
### Legend

- 1 Automate Document Coordination · effort LOW · impact HIGH
- 2 Integrate Compliance Checklists · effort MEDIUM · impact HIGH
- 3 Implement Proposal Tracking Dashboard · effort MEDIUM · impact MEDIUM
- 4 Streamline Approval Processes · effort LOW · impact MEDIUM

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# ▶ Phased Implementation Timeline



## Discover · 0–30 days

- Map current processes
- Identify automation opportunities

## Design · 30–60 days

- Develop automation workflows
- Define integration points

## Deploy · 60–90 days

- Implement automation solutions
- Train users

## Scale · 90–120 days

- Optimize automated workflows
- Expand to additional processes

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The logo consists of the letters 'HX' in a bold, white, sans-serif font, centered within a blue-outlined square.

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