



# **Asian American Chamber of Commerce**

## **Practical Business Development and Capture Tips**



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# **Asian American Chamber of Commerce**

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## ***GovCon Committee***

### ***Practical Business Development and Capture Tips for Success***

*Eric Gregory, CPP APMP Fellow*

*Executive Consultant & Advisor*

*December 4, 2020*





# Welcome!

Adventure: The Hunt

Excitement: The Challenge

Thrills: The Ride

Chills: The Anticipation

Dizziness: The Adrenalin

Fun: The Win



## Objectives

**1** | Gain competitive perspective

**2** | Focus energy on winning

**3** | Focus actions on competitive results

**4** | Winning through knowledge  
and strategy



# Lexicon

<b>Value Proposition</b>	The 3-4 quantitative experiences you promise to the client that support their agency mission outcome.
<b>Issues</b>	The client's concerns--issues are the pain points the client experiences daily requiring resolution—drive to the “hot buttons”
<b>Strategy</b>	The actions required to win the client, out smart the competition, and to create the valued solution
<b>Feature</b>	Specific aspects, or attributes, of our product or service— speed, schedule, average call length, dollars of revenue collected, etc.—the “what”
<b>Benefit</b>	Tangible advantages for the client— reduced cost or risk, improved quality, reliability, profit, safety, etc.—the “so what”
<b>Strengths</b>	Solution feature with a tangible benefit that solves a highly important client issue or exceeds a stated requirement with little risk and cost.
<b>Discriminator</b>	A benefit that is important to the client and unique to you



## Winners and Losers

### WINNERS

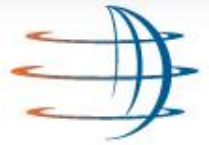
- Plan
- Dominate
- Control
- Adapt
- Manage
- Evolve
- Improve
- Surprise
- Counter
- Think
- Angle

### LOSERS

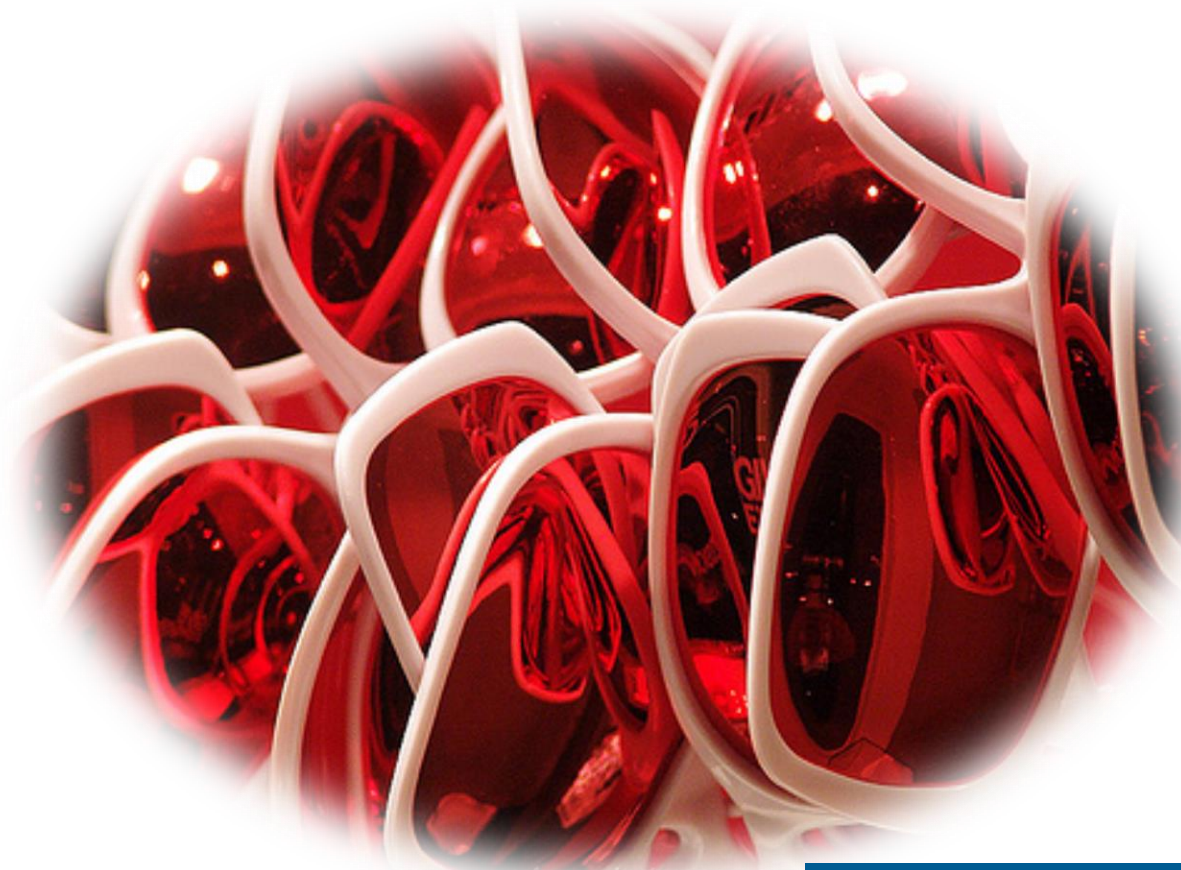
- React
- Fear
- Hope
- Guess
- Stay Complacent
- Remain Static
- Regress
- Excuse
- Create Disorder
- Temporize
- Languish

14-JS-035





## The Enemy



**Don't be fooled by the obvious.**



# Culture: Thrive or Die



**FOCUS:** Aligns the entire company towards achieving its vision, mission, and goals.

**MOTIVATION:** Builds higher employee motivation and loyalty.

**CONNECTION:** Builds team cohesiveness among the company's various departments and divisions.

**COHESION:** Builds consistency and encourages coordination and control within the company.

**SPIRIT:** Shapes employee behavior at work, enabling the organization to be more efficient and alive.



Shawn Parr, Fast Company, *Culture Eats Strategy For Lunch*, Jan 2012

# A Winning Culture

**Expectations**

- Clear

**Attitudes**

- Lived

**Beliefs**

- Transmitted

**Rituals**

- Practiced

**Symbols**

- Observed

**Actions**

- Defined

**Tools**

- Available and used

**Education**

- Formal and mentoring

**Reinforcements**

- Positive





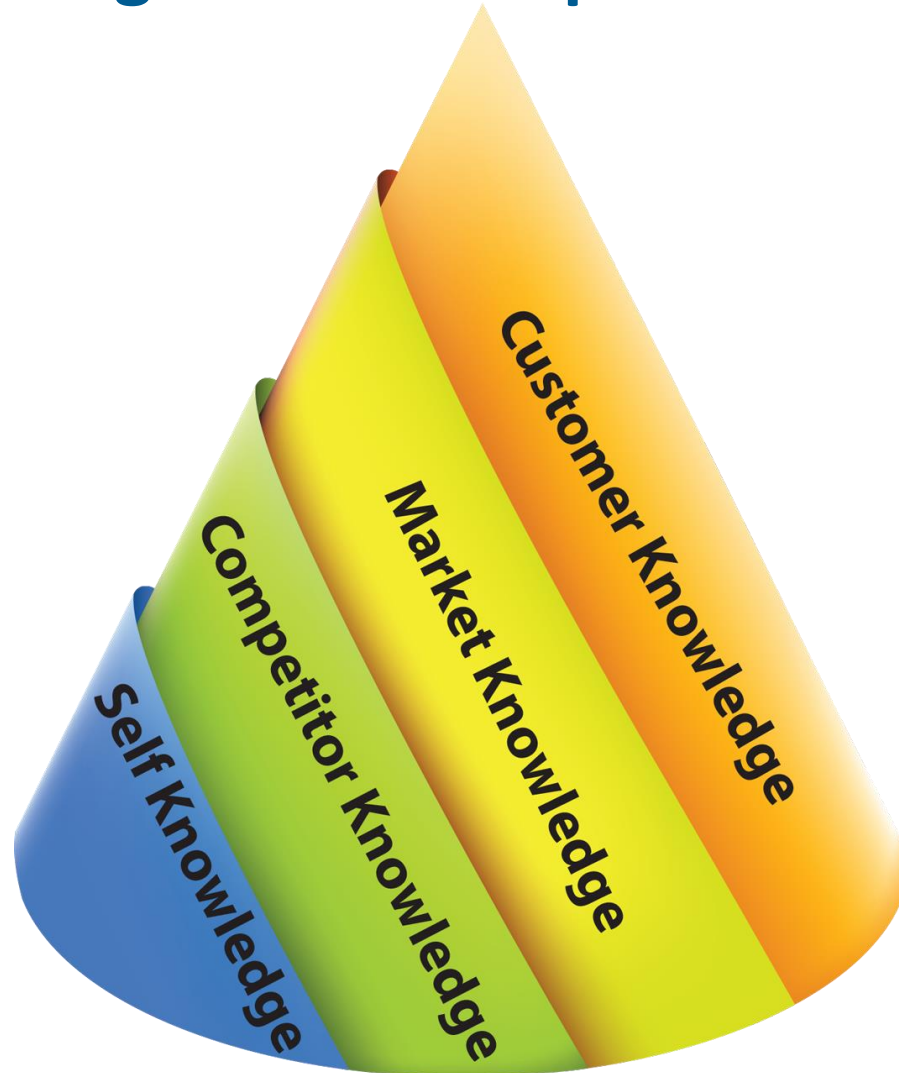
## Target the Best Opportunities

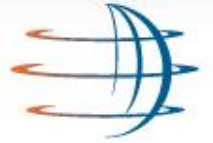




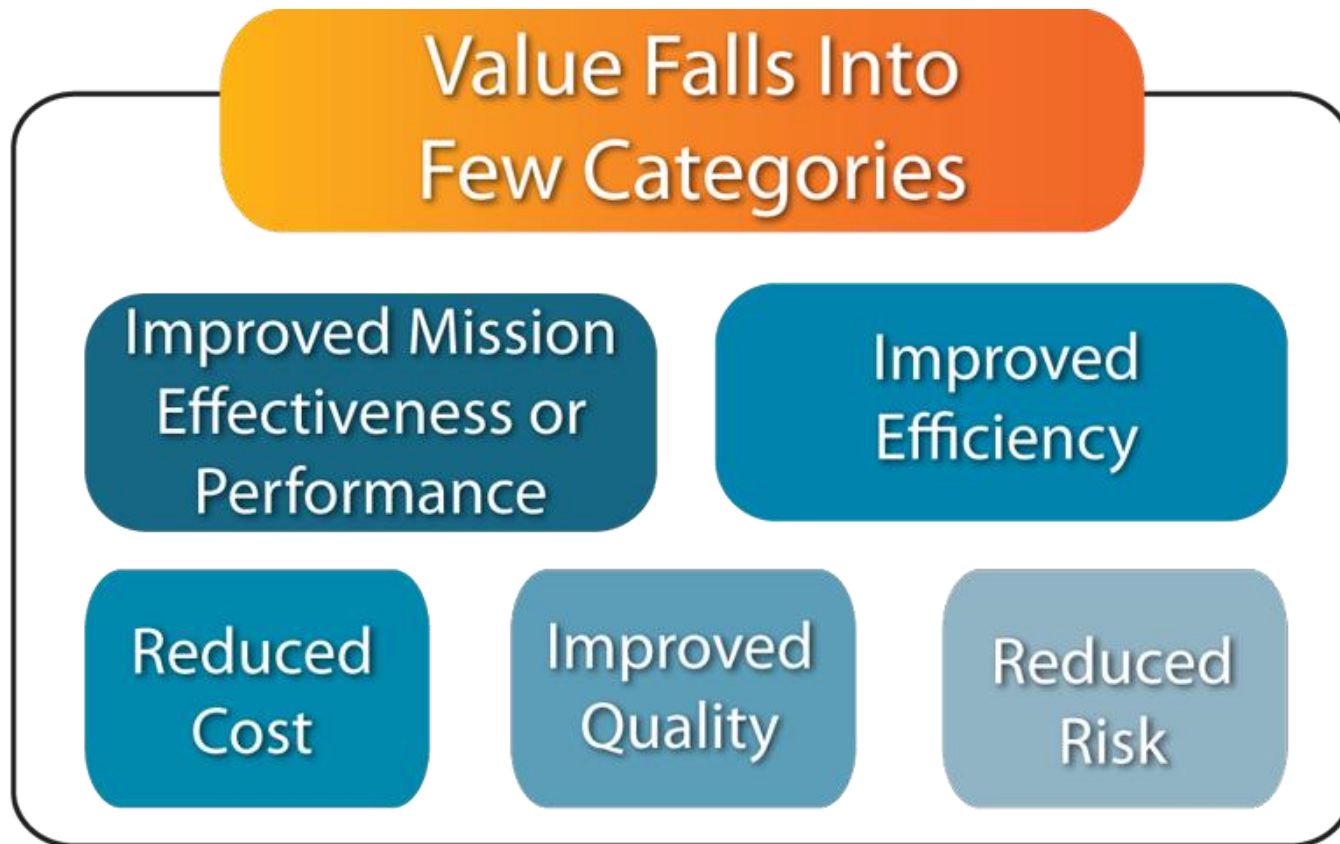


## The Simple Things Success Depends On





## The Value Box

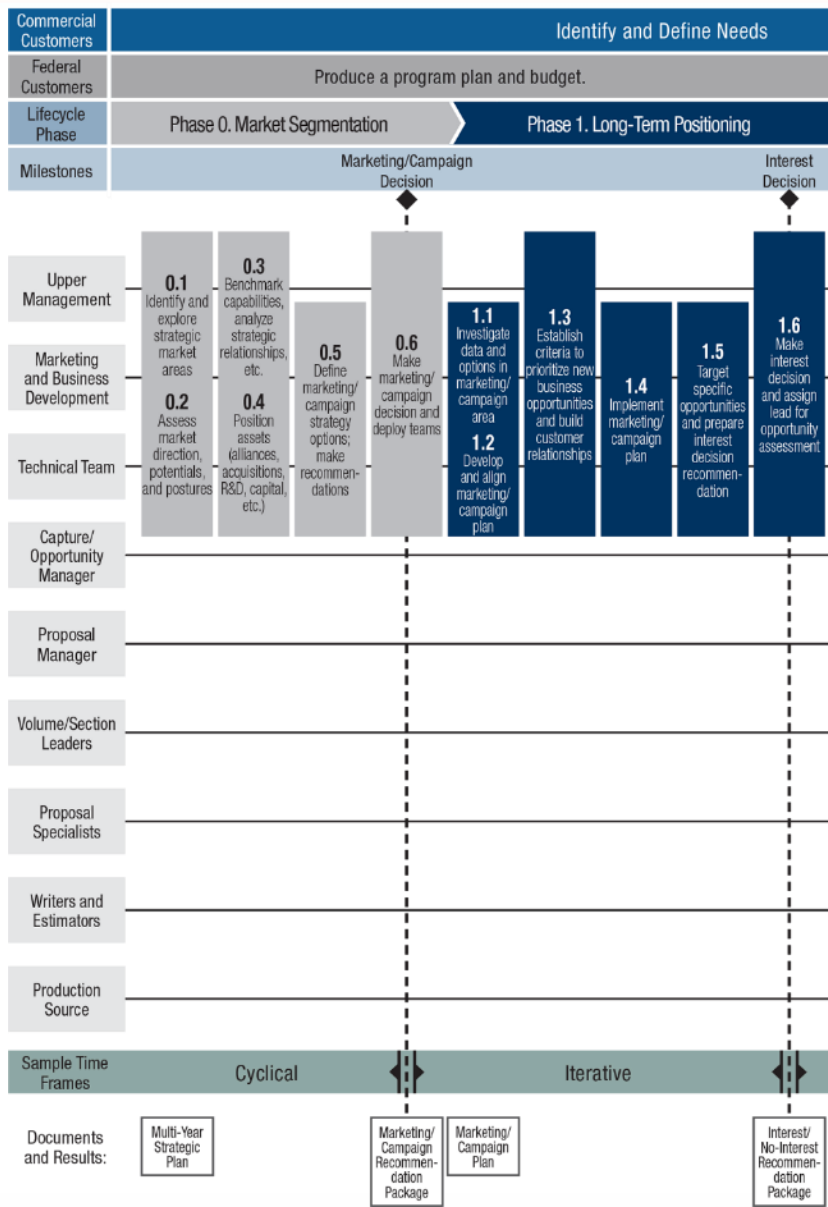




# Shipleys Seven-Phase Business Development Process

Phase	Title	Decision Milestone
0	Market Segmentation	Marketing/Campaign
1	Long-Term Positioning	Interest
2	Opportunity Assessment	Pursuit
3	Capture Planning	Preliminary Bid
4	Proposal Planning	Bid Validation
5	Proposal Development	Proposal Submittal
6	Post-Submittal Activities	Final Offer





## Market Segmentation and Long-Term Positioning

### Inflection Points:

- Benchmark Capabilities, Analyze Strategic Relationships
- Make Marketing/Campaign Decisions and Deploy Teams
- Establish criteria to prioritize new business opportunities and build relationships



## PHASE 0: MARKET SEGMENTATION



**0.1**  
Identify and explore strategic market areas

**0.2**  
Assess market direction, potentials, and postures

**0.3**  
Benchmark capabilities, analyze strategic relationships, etc.

**0.4**  
Position assets (alliances, acquisitions, R&D, capital, etc.)

**0.5**  
Define marketing/campaign strategy options; make recommendations

**0.6**  
Make marketing/campaign decision and deploy teams

Campaign/Marketing: Establish market directions, determine desired capabilities and resource mix

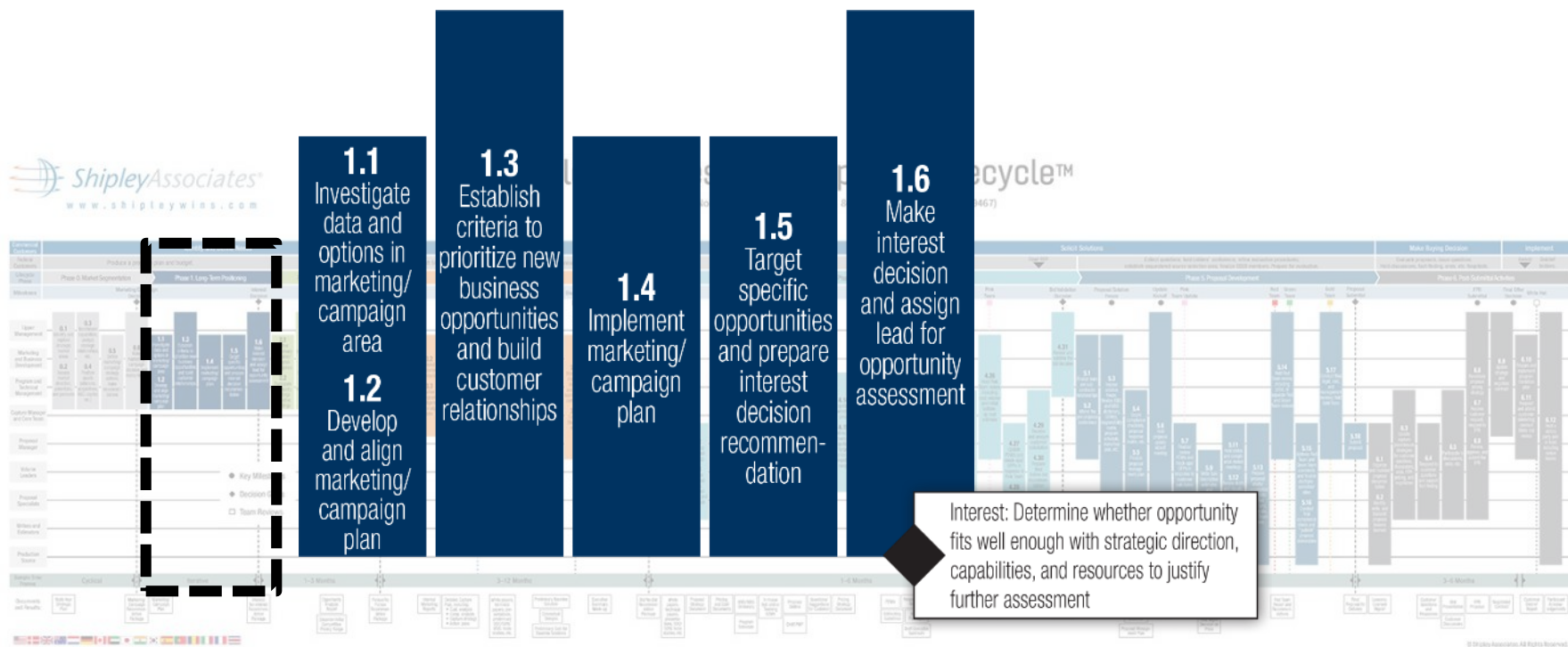
Identify and explore strategic market area

- Define and sub-divide a large market into segments that exhibit similar needs, wants, or demand characteristics.
- Develop a marketing mix that aligns with your customers' expectations by market segment, geography, and culture.

Make decision to pursue market area



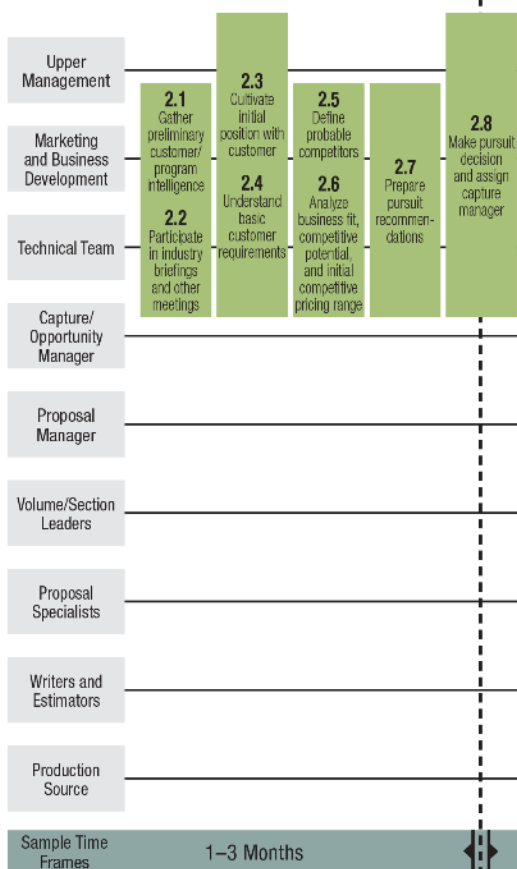
## PHASE 1: LONG-TERM POSITIONING







Commercial Customers	
Federal Customers	Appoint SSA and SSAC. Develop acquisition plan.
Lifecycle Phase	Phase 2. Opportunity Assessment
Milestones	Pursuit Decision



Documents and Results:

Opportunity Analysis Report  
Establish Initial Competitive Pricing Range

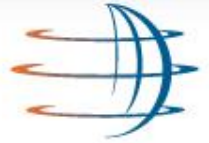
Pursue/No Pursue Recommendation Package

## Opportunity Assessment

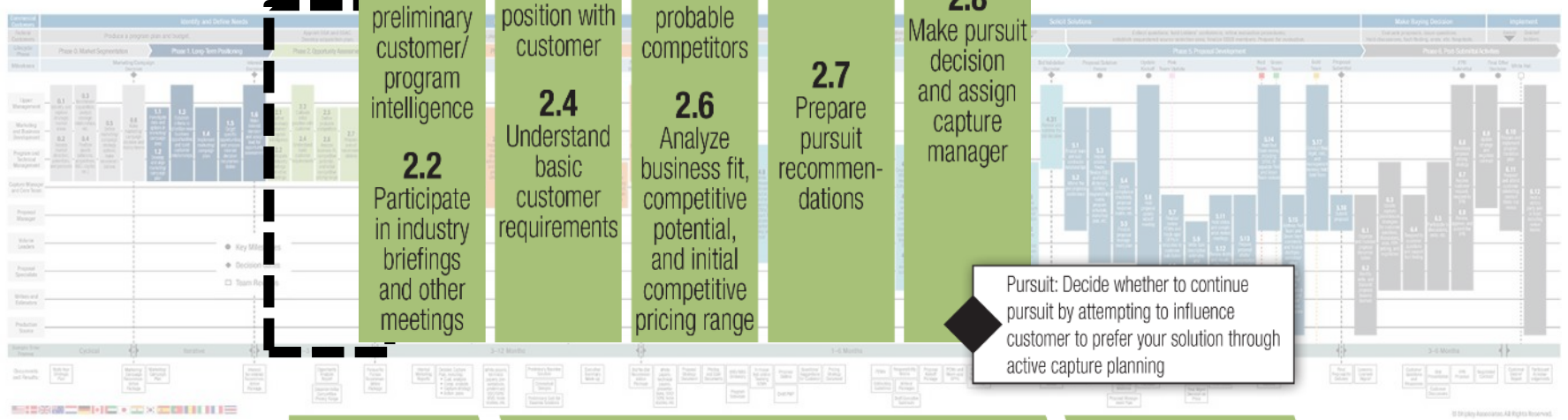
### Inflection Points:

- Cultivate initial position with customer(s)
- Understand basic customer requirements

**Customer requirements do not equal company capabilities, products, or services. Sell what the customers need, not what you have.**



## PHASE 2: OPPORTUNITY ASSESSMENT



**2.1** Gather preliminary customer/program intelligence

**2.2** Participate in industry briefings and other meetings

**2.3** Cultivate initial position with customer

**2.4** Understand basic customer requirements

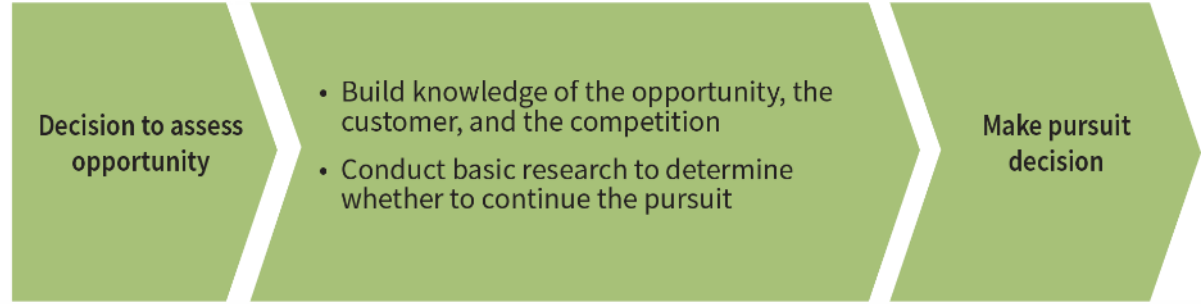
**2.5** Define probable competitors

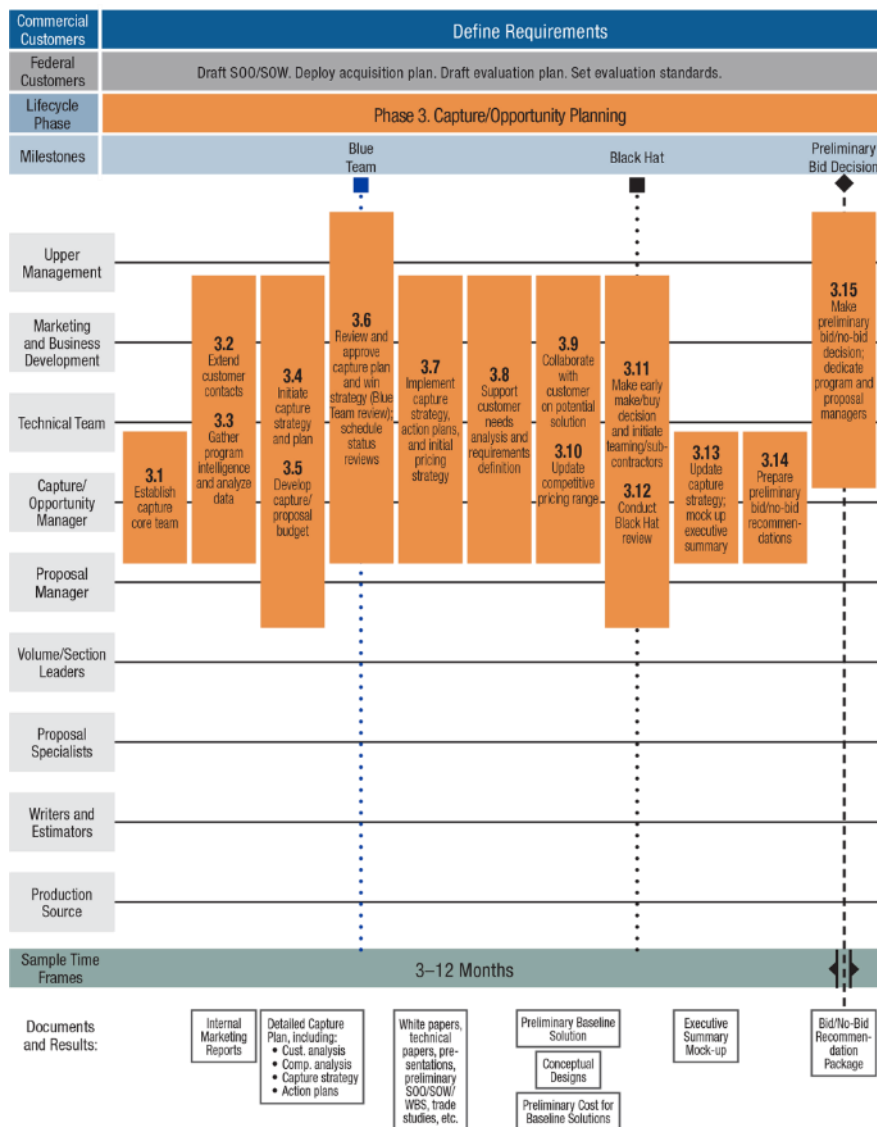
**2.6** Analyze business fit, competitive potential, and initial competitive pricing range

**2.7** Prepare pursuit recommendations

**2.8** Make pursuit decision and assign capture manager

Pursuit: Decide whether to continue pursuit by attempting to influence customer to prefer your solution through active capture planning

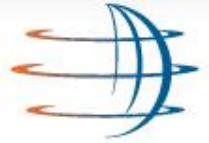




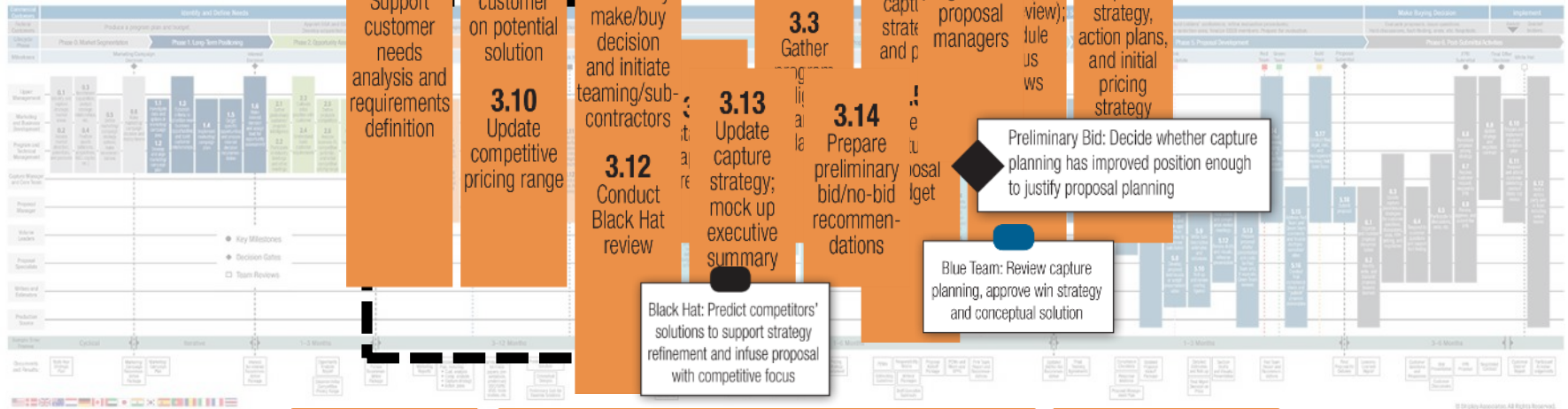
## Capture/Opportunity Planning

### Inflection Points:

- Establish capture core team
- Support customer needs analysis and requirements definition
- Collaborate with customer on potential solution



## PHASE 3: CAPTURE PLANNING



**3.8** Support customer needs analysis and requirements definition

**3.9** Collaborate with customer on potential solution  
**3.10** Update competitive pricing range

**3.11** Make early make/buy decision and initiate teaming/sub-contractors  
**3.12** Conduct Black Hat review

**3.13** Update capture strategy; mock up executive summary

**3.2** Extend customer contacts  
**3.3** Gather intelligence  
**3.14** Prepare preliminary bid/no-bid recommendations

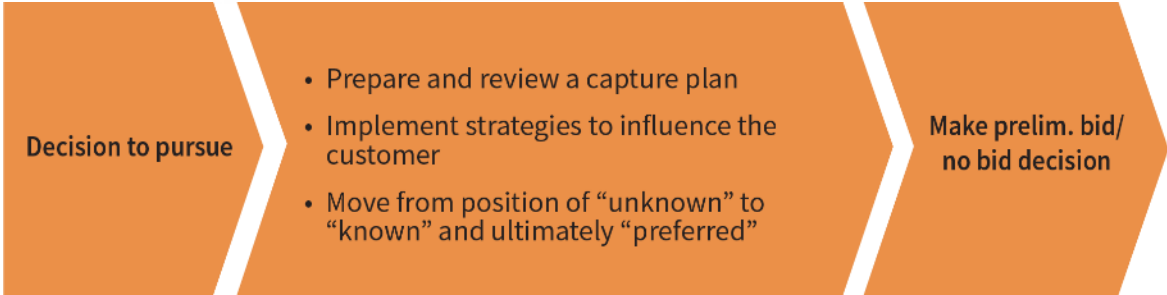
**3.4** Initiate capture strategy and program and proposal managers  
**3.15** Make preliminary bid/no-bid decision; dedicate program and proposal managers

**3.7** Implement capture strategy, action plans, and initial pricing strategy

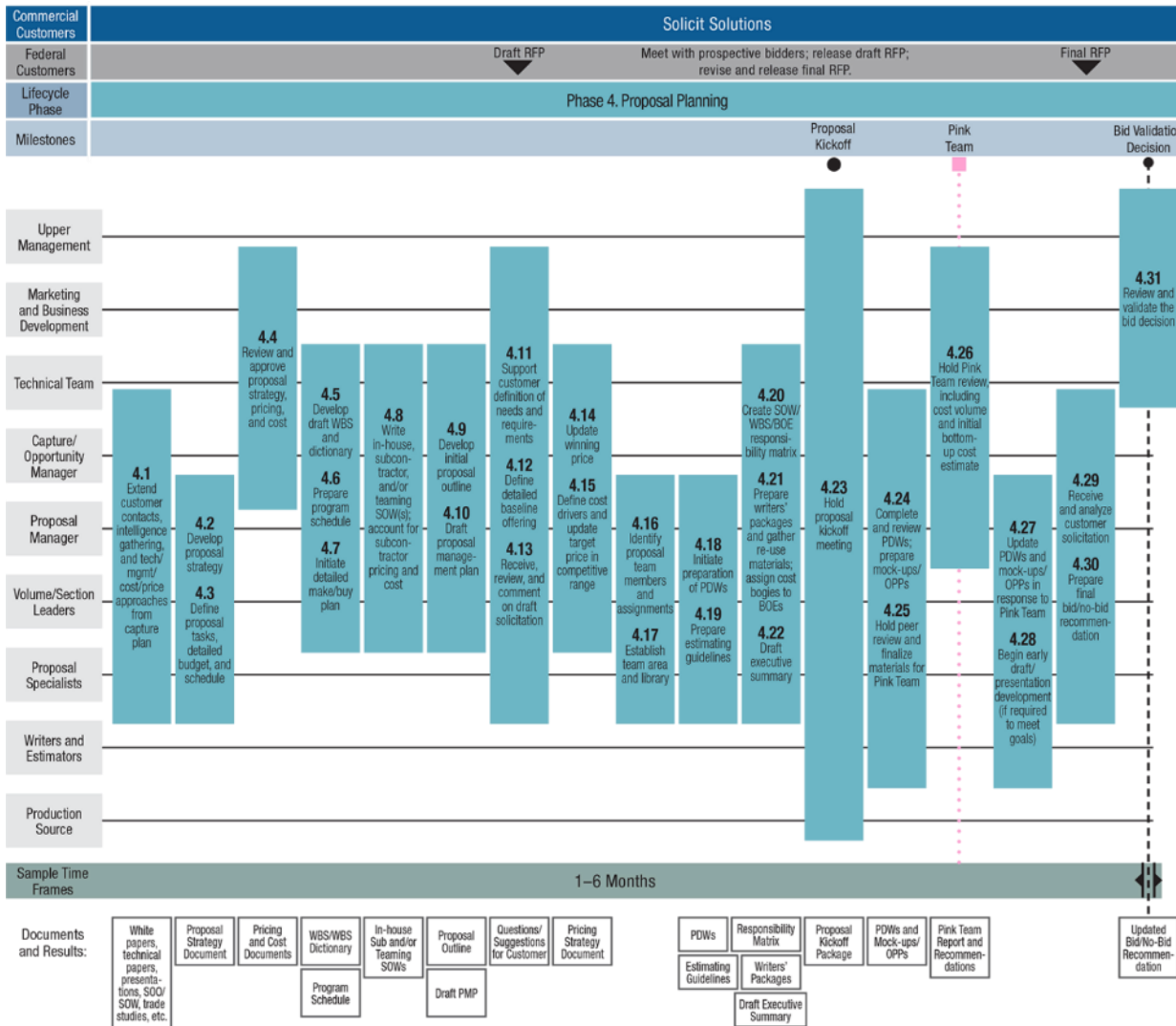
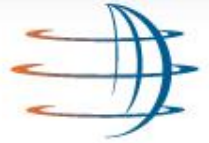
Black Hat: Predict competitors' solutions to support strategy refinement and infuse proposal with competitive focus

Preliminary Bid: Decide whether capture planning has improved position enough to justify proposal planning

Blue Team: Review capture planning, approve win strategy and conceptual solution



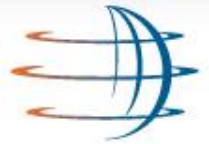




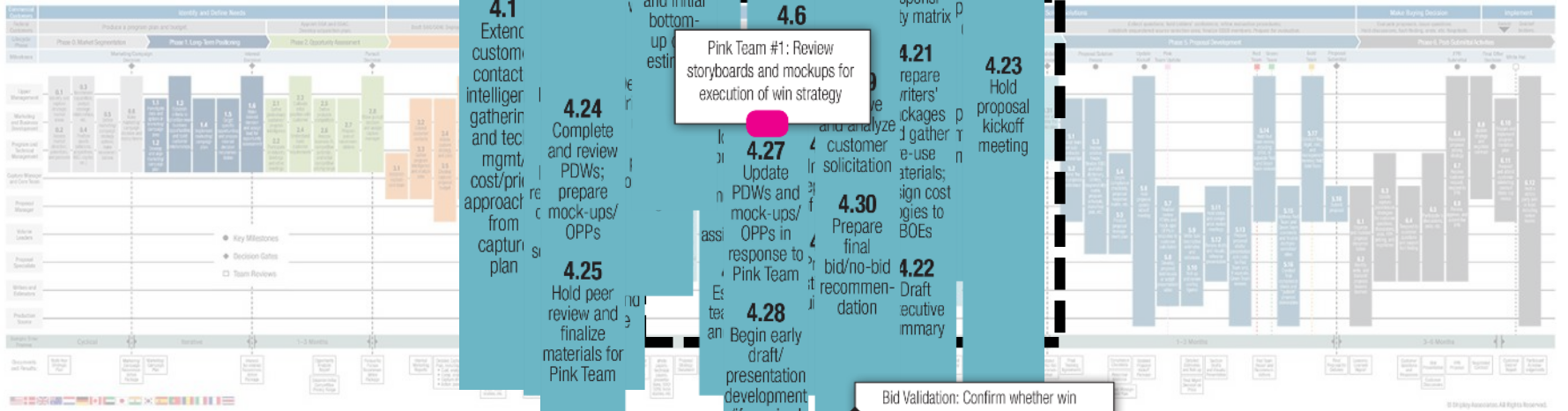
## Proposal Planning

### Inflection Points:

- Support customer definition of needs and requirements
- Define cost drivers and update target price in competitive range



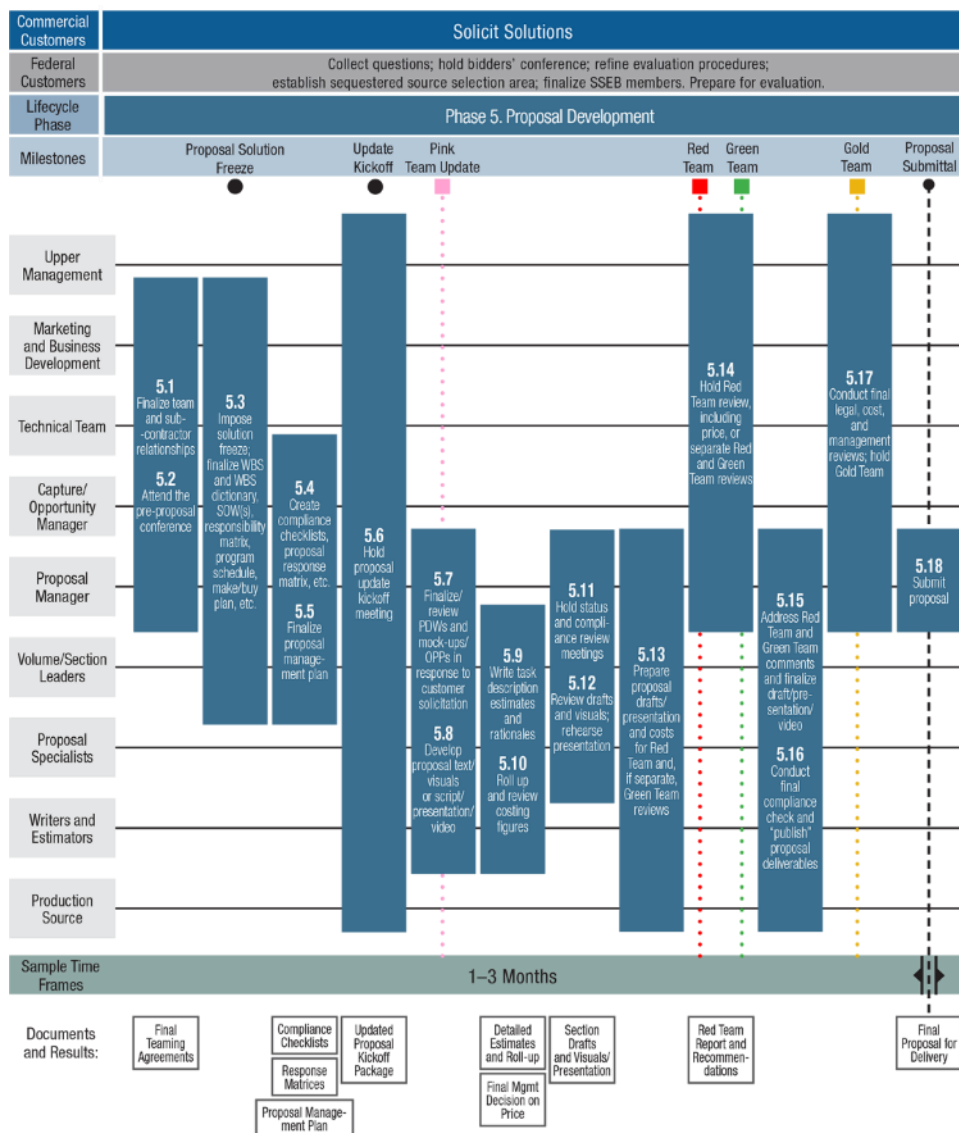
## PHASE 4: PROPOSAL PLANNING



**Decision to bid**

- Extend data from the capture plan to the proposal management plan
- Extend the capture strategy into the proposal strategy
- Refine the solution and price to win

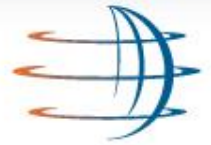
**Validate the bid decision**



## Proposal Development

### Inflection Points:

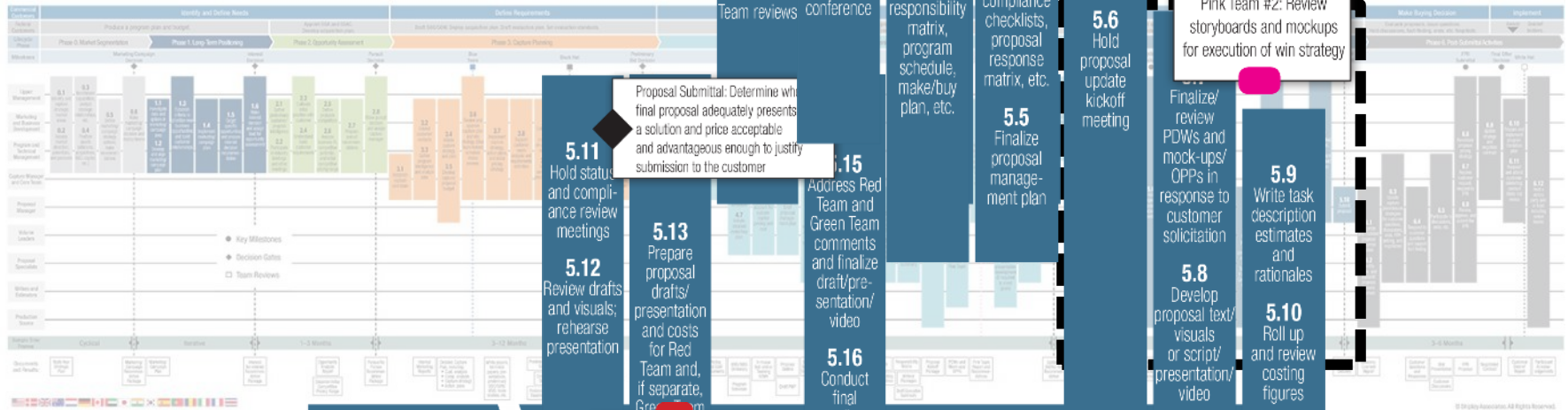
- Proposal kickoff
- Pink team
- Red team, including price



## PHASE 5: PROPOSAL DEVELOPMENT



Shipleys Business  
Global Headquarters: 532 North



**5.1** Finalize team and sub-contractor relationships

**5.14** Hold Red Team review, including price, or separate Red and Green Team reviews

**5.2** Attend the pre-proposal conference

**5.3** Impose solution freeze; finalize WBS and WBS dictionary, SOW(s), responsibility matrix, program schedule, make/buy plan, etc.

**5.4** Create compliance checklists, proposal response matrix, etc.

**5.5** Finalize proposal management plan

**5.6** Hold proposal update kickoff meeting

**5.6** Hold proposal update kickoff meeting

**5.7** Pink Team #2: Review storyboards and mockups for execution of win strategy

**5.11** Hold status and compliance review meetings

**5.12** Review drafts and visuals; rehearse presentation

Proposal Submittal: Determine whether final proposal adequately presents a solution and price acceptable and advantageous enough to justify submission to the customer

**5.13** Prepare proposal drafts/presentation and costs for Red Team and, if separate, Green Team

**5.15** Address Red Team and Green Team comments and finalize draft/presentation/video

**5.16** Conduct final compliance check and "publish" proposal deliverables

Finalize/review PDWs and mock-ups/QPPs in response to customer solicitation

**5.8** Develop proposal text/visuals or script/presentation/video

**5.9** Write task description estimates and rationales

**5.10** Roll up and review costing figures

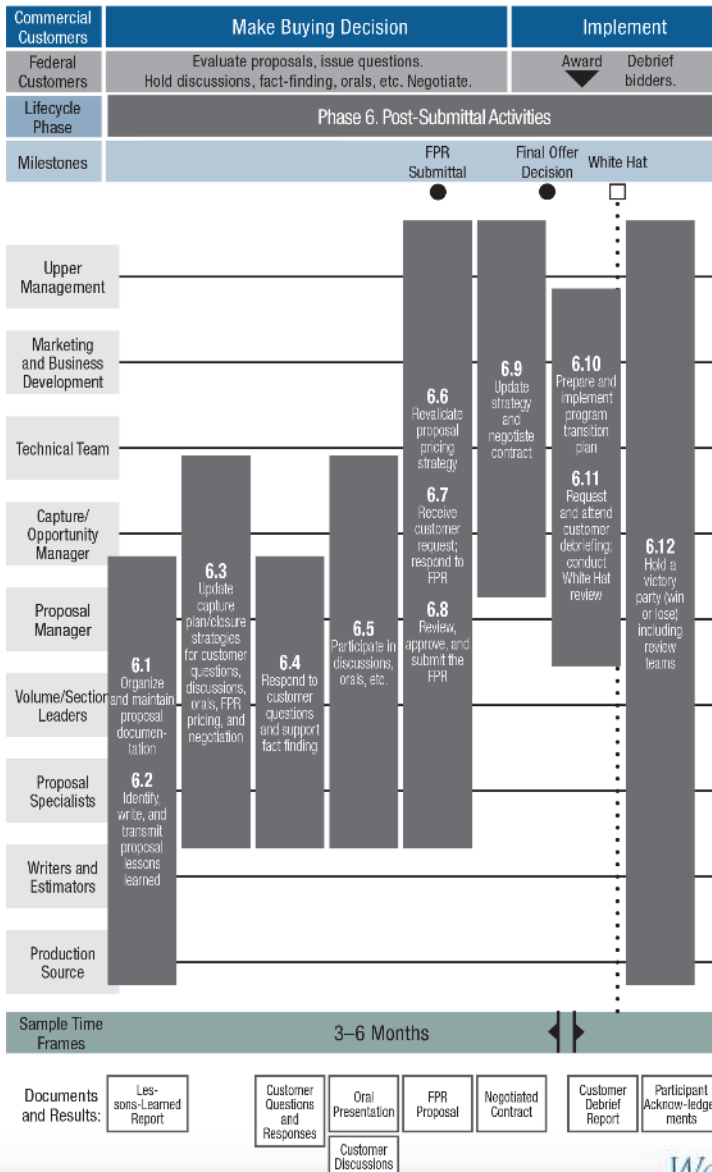
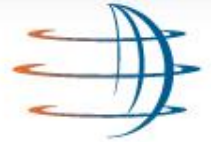
RFP release and bid validation

Red Team: Review proposal to predict scoring and improve effectiveness

- Make assignments
- Make daily
- Prepare a persuasive sales document

Make submit decision





## Post-Submittal Activities

### Inflection Points:

- Respond to customer questions and support fact finding
- Revalidate proposal pricing strategy



## PHASE 6: POST SUBMITTAL



**6.6** Revalidate proposal pricing strategy

**6.7** Receive customer request; respond to FPR

**6.8** Review, approve, and submit the FPR

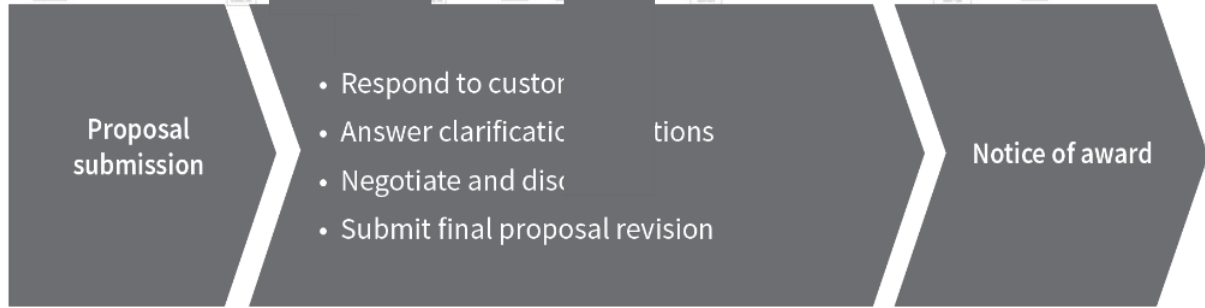
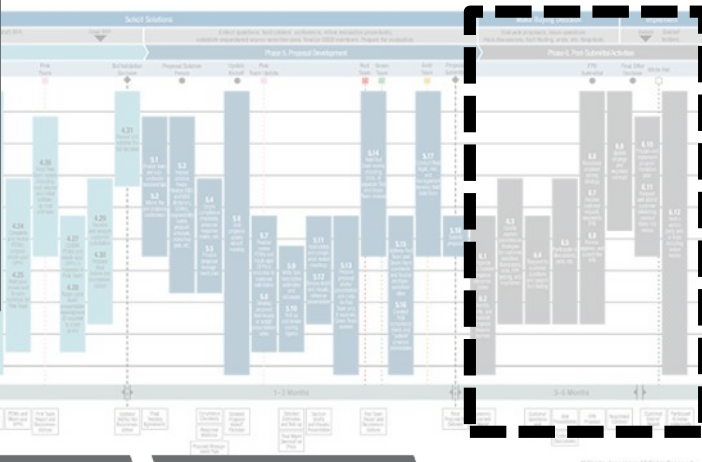
**6.9** Update strategy and negotiate contract

**6.10** Prepare and implement program transition plan

**6.11** Request and attend customer debriefing; conduct White Hat review

**6.5** Participate in discussions, orals, etc.

**6.12** Hold a victory party (win or lose) including review teams





## Decision Gates Answer Critical Questions

No.	Phase	Gate	Questions
0	Market Segmentation	Campaign/ Marketing	<i>Is market niche congruent with goals in strategic plan?</i>
1	Long-Term Positioning	Interest	<i>Does opportunity merit expending resources to research and assess it?</i>
2	Opportunity Assessment	Pursuit	<i>Should we commit resources to developing capture plan and influencing customer to prefer our solution?</i>
3	Capture Planning	Preliminary Bid	<i>Have capture activities positioned us favorably enough with customer to justify planning proposal?</i>
4	Proposal Planning	Bid Validation	<i>Is opportunity still worth pursuing and proposal worth preparing, considering final details of RFP?</i>
5	Proposal Development	Proposal Submittal	<i>Should we submit completed proposal? Is programmatic risk justified by probable financial reward?</i>
6	Post-Submittal Activities	Final Offer	<i>After negotiations, is programmatic risk still justified by financial reward considering terms of contract?</i>



## Opportunity Specific Key Questions



**Is it real?**

**What is the schedule?**

**What is the budget?**

**Can we win?**

**How will it be funded?**

**Do we want to?**

**Can we provide it?**

**What is it?**

**Where will it take us?**

**Will the customer buy from us?**





## Other Opportunity Decision Gate Questions

Who have you talked to?

When and where did you talk to them?

What did you learn?

Have you read key customer documents?

What is their acquisition strategy? Can we shape it?

Who will be the decision makers?

What are the key issues the procurement will turn on?

What are the 5 critical actions we have to take to improve Pwin?

What is our solution approach tied to their mission and issues?

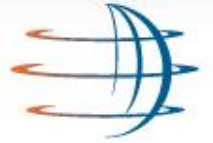
What is the PTW? Can we get there?

Who is competing and what will their offer be?

What will it cost to win?

Do we have the people to win?

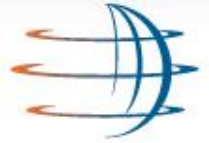
*Asking the right questions at the right time throughout the process must be the leadership team's responsibility. Only by focusing on the key questions can we increase Pwin continuously as part of the competition.*



## The Two Essential Questions

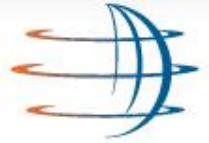
**Do we have the capability to deliver a solution that solves the customer's main mission issue or problem with a price they will accept?**

**Do we have the credibility to deliver based on relevant experience and past performance?**



## Marketing/Campaign Decision Questions

Category	Questions
<b>Market Overview</b>	<ul style="list-style-type: none"> <li>✓ Have we defined a specific product or service we will provide?</li> <li>✓ Do we know typical customers?</li> <li>✓ Have we forecasted size of the market segment?</li> </ul>
<b>Competitive Landscape</b>	<ul style="list-style-type: none"> <li>✓ Have we identified competitors operating in the segment?</li> <li>✓ Do we have qualifications, people, and facilities to enter the market?</li> </ul>
<b>Fit with Strategic Plans</b>	<ul style="list-style-type: none"> <li>✓ Does the investment required fit with our plans?</li> <li>✓ Will contracts in this segment contribute to desired capabilities?</li> <li>✓ Does our research support a favorable business case for entering the market segment?</li> </ul>



## Interest Decision Questions

Category	Questions
<b>Opportunity</b>	<ul style="list-style-type: none"> <li>✓ Is the opportunity real and funded?</li> <li>✓ Do we know the potential project owner's perception of us?</li> </ul>
<b>Fit</b>	<ul style="list-style-type: none"> <li>✓ Does this opportunity support our strategic, annual operating, account, or marketing plans?</li> </ul>
<b>Positioning</b>	<ul style="list-style-type: none"> <li>✓ Does the customer know we are considering this opportunity?</li> <li>✓ Are we an incumbent?</li> <li>✓ If not, have we been actively calling on the prospect?</li> </ul>
<b>Customer Mission</b>	<ul style="list-style-type: none"> <li>✓ Do we thoroughly understand the customer's mission?</li> </ul>
<b>Competition</b>	<ul style="list-style-type: none"> <li>✓ Do we know who potential competitors are likely to be?</li> <li>✓ Can we team with a competitor if necessary?</li> <li>✓ Are there alternatives to our likely solution?</li> </ul>



## Pursuit Decision Questions

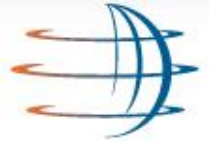
Category	Questions
<b>Business Case</b>	<ul style="list-style-type: none"> <li>✓ Do we have adequate business development resources to aggressively develop the opportunity?</li> <li>✓ Are there acceptable profit margins or other strategic reasons for wanting to win?</li> <li>✓ Does the opportunity conflict with other contracted or expected work?</li> </ul>
<b>Decision-Makers, Issues/Hot Buttons</b>	<ul style="list-style-type: none"> <li>✓ Do we know the key decision-makers and their issues and hot buttons?</li> <li>✓ Do the key decision-makers know us?</li> </ul>
<b>Contractor Role and Responsibilities</b>	<ul style="list-style-type: none"> <li>✓ Do we have a clear understanding of our anticipated role?</li> <li>✓ Are there any potential conflicts of interest for us?</li> </ul>
<b>Competition</b>	<ul style="list-style-type: none"> <li>✓ Have we identified probable competitors?</li> </ul>
<b>Competitive Position</b>	<ul style="list-style-type: none"> <li>✓ Do customer requirements match our competencies?</li> <li>✓ Have we established a price to compete?</li> <li>✓ Do we have a baseline solution aligned to the price to compete?</li> </ul>





## Preliminary Bid Decision Questions

Category	Questions
<b>Contract Schedule</b>	✓ Do we have a clear understanding of the deliverables and schedule?
<b>Evaluation Process</b>	✓ Are we sure of the evaluation process to be used?
<b>Competition</b>	<ul style="list-style-type: none"> <li>✓ Do we know the customer's perception of competitors?</li> <li>✓ Has an objective bidder comparison been completed?</li> </ul>
<b>Subcontracting</b>	✓ Do we have firm commitments from needed teammates?
<b>Past Performance</b>	✓ Do we have strong, relevant past performance?
<b>Management</b>	✓ Does our management approach provide added value?
<b>Technical</b>	✓ Does our technical solution provide added value or discriminators?
<b>Discriminators, Themes</b>	<ul style="list-style-type: none"> <li>✓ Are our discriminators unique and important to the customer?</li> <li>✓ Can the customer justify selecting us based on our discriminators and cost?</li> </ul>
<b>Pricing to Win</b>	✓ Has a price to win been determined, and is it acceptable to management?
<b>Opportunity Status</b>	<ul style="list-style-type: none"> <li>✓ Is the customer adhering to the expected schedule?</li> <li>✓ If not, why not, and what does that tell us about the opportunity?</li> </ul>



## Bid Validation Decision Questions

Category	Questions
<b>RFP Analysis</b>	<ul style="list-style-type: none"> <li>✓ Are announced RFP terms as anticipated and still acceptable?</li> <li>✓ Does the RFP show evidence of influence by competitors?</li> <li>✓ Based on published evaluation criteria, can the customer justify selecting us?</li> </ul>
<b>Solution</b>	<ul style="list-style-type: none"> <li>✓ Are technical requirements in the RFP what we anticipated?</li> <li>✓ Is our technical approach verified as acceptable to the customer?</li> <li>✓ Are teammate roles clearly defined and formally agreed?</li> </ul>
<b>Proposal Readiness</b>	<ul style="list-style-type: none"> <li>✓ Are the proposal schedule, budget, outline, and compliance checklist complete?</li> <li>✓ Is the proposal team identified?</li> <li>✓ Has a draft executive summary been prepared?</li> <li>✓ Has the price to win been updated based on the latest competitive intelligence and RFP?</li> <li>✓ Is our preliminary, bottom-up cost estimate consistent with the price to win?</li> <li>✓ Can the solution be profitably delivered at the price to win?</li> </ul>
<b>Issues</b>	<ul style="list-style-type: none"> <li>✓ Have all our internal issues been addressed and resolved?</li> </ul>



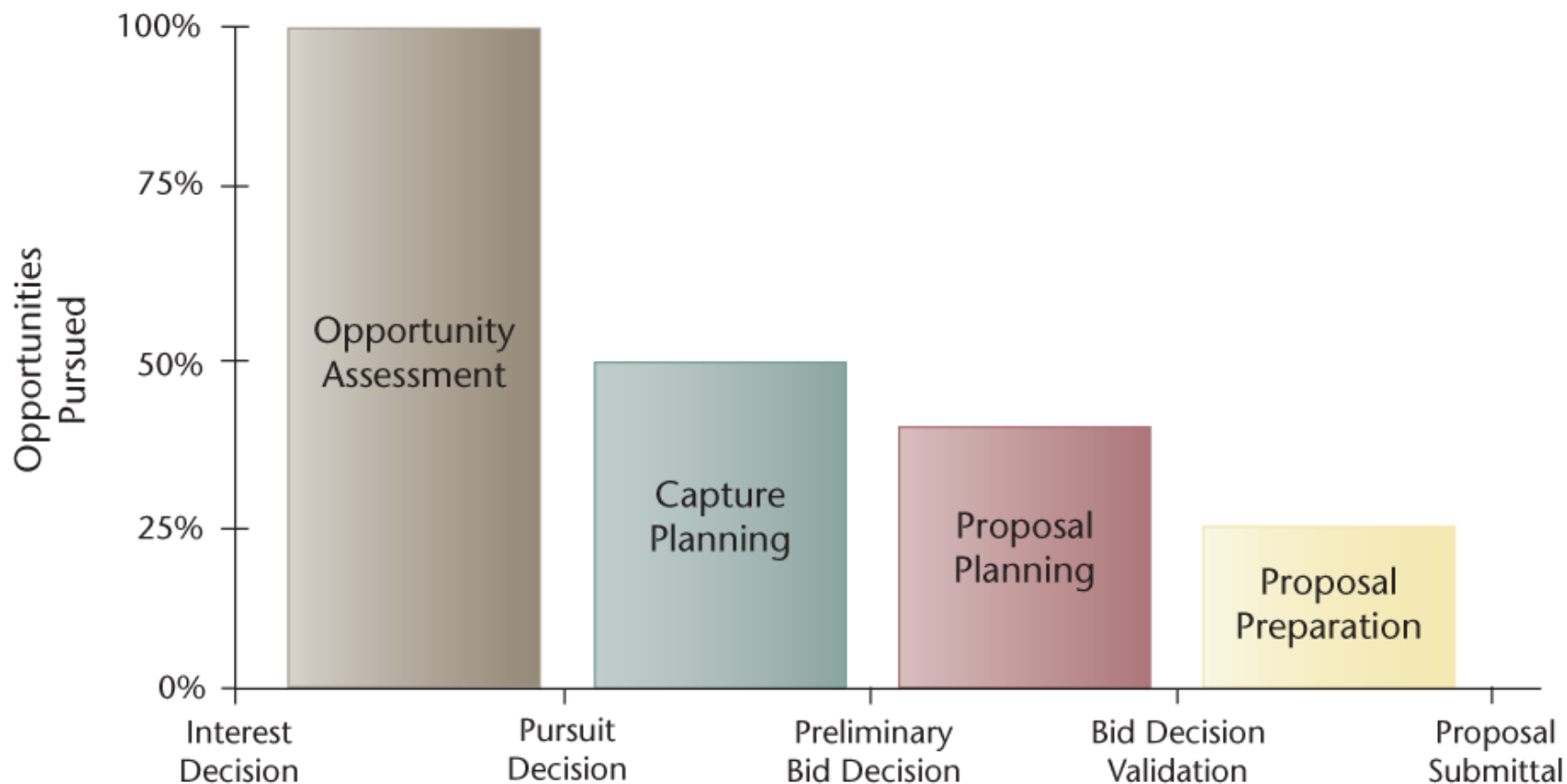
## Proposal Submittal Decision Questions

Category	Questions
<b>Our Proposal</b>	<ul style="list-style-type: none"> <li>✓ Is our proposal compliant, responsive, competitive, and priced to win?</li> <li>✓ Does our proposal meet corporate quality standards?</li> </ul>
<b>Risk Assessment</b>	<ul style="list-style-type: none"> <li>✓ Are there any unresolved elements of risk to us that could preclude submitting the proposal?</li> <li>✓ Will the proposal be evaluated as being low risk to the customer?</li> </ul>
<b>Negotiation</b>	<ul style="list-style-type: none"> <li>✓ Is the contract likely to be awarded without negotiation? Are we prepared to accept this?</li> <li>✓ If negotiations occur, do we know who in the customer organization will be leading them?</li> <li>✓ Is the customer under any constraints (e. g., time) that we can leverage?</li> <li>✓ Has our negotiating team been identified?</li> <li>✓ Is our negotiating position clearly defined and agreed to by senior management?</li> </ul>
<b>Transition</b>	<ul style="list-style-type: none"> <li>✓ Is our project manager ready to begin delivery immediately upon award?</li> </ul>



# Decision Milestones

## Create Opportunity “Funnel”

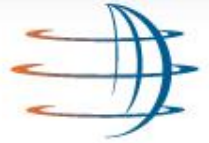




## Let's Talk Shaping...

- Two types of shaping in our business
  - Market
  - Opportunity
- Different strategies for each
- Common goals for each
  - Favored position
  - Out deliver and out maneuver competition
- Complex and well coordinated actions required
- Dependent on strategic and annual operating plan





## Market Shaping....



**Where are customers going  
and how are they going?**

**Who do we follow? Who do  
we abandon?**

**What will they want?**

**Can we deliver?**

**What will we deliver?**

- Detect nascent trends.
- Develop alignment campaign. Assign Commander.
- Select market segment to pursue.
- Develop a vision for a set of intractable customer problems.
- Position as corporate and individual experts in key emerging areas.
- Develop positioning strategy with specific actions and investments.
- Target customer visionaries and transformational leaders.
- Be visible at symposia, in the media, with experts.

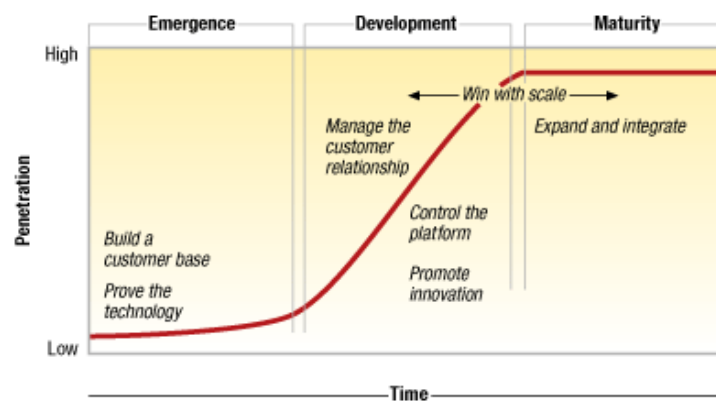


## Market Shaping...The Baseline Model Still Applies

- Be on the leading edge
- Seize the initiative
- Push, pull, and tug
- Drive direction with customers, partners, technology firms, and experts
- Be aggressive

EXHIBIT 4

### The three stages of market evolution



### Examples

Cyber

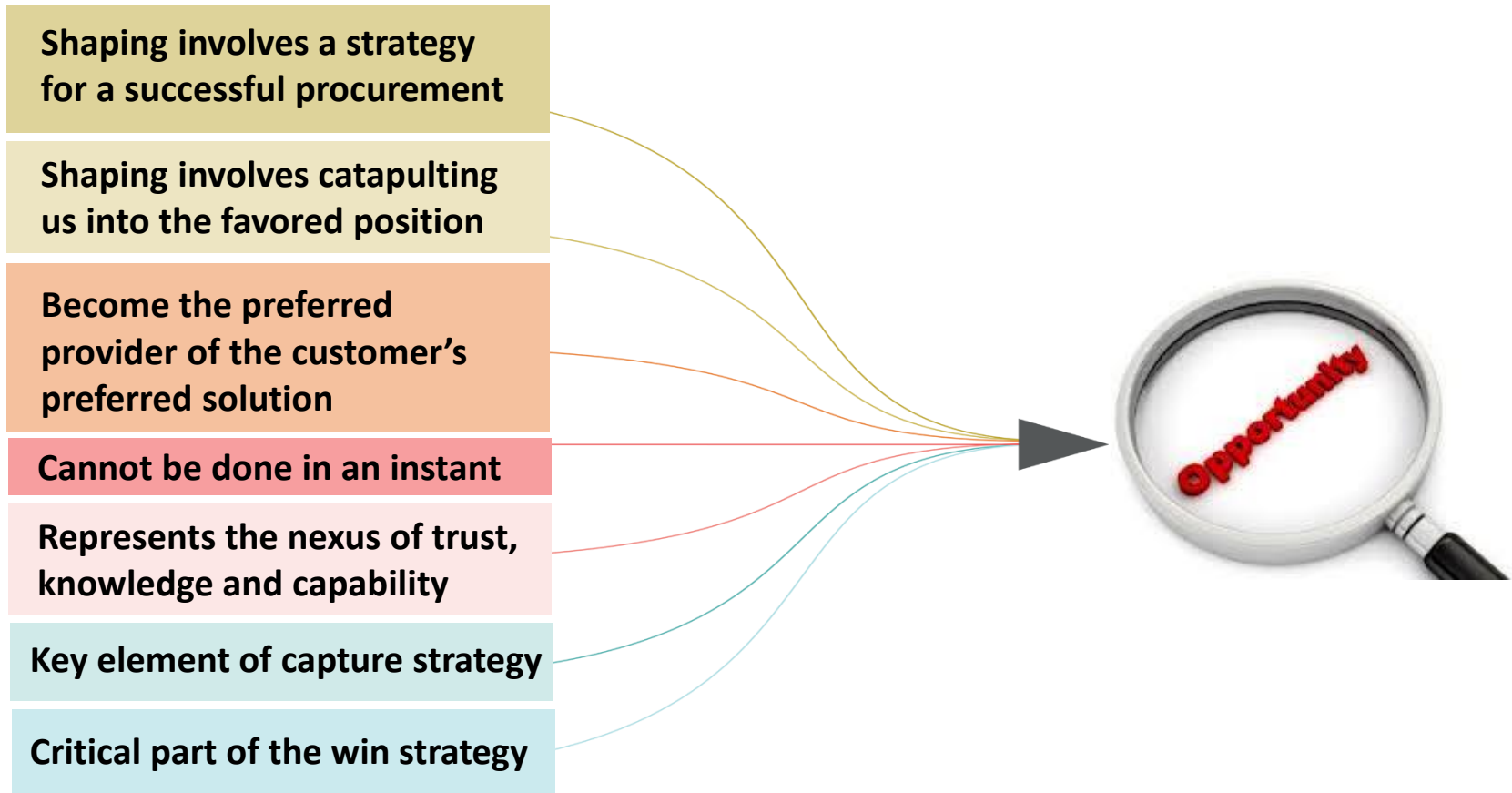
Big Data

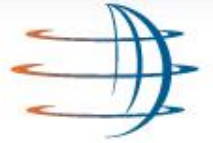
Cloud computing

Where were you?



## Opportunity Shaping....

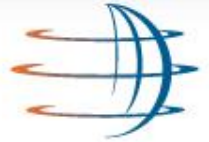




## Opportunity Shaping Has Many Paths....

- White papers on requirements, solution tradeoffs, risks, RFP structure, evaluation criteria, work content, cost drivers, and management approaches help shape opportunities
- Conversing with the customer execution team
- Befriend the acquisition crew in charge
- Craft strategies to make the customers heroes





## Opportunity Shaping Has Risks....

Make sure the customer(s) welcome suggestions and white papers

Do not write requirements for anybody. Merely suggest

Do not suggest total cost profiles. Deal with drivers only

Do not take any material from customers if offered

Always be on the right ethical side

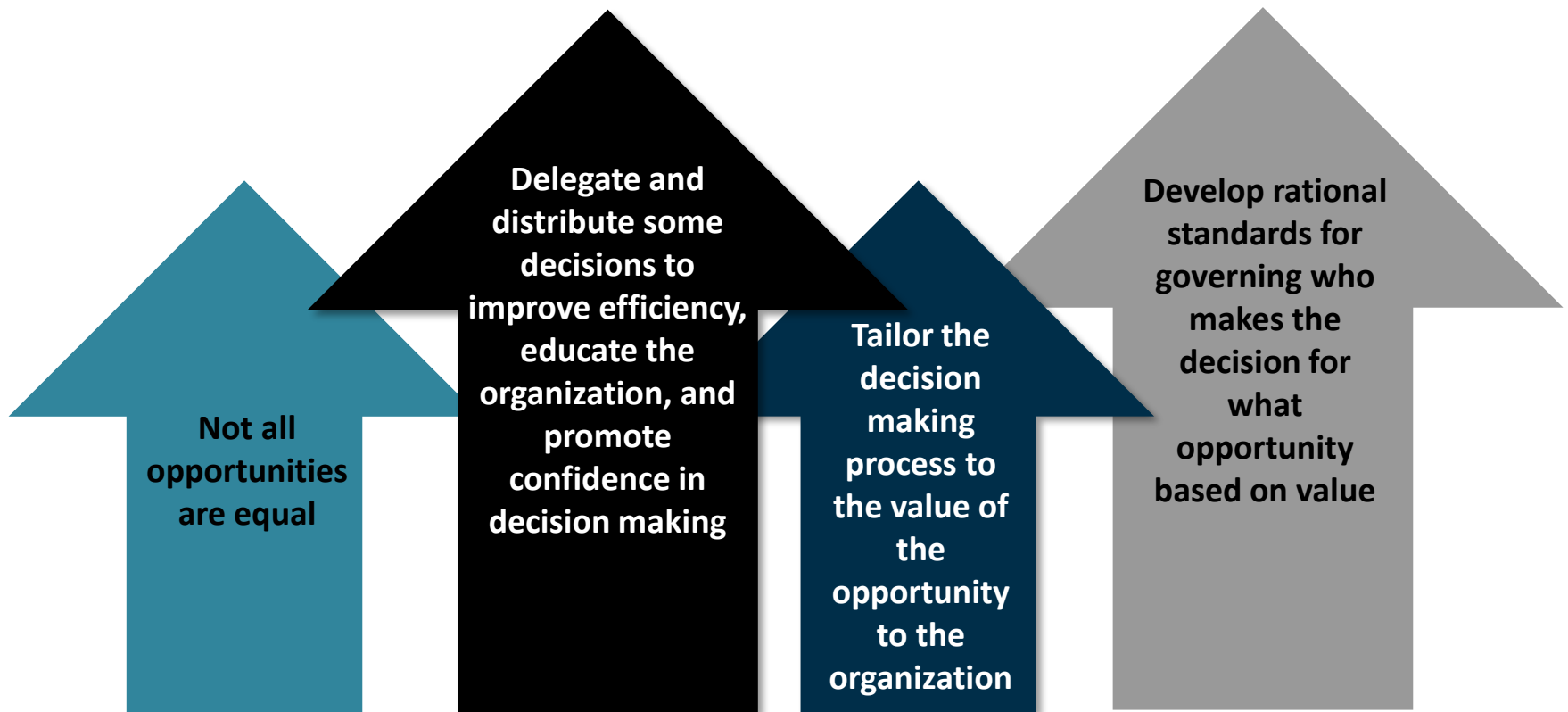
But don't be afraid to be a good partner







# Thresholding and Tailoring





# Thresholding and Tailoring Notional Approach

Decision Maker	Bid Review Group	\$ Value of Opportunity or B&P
President	Corporate	> \$50M or >\$150K B&P
Business Unit VP	Business Unit	>\$10M or > \$50K B&P
Business Unit Division Director	Business Unit Division	>\$1M or > \$25k B&P
Product or Service Area Manager	Product or Service Area Manager	< \$1M or < \$25K B&P



# Bid Review Group Notional Concept

Bid Review Group	Lead	Members
Corporate	President or VP Business Development (BD)	President, VP BD, Business Unit VPs, VP Contracts, VP Finance
Business Unit	Business Unit VP	Business Unit VP, Business Unit Director BD, Business Unit Director Contracts, Business Unit Director Finance
Business Unit Division	Business Unit Division Director	Business Unit Division Director, Business Unit BD Representative, Key Functional Managers, Contracts Representative, Finance Representative
Product or Service Area Manager	Product or Service Area Manager	Product or Service Area Manager (one on one)



# Consistency for Effectiveness

Develop rational standards for governing who makes the decision for what opportunity based on value.

Use templates and notional timelines for decision gate windows pre-RFP.

Tailor templates for each threshold by mandatory vs optional slides.

For opportunities <\$10M use abbreviated template that still answers critical questions and enables effective decision based on Pwin and cost (investment).

Try to group like decisions (Interest, Pursue, Preliminary Bid)

Bid Validation within 48 hours of RFP receipt

Set standard time for decision gates (Corporate Tuesdays at 10 am, Business Unit Thursdays at 3 pm, etc)

Have a BD coordinator assigned at each level to plan and coordinate the event

Publish docket in advance





# Final Decision Gate Thoughts

The emphasis is on decision (proceed, stop, defer with conditions)

Establish the rule set and set expectations for following the rules

Keep the process simple, effective, and regular

Focus on Pwin, cost to win, and actions needed to win

A good capture plan forms the basis for a good decision gate briefing

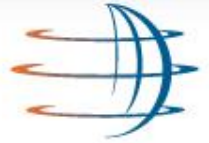
Develop a set of simple, rational BD metrics and review them quarterly





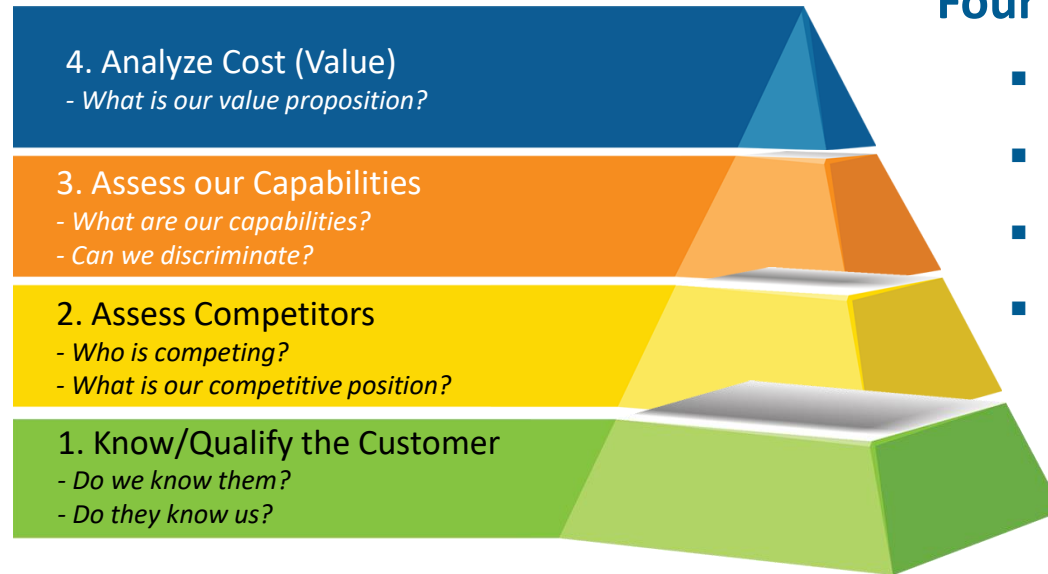
# Business Capture





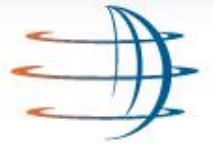
# Capture Planning Should Improve Our *Win Probability*

$P^{Win}$

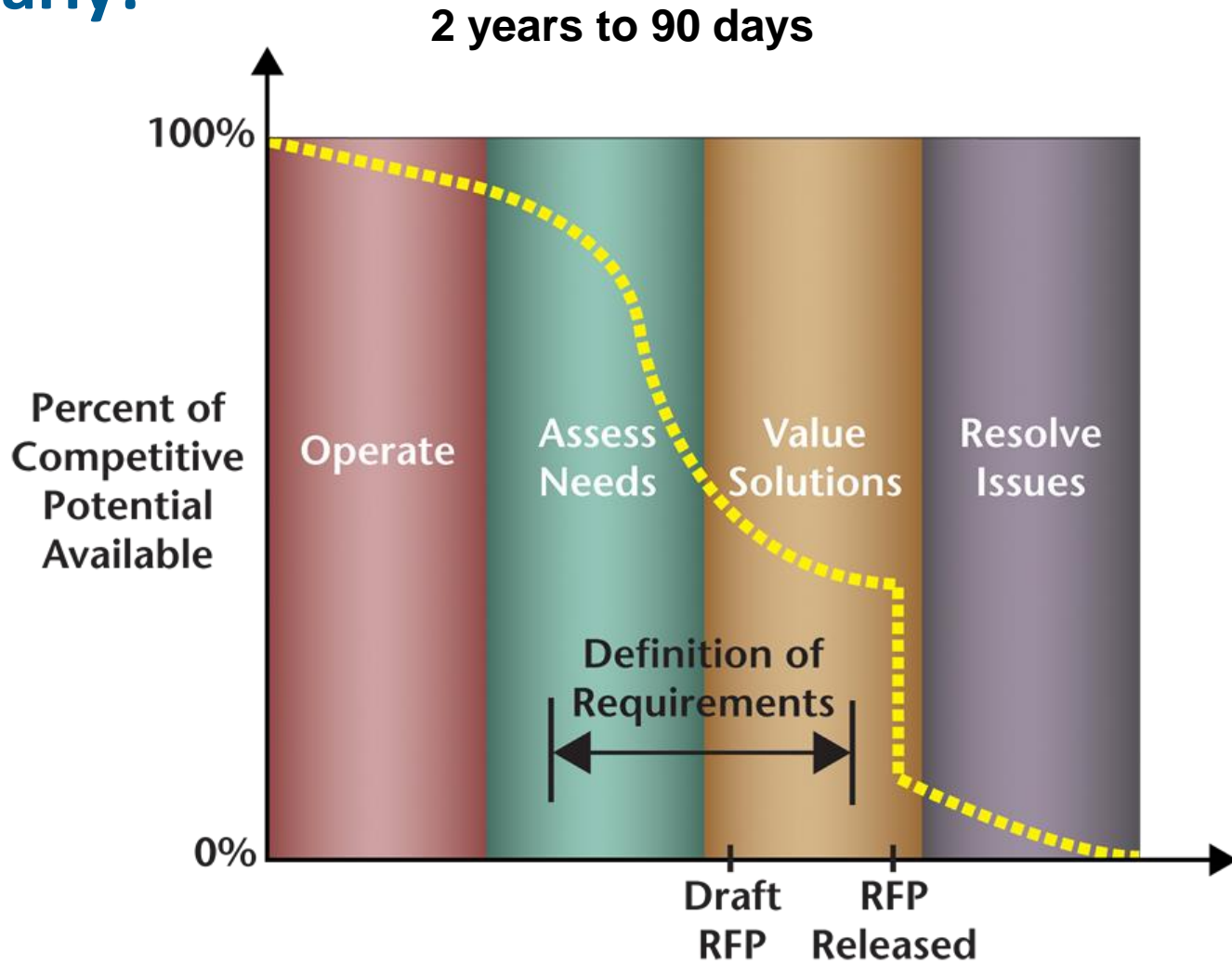


## Four Cs in Probability of Winning

- Customer
- Competitor
- Capabilities
- Cost (Value)



# Start Early!





## Seven Attributes Agency Decision Makers Value

- ✓ Experience
- ✓ Expertise
- ✓ Value
- ✓ Customer Service
- ✓ Trustworthiness
- ✓ Innovation
- ✓ Employee Care



## Know the Customer Decision-Makers

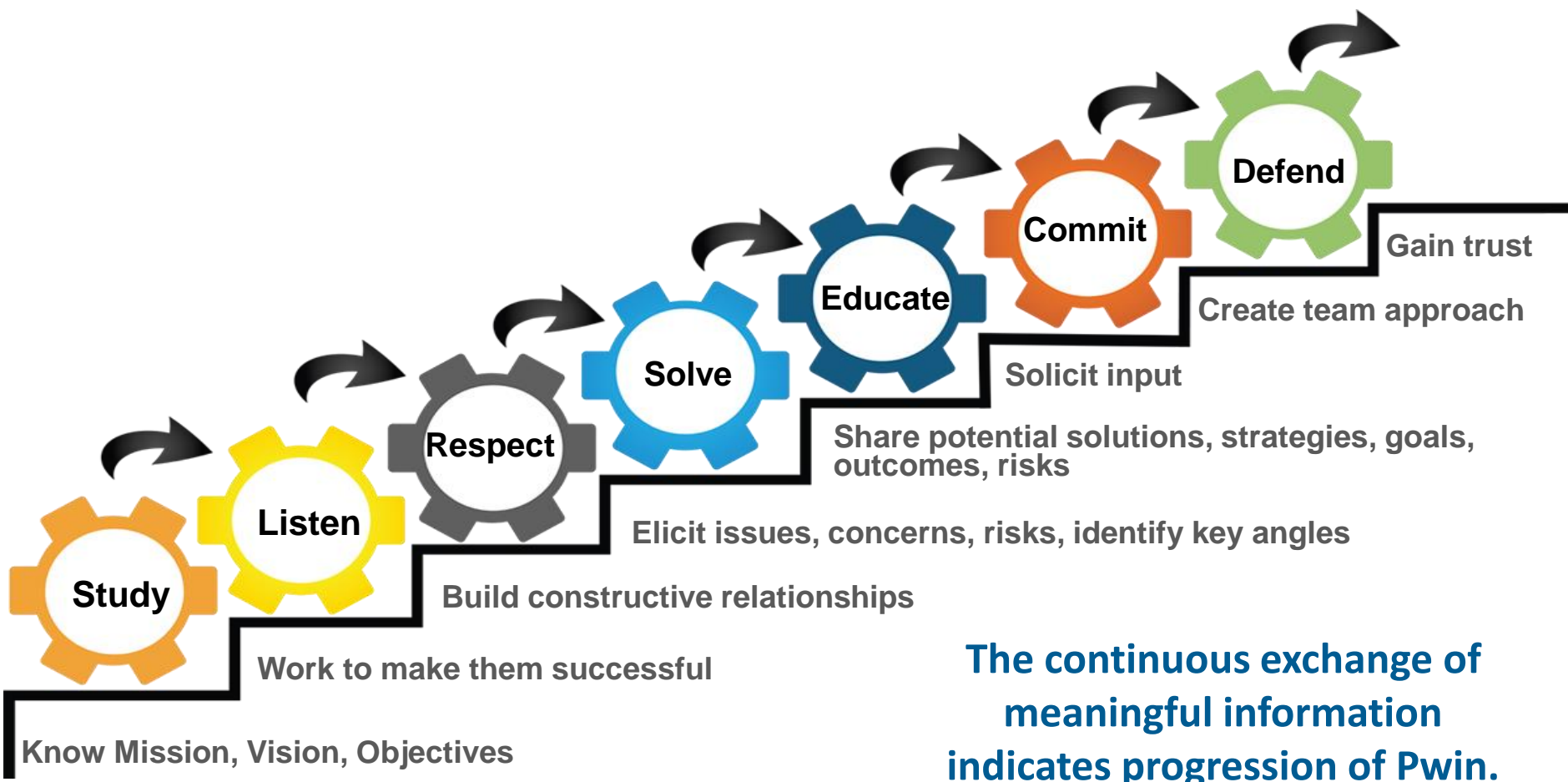
1. Identify influencers and key decision-makers
2. Define their role in the company and in the buying decision
  - Financial buyer
  - Technical buyer
  - Leadership stakeholder
3. List their primary and secondary “hot button” issues
4. Get to know them
  - One-on-one meetings - listening
  - Events, demos, and conferences
  - Social media, research
  - Networking





# Winning the Customer: Get Them Phase

*Continuous and effective communication Wins the Customer*





# Winning the Customer: Keep Them Phase

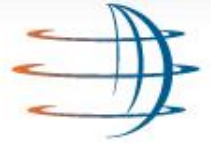
*Frequent exchange of constructive ideas Keeps the Customer*





# Customer Intelligence Identifies Issues and Hot Buttons





## Federal Rules (FAR 15)

# Encourage Exchanges with Industry

### Permitted Topics

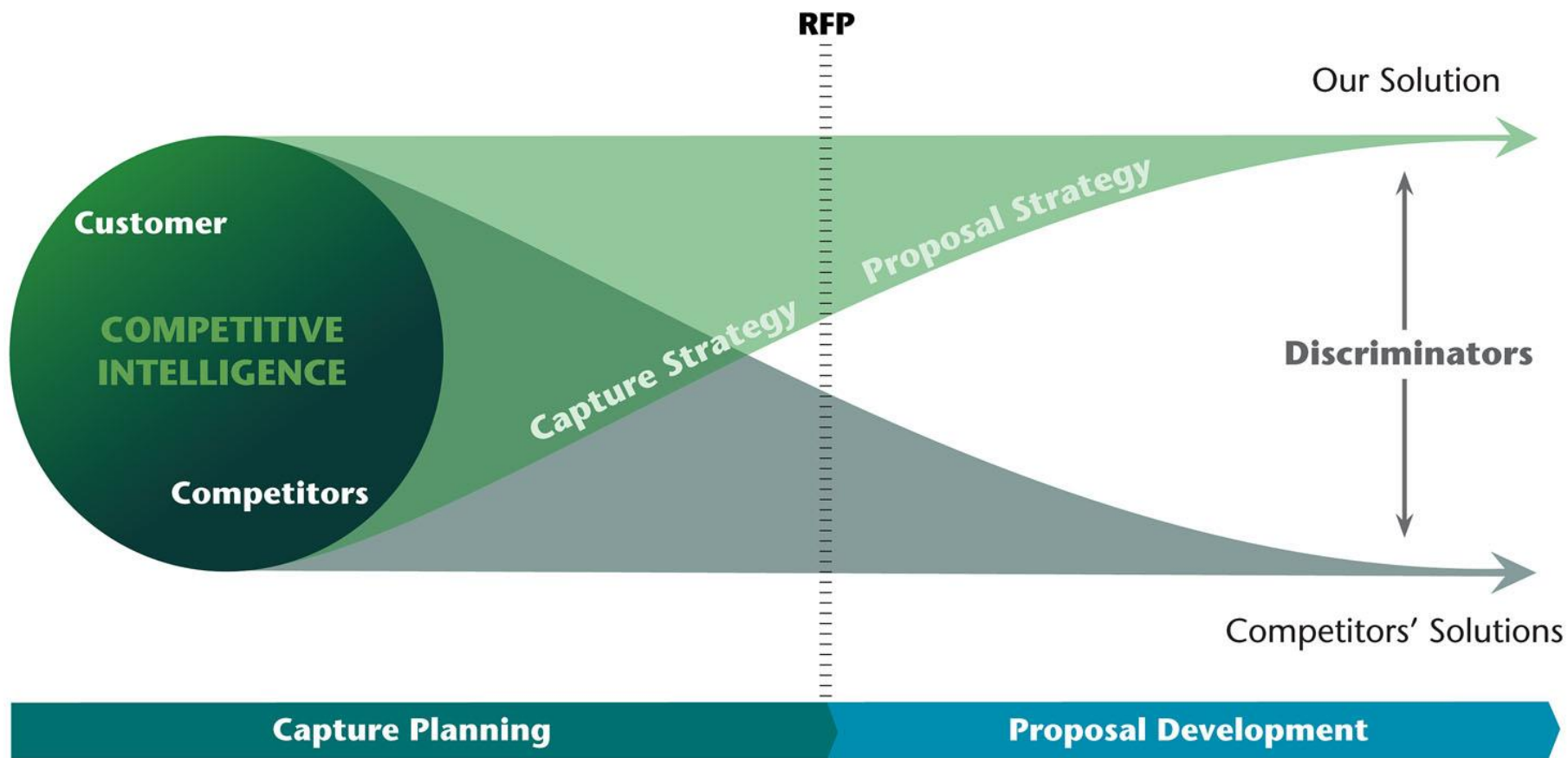
- Contract type
- Terms and conditions
- Acquisition schedule
- Feasibility of requirements
- Statements of work
- Data requirements
- Proposal instructions
- Evaluation criteria
- Past performance
- Reference documents
- Industry concerns

### Suggested Techniques

- Industry conferences
- Public hearings
- Market research
- One-on-one meetings
- Presolicitation notices
- Draft RFPs
- RFIs
- Presolicitation conferences
- Site visits



# Gaining Competitive Separation







# The Path to Victory





# How do we do business capture?

## Capture Plan

Prepared by:  
For Opportunity:  
Last Updated:

Interest Decision:	Yes	No	NA	mm/dd/yy
Pursuit Decision:	Yes	No	NA	mm/dd/yy
Preliminary Bid Decision:	Yes	No	NA	mm/dd/yy
Bid Validation Decision:	Yes	No	NA	mm/dd/yy
Proposal Submittal Decision:	Yes	No	NA	mm/dd/yy

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### Gate Review Conventions

○ = Gate

- 1 = Interest Decision
- 2 = Pursuit Decision
- 3 = Preliminary Bid Decision
- 4 = Bid Validation Decision
- 5 = Proposal Submittal Decision

① B   ② D   ③ U   ④ U   ⑤ U

**Letter = Level of Detail**

- B = Basic
- D = Detailed
- U = Updated

**Examples:**

① B  
Indicates basic level content is expected at the first (Interest) gate review.

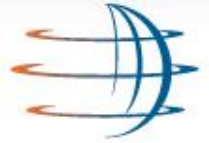
② D  
Indicates detailed level content is expected at the second (Pursuit) gate review.

The gate review symbols and conventions shown above are used in this template to suggest when each type of content might be added, improved, and updated in a capture plan. Tailor these suggestions to match needs and processes of your organization.

Insert this slide if reviewers are unfamiliar with these conventions.

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**Capture plans are essential for business capture success. Would you do a project for a customer without a Project Plan? Why would you do a Capture Project without a Capture Plan?**



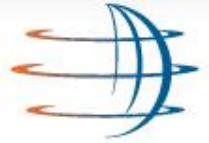
# Begin with Opportunity Description

**EXTERNAL ANALYSIS**  
**Opportunity Description**

Elements	Description
Customer	
Program Summary	
Key Requirements	
Deliverables	
Budget and Fiscal-Year Funding Profile	
Schedule	
Type of Contract	
Other: (Specify)	

1 B 2 D 3 U 4 U 5 U

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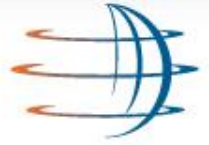
# Continue with Customer Profile

**EXTERNAL ANALYSIS**  
**Customer Profile**

<b>Organization and Key Personnel</b>	
<b>Purchasing or Buying Process</b>	
<b>Evaluation Process</b>	
<b>Buying History and Trends</b>	

1 B 2 D 3 U 4 U 5 U

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## Describe Issues and Hot Buttons

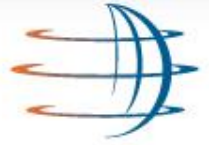
**EXTERNAL ANALYSIS**  
**Hot Button Issues**

Hot Button Issues	Background Information

2 D 3 U 4 U 5 U

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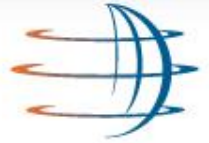
# Summarize Competitors' Backgrounds

**EXTERNAL ANALYSIS**  
**Competitor Intelligence – Competitor A**

<b>Market Approach and Position</b>	
<b>Products and/or Services</b>	
<b>Historical Pricing Patterns</b>	
<b>Business Development</b>	
<b>Customer Relationship</b>	
<b>Relevant Experience</b>	
<b>Past Performance</b>	

3 B 4 D 5 U

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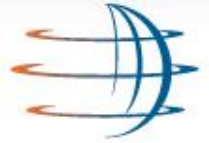
# Analyze Competitive Positions

**EXTERNAL ANALYSIS**  
**Competitor Intelligence – Competitor A**

Customer Perceptions	Strengths	Weaknesses	
	<ul style="list-style-type: none"> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> </ul>		<ul style="list-style-type: none"> <li>■</li> <li>■</li> <li>■</li> <li>■</li> <li>■</li> </ul>
Customer Issues	Available Solution	Discriminator	Gap

3 B 4 D 5 U

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## A Successful Capture Leader....



- Embraces process and discipline
- Creates and manages to a Blue Teamed Capture Plan
- Sets high expectations for the Capture Team
- Focuses every minute on increasing Pwin
- Leads by example
- Helps the Team succeed
- Makes the right actions happen
- Works always from a position of knowledge
- Recommends a No Bid when necessary

## **How Can My Company Get Affordable Help?**

*Use capture and proposal augmentation judiciously and leverage virtual support where you can.*





## Key Areas to Focus on for Help

Capture assessments

Proposal assessments

Compliance matrix development

Proposal outline development

Proposal management

Proposal writing and editing

Graphics support

Daily proposal management

Proposal storage and management (SharePoint)

Pink Team reviews

Red Team reviews

**Many services provided virtually or onsite as required.**





## Virtual Bid *and* Proposal Support

### Service Description

*Is your proposal team dispersed and having a hard time developing a winning proposal? Do you have limited resources but face competition from larger, more sophisticated competitors? Is your proposal team overwhelmed because of the number of opportunities you are trying to pursue?*

Whether you need to augment your existing proposal team or need someone to manage the entire proposal effort, Shibley can help. We have helped clients save time and money by providing virtual proposal support in these areas:

- **Proposal Management** – managing the entire proposal effort, from proposal compliance and schedule to final proposal delivery
- **Proposal Writing** – guiding your subject experts in writing sections or volumes, including management, technical, past performance, and cost
- **Proposal Bollerplate Development** – creating hard-hitting content

- **Proposal Graphics** – creating graphics from scratch or tailoring existing graphics
- **Desktop Publishing and Editing** – developing consistent formats; ensuring proper spelling, grammar, and punctuation

The benefits of engaging Shibley's qualified virtual resources are tremendous:

- Save on travel expenses
- Leverage technology investments
- Maintain your proposal information in a secure, virtual location (SharePoint)
- Ensure compliance with RFP requirements
- Let the experts manage the process
- Allow your internal resources to focus on their day jobs

Maximize the time and effort of your valuable technical or sales resources by outsourcing proposal management and development to Shibley, a cost-effective partner with resources available across the globe.

*We help you win business!*

### The Challenge

*Having all contributors to a proposal co-located is a luxury many smaller companies cannot afford. How do you effectively manage a proposal effort with a dispersed workforce?*

*How do you monitor the quality of proposal content to ensure compliance and customer focus?*

*How do you leverage your company's technical experience effectively in developing a proposal?*

### The Solution

*By partnering with Shibley's virtual proposal support team, you save on travel costs and gain the experience of proposal management professionals who know how to keep the project on task and on schedule.*

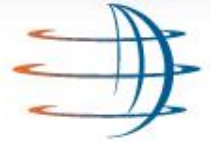
*Take advantage of experienced resources who understand the proposal process and bring years of proposal development experience and success to help your business win.*

*Our support is scalable. We can help you manage the proposal effort, augment your writing and production staff, conduct proposal reviews, create graphics, produce the final documents, and coach your team in these tasks. We can help you address large or small proposal efforts.*

### Contact Information

Info@shibleywins.com  
888.772.WINS(9467)

**We can provide services across the country from our HQ in Utah and increase Pwin without driving cost excessively.**



## Shibley VANTAGE Program

*Vantage: a. An advantage in a competition or conflict; superiority. b. A position, condition, or opportunity that is likely to provide superiority or an advantage.*



### Blended Shibley Solutions that Enable Winning

The Shibley VANTAGE program allows organizations of all sizes to gain access to Shibley's proven and documented best practices, processes, methodology, training curriculum, tools, templates, and experience gained over the past 40 years.

Shibley VANTAGE organizations build sustainable business capture capability that supports revenue generation goals and enhances win rates.

Shibley offers three levels of blended VANTAGE participation that are tailored to all companies—from small businesses just beginning to compete to mid-tier companies needing to improve win rates to large corporations committed to achieving the highest level of sustainable business development capability and maturity.

#### Tier 1: Adopter Organization

Small businesses or companies entering new markets gain an immediate competitive edge by adopting the Shibley process and associated training and tools. Within weeks—at a very affordable price—companies can begin to compete on a much more level playing field with larger competitors. This level of partnership eliminates the time and expenses of designing, developing, and documenting a business capture framework that is already available based on years of experience.

#### Tier 2: Adapter Organization

Mid-tier companies leverage their business development dollars by adapting Shibley's intellectual property and blending it with their existing business development systems. **Adapter Organizations** gain a well-established business development process tailored to their exact corporate culture and markets.

#### Tier 3: Advancer Organization

Large corporations team with Shibley to advance to the highest level of CMMI maturity in business development. As an **Advancer Organization**, these companies truly advance the arts and science of business development to create sustainable revenue generation.

Build a repeatable and sustainable business development capability by partnering with Shibley.

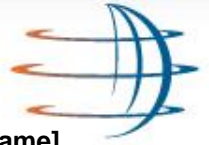
### Tier 1: Adopter Organization

Small businesses or companies entering new markets gain an immediate competitive edge by adopting the Shibley process and associated training and tools. Within weeks—at a very affordable price—companies can begin to compete on a much more level playing field with larger competitors. This level of partnership eliminates the time and expenses of designing, developing, and documenting a business capture framework that is already available based on years of experience.

**You can gain competitive advantage through a tailored small business approach.**

### Should your company become a Shibley VANTAGE organization?

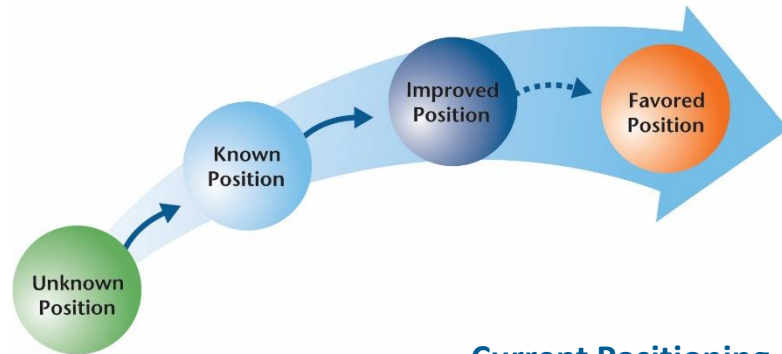
- Do you have limited resources but face competition from larger, more sophisticated competitors? and acquisitions? Do you need a "unified system" to increase win rates and efficiencies?
- Do you have an existing business development system that needs to be refreshed or re-engineered to meet new competitive pressures? • Are you committed to being the "best of the best?" Will working closely with Shibley as a VANTAGE Associate help you achieve your goal?
- Do you have multiple business development systems, approaches, and cultures resulting from mergers



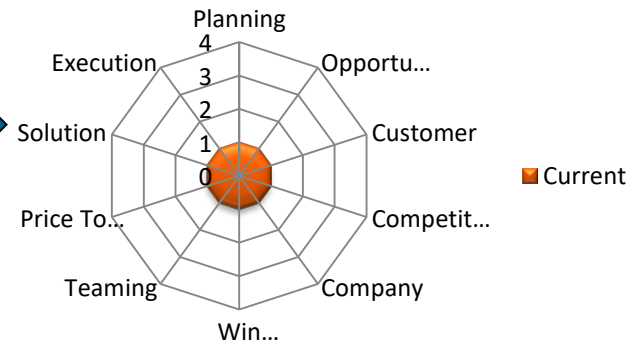
This *Capture Assessment Report* provides an unbiased, independent, professional view of the state of [Company Name] progress in positioning to win the [Opportunity Name]. Capture activities such as research, analysis, strategy development, and tactical execution move your company from an unknown position to a known position and to an improved or favored position prior to release of an RFP.

Capture Name:	
Assessors:	[Name] [Credentials] [Contact Information]

Shipleys Associates  
**Capture Assessment Report**  
*Measuring and Improving Your Capture Position*

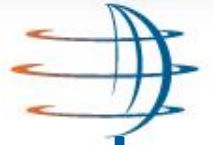


### Current Positioning

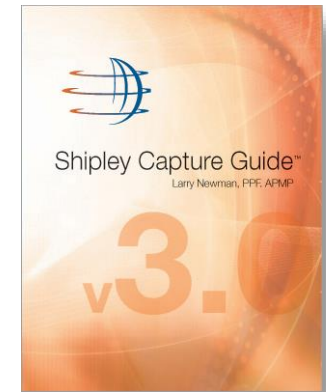
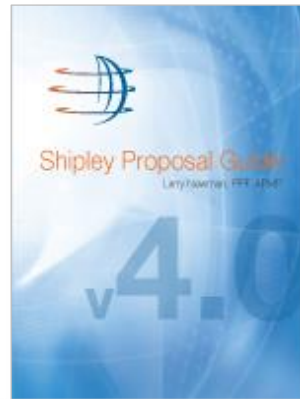
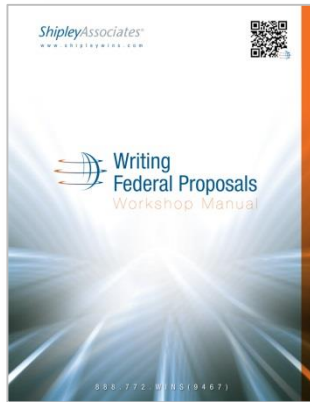


- Capture planning
- Opportunity knowledge and influence
- Customer knowledge and relationship
- Intelligence on the competition
- A realistic self-assessment of your own capabilities and qualifications
- An actionable set of win strategies
- A rational teaming approach
- A pricing strategy based on customer budget and competitive pressures
- A solution consistent with the pricing strategy
- A low risk program execution plan

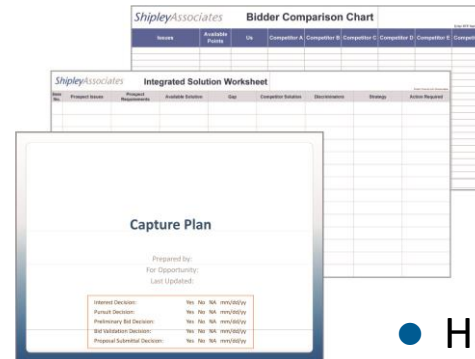




## Attend Shipley Workshops and Gain Knowledge and Tools



- Soft copy of tools and templates



- Hard copies of SMARTforms





## Final Thoughts: Plan for Success

Develop a business development strategy

Allocate appropriate resources to make it successful

Measure progress toward specific goals

Gain and keep discipline and leadership

Hire experts to support you internally and as consultants

**Thank you for participating!**