



Decision Gates and Color Team Reviews

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Gates Versus Reviews

Decision gates implement the opportunity funnel. Reviews improve pursuit of opportunities within it.

Gates vs. Reviews: What's the Difference?

Decision Gates

- ✓ Purpose: to **make decisions** regarding allocation or withdrawal of BD resources
- ✓ Led by executives
- ✓ Address business and strategic issues
- ✓ Limited outcomes (advance, end, or defer)
- ✓ Subordinates execute outcomes

Color Team Reviews

- ✓ Purpose: to **improve quality** of thinking and documentation
- ✓ Performed by management, staff, subject matter experts
- ✓ Address tactical and execution issues
- ✓ Wide variety of outcomes (qualitative and quantitative)
- ✓ Staff and peers execute outcomes

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>

Reviews Improve Pursuits

No.	Phase	Color Team Reviews
0	Market Segmentation	
1	Long-Term Positioning	
2	Opportunity Assessment	
3	Capture Planning	<ul style="list-style-type: none"> Blue Team: <i>Reviews initial capture planning, focusing on development of win strategy</i> Black Hat: <i>Predicts competitors' solutions to support strategy development and infuse proposal with competitive focus</i>

Reviews Improve Pursuits (continued)

No.	Phase	Color Team Reviews
4	Proposal Planning	
5	Proposal Development	<p data-bbox="531 592 1825 692"> Pink Team: <i>Reviews storyboards and mockups for compliance and execution of win strategy</i></p> <p data-bbox="531 749 1825 849"> Red Team: <i>Reviews proposal to predict scoring and improve effectiveness</i></p> <p data-bbox="531 906 1825 949"> Green Team: <i>Reviews pricing, consistency across volumes</i></p> <p data-bbox="531 1006 1825 1049"> Gold Team: <i>Reviews final proposal and price</i></p>
6	Post-Submittal Activities	<p data-bbox="531 1092 1825 1192"> White Hat: <i>Documents lessons learned to improve capture and proposal processes</i></p>

Every Milestone Fits a Timeline

Customer Milestones					Draft RFP ▼ Final RFP	Proposals Due ▼	Award ▼
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
Color Team Reviews				Blue Team Black Hat		Pink Team Red Team Green Team Gold Team	White Hat
Key Documents	<ul style="list-style-type: none"> Multi-year strategic plan 	<ul style="list-style-type: none"> Annual operating plan Marketing plan 	<ul style="list-style-type: none"> Opportunity analysis report 	<ul style="list-style-type: none"> Capture plan 	<ul style="list-style-type: none"> Capture plan Storyboards Mockups 	<ul style="list-style-type: none"> Storyboards Mockups Final draft proposal 	<ul style="list-style-type: none"> Proposal revision Lessons learned Contract

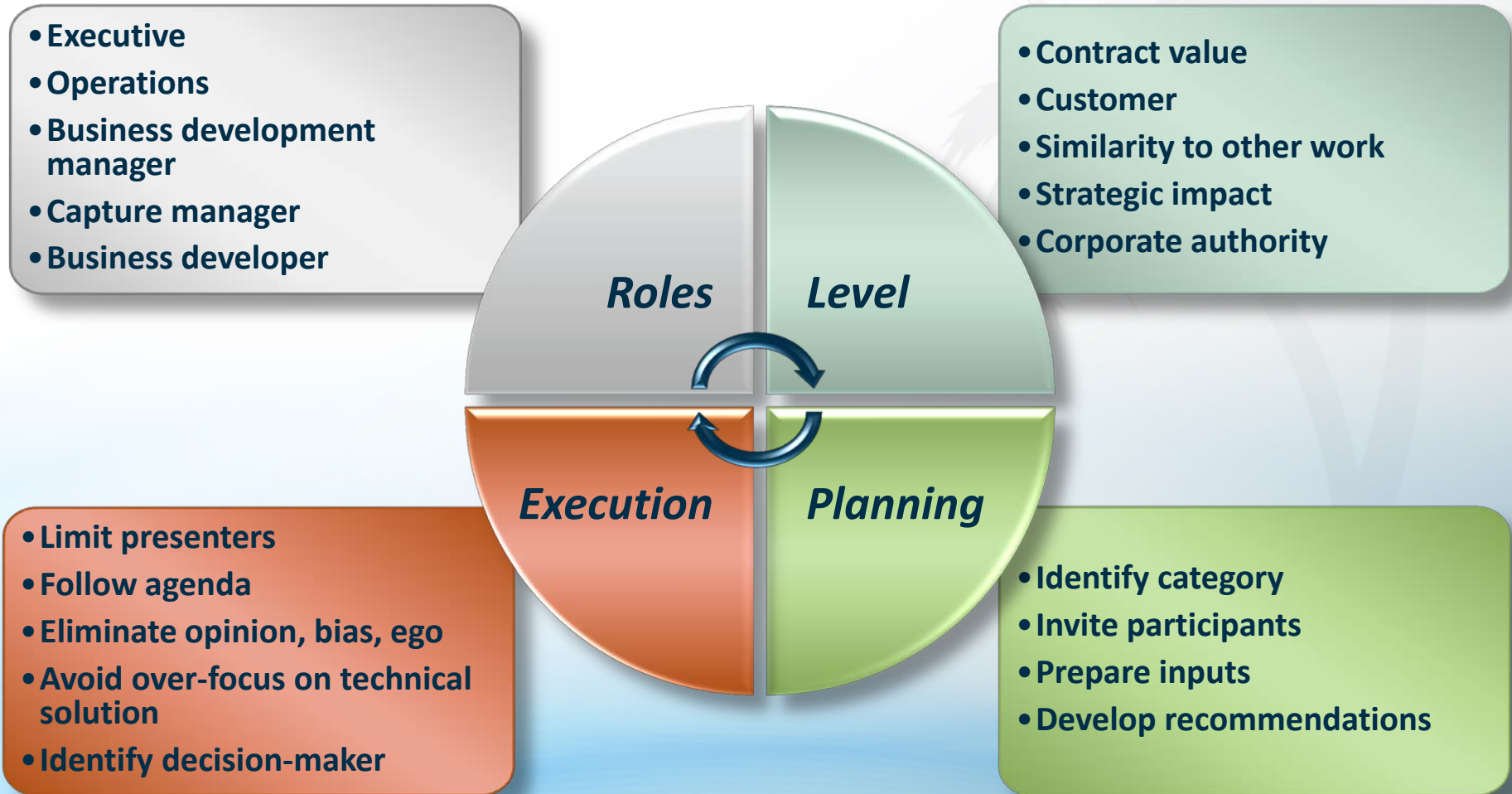


Decision Gates

Decision gates are business development milestones at which executives decide whether to advance an opportunity to the next phase or end pursuit.

Some persons are very decisive when it comes to avoiding decisions.

Good Decision Gates Are Structured



Understand Each Role

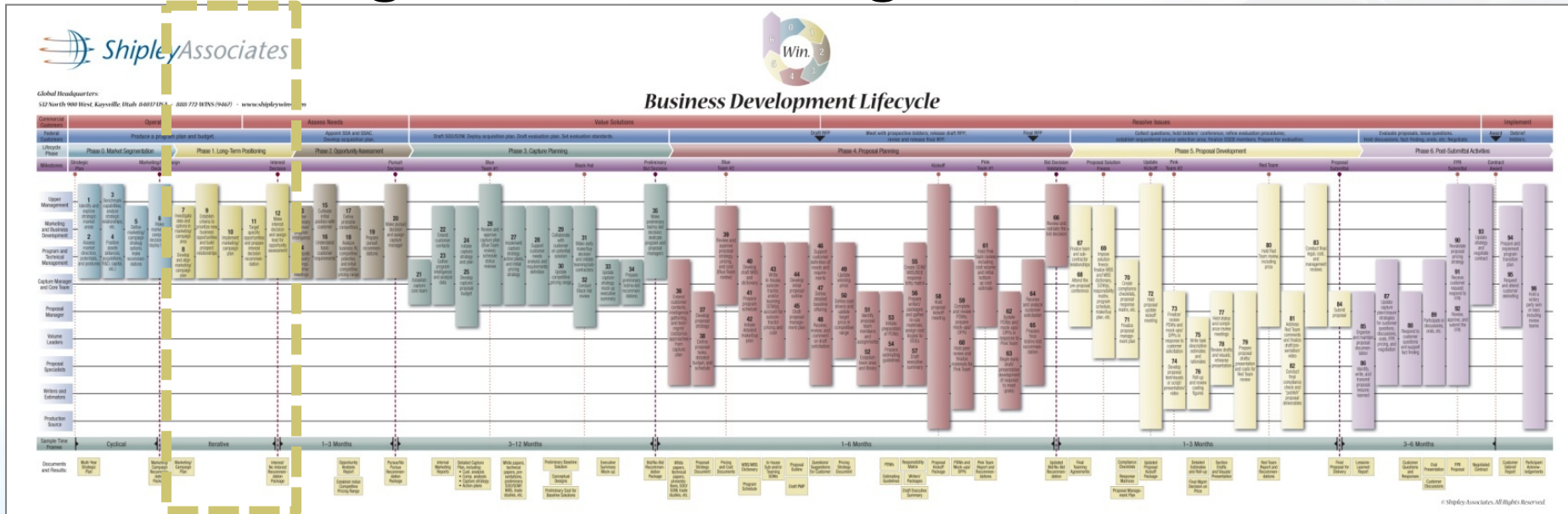
Role	Executive	Operations	Business Development Manager	Capture Manager	Business Developer
Primary Duties	<ul style="list-style-type: none"> • Define • Decide • Lead 	<ul style="list-style-type: none"> • Advise • Support 	<ul style="list-style-type: none"> • Assign • Monitor • Collaborate 	<ul style="list-style-type: none"> • Engage • Inform • Execute 	<ul style="list-style-type: none"> • Prospect
Tips for Success	<ul style="list-style-type: none"> • Know and support process • Communicate vision • Make gates a priority • Respond to facts 		<ul style="list-style-type: none"> • Be proactive • Cultivate market knowledge • Be open • Be honest • Involve others between gates 		

Gate 0: Marketing/Campaign Decision

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	0 Interest	1 Pursuit	2 Preliminary Bid	3 Bid Validation	4 Proposal Submittal	5 Final Offer
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The Marketing/Campaign Decision determines whether a potential market segment or customer fits your organization's strategic focus.

Phase 1: Long-Term Positioning



Decision to enter market

- Establish place in market
- Influence potential customers' perceptions
- Prospect for leads

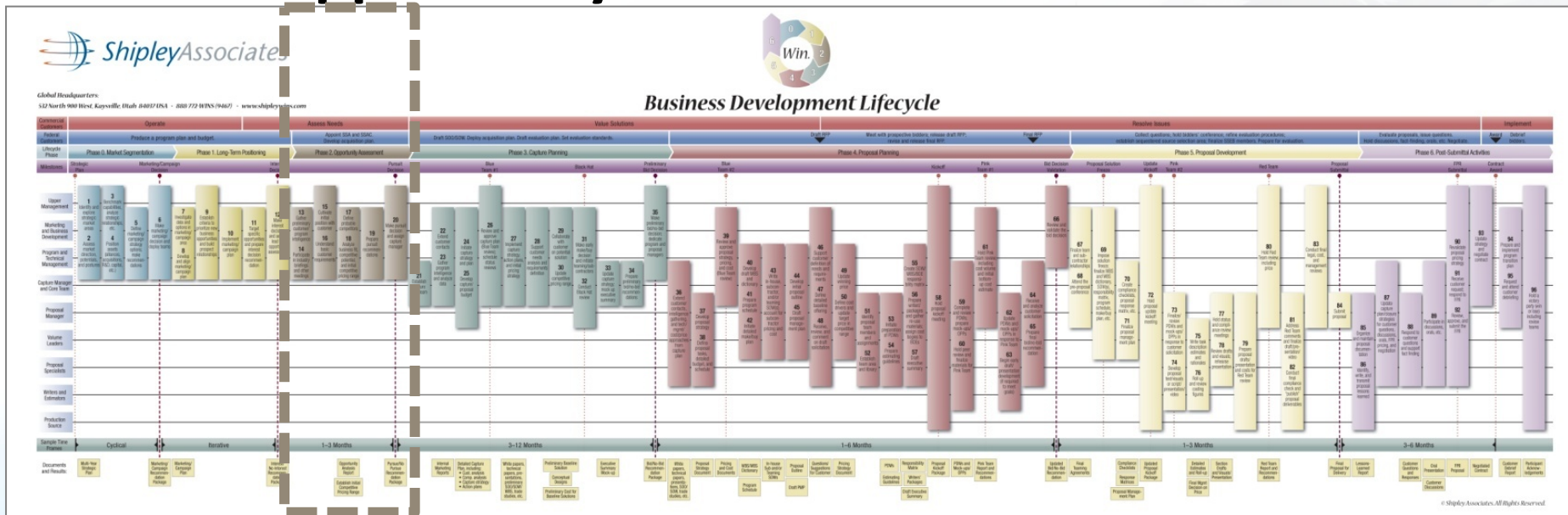
Decide specific opportunity is of interest

Gate 1: Interest Decision

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
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The Interest Decision verifies that an identified opportunity fits your organization's strategic direction and capability.

Phase 2: Opportunity Assessment



Decision to assess opportunity

- Research opportunity, customer, and competition to determine win potential
- Confirm alignment with capabilities and strategic direction

Decide to pursue opportunity

Gate 2: Pursuit Decision

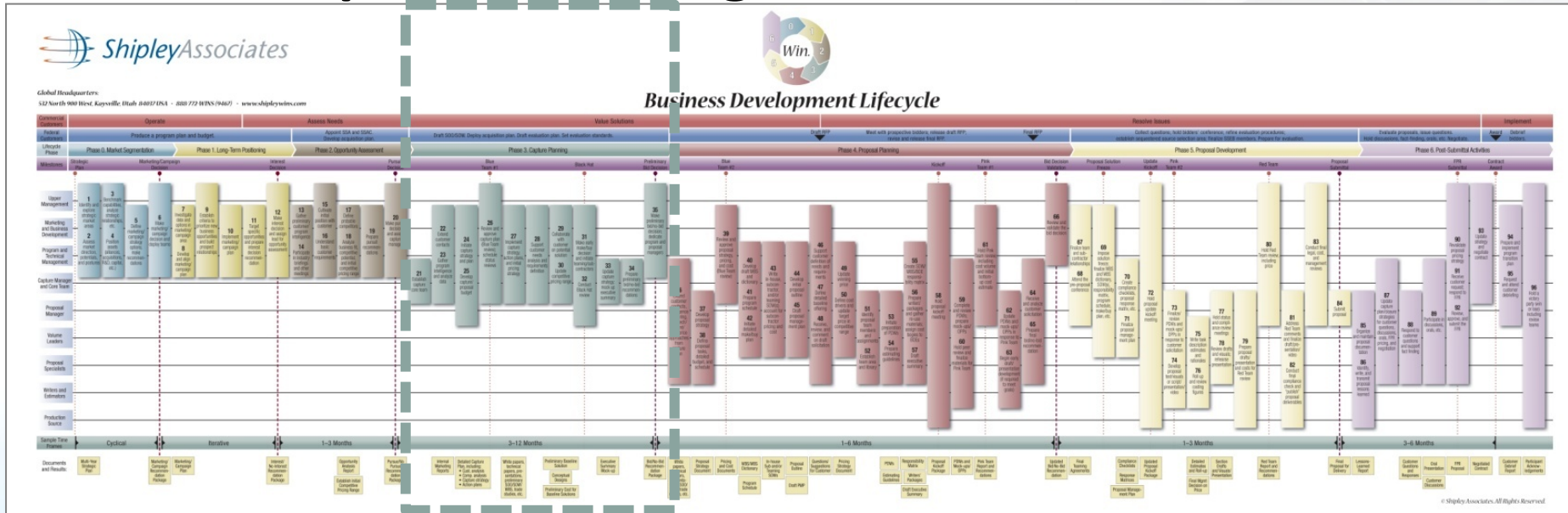
Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
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The Pursuit Decision analyzes customer, opportunity, and competitor intelligence to decide whether to advance to capture planning.

Pursuit Decision Questions

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

Phase 3: Capture Planning



Decision to pursue

- Prepare, review, and implement capture plan to influence customer
- Move from unknown to known to preferred position with customer

Decide to plan proposal

Gate 3: Preliminary Bid Decision

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
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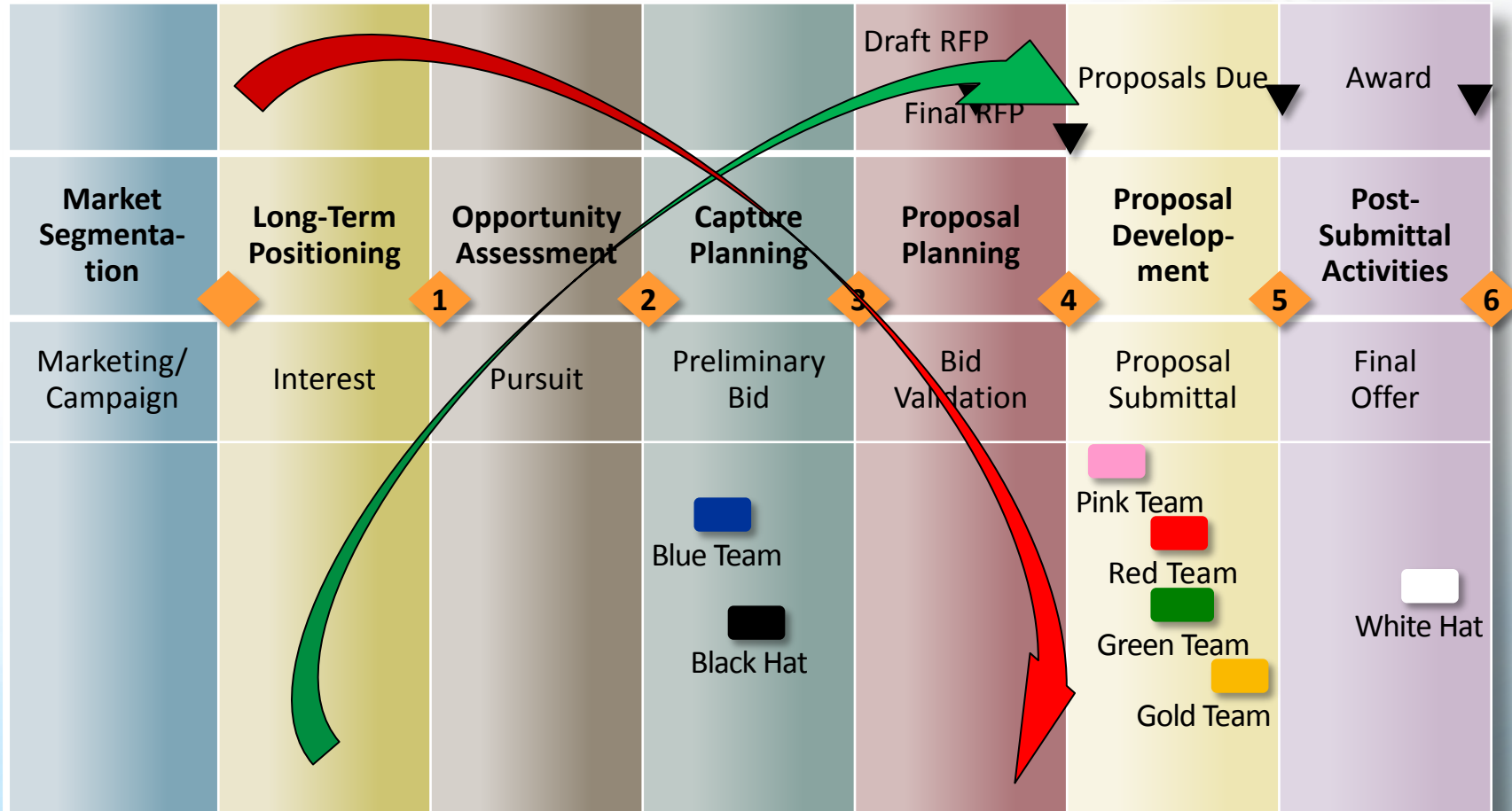
The Preliminary Bid Decision assesses win strategy, competitive position, technical solution, and price to win, determining whether to plan a proposal.

Capture Plan Evolves to Support Progression

Phase:	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal
Decision Gate:	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
Executive Summary		Basic	Detailed	Updated	Updated	Updated
External Analysis						
Opportunity Description	Basic	Detailed	Updated	Updated	Updated	Updated
Customer Profile		Basic	Detailed	Updated	Updated	Updated
Customer Issues and Hot Buttons		Basic	Detailed	Updated	Updated	Updated
Competitor Intelligence			Basic	Detailed	Updated	Updated
Our Competitive Position		Basic	Detailed	Updated	Updated	Updated
Bidder Comparison Chart			Basic	Detailed	Updated	Updated
Internal Analysis						
Our Estimate of Price to Win			Basic	Detailed	Updated	Updated
Our Technical/Management Solution		Basic	Detailed	Updated	Updated	Updated
Teaming and Subcontracting			Basic	Detailed	Updated	Updated
Strategy Development						
Leverage Our Strengths			Basic	Detailed	Updated	Updated
Mitigate Our Weaknesses			Basic	Detailed	Updated	Updated
Exploit Competitor Weaknesses			Basic	Detailed	Updated	Updated
Neutralize Competitor Strengths			Basic	Detailed	Updated	Updated
Action Plans						
Customer Contact Plan		Basic	Detailed	Updated	Updated	Updated
Intelligence Collection Plan		Basic	Detailed	Updated	Updated	Updated
Contingency Plan			Basic	Detailed	Updated	Updated
Solution Development Plan			Basic	Detailed	Updated	Updated
Customer Risk Management Plan			Basic	Detailed	Updated	Updated

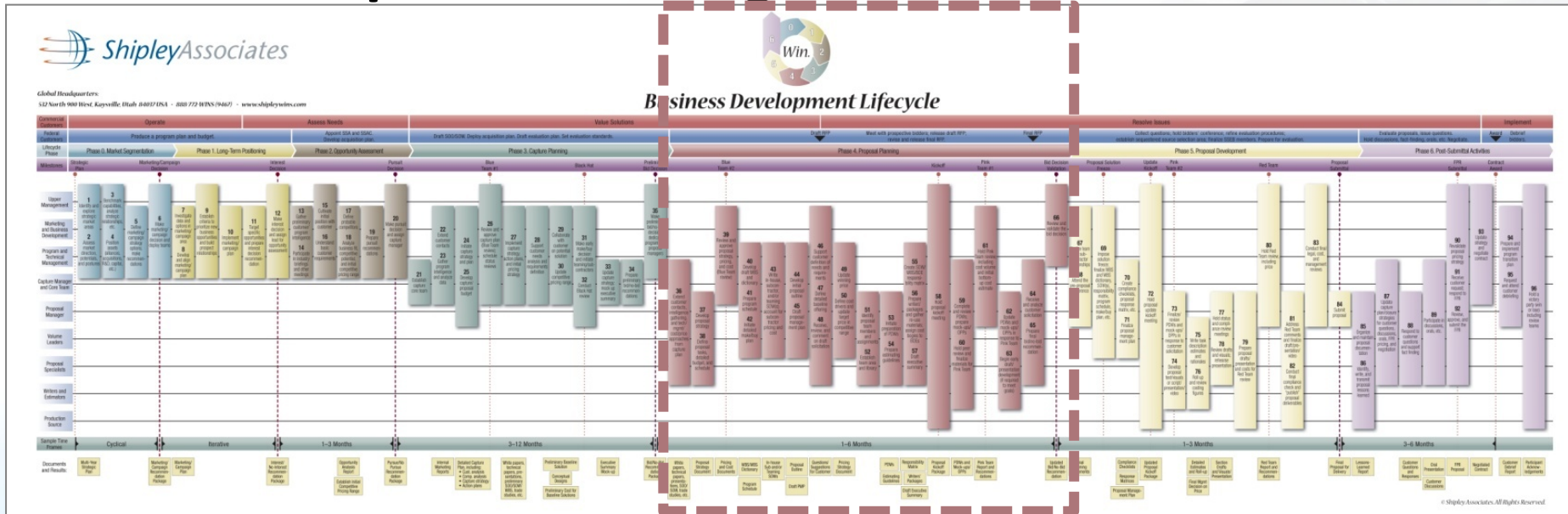
Make the Most of the Early Stages

Your Opportunity to Influence



Availability of Opportunity Information

Phase 4: Proposal Planning



Decision to plan proposal

- Refine solution and price to win
- Convert capture strategies into proposal messages
- Begin preliminary content planning

Decide to bid

Gate 4: Bid Validation Decision

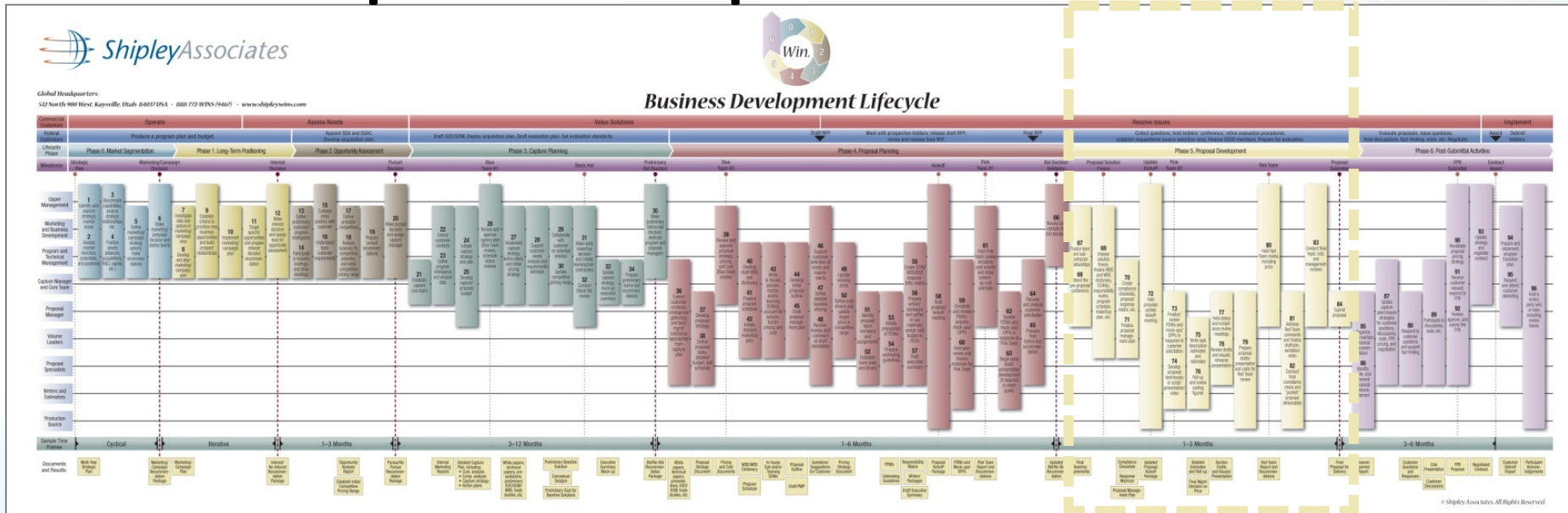
Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
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The Bid Validation Decision confirms your tentative plan to prepare a bid after seeing the final request for proposals.

Bid Validation Decision Questions

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

Phase 5: Proposal Development



Decision to bid after RFP review

- Make clear assignments
- Plan and approve content
- Draft proposal according to plan
- Review final proposal thoroughly

Decide to submit proposal

Objectives of Kickoff Meetings



Divide Kickoff Meeting if Necessary



Establish Leadership:

Plan an Effective Kickoff Meeting

Invite the Right People

- ✓ Senior managers
- ✓ Capture lead
- ✓ Program manager
- ✓ Volume managers
- ✓ Writers
- ✓ Coordinators
- ✓ Production supervisor
- ✓ Editors and artists
- ✓ Resource managers
- ✓ Teaming partners

Virtual Teleconference Kickoff Simulation

Listen to the Simulation and Note Findings

- Preparation?
- Discipline?
- Team Building?
- Areas for Improvement?

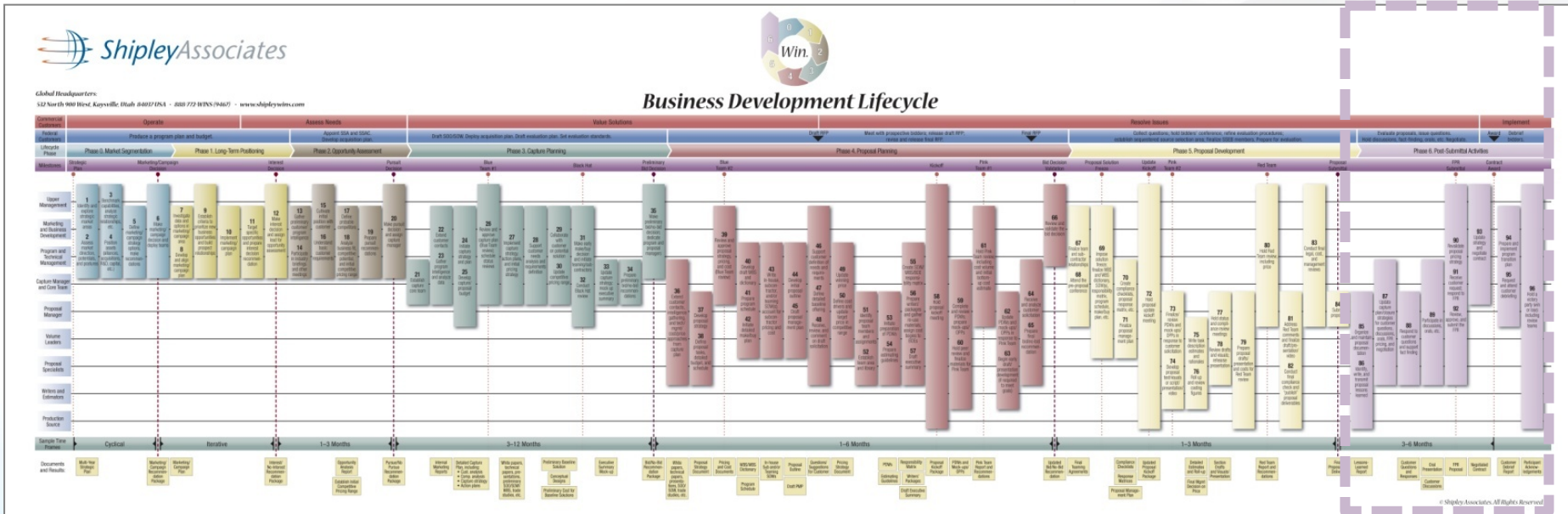


Gate 5: Proposal Submittal Decision

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
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The Proposal Submittal Decision determines whether your completed proposal presents your organization and offer acceptably, with risks justified by rewards.

Phase 6: Post Submittal Activities



Decision to submit proposal

- Respond to customer
- Negotiate
- Revise proposal if necessary

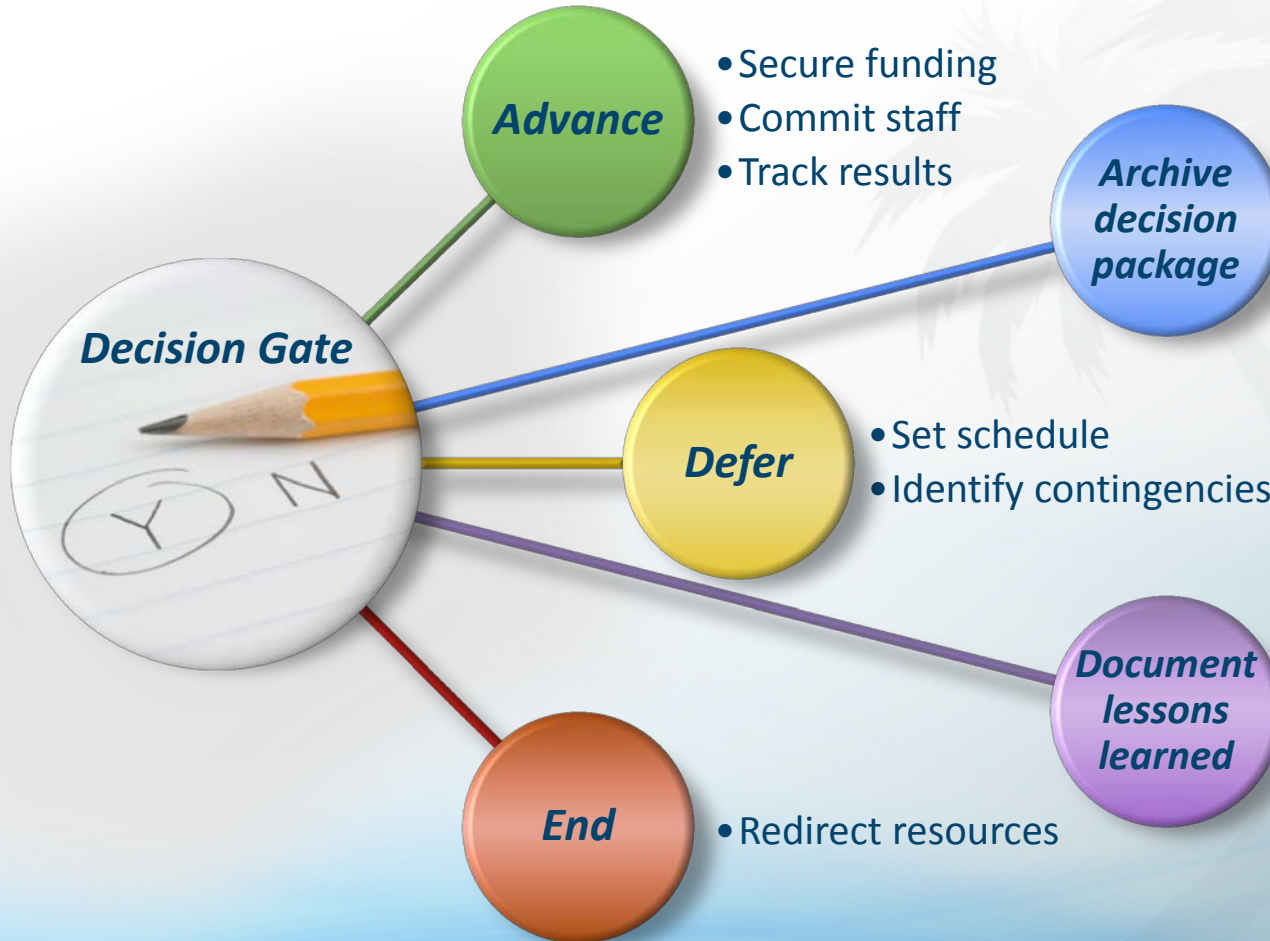
Decide to accept or submit final offer

Gate 6: Final Offer Decision

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
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If changes have occurred since your original offer, the Final Offer Decision is your last opportunity to accept or reject the deal.

A Few Words on Decision Gate Actions





Color Team Reviews

Color team reviews are business development milestones at which experts and managers work to improve opportunity pursuits.

Follow a Consistent Process for Each Review

PREPARE

- ✓ Plan and schedule
- ✓ Identify members
- ✓ Train reviewers
- ✓ Develop in-briefing

CONDUCT

- ✓ Present in-briefing
- ✓ Review individually
- ✓ Discuss as group
- ✓ Report

RESPOND

- ✓ Debrief staff
- ✓ Support team
- ✓ Distribute products
- ✓ Archive materials
- ✓ Execute and verify

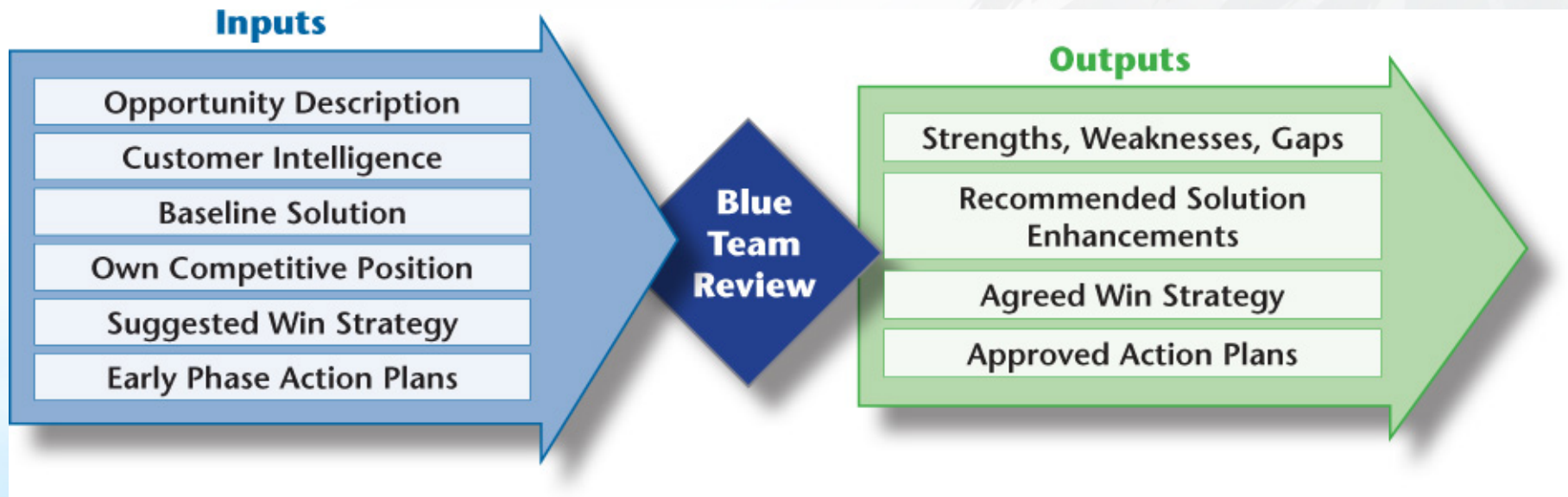
Make reviews comprehensive, positive, and constructive.

Blue Team Review

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
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The Blue Team reviews knowledge of the customer and opportunity, provides guidance on your solution, and agrees on win strategy.

Blue Team Inputs and Outputs

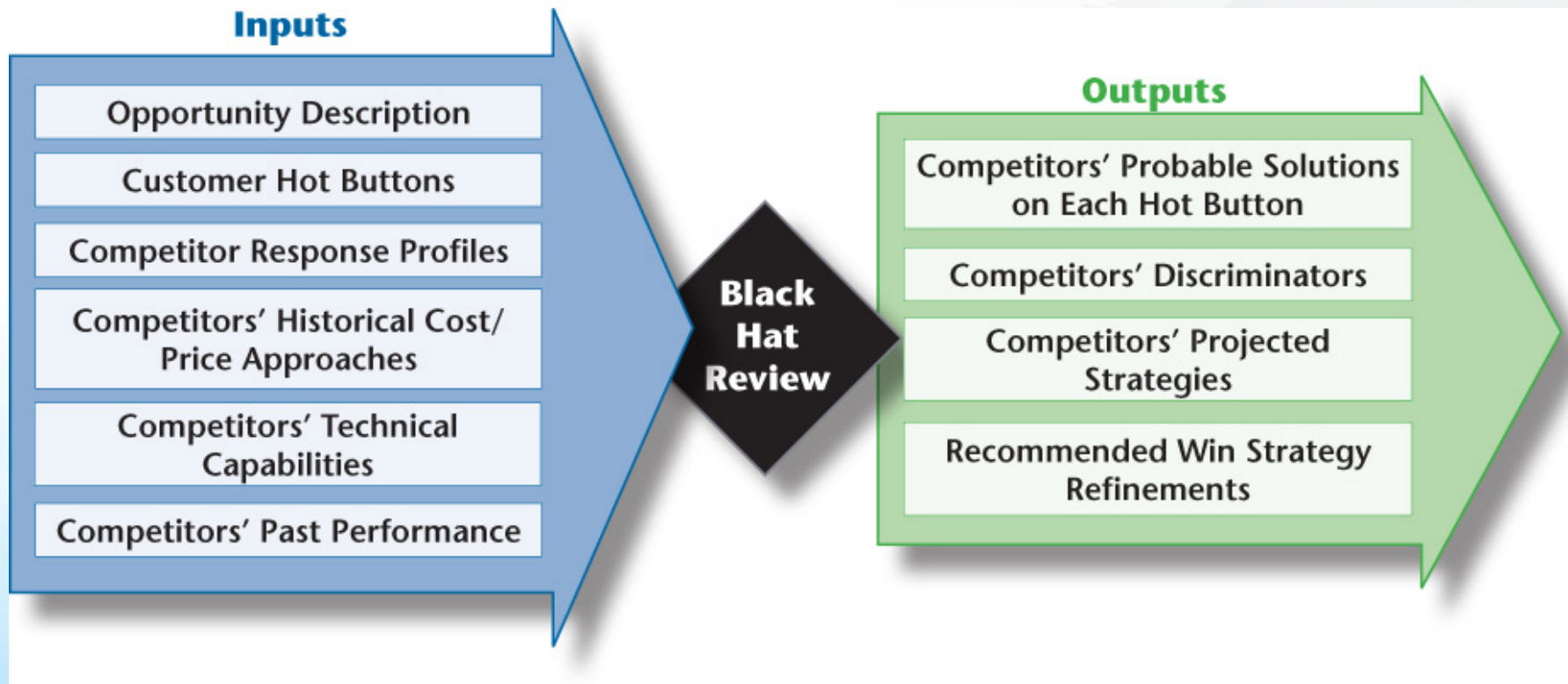


Black Hat Review

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
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The Black Hat Review predicts competitors' solutions and strategies so you can counter them in capture planning and proposal development.

Black Hat Inputs and Outputs

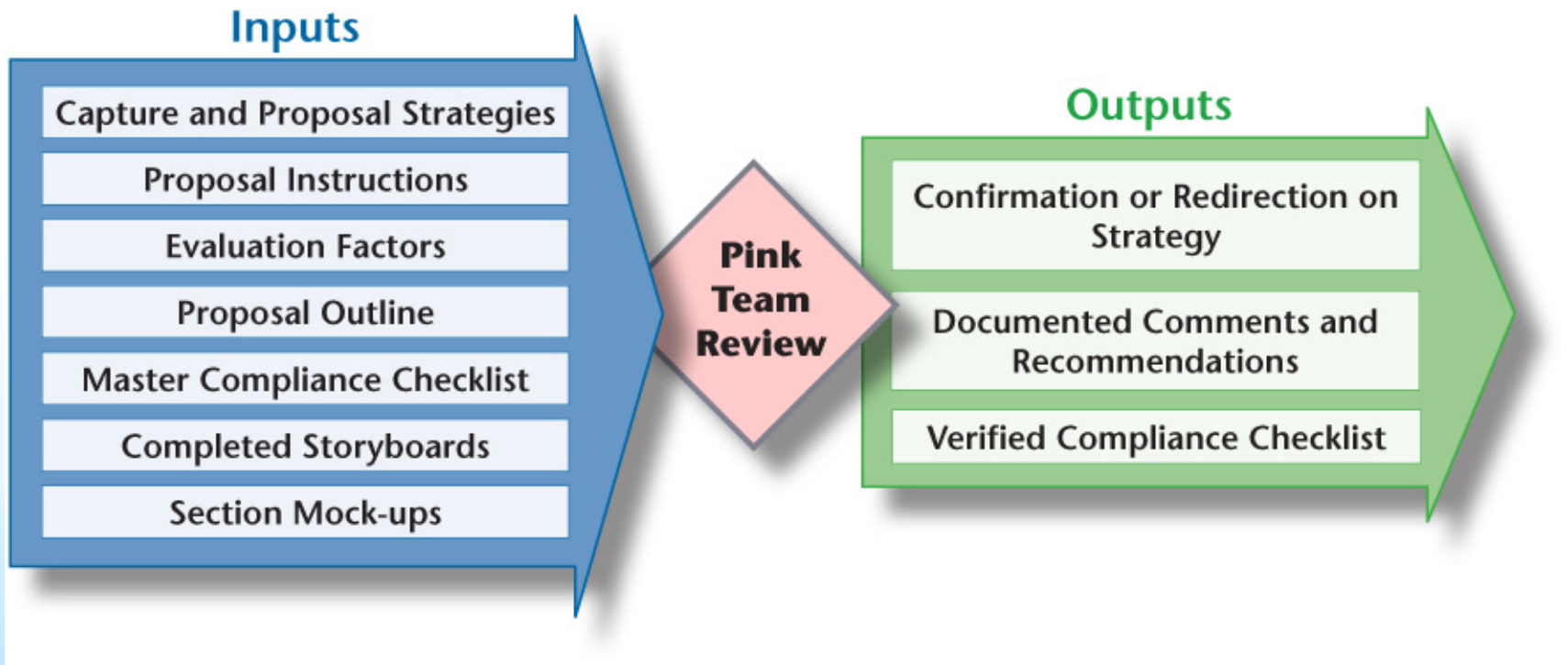


Pink Team Review

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
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The Pink Team reviews storyboards and mockups to ensure your win strategy and solution set will be presented effectively in your proposal.

Pink Team Inputs and Outputs



Planning and Executing a Pink Team Review

Organizer	<ul style="list-style-type: none">• Proposal manager
Team Members	<ul style="list-style-type: none">• Independent, respected Pink Team leader• Line managers• Subcontractor executives• Business development managers• Subject matter experts
Other Attendees	<ul style="list-style-type: none">• Capture manager• Program manager
Documents	<ul style="list-style-type: none">• Blue Team and Black Hat summary reports (or capture plan)• Request for proposals• Compliance checklist and proposal outline• Storyboards and mock-ups

Pink Team Methodology

PREPARE

- Recruit members and define responsibilities
- Identify, distribute, and train reviewers to use tools
- Allow sufficient time
- Provide adequate facilities

CONDUCT

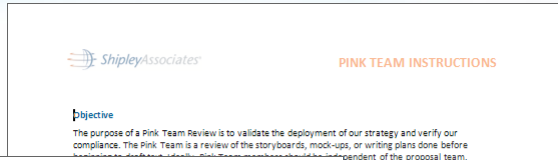
- Provide orientation briefing
- Display material in sequence
- Perform Pink Team review
- Document findings, recommendations, action items

RESPOND

- Assign and track action items

Pink Team Toolkit

- Pink Team Instructions
- Pink Team Planner
- Pink Team Checklist
- Pink Team Review Form
- Pink Team Assessment Form



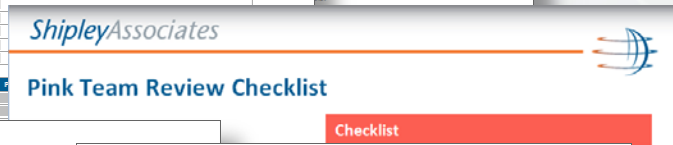
PINK TEAM INSTRUCTIONS

Objective
The purpose of a Pink Team Review is to validate the deployment of our strategy and verify our compliance. The Pink Team is a review of the storyboards, mood-ups, or writing plans done before the prospect's requirements, the job preparing compliance checklists, review wall mounted storyboards and the review team. When the latter team present to gain the benefit of the review portions they have independent of the proposal team.

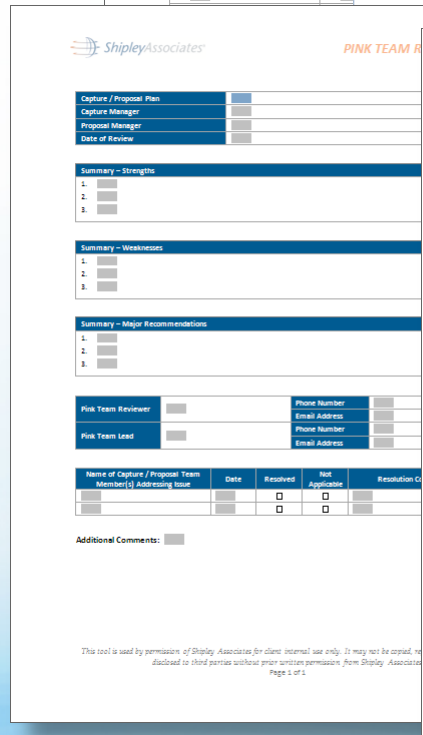


PINK TEAM PLANNER

Proposal Name	
Proposal Manager	
Pink Team Leader	
In Briefing Date	
In Briefing Time	
Location	



Pink Team Review Checklist



PINK TEAM REVIEW FORM

Capture / Proposal Plan	
Capture Manager	
Proposal Manager	
Date of Review	

Summary - Strengths

1.	
2.	
3.	

Summary - Weaknesses

1.	
2.	
3.	

Summary - Major Recommendations

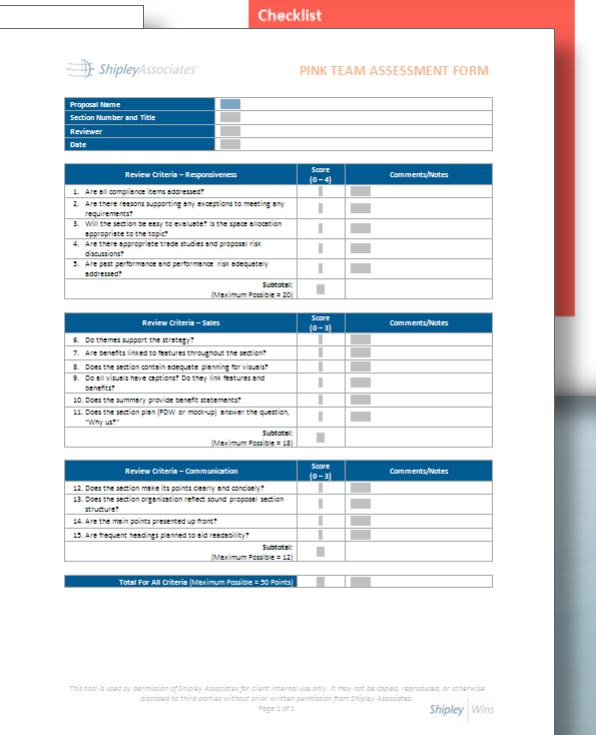
1.	
2.	

Pink Team Reviewer		Phone Number	
		Email Address	
Pink Team Lead		Phone Number	
		Email Address	

Name of Capture / Proposal Team Member(s)	Addressing Issue	Date	Resolved	Not Applicable	Resolution Complete
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional Comments:

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PINK TEAM ASSESSMENT FORM

Proposal Name	
Section Number and Title	
Reviewer	
Date	

Review Criteria - Responsiveness	Score (0-4)	Comments/Notes
1. Are all compliance items addressed?	<input type="checkbox"/>	
2. Are there reasons supporting any exceptions to meeting any requirements?	<input type="checkbox"/>	
3. Will the section be easy to evaluate? Is the space allocation appropriate to the topic?	<input type="checkbox"/>	
4. Are there appropriate trade studies and proposal risk discussions?	<input type="checkbox"/>	
5. Are cost performance and performance risk adequately addressed?	<input type="checkbox"/>	
Subtotal:	<input type="checkbox"/>	
(Maximum Possible = 20)		

Review Criteria - Sales	Score (0-3)	Comments/Notes
6. Do themes support the strategy?*	<input type="checkbox"/>	
7. Are benefits linked to features throughout the section?	<input type="checkbox"/>	
8. Does the section contain adequate planning for visuals?*	<input type="checkbox"/>	
9. Do all visuals have captions? Do they link features and benefits?*	<input type="checkbox"/>	
10. Does the summary provide benefit statements?*	<input type="checkbox"/>	
11. Does the section plan (POV or mood-ups) answer the question "Why us??"	<input type="checkbox"/>	
Subtotal:	<input type="checkbox"/>	
(Maximum Possible = 18)		

Review Criteria - Communication	Score (0-3)	Comments/Notes
12. Does the section make its points clearly and concisely?*	<input type="checkbox"/>	
13. Does the section organization reflect sound proposal section structure?*	<input type="checkbox"/>	
14. Are the main points presented up front?*	<input type="checkbox"/>	
15. Are frequent headings planned to aid readability?*	<input type="checkbox"/>	
Subtotal:	<input type="checkbox"/>	
(Maximum Possible = 12)		

Total For All Criteria (Maximum Possible = 50 Points)	<input type="checkbox"/>	
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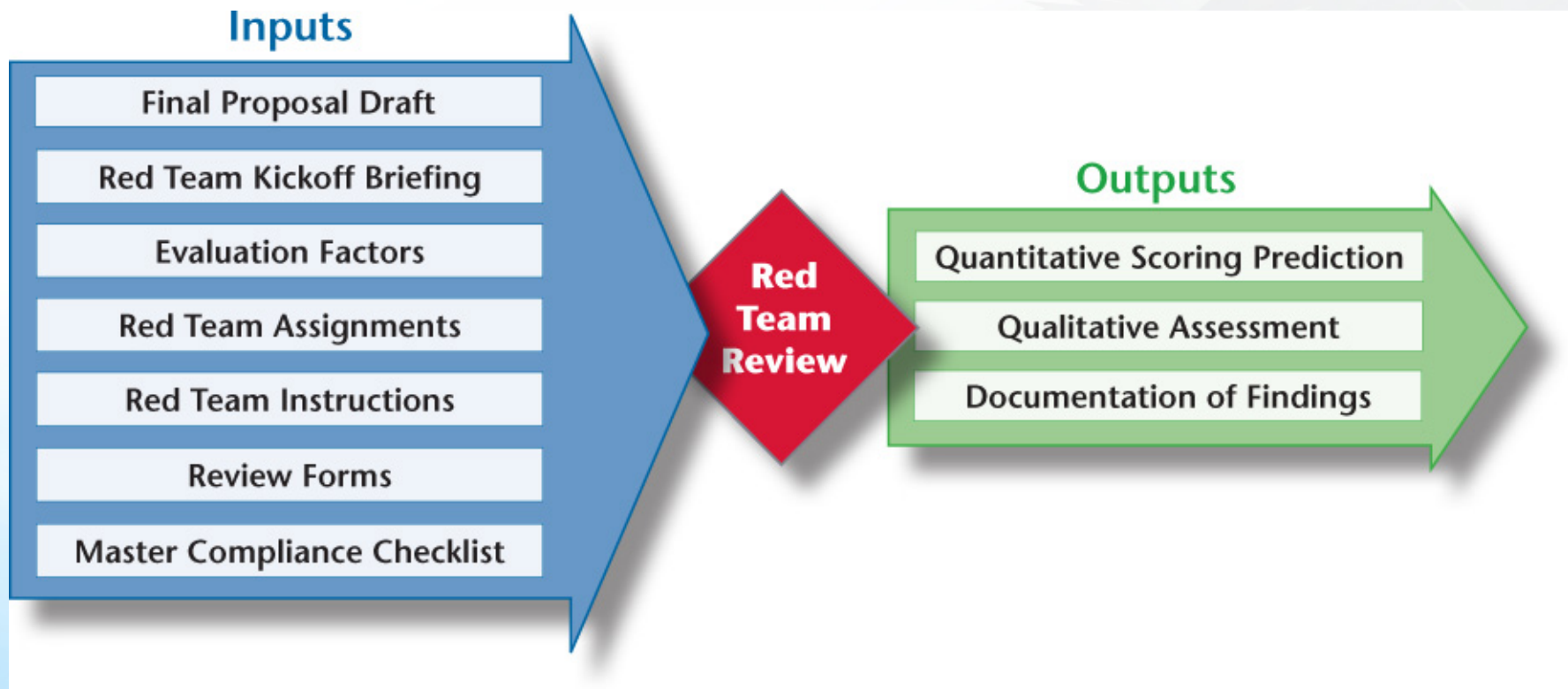
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Red Team Review

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
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The Red Team predicts how well your proposal will score against customer evaluation criteria and recommends improvements.

Red Team Inputs and Outputs



Tools to Prepare for Red Team

- Red Team Planner
- Red Team Instructions
- Red Team Scoring Guidance
- Red Team Assignments
- Red Team In-briefing

RED TEAM PLANNER

Proposal Name: _____
 Proposal Manager: _____

Review Members	7	8	9	10	11	12

Red Team Instructions

Purpose of the Red Team

The Red Team fills an important, value-adding role in proposal development. Although reviewers are not members of the writing team, they can have a major impact on the final quality of the proposal. The Red Team reviews every section of the proposal. It has two purposes:

- Emulate the customer's evaluation process by reviewing the proposal from the customer's perspective.
- Many reviews are from a company perspective to protect against legal, financial and technical liabilities.

Red Team Scoring Guidance

Scoring System

Color	Numbers	Adjectives	Compliance and Responsiveness Criteria
Blue	8-10	Outstanding	The section is compliant and responsive and clearly substantiates added value beyond requirements. The offering is clearly superior and is well presented.
Green	5-7	Good	The section is compliant and responsive, with no deficiencies and only minor weaknesses. A minimally compliant section just meeting requirements earns a 5.
Yellow	3-4	Marginal	The section is only partially compliant or responsive, fails to fully address requirements, or does not adequately substantiate claims. It contains weaknesses in several areas or a significant weakness.
Red	0-2	Unsatisfactory	The section is non-responsive or not requirements. The response is large exhibits one or more deficiencies.

Risk Scoring

Color	Scoring	Proposal Risk Criteria	R
Green	Low	Unlikely to cause disruption of schedule, increase in cost, or degradation of performance; normal offeror emphasis and normal customer monitoring will probably overcome difficulties.	Little d perform
Yellow	Moderate	Can potentially cause some disruption of schedule, increase in cost, or degradation of performance; however, special contractor emphasis and close customer monitoring will probably overcome difficulties.	Some offeror offeror
Red	High	Likely to cause significant, serious disruption of schedule, increase in cost, or degradation of performance, even with special contractor emphasis and close customer monitoring.	Signifi offeror offeror

Scoring Instructions

Evaluate assigned sections for compliance, responsiveness, and risk using the following instructions:

- Compliance** means strict adherence to the prospect's bid request in two areas:
 - Proposal preparation instructions, including following the requested order of sections, and submitting the proposal to the right person and in the right format.
 - Requirements, including the statement of work, specifications, technical requirements, and any other requirements. Compliance is not total; specific exceptions and deviations must be identified and explained.
- Responsiveness** means the proposed solution fully addresses the prospect's requirements. The proposal addresses the customer's major issues and hot buttons, whether or not they are explicitly stated in the bid request. Responsive proposals exhibit a high degree of customer focus.
- Risk** can be one of two types:
 - Proposal Risk** is associated with the proposed approach and solution. It is based on the bidder's performance record on similar projects.
 - Performance Risk** is based on the bidder's performance record on similar projects.

Red Team Assignments

3:31 PM 6/11/2013

[Proposal Title]

Section Number	Section Heading (Title)	Page #	Primary (P) and Secondary (S) Reviewers

[Proposal Name]
Red Team In-Briefing

Presented by:
 [Red Team Leader's Name]
 [Organization]
 [Date]

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Assignments Tool Is Most Important

Elements of SMaRTform

Example Proposal			Red Team Assignments															
Section Number	Section Heading (Title)	Page Alloc.	Primary Assigned	Secondaries Assigned	Primary (P) and Secondary (S) Reviewers													
					Harry Potter	Samantha Smith	Wiley Coyote	Elmer Fudd	Leah Tennet	Marvin Shields	Mary Sumter							
1	Executive summary	4	1	1		P			S									
2.1	Engineering design	6	2					S	P			S						
2.2	Material selection	3	1		P				S									
2	Test plan	7	1			S					P							
2.4	Trade-off studies	3	1		S					P								
2.5	Technical description	4	1								S	P						
3.1	Management description	5	1			P						S						
3.2	Cost control plan	1	1					P	S									
3.3	Staffing	1	1		P	S												
4	Past performance	5	1	1				S	P									
5.1	Price	15	1	2	S			S			P							
5.2	Award fee plan	3	1	1				P		S								
6	System approvals	4	1	1					S			P						
Approximate Page Count Totals		75				33	28	24	22	19	26	19						

Horizontal Review Types	Horizontal Reviewers
1st Horizontal Review: Theme Statements	Tim Smatterly
2nd Horizontal Review: Visuals & Captions	Sasha Bessemer
3rd Horizontal Review: Outline & Headings	Toni Graham
4th Horizontal Review: Callouts	Bob Gorman

- 1 Proposal title
- 2 Section numbers
- 3 Section titles
- 4 Page allocation
- 5 Reviewers' names
- 6 Primary/secondary designations
- 7 Total primary reviewers
- 8 Total secondary reviewers
- 9 Total page count by reviewer
- 10 Horizontal review assignments
- 11 Pop-up help (on mouse-over)

Green Team Review

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
Color Team Reviews				Blue Team Black Hat		Pink Team Red Team Green Team Gold Team	White Hat
Key Documents	• Multi-year strategic plan	• Annual operating plan • Marketing plan	• Opportunity analysis report	• Capture plan	• Capture plan • Storyboards • Mockups	• Storyboards • Mockups • Final draft proposal	• Proposal revision • Lessons learned • Contract

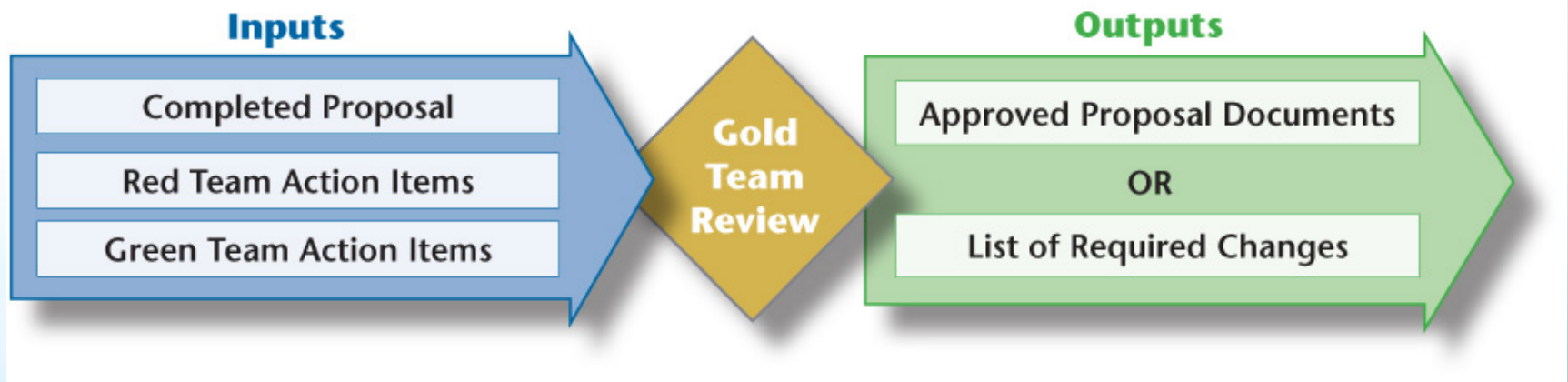
The Green Team checks pricing for consistency with your proposed solution set and alignment with your price to win.

Gold Team Review

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
Color Team Reviews				Blue Team Black Hat		Pink Team Red Team Green Team Gold Team	White Hat
Key Documents	• Multi-year strategic plan	• Annual operating plan • Marketing plan	• Opportunity analysis report	• Capture plan	• Capture plan • Storyboards • Mockups	• Storyboards • Mockups • Final draft proposal	• Proposal revision • Lessons learned • Contract

The Gold Team reviews the final proposal, confirming changes from Red and Green Teams, and checking proposal quality.

Gold Team Inputs and Outputs

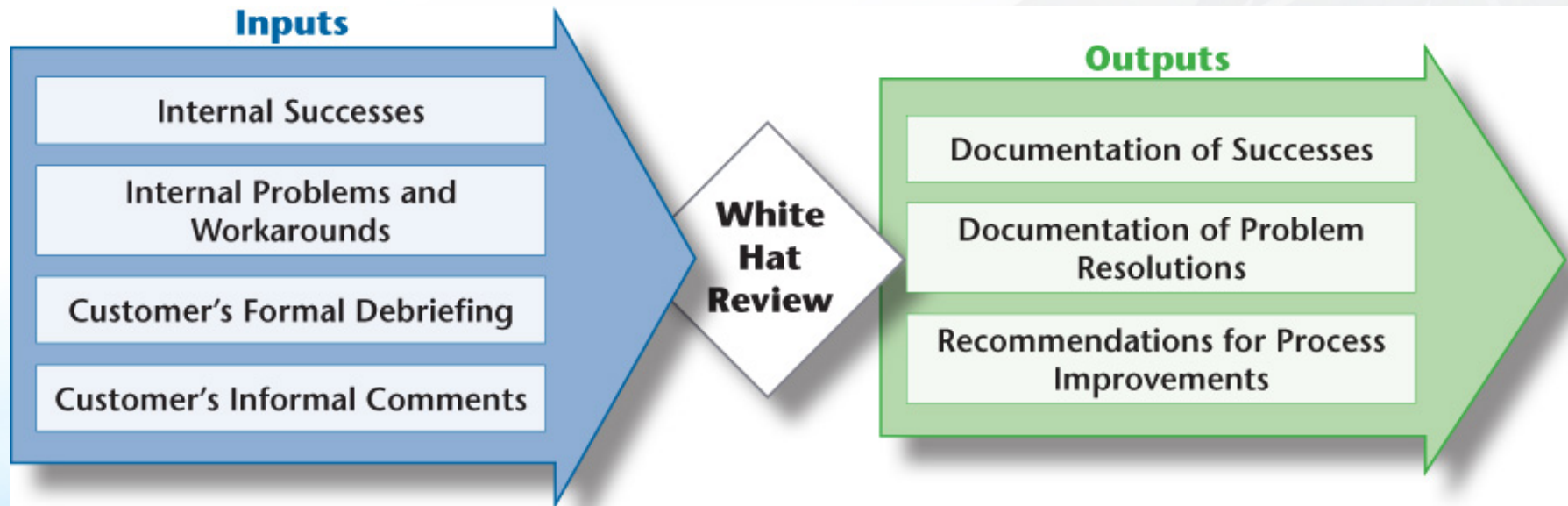


White Hat Review

Customer Milestones					Draft RFP Final RFP	Proposals Due	Award
Phase	Market Segmentation	Long-Term Positioning	Opportunity Assessment	Capture Planning	Proposal Planning	Proposal Development	Post-Submittal Activities
Decision Gates	Marketing/Campaign	Interest	Pursuit	Preliminary Bid	Bid Validation	Proposal Submittal	Final Offer
Color Team Reviews				Blue Team Black Hat		Pink Team Red Team Green Team Gold Team	White Hat
Key Documents	• Multi-year strategic plan	• Annual operating plan • Marketing plan	• Opportunity analysis report	• Capture plan	• Capture plan • Storyboards • Mockups	• Storyboards • Mockups • Final draft proposal	• Proposal revision • Lessons learned • Contract

The White Hat Review documents lessons learned from the capture and proposal efforts to improve future pursuits.

White Hat Inputs and Outputs



Review Names and Purposes Vary

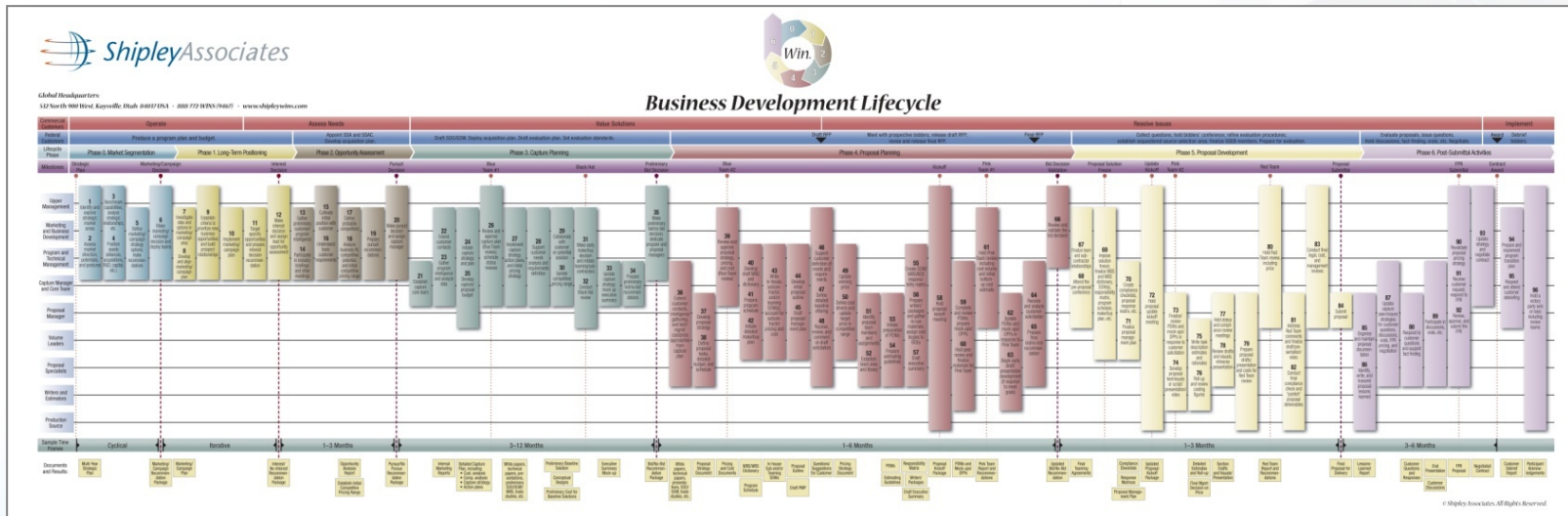
Color Team	Purpose	Functional Names
Purple	Review opportunity assessment report for alignment	• Opportunity
Blue #1	Review initial capture plan and solution	• Win strategy
Black Hat #1	Predict competitors' solutions	• Competitor
Blue #2	Review updated capture plan and proposal management plan	• Proposal planning • Proposal strategy
Black Hat #2	Predict competitors' solutions	• Competitor update
Pink #1	Review storyboards/mockups against capture plan	• Proposal readiness
Green #1	Review targeted combination of price and capability	• Price to win
Pink #2	Review storyboard/mockups against RFP	• Storyboard
Green #2	Review WBS, BOEs, price calculations	• Final price
Red	Review near-final draft, including cost, to predict scoring	• Proposal quality
Merlot	Review improved, post-Red Team proposal draft	• Final quality
Gold	Approve final proposal and price	• Final proposal
White Hat	Review and document lessons learned	• After-action



Implementing Decision Gates and Reviews

Decision gates and color team reviews can be adapted to your organization's needs to increase your probability of winning.

Commit to a Single, Disciplined Process



BENEFITS

- Reduced costs
- Increased productivity
- Improved forecasting
- Increased visibility and control

FEATURES

- Flexible
- Tailorable
- Scalable
- Based on best practices
- Championed at executive level

Don't Be Trapped by Process

Improve Performance by:

- Streamlining repetitive tasks
- Standardizing approaches
- Enforcing policies
- Providing guidance on management priorities

Consider the Possibilities of:

- Eliminating phases and gates
- Standardizing decisions
- Cutting tasks
- Combining reviews

Design or Adapt Your Process Intelligently

Constants

- Disciplined business development process
- Standardized decision gates
- Formal color team reviews

Variables

- Number of phases
- Number of gates
- Number, type, standards for color teams
- Number, type, size of documents reviewed

Factors

- Time available
- Size, risk, importance of opportunity
- Number of people involved
- Commitment

Closing Thoughts:

- Timely decisions need to be made and noted
- All participants need to know what to expect out of a particular gate or color team review.
- Each decision gate and color team review has a particular purpose.
- Focus on the win progress of the opportunity, not the condition of the document
- Have a review thread through the reviews
- Do the reviews that are necessary; forget the others.

How effective are the decision gate reviews and color team reviews in your organization?



Decision Gates and Color Team Reviews

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