

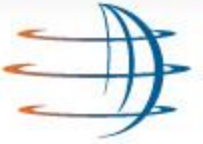
# Winning as the Underdog

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# From Start to Finish

*Market Segmentation*

*Long Term Positioning*

*Opportunity Assessment*

*Capture Planning*

*Proposal Planning*

*Proposal Development*

*Post Submittal Activities*

| January |    |    |    |    |    |    |
|---------|----|----|----|----|----|----|
| S       | M  | T  | W  | T  | F  | S  |
| 1       | 2  | 3  | 4  | 5  | 6  | 7  |
| 8       | 9  | 10 | 11 | 12 | 13 | 14 |
| 15      | 16 | 17 | 18 | 19 | 20 | 21 |
| 22      | 23 | 24 | 25 | 26 | 27 | 28 |
| 29      | 30 | 31 |    |    |    |    |

| February |    |    |    |    |    |    |
|----------|----|----|----|----|----|----|
| S        | M  | T  | W  | T  | F  | S  |
|          |    |    | 1  | 2  | 3  | 4  |
| 5        | 6  | 7  | 8  | 9  | 10 | 11 |
| 12       | 13 | 14 | 15 | 16 | 17 | 18 |
| 19       | 20 | 21 | 22 | 23 | 24 | 25 |
| 26       | 27 | 28 | 29 | 30 |    |    |

| March |    |    |    |    |    |    |
|-------|----|----|----|----|----|----|
| S     | M  | T  | W  | T  | F  | S  |
|       |    |    |    |    | 1  | 2  |
| 3     | 4  | 5  | 6  | 7  | 8  | 9  |
| 10    | 11 | 12 | 13 | 14 | 15 | 16 |
| 17    | 18 | 19 | 20 | 21 | 22 | 23 |
| 24    | 25 | 26 | 27 | 28 | 29 | 30 |

| April |    |    |    |    |    |    |
|-------|----|----|----|----|----|----|
| S     | M  | T  | W  | T  | F  | S  |
| 1     | 2  | 3  | 4  | 5  | 6  | 7  |
| 8     | 9  | 10 | 11 | 12 | 13 | 14 |
| 15    | 16 | 17 | 18 | 19 | 20 | 21 |
| 22    | 23 | 24 | 25 | 26 | 27 | 28 |
| 29    | 30 | 31 |    |    |    |    |

| May |    |    |    |    |    |    |
|-----|----|----|----|----|----|----|
| S   | M  | T  | W  | T  | F  | S  |
|     |    |    | 1  | 2  | 3  | 4  |
| 5   | 6  | 7  | 8  | 9  | 10 | 11 |
| 12  | 13 | 14 | 15 | 16 | 17 | 18 |
| 19  | 20 | 21 | 22 | 23 | 24 | 25 |
| 26  | 27 | 28 | 29 | 30 |    |    |

| June |    |    |    |    |    |    |
|------|----|----|----|----|----|----|
| S    | M  | T  | W  | T  | F  | S  |
|      |    |    |    |    | 1  | 2  |
| 3    | 4  | 5  | 6  | 7  | 8  | 9  |
| 10   | 11 | 12 | 13 | 14 | 15 | 16 |
| 17   | 18 | 19 | 20 | 21 | 22 | 23 |
| 24   | 25 | 26 | 27 | 28 | 29 | 30 |

| July |    |    |    |    |    |    |
|------|----|----|----|----|----|----|
| S    | M  | T  | W  | T  | F  | S  |
| 1    | 2  | 3  | 4  | 5  | 6  | 7  |
| 8    | 9  | 10 | 11 | 12 | 13 | 14 |
| 15   | 16 | 17 | 18 | 19 | 20 | 21 |
| 22   | 23 | 24 | 25 | 26 | 27 | 28 |
| 29   | 30 | 31 |    |    |    |    |

| August |    |    |    |    |    |    |
|--------|----|----|----|----|----|----|
| S      | M  | T  | W  | T  | F  | S  |
|        |    |    | 1  | 2  | 3  | 4  |
| 5      | 6  | 7  | 8  | 9  | 10 | 11 |
| 12     | 13 | 14 | 15 | 16 | 17 | 18 |
| 19     | 20 | 21 | 22 | 23 | 24 | 25 |
| 26     | 27 | 28 | 29 | 30 |    |    |

| September |    |    |    |    |    |    |
|-----------|----|----|----|----|----|----|
| S         | M  | T  | W  | T  | F  | S  |
|           |    |    |    |    | 1  | 2  |
| 3         | 4  | 5  | 6  | 7  | 8  | 9  |
| 10        | 11 | 12 | 13 | 14 | 15 | 16 |
| 17        | 18 | 19 | 20 | 21 | 22 | 23 |
| 24        | 25 | 26 | 27 | 28 | 29 | 30 |

| October |    |    |    |    |    |    |
|---------|----|----|----|----|----|----|
| S       | M  | T  | W  | T  | F  | S  |
| 1       | 2  | 3  | 4  | 5  | 6  | 7  |
| 8       | 9  | 10 | 11 | 12 | 13 | 14 |
| 15      | 16 | 17 | 18 | 19 | 20 | 21 |
| 22      | 23 | 24 | 25 | 26 | 27 | 28 |
| 29      | 30 | 31 |    |    |    |    |

| November |    |    |    |    |    |    |
|----------|----|----|----|----|----|----|
| S        | M  | T  | W  | T  | F  | S  |
|          |    |    | 1  | 2  | 3  | 4  |
| 5        | 6  | 7  | 8  | 9  | 10 | 11 |
| 12       | 13 | 14 | 15 | 16 | 17 | 18 |
| 19       | 20 | 21 | 22 | 23 | 24 | 25 |
| 26       | 27 | 28 | 29 | 30 |    |    |

| December |    |    |    |    |    |    |
|----------|----|----|----|----|----|----|
| S        | M  | T  | W  | T  | F  | S  |
|          |    |    |    |    | 1  | 2  |
| 3        | 4  | 5  | 6  | 7  | 8  | 9  |
| 10       | 11 | 12 | 13 | 14 | 15 | 16 |
| 17       | 18 | 19 | 20 | 21 | 22 | 23 |
| 24       | 25 | 26 | 27 | 28 | 29 | 30 |





# Market Segmentation

## Guidelines for Marketing/Campaign Decisions—Getting in the Game

|                            |   |
|----------------------------|---|
| <b>Decisions</b>           | <ul style="list-style-type: none"> <li>• Pursue market or customer</li> <li>• Assignment of responsibility</li> </ul>   |
| <b>Organizer</b>           | <ul style="list-style-type: none"> <li>• Executive or business development manager</li> </ul>   |
| <b>Attendees</b>           | <ul style="list-style-type: none"> <li>• Executive</li> <li>• Operations</li> <li>• Business development manager</li> </ul>   |
| <b>Inputs</b>              | <ul style="list-style-type: none"> <li>• Multi-year strategic plan</li> <li>• Market analyses and forecasts</li> <li>• Marketing campaign recommendation</li> </ul> |
| <b>Resources Allocated</b> | <ul style="list-style-type: none"> <li>• Marketing team</li> <li>• Market research funding</li> </ul>   |
| <b>Pipeline Action</b>     | <ul style="list-style-type: none"> <li>• None</li> </ul>  |



# Market Segmentation (con't)

## Marketing/Campaign Decision Questions—What will it take to win?

### Market Overview

*Have we defined a specific product or service we will provide?*

*Do we know typical customers?*

*Have we forecasted size of the market segment?*

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### Competitive Landscape

*Have we identified competitors operating in the segment?*

*Do we have qualifications, people, and facilities to enter the market?*

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### Fit with Strategic Plans

*Does the investment required fit with our plans?*

*Will contracts in this segment contribute to desired capabilities?*

*Does our research support a favorable business case for entering the market segment?*



# Long Term Positioning

## Opportunity

*Is the opportunity real and funded?*

*Do we know the potential project owner's perception of us?*

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## Fit

*Does this opportunity support our strategic, annual operating, account, or marketing plans?*

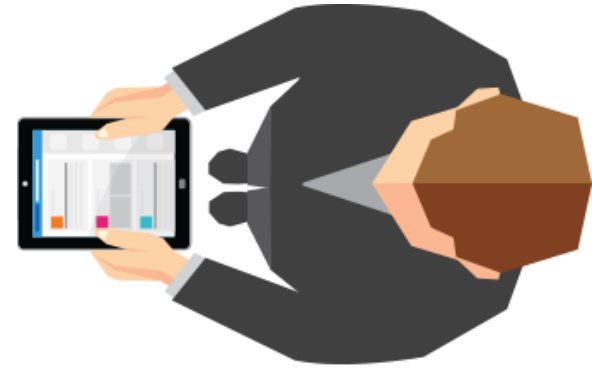
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## Positioning

*Does the customer know we are considering this opportunity?*

*Are we an incumbent?*

*If not, have we been actively calling on the prospect?*



## Customer Mission

*Do we thoroughly understand the customer's mission?*

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## Competition

*Do we know who potential competitors are likely to be?*

*Can we team with a competitor if necessary?*

*Are there alternatives to our likely solution?*



# Opportunity Assessment

|                            |   |
|----------------------------|---|
| <b>Decisions</b>           | <ul style="list-style-type: none"> <li>• Advance to Capture Planning</li> <li>• Assign capture manager</li> <li>• Conformance of baseline solution to price to compete</li> </ul> |
| <b>Organizer</b>           | <ul style="list-style-type: none"> <li>• Business development manager</li> </ul>  |
| <b>Attendees</b>           | <ul style="list-style-type: none"> <li>• Executive</li> <li>• Business development manager</li> <li>• Business developer</li> </ul>   |
| <b>Inputs</b>              | <ul style="list-style-type: none"> <li>• Opportunity analysis report</li> <li>• Price to compete</li> <li>• Beginning of capture plan</li> <li>• Capture budget</li> </ul>        |
| <b>Resources Allocated</b> | <ul style="list-style-type: none"> <li>• Capture team staff and funding</li> <li>• Tentative budget for remaining pursuit</li> </ul>  |
| <b>Pipeline Action</b>     | <ul style="list-style-type: none"> <li>• Update tracking system</li> <li>• Add opportunity to forecast</li> </ul>   |

# Capture Planning – Information We Must Gather

## **Business Case**

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?

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## **Decision-Makers, Issues/Hot Buttons**

Do we know the key decision-makers and their issues and hot buttons?

Do the key decision-makers know us?

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## **Contractor Role and Responsibilities**

Do we have a clear understanding of our anticipated role?

Are there any potential conflicts of interest for us?

## **Competition**

Have we identified probable competitors?

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## **Competitive Position**

Do customer requirements match our competencies?

Have we established a price to compete?

Do we have a baseline solution aligned to price to compete?



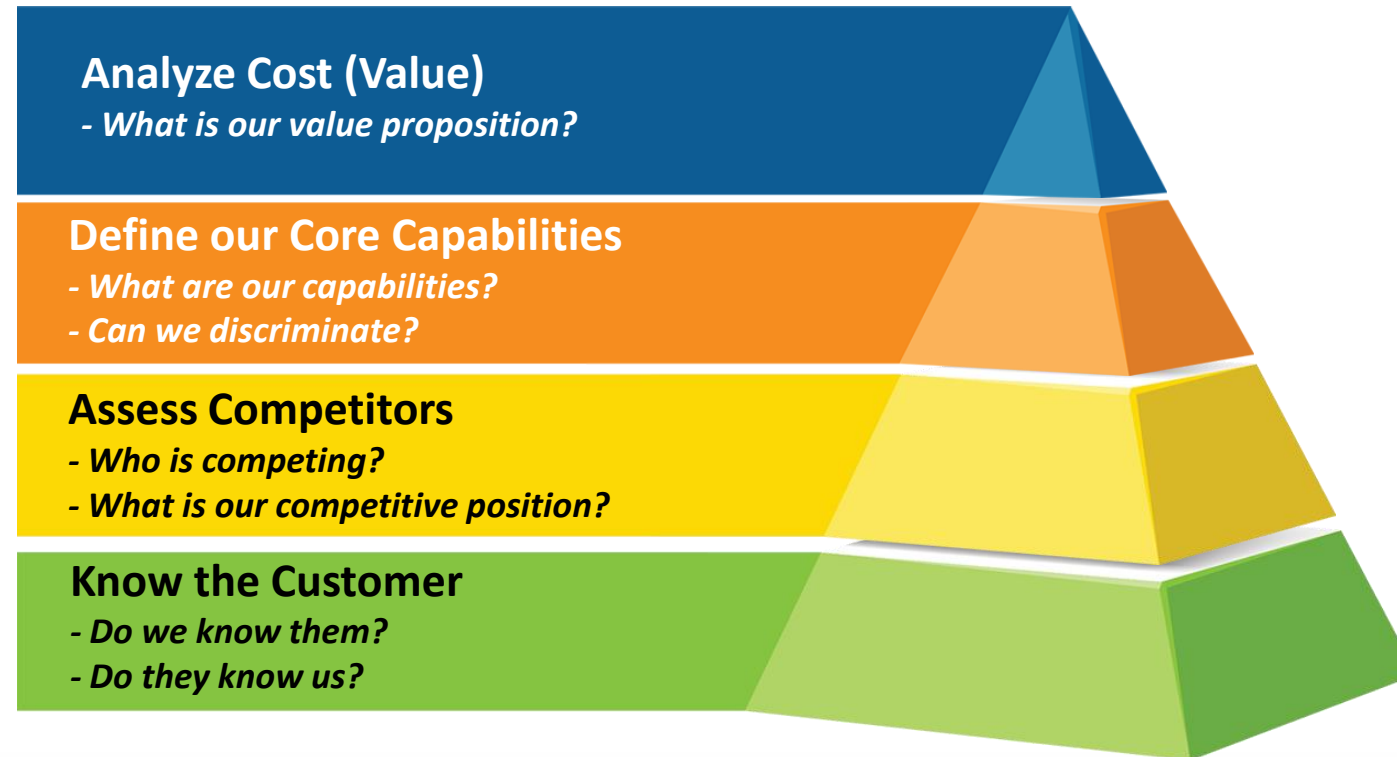


# Capture Activities – Improve Your $P^{win}$

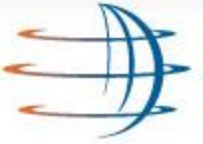
## Know the Four Cs

Customer, Competitor, Core Capabilities, and Cost to Win (Value)

$P^{win}$







# Proposal Planning– Final Preparation for the Real Deal

## **Contract Schedule**

*Do we have a clear understanding of the deliverables and schedule?*

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## **Evaluation Process**

*Are we sure of the evaluation process to be used?*

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## **Competition**

*Do we know the customer's perception of competitors?*

*Has an objective bidder comparison been completed?*

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## **Subcontracting**

*Do we have firm commitments from needed teammates?*

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## **Past Performance**

*Do we have strong, relevant past performance?*

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## **Management**

*Does our management approach provide added value?*

## **Technical**

*Does our technical solution provide added value or discriminators?*

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## **Discriminators, Themes**

*Are our discriminators unique and important to the customer?*

*Can the customer justify selecting us based on our discriminators and cost?*

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## **Pricing to Win**

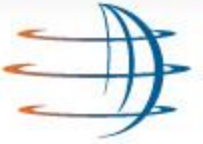
*Has a price to win been determined, and is it acceptable to management?*

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## **Opportunity Status**

*Is the customer adhering to the expected schedule?*

*If not, why not, and what does that tell us about the opportunity?*



# The Final Cut – A Simple Tool

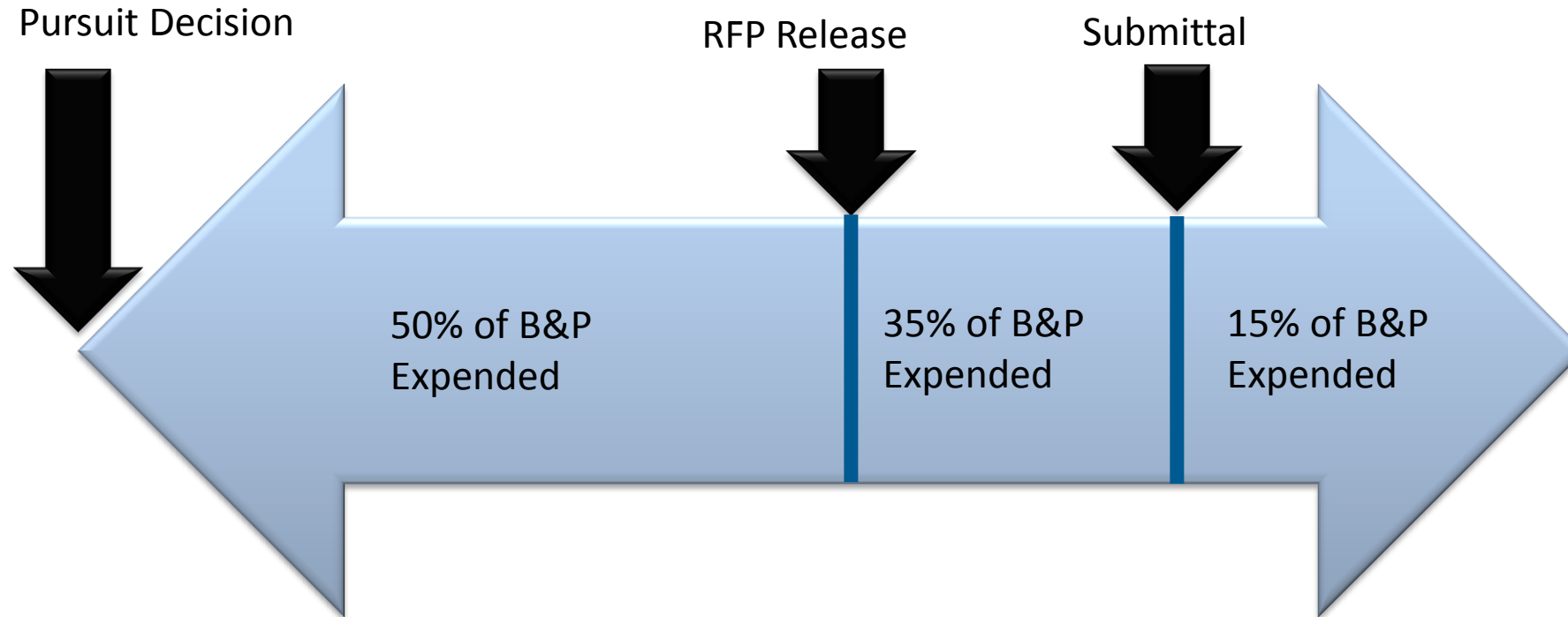
ShipleysAssociates  Bid Decision Calculator

| Opportunity:               |          |                                     |        |               |
|----------------------------|----------|-------------------------------------|--------|---------------|
| Anticipated Value:         |          |                                     |        |               |
| Decision Factor            | Wt. Inc. | Decision Factor Rating (Select One) | Points | Score         |
| Pre-RFP Marketing          |          |                                     |        |               |
| Prospect's Preference      |          |                                     |        |               |
| Prospect's Knowledge of Us |          |                                     |        |               |
| Technical                  |          |                                     |        |               |
| Management                 |          |                                     |        |               |
| Cost                       |          |                                     |        |               |
| Incumbency                 |          |                                     |        |               |
| Experience                 |          |                                     |        |               |
| Past Performance           |          |                                     |        |               |
| Contract Risk              |          |                                     |        |               |
| Contract Size              |          |                                     |        |               |
| Other                      |          |                                     |        |               |
| Other                      |          |                                     |        |               |
|                            |          |                                     |        | <b>Result</b> |

Key: 4 = Strong Pursuit 3 = Moderate Pursuit 2 = Moderate Avoidance 1 = Strong Avoidance



# Proposal Planning – Invest Early to Win



**Smart investment upfront drives up probability of win (Pwin) for profitable growth**



# Proposal Planning— A Game Plan to Increase Winning



Successful BD follows a structured approach to apply resources to opportunities you can win.

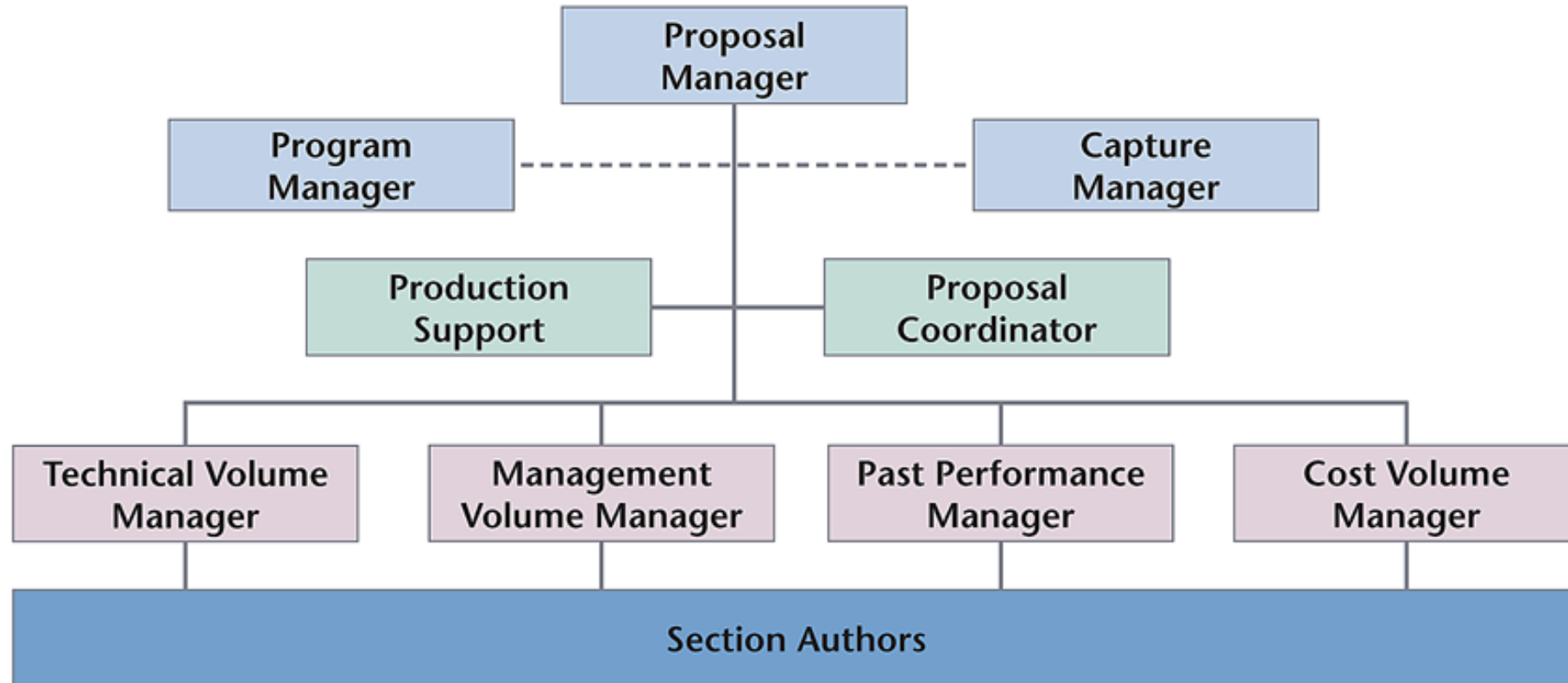


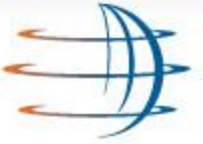
# Proposal Development – Review Often and Adjust

| 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<br>• 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                             |



# A Dedicated Team – Committed Professionals





# Post Submittal Activities - *Guidelines for Final Offer*

|                            |   |
|----------------------------|---|
| <b>Decisions</b>           | <ul style="list-style-type: none"> <li>• Accept all terms and conditions of contract</li> <li>• Submit possible proposal revision</li> <li>• Program staff ready for startup</li> </ul> |
| <b>Organizer</b>           | <ul style="list-style-type: none"> <li>• Capture manager</li> </ul>   |
| <b>Attendees</b>           | <ul style="list-style-type: none"> <li>• Executive</li> <li>• Operations (including program manager)</li> <li>• Business development manager</li> <li>• Capture manager</li> </ul>      |
| <b>Inputs</b>              | <ul style="list-style-type: none"> <li>• Revised proposal</li> <li>• Final contract</li> </ul>  |
| <b>Resources Allocated</b> | <ul style="list-style-type: none"> <li>• Program team and facilities</li> <li>• Company investment incorporated in offer</li> </ul>   |
| <b>Pipeline Action</b>     | <ul style="list-style-type: none"> <li>• Book revenue</li> <li>• Hold victory party</li> </ul>  |



# Post Submittal Activities - The Last Step

## Legal

*Have contract terms been reviewed and agreed?*

*Have necessary performance bonds been secured?*

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## Financial

*Is the final contract price acceptable?*

*Are any investments fully documented and understood by management?*

*Is requisite financing in place?*

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## Performance

*Is the project team identified? If not, are staffing plans in place?*

*Is the technical solution fully understood?*

*Are production rates and schedules achievable?*

*Are key subcontractors ready to begin work on schedule?*







# We Won as the Underdog!

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**Questions?**

