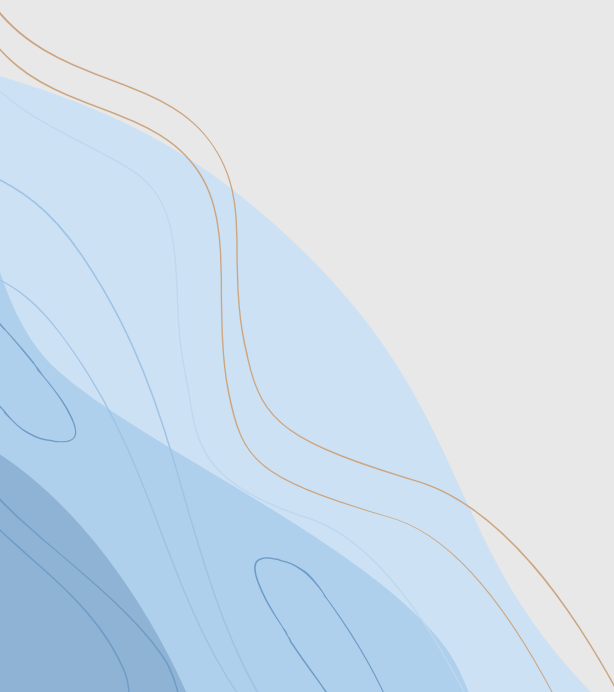




APMP California Capture Adventure  
Gate Decision Management  
Is this a go?



# Welcome!

## Thanks for being part of the adventure!

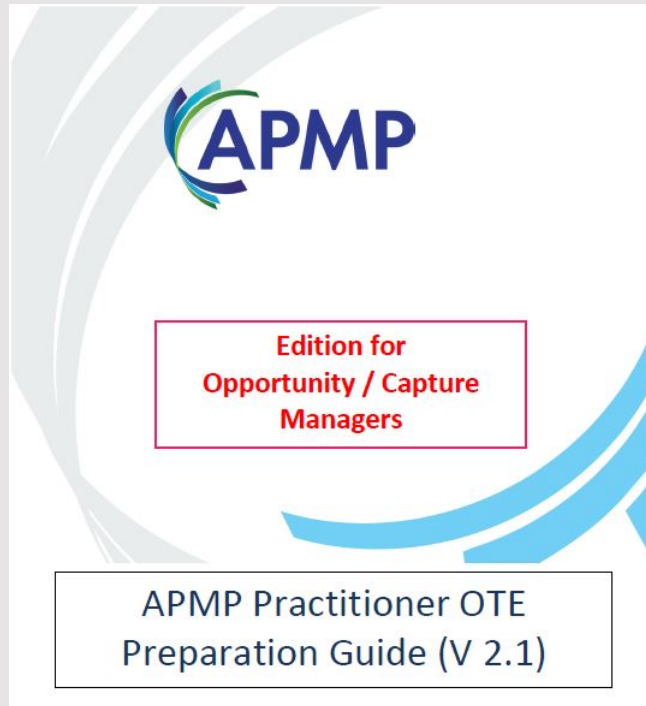


Marie  
APMP Professional  
Development Chair




Heather  
APMP California Chapter Chair

# Takeaways



[https://www.apmp.org/resource/resmgr/certification/APMP Opportunity & Capture P.pdf](https://www.apmp.org/resource/resmgr/certification/APMP_Opportunity_&_Capture_P.pdf)



## Appendix B - APMP Industry Glossary of Terms (Version 6)

This glossary has been compiled by interviewing more than 50 industry experts from around the globe, polling more than 750 APMP members, and gathering contributions from the writers, reviewers, and editors of the new APMP Body of Knowledge. This glossary includes more than 200 terms that cover a wide spectrum of business development activities with an emphasis on opportunity and proposal development.

Term	Equivalent or Corresponding Terms	Definition and Additional Information
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# APMP CAPTURE PRACTITIONER CERTIFICATION

<https://www.apmp.org/page/CapturePractitioner>

# APPROVED TRAINING ORGANIZATIONS

<https://www.apmp.org/page/AccreditationATOs>

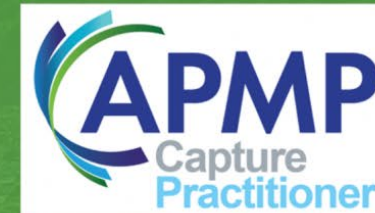


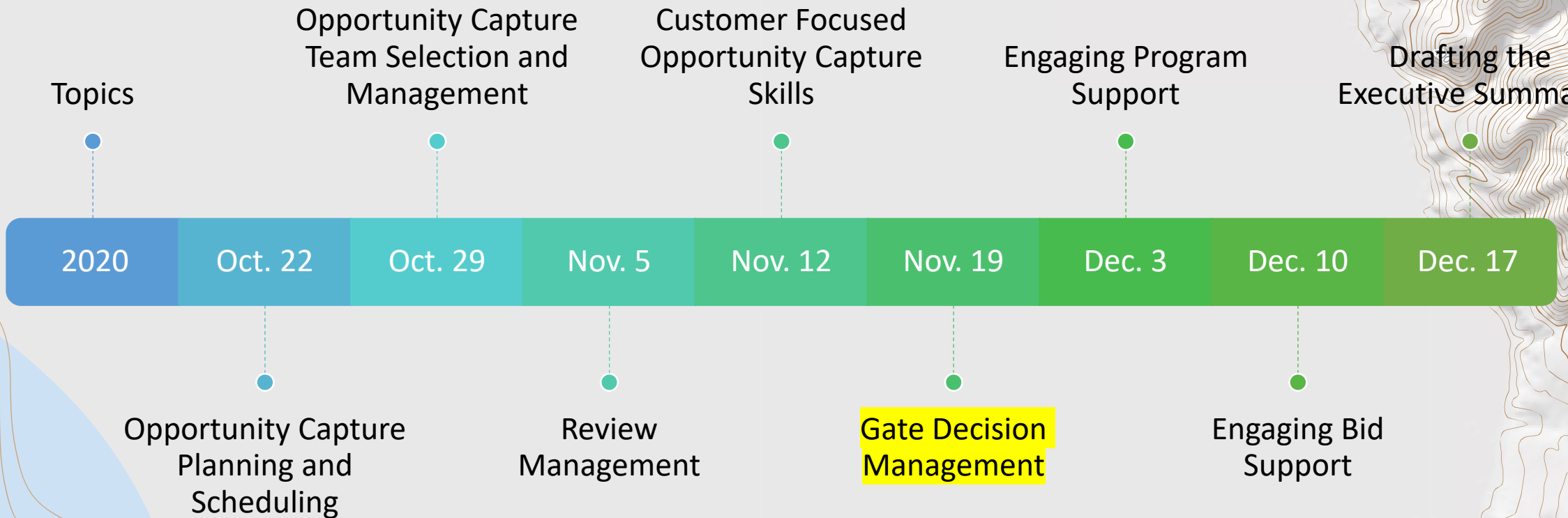


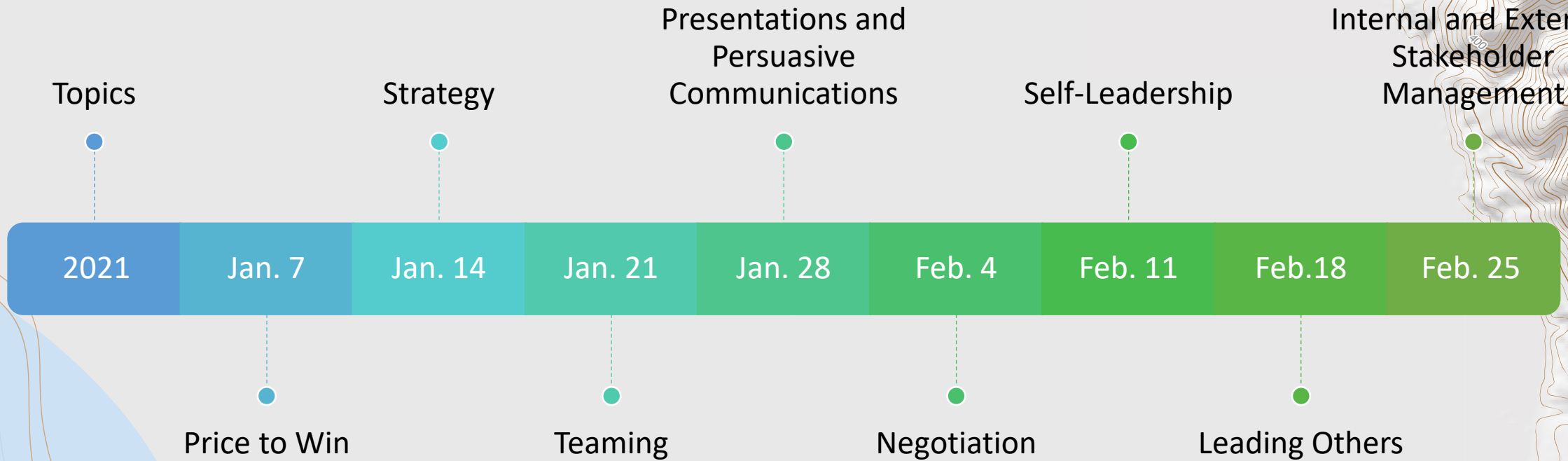
# APMP CALIFORNIA CAPTURE ADVENTURE SERIES

EVERY THURSDAY ON ZOOM | 9:30 - 10 AM  
OCT. 22 - FEB. 25

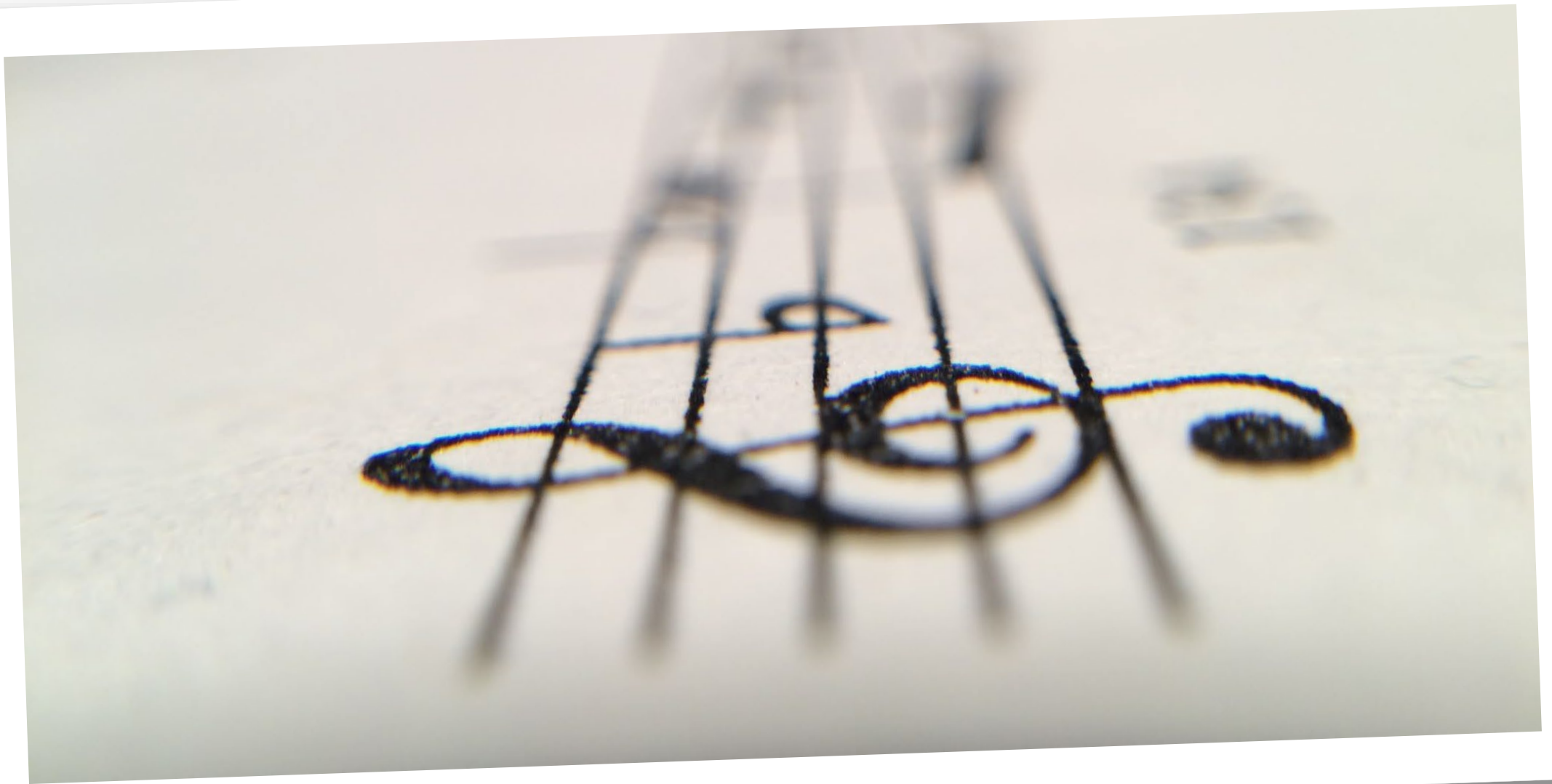
JOIN US FOR A WEEKLY 30-MINUTE  
POWER HALF-HOUR TO PREPARE FOR THE  
APMP CAPTURE PRACTITIONER CERTIFICATION!













An aerial photograph of a large body of water, possibly a reservoir or a wide river, with a sun flare at the top center. The water is dark blue with some ripples and a few small boats visible in the distance. The sun flare is bright and creates a lens flare effect across the top of the image.

# Gate Decision Management

# Gate Decision Management

1

Manage decision gates at process milestones

2

Develop and communicate the required inputs and written outputs for each decision gate including securing adequate funding and resources when advancing

3

Engage the appropriate decision-makers and significant contributors for the decision gate

## Gate Decision Management

4

Provide objective reasoning to end opportunity capture activity if the decision gate information lacks clarity and / or if the opportunity capture team does not know if, how, where, or when the information can be obtained

5

Update the opportunity capture plan and ensure gate decision packages are archived with lessons learned

A dark green rectangular banner with a white and light blue circular logo on the left. The logo consists of three curved lines in white, light blue, and purple. To the right of the logo, the text "APMP Body of Knowledge" is written in a white, sans-serif font.

## APMP Body of Knowledge

<https://www.apmp.org/page/BOK>



# Gate Decision Management BOK Topics



Gate Decisions



Budgets



Developing the  
Solution Cost



Lessons Learned  
Analysis and  
Management

# Gate Decision Management BOK Topics

<http://bok.apmp.org/bok/gate-decisions/>

<http://bok.apmp.org/bok/budgets/>

<http://bok.apmp.org/bok/developing-the-solution-cost/>

<http://bok.apmp.org/bok/lessons-learned-analysis-and-management/>

# Summary

- Use gate decisions to control progression through business development phases.
- Include relevant roles and limit nonessential participants at gate decisions.
- Hold gate decision with the right level of senior management involvement.
- Plan decision gates carefully.
- Specify inputs and outputs for each gate decision.
- Avoid overfocus on the technical solution.

# Summary

- Continue the gate decision until management reaches a firm decision.
- Be prepared to end the pursuit.
- Eliminate personal opinion, bias, and ego.
- Record the decision, update the opportunity/capture plan, archive the information, and document lessons learned.
- Gate decisions are a key component of the business development lifecycle.



# Summary

- Gate decisions prevent businesses from unnecessarily expending resources on bid they have a low probability of winning.
- Consistent decision criteria can help organizations make decisions effectively.
- Two important criteria are probability of win and probability of go, or the likelihood that a customer will actually proceed with a funded program upon making an award decision.

PHASES	BID DECISIONS	TEAM REVIEWS	MAJOR OUTPUTS
MARKET IDENTIFICATION	Market Entry Decision	Market Assessment – An analysis of market potential and requirements vs. corporate capabilities	<ul style="list-style-type: none"> <li>Strategic Plan (Input)</li> <li>Market Strategy</li> </ul>
ACCOUNT PLANNING	Opportunity / Capture Qualification Decision	Account Review – Periodic reviews of opportunity / capture potential within targeted accounts	<ul style="list-style-type: none"> <li>Account Plan</li> </ul>
OPPORTUNITY / CAPTURE ASSESSMENT	Bid Pursuit Decision	Competitor Review – An assessment and analysis of competitors' likely strategies and solutions	<ul style="list-style-type: none"> <li>Competitive Assessment</li> </ul>
OPPORTUNITY / CAPTURE PLANNING	Bid / No-Bid Decision	Opportunity / Capture Plan Review – An assessment of the opportunity / capture plan and validation of the win strategy and required actions documented in the opportunity / capture plan	<ul style="list-style-type: none"> <li>Opportunity / Capture Plan</li> <li>Pricing Strategy</li> </ul>
PROPOSAL PLANNING	Bid Validation Decision	Proposal Strategy Review – A review of the content plan to validate the execution of the bid strategy for writers and verify compliance with customer requirements	<ul style="list-style-type: none"> <li>Proposal Strategy Plan</li> <li>Proposal Responsibility Matrix</li> </ul>
PROPOSAL DEVELOPMENT	Final Review	<p>Final Document Review – A comprehensive review of the proposal by independent reviewers who emulate the customer's evaluation team</p> <p>Business Case Review / Senior Management Review – Includes all the internal milestones and approvals (internal governance) required to sign off on the solution, pricing, and legal requirements</p>	<ul style="list-style-type: none"> <li>Proposal Outline</li> <li>Response Matrix</li> <li>Style Sheet</li> <li>Content Plan</li> <li>Proposal Budget</li> <li>Executive Summary</li> <li>Proposal Plan</li> <li>Proposal</li> </ul>
NEGOTIATION		Lessons Learned Review – An assessment of the proposal development / management process and results, conducted after completion of a proposal to identify areas for improvement on subsequent projects	<ul style="list-style-type: none"> <li>Best and Final Offer (BAFO)</li> </ul>
DELIVERY		Project Review – Periodic status reports and performance reviews with customer	<ul style="list-style-type: none"> <li>Products and Services</li> </ul>

**Figure 1. Gate Decisions and the BD Lifecycle.** *Following a structured gate-decision process improves BD success.*



# Recent Trends

---

- Accelerated decision timelines. Faster turnarounds have forced proposal teams to make decisions more quickly and efficiently.
- Simpler templates. Now, teams make decisions using essential data only.
- More in-depth decisions. Rather than just filling in boxes, teams now often plan their win strategies as they cross decision gates.
- Increased focus on price. Today's RFPs increasingly focus on price as the discriminator. If you can't get to the winning price, you may be better off not bidding.
- Lower-level decisionmaking. Flowing decisionmaking downward as much as possible can lead to faster, better decisions.
- Rise of decision tracking. Organizations may be able to learn from their ratios of bid to no-bid.

# 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 decisionmakers?

What are the key issues the procurement will turn on?

What are the five critical actions we have to take to improve probability of win?

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

What is the price-to-win?  
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?



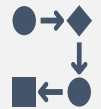
# Terms to Know – Gate Decisions

- [Bid Decisions](#)
- [Probability of Go](#)
- [Probability of Win](#)
- [Win Rate](#)

# Common Pitfalls and Misconceptions



Avoid these common misconceptions to improve your overall gate-decision performance



**All opportunity information is known at the beginning of the cycle.**

Set information maturity expectations for each review.



**You can't lose a high probability of win deals if you start late.**

A late start equals lower probability of win.



**Strategy should remain static throughout decisions.**

Win strategy is key and should be reassessed at every review.



**You can't win a low probability of win deals if you start early.**

The right actions can make a low probability of win deals into a high probability of win deals.

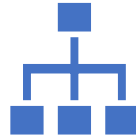


# Common Pitfalls and Misconceptions



**Probability of go has no value in the decision to pursue or not.**

If a bid doesn't generate revenue, you can't gain ROI.



**Resourcing is unimportant in probability-of-win calculations.**

Subpar teams do not often win.



**Gates can be treated as reviews rather than decision points.**

Deferring decisions wastes time and money.



**Gate-decision quality is not indicative of probability of win.**

Strategy rules. Bad strategy is often associated with low probability of win.



**Price-to-win can come late in the gate process.**

Competitive pricing strategy must come early to match the solution presented.



# Summary - Budgets

- Companies can optimize their resources to win more bid by planning, tracking, and managing budgets
- Budgets are developed based on a bid's strategic importance to a company
- Organizations should set up processes for collecting reliable budget data, plan for unforeseen expenses and known constraints, and use lessons learned, expenditure records, and metrics to increase budget accuracy
- The qualification phase can have the biggest impact on cost savings; make informed decisions concerning whether to pursue new opportunities



# Summary continued - Budgets

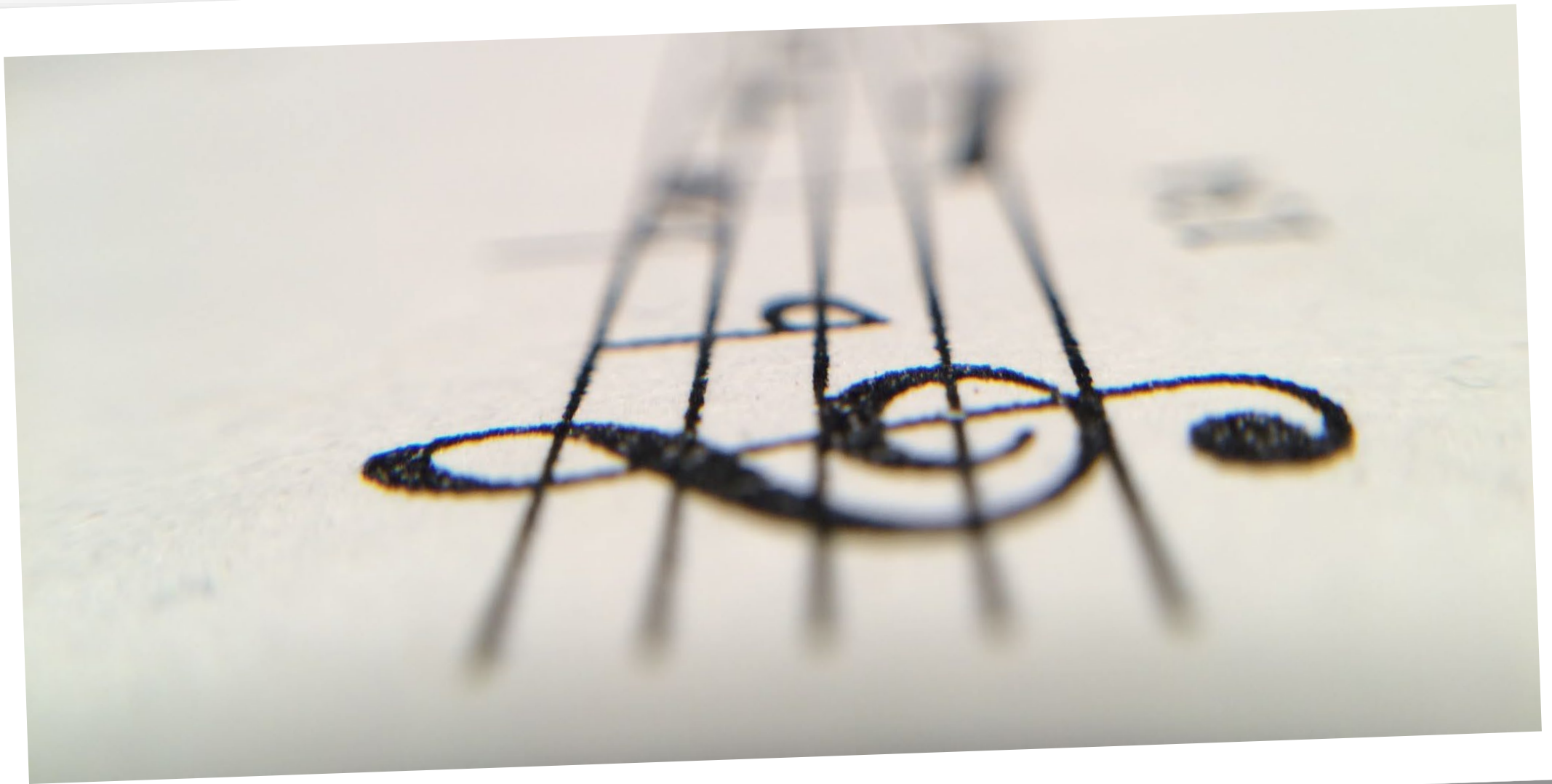
- Work not completed during the opportunity/capture phase drives costs into the proposal phase. It also has the potential to inflate costs many times over through multiple rewrites.
- After the RFP drops, obtain executive approval for an outline, dedicate time to communicating your solution to writers, and develop a writing plan
- Dedicate part of the budget to post-submission activities; capture lessons learned and implement continuous improvement
- The more you enforce best practices on each bid, the shorter the learning curve will be for the next effort

# Summary – Developing the Solution Cost

- Plan activities early in the opportunity/capture phase to work with the customer to establish their requirements—and, if they have one budget, develop a realistic target cost.
- Keep the target cost under constant review when helping the customer develop a budget for the opportunity.
- Continually and clearly differentiate between cost, price, and value with the customer and with the solution team.
- Manage the development of a cost strategy that is aligned to and supports the win strategy.
- Prepare estimating guidelines for each opportunity.
- Develop a firm and objective rationale for your cost estimates to reduce requests to lower the price during negotiation.

# Summary – Lessons Learned

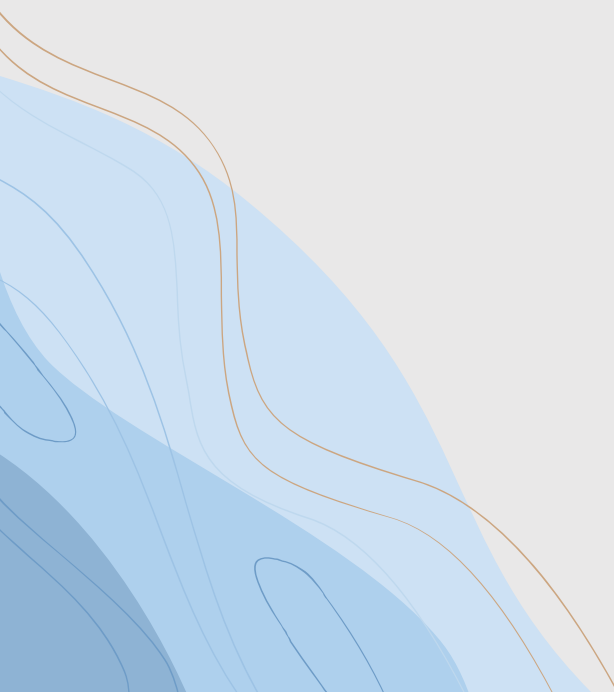
- Organizations that invest in lessons-learned sessions tend to see more wins in the marketplace
- Conducting lessons-learned reviews both internally and with your customer can help you understand what went well and what you can improve
- Using a consistent post-award debriefing protocol provides valuable trend analysis for what drives wins and losses in your market
- Lessons learned are not about dwelling on the past but about winning the next opportunity—conditioning the customer and your organization for the future





# APMP California Capture Adventure

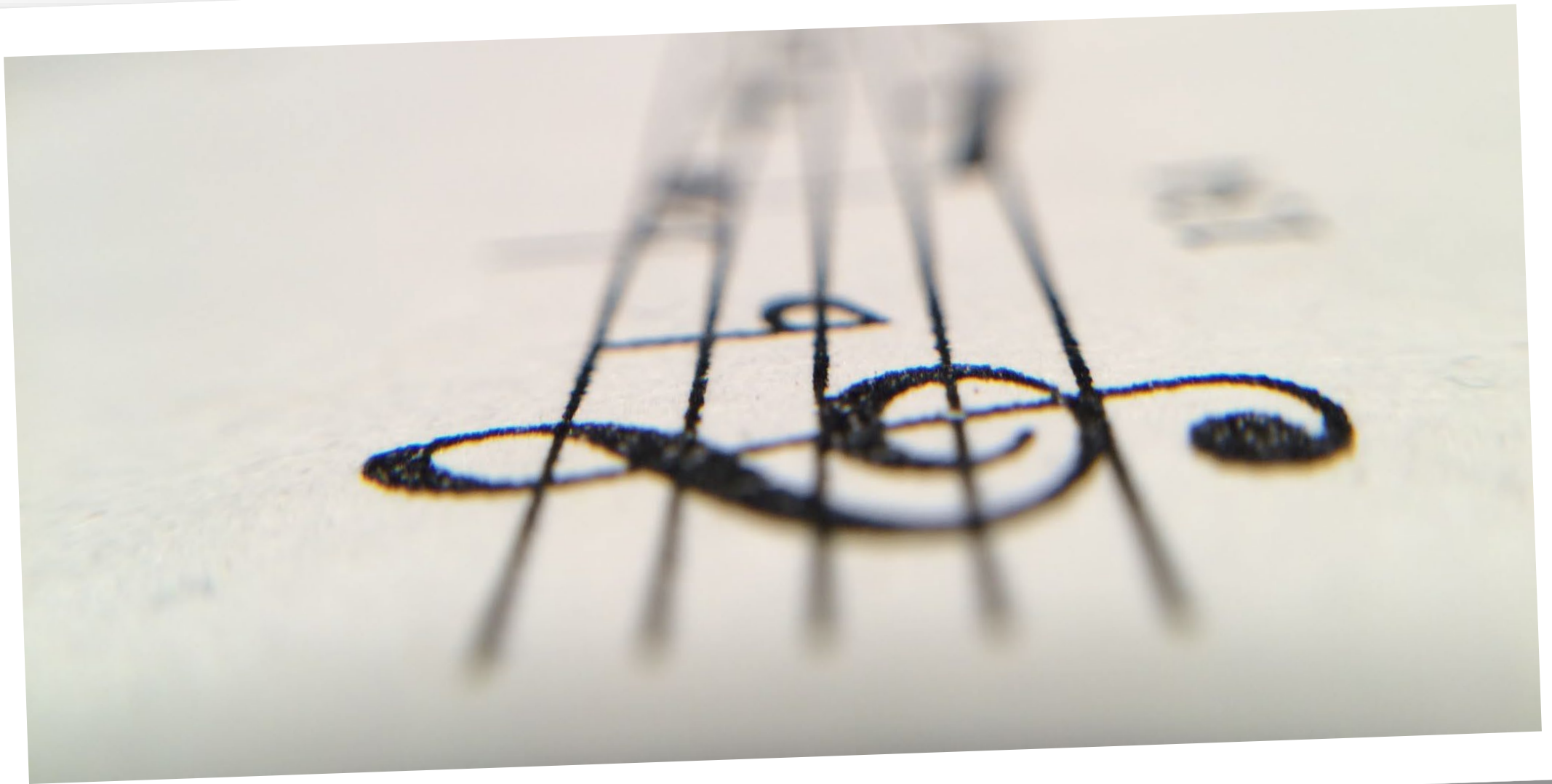
## What can you take away?





An aerial photograph of a coastline at sunset. The sun is low on the horizon, creating a bright glow and casting long shadows across the water. The text "Can you capture every moment?" is overlaid in white, centered on the image.

Can you capture every  
moment?



# CAPTURE AND BUSINESS DEVELOPMENT CONFERENCE

JANUARY 28, 2021 | ONLINE



# Virtual Events Calendar

APMP Community Calendar

[https://www.apmp.org/events/event\\_list.asp](https://www.apmp.org/events/event_list.asp)

APMP Webinars & Recordings

<https://www.apmp.org/page/APMPOnDemandStore>



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