

Turning your Capture Strategy into Results

“However beautiful the strategy, you should occasionally look at the results.”

-Sir Winston Churchill



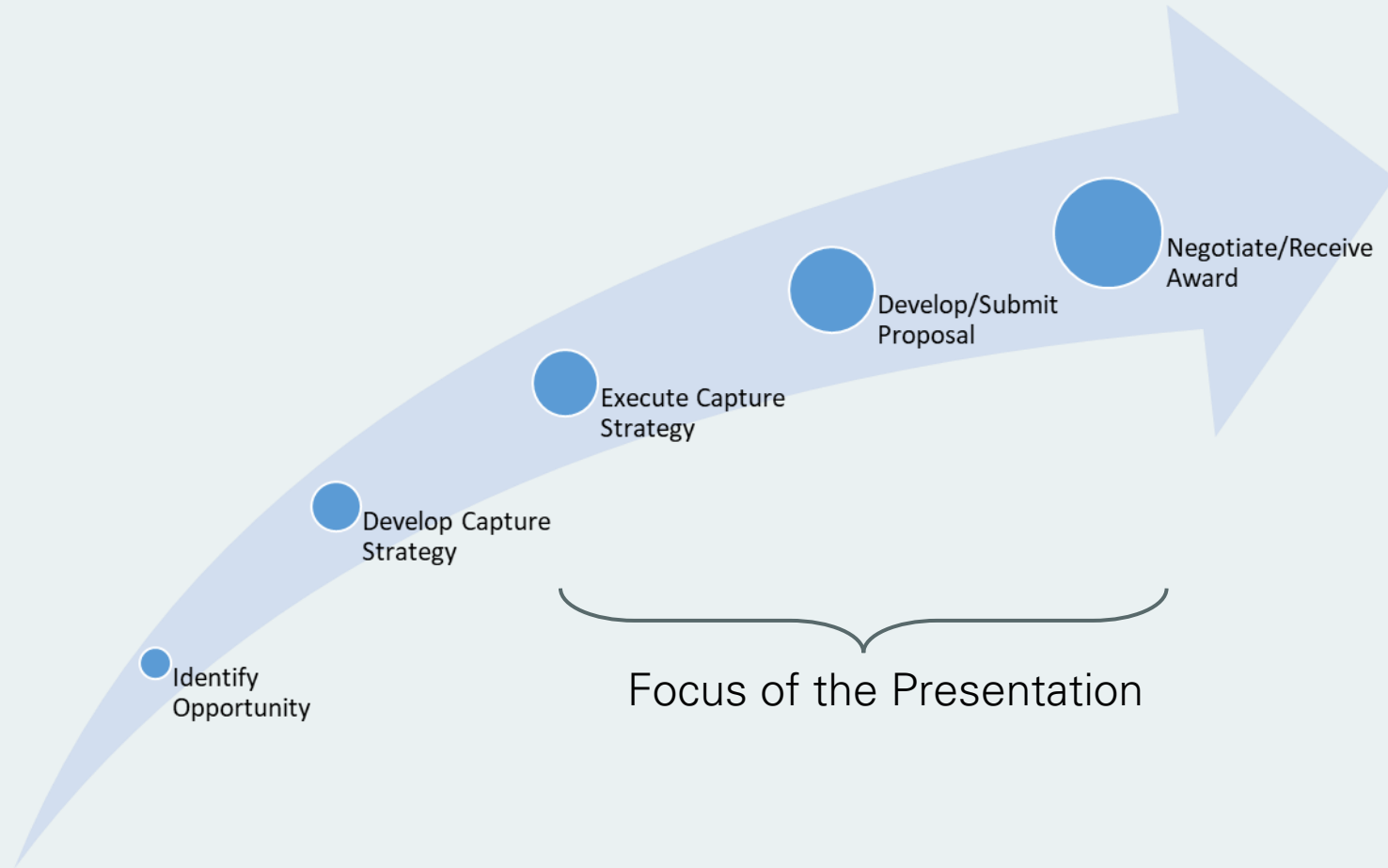
STRATEGY

“ Just because you have a plan doesn't mean it will actually work. “

Agenda

- Scope
- Execute Capture Strategy – Best Practices
- Develop/Submit Proposal – Best Practices
- Negotiate/Receive Award – Best Practices
- Measuring Success

Scope



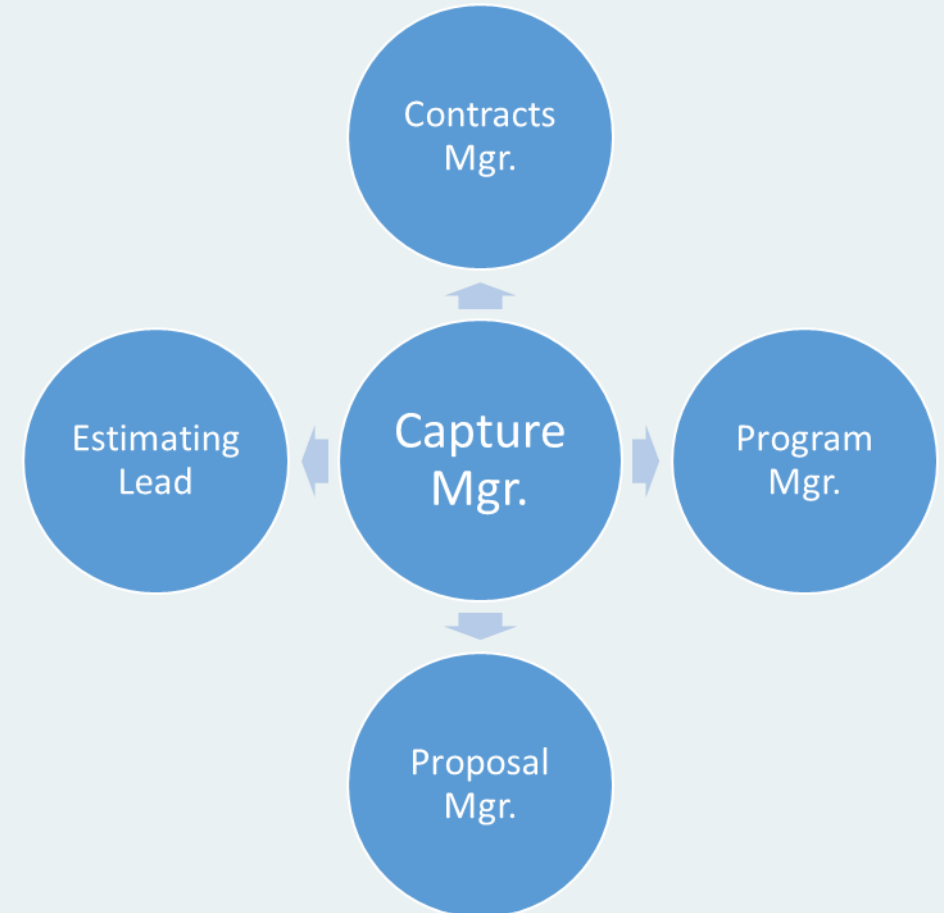


Execute Capture Strategy

Assemble and Empower the “Core Team”

Clarity of Roles is Essential

- Capture Manager – responsible for the win, develops win strategy, and leads the team
- Program Manager – responsible for the executable offer
- Proposal Manager – responsible for a compliant, responsive proposal
- Contracts Manager – responsible for contractual/legal elements
- Estimating Lead – responsible for the proposal cost estimate



Use tools to ensure alignment and progress

- Use Executive Summary to document and maintain the capture strategy – the “North Star”
 - Not just for executives
 - Not a summary
 - Written first, revised last
- Establish operating rhythm for core team and other key team members
- Create and manage dynamic plan to implement capture strategy and monitor changes



Develop/Execute Contact Plan

- Contacts
 - Customers
 - Competitors (early is best, listen)
 - Key suppliers (if applicable)
- Elements
 - Name / Title
 - Role in Requirements / Selection
 - Draft Questions

Know “what to share” and “what to protect”

Be open to changing your beautiful strategy

- If the draft or final solicitation includes
 - Unanticipated evaluation factors
 - Different priority on factors than anticipated
- If your contact plan reveals new, key information (e.g., personnel changes)
- If you see “leading indicators” of your competitor’s strategy
 - Exclusive teaming
 - Advertisements
 - Interviews/White Papers
- If your internal stakeholders drive changes

Ensure Stakeholder Support

- Conduct formal Gate Reviews as early as possible to build alignment and ownership
- Conduct strategy reviews to resolve issues and address risks
- Encourage informal tag-ups between core team members (trusted agents) and “their” stakeholders to address concerns and avoid surprises



Develop/Submit Proposal

Plan with margin

- Target 10% of available time for planning (e.g., conduct proposal kickoff ~3 days into a 30-day proposal cycle)
- Do not allocate to the page count limit in the kickoff meeting
 - ~10% margin (e.g., 10 pages of a 100-page volume)
 - Release margin to address Red Team actions or fix allocation errors
- Manage page count
 - Never “cut to fit”
 - Do not create, accept, or pass defects
- Plan to submit a day early

Ensure proposal team members are trained

- Include JIT training as part of key meetings
 - Kickoff meeting – How to storyboard
 - Writing kickoff – Writing tips/instructions
 - Red Team review – Red Team instructions/expectations
 - Red Team outbrief – Author expectations
- Provide additional training to “first timers”
 - Proposal process
 - How the customer evaluates
 - Common approaches/graphics (topic specific)

Conduct independent reviews

- Choose reviewers that are:
 - Not contributing to proposal strategy or contents
 - Competent in some aspect (e.g., technical, management) of the proposal
 - Have previously written proposals
- Ensure that reviews provide:
 - Checkpoints to drive progress and alignment
 - Recommended corrective action to resolve issues
- Do not use proposal approvers/executives as independent reviewers
 - Do not follow instructions (no specific corrective actions)
 - Are not comfortable with “seeing the sausage being made”

Do not focus exclusively on compliance

- Compliant proposals have no strengths and are equivalent to a “C paper”
- A “C paper” is usually not good enough to win a competitive pursuit
- Focus on scoring strengths to get an “A or B paper”

Color Rating	Adjectival Rating	Description
BLUE	OUTSTANDING	Proposal demonstrates an exceptional approach and understanding of the requirements and contains multiple strengths or at least one significant strength, and risk of unsuccessful performance is low.
PURPLE	GOOD	Proposal indicates a thorough approach and understanding of the requirements and contains at least one strength or significant strength, and risk of unsuccessful performance is low to moderate.
GREEN	ACCEPTABLE	Proposal meets requirements and indicates an adequate approach and understanding of the requirements, and risk of unsuccessful performance is no worse than moderate.
YELLOW	MARGINAL	Proposal has not demonstrated an adequate approach and understanding of the requirements, or risk of unsuccessful performance is high.
RED	UNACCEPTABLE	Proposal does not meet requirements of the solicitation and, thus, contains one or more deficiencies and is unawardable, or risk of performance is unacceptably high.

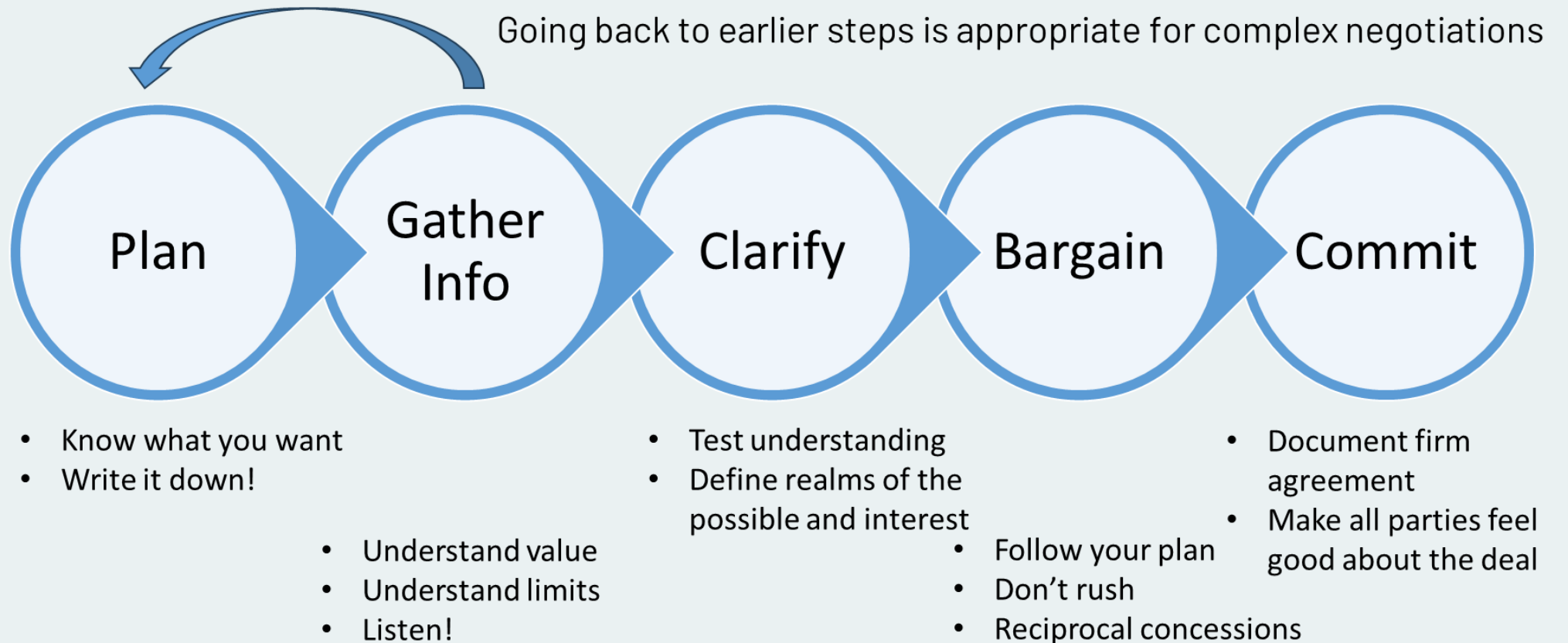


Negotiate/Receive Award

Negotiation – A dialogue to reach agreement on an issue in conflict

- Integrative (Win-Win)
 - Sometimes called Complex or “Non-Zero-Sum Game”
 - Potentially characterized by multiple “Winners”
 - The product/service and price are both at issue
- Distributive (Zero-Sum Game)
 - Sometimes called Positional or Hard Bargaining
 - Characterized by “Winners” and “Losers”
 - The product/service is usually fixed and the issue is price

Five Step Negotiation Progress



Value is the customer's decision

"I have seen, and heard, much of cockney impudence before now; but never expected to hear a coxcomb ask two hundred guineas for flinging a pot of paint in the public's face."

John Ruskin

"...As to what the picture represents that depends upon who looks at it. To some persons it may represent all that is intended; to others it may represent nothing."

James Whistler



Nocture in Black and Gold: the Falling Rocket James Abbott McNeill Whistler (~1875)

Gathering information and using silence

- Focus on understanding the other side
- What do they really value ... and compare to what you thought ... can it be quantified to support a value analysis?
- What constraints are they under ... who else is in the decision process and needs to participate or ratify the agreement?
- Clarify any logistics elements or impacts
- Be willing to talk, but focus on listening
- Use silence
 - People love to talk about themselves...let them
 - There is no pride in selling

Finding yourself in a distributive negotiation

Rules

- Never name the first price
- Make small changes and use time (Run out the clock)
- Don't make an offer where you won't agree to "split the difference"
- Walk away at least once

Behaviors

- Limited discretion ("I'll ask my manager")
- Unreciprocated offers (Bidding against yourself)
- "Good Cop, Bad Cop"
- "Divide and Conquer"
- Take-it-or-leave-it





Measuring Success

Making results transparent motivates improvement

- Win Rate = $\frac{\# \text{ Pursuits Won}}{\# \text{ Pursuits Bid}}$
 - Benchmark your industry to understand what value is “good”
 - Commercial usually ~35%
 - Government usually ~70%
- Capture Rate = $\frac{\text{Bid Value Won}}{\text{Total Bid Value}}$
 - If Capture Rate \ll Win Rate, you may need to adjust your approach (e.g., start earlier) on larger pursuits

Thank
you

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