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# 1 RPRC BUSINESS DEVELOPMENT TEAM BIBLE

## 1.1 The Complete One-Stop Guide for BD Excellence

**Version 2.0 | September 2025** **Integrating Chas's Capture Management Expertise with RPRC Strategic Vision**

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## 1.3 PART I: FOUNDATION & PHILOSOPHY

### 1.3.1 Mission & Vision

**RPRC BD Mission**: Transform RPRC into the premier academic research partner for DoD and industry by 2027, achieving $150M+ annual revenue through systematic BD excellence.

**Core Vision**: Build on RPRC's proven $110M MUDLAN delivery success to establish market leadership in rapid prototyping and emerging technology development.

### 1.3.2 Strategic Framework

#### 1.3.2.1 Five Strategic Pillars

1. **Intelligence-Driven BD** - Predictive opportunity identification
2. **Relationship Supremacy** - Deep Program Executive Office (PEO) relationships
3. **Rapid Response Capability** - 48-hour white paper response time
4. **Technology Leadership** - Cutting-edge research positioning
5. **Lead Academic Partner** – To strategic prime contractor alliances

#### 1.3.2.2 Success Metrics

* Annual revenue growth: 25% year-over-year
* Win rate: 35% (vs. industry average 15%)
* Average contract value: $2M+ (vs. current $500K)
* Customer retention rate: 90%
* Prime contractor partnerships: 50+ active relationships

1.3.2.3RPRC Business Model

* + Applied Research, capability integration i.e. take new tech and insert into existing C5ISR system
  + Leverage small business innovation
  + Unbiased and leverage faculty to solve the toughest problems
  + Methods to win and conduct applied research

                                                              i.      Prime Contracts, OTAs  i.e. MUDLAN/MADD – CDAO for OTA

                                                            ii.      Congressional Plus Ups ( need to have a sponsor that provides PE and supports when asked by Congressional Staffers)

                                                          iii.      STTRs (small businesses that can provide innovation tech to address operational gaps)

                                                          iv.      Subcontractor, especially on large National Security Programs

                                                            v.      Grants, NIH, NSF

                                                          vi.      Independently funded initiatives from Foundations etc

### 1.3.3 Core Principles

**The RPRC BD Code:**

1. **Customer First** - Every decision must benefit the customer and a deep understanding of the mission
2. **Data-Driven** - All BD decisions backed by intelligence
3. **Speed & Agility** - Faster than competitors at every stage
4. **Excellence** - Quality over quantity in every deliverable
5. **Integrity** - Honest, transparent, and ethical in all dealings
6. **Collaboration** - Internal and external partnerships drive success
7. **Continuous Learning** - Adapt and improve from every engagement

### 1.3.4 Competitive Positioning

#### 1.3.4.1 Differentiation Against Elite Institutions (What we are up against)

**vs. GTRI**: Faster response, deeper DoD integration **vs. MIT Lincoln Lab**: More agile, industry-friendly processes **vs. Johns Hopkins APL**: Broader technology portfolio, academic flexibility

#### 1.3.4.2 Unique Value Propositions

* **48-Hour Response Time**: Industry-leading white paper turnaround
* **Embedded Industry Partners**: Co-located prime contractors
* **Real-Time Collaboration**: Virtual teaming capabilities
* **Technology Transition Pipeline**: Clear research-to-deployment path

## 1.4 PART II: THE 4-GATE BD & CAPTURE PROCESS

┌──────────────────────────────────────────────────────────────────────┐  
│ RPRC 4-GATE VISUAL ROADMAP │  
├──────────────────────────────────────────────────────────────────────┤  
│ │  
│ GATE 1 GATE 2 GATE 3 GATE 4 │  
│ ▼──────▼ ▼──────▼ ▼──────▼ ▼──────▼ │  
│ │  
│ 📋 QUALIFY → 🎯 PURSUE → 🏆 CAPTURE → ✅ BID/NO-BID │  
│ │  
│ • 8 Questions • Call Plan • Storyboards • RFP Analysis │  
│ • Capability • Timeline • Win Themes • Risk Review │  
│ • Quick Check • Investment • Team Build • Final Decision │  
│ │  
│ PWin: >10% PWin: >20% PWin: >30% PWin: >40% │  
│ │  
└──────────────────────────────────────────────────────────────────────┘

### 1.4.1 Gate 1: Opportunity Identification/Qualification

**Purpose**: Determine if pursuit is viable and aligns with RPRC capabilities

#### 1.4.1.1 Qualification Criteria (The 8 Essential Questions)

1. **What exactly is the opportunity?** (Real vs. phantom)
2. **What is the acquisition schedule?** (RFI/RFP/Award dates)
3. **What is the contract value?** (Incumbent value, expected value, # awards)
4. **Is there a Government PM assigned?** (Accountability check)
5. **Is there budget alignment?** (Current/next year funding)
6. **Does the client know RPRC?** (Relationship status)
7. **Does scope align with capabilities?** (Similar size/scope experience)
8. **Do we have a chance?** (Bottom line reality check)

#### 1.4.1.2 Gate 1 Deliverables

* **Opportunity Intelligence Report**
  + Basic opportunity data from SAM.gov/GOVWIN
  + Initial customer research
  + Preliminary capability match
* [**Quad Chart Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/RPRC_Quad_Chart_Template.md) (Initial version)
* **Go/No-Go Recommendation**
  + Risk assessment
  + Resource requirements estimate
  + Strategic alignment evaluation

**📋 Gate 1 Tools:**

* [Daily Execution Playbook](file:///Users/michaelkomorous/02_Templates/Training_Materials/BD_DAILY_EXECUTION_PLAYBOOK.md)
* [Quick Reference Card](file:///Users/michaelkomorous/02_Templates/Training_Materials/BD_QUICK_REFERENCE_CARD.md)

#### 1.4.1.3 Gate 1 Decision Criteria

**PROCEED TO GATE 2 IF:**

* All 8 qualification questions answered
* Opportunity value >$500K
* Timeline allows adequate pursuit
* Customer contact identified
* No fatal technical/business flaws

**Approval Required**: BD Director + Department Head

### 1.4.2 Gate 2: Pursue Decision

**Purpose**: Develop pursuit strategy and commit resources

#### 1.4.2.1 Gate 2 Requirements

**1. Client History Analysis**

* RPRC relationship status
* Previous interactions/contracts
* Key personnel relationships
* Customer satisfaction metrics

**2. Call Plan Development**

* Contracting Officer engagement strategy
* Program Manager meeting schedule
* Technical SME interview plan
* Acquisition Authority identification
* Question matrix for each stakeholder

**3. Opportunity Timeline**

* Acquisition schedule overlay
* Gate 1-4 milestones
* RFI/RFP/Award critical dates
* Competitor timeline analysis

**4. Strategy & Win Themes**

* Positioning strategy for prime/sub role
* Networking and teaming
* Client engagement plan
* IR&D investment requirements
* Key hire identification
* Facility/certification needs

**5. Investment Requirements**

* Personnel costs (BD, technical)
* Travel and meeting expenses
* Facility security clearance
* ISO certifications
* Capability development costs

#### 1.4.3.2 The Art of Customer Engagement

**First Rule**: Don't do all the talking **Process**:

1. Start with pleasantries
2. Ask questions, let customer talk
3. Take detailed notes (bring a second person)
4. Leave white papers, not presentations
5. Focus on learning customer needs
6. Identify hot buttons and pain points

**Customer Hot Buttons**: Emotional drivers that motivate action

* Urgent problems requiring solutions
* Personal aspirations and career goals
* Budget pressures and constraints
* Technical challenges and risks
* Political and organizational dynamics

#### 1.4.2.2 Gate 2 Deliverables

* **Pursuit Strategy Document**
* **Resource Allocation Plan**
* **Customer Engagement Calendar**
* [**Competitive Analysis Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_BEST_PRACTICES_LIBRARY.md#competitive-analysis)
* **Investment ROI Projection**
* [**Updated Quad Chart**](file:///Users/michaelkomorous/02_Templates/BD_Templates/RPRC_Quad_Chart_Template.md) (Complete version)

**📋 Gate 2 Tools:**

* [Weekly BD Summary Report](file:///Users/michaelkomorous/02_Templates/BD_Templates/WEEKLY_BD_SUMMARY_REPORT.md)
* [Executive BD Briefing Template](file:///Users/michaelkomorous/02_Templates/BD_Templates/EXECUTIVE_BD_BRIEFING_TEMPLATE.md)
* [Competitive Intelligence Framework](#X685c83998df6529664eb34f13a2eeed356f0e33)
* [Customer Relationship Matrix](#appendix-f2-customer-relationship-matrix)

#### 1.4.2.3 Gate 2 Decision Criteria

**PROCEED TO GATE 3 IF:**

* Customer access confirmed
* Win probability >20%
* Resource availability verified
* Strategic value demonstrated
* Competitive position defensible

**Approval Required**: Senior BD Director + Division Chief

### 1.4.3 Gate 3: Capture Management

**Purpose**: Execute capture strategy and position to win

#### 1.4.3.1 Capture Management Components

**1. Key Personnel Strategy**

* Client intimacy assessment
* Experience requirements mapping
* Resume gap analysis
* Recruitment/retention plan

**2. Staffing Plan Development**

* Level of effort analysis
* Capability requirements matrix
* Internal resource allocation
* External partner identification

**3. Dream Team Assembly**

* Prime/sub team composition
* Small business requirements compliance
* Teaming agreement negotiations
* Workshare allocation

**4. Strategy Refinement**

* Updated win themes based on customer intel
* Discriminator development
* Ghost competitor positioning
* Value proposition enhancement

**5. Gap Analysis**

* SOW requirement traceability
* Section L instruction compliance
* Section M evaluation criteria mapping
* Capability vs. requirement matrix

**6. Past Performance Validation**

* Similar size/scope/complexity contracts
* Reference customer preparation
* Performance narrative development
* Lessons learned integration

#### 1.4.3.3 Storyboard Development Process

**Storyboard Template**:

* **SOW Requirement** (Technical/Management)
* **Policy/Standard Reference**
* **Customer Hot Button(s)**
* **RPRC Feature(s)**
* **Customer Benefit(s)**
* **Discriminator(s)**
* **SWOT Analysis** (optional)
* **Win Theme Statement**
* **Supporting Graphic/Visual**

**Win Theme Formula**: Hot Button + Feature + Benefit = Win Theme

#### 1.4.3.4 Gate 3 Deliverables

* **Complete Storyboard Set** (using [Best Practices Guide](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_BEST_PRACTICES_LIBRARY.md))
* **Customer Intelligence Report**
* **Team Composition Plan**
* **Past Performance Portfolio**
* **Updated Competitive Analysis**
* [**Final Quad Chart**](file:///Users/michaelkomorous/02_Templates/BD_Templates/RPRC_Quad_Chart_Template.md) (Gate 3 complete)

**📋 Gate 3 Tools:**

* [Company Profile Template](file:///Users/michaelkomorous/02_Templates/BD_Templates/20250915_Company_Profile_Template.md)
* [Action Item Tracker](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_ACTION_ITEM_TRACKER.csv)

#### 1.4.3.5 Gate 3 Decision Criteria

**PROCEED TO GATE 4 IF:**

* Customer engagement successful
* Win themes validated
* Team assembly complete
* Past performance adequate
* Technical approach sound

**Approval Required**: Executive Director + Principal Investigator

### 1.4.4 Gate 4: Bid/No-Bid Decision

**Purpose**: Final commitment decision when RFP released

#### 1.4.4.1 Gate 4 Analysis Requirements

**1. RFP Analysis**

* SOW requirement breakdown
* Section L instruction compliance
* Section M evaluation criteria weighting
* Contract type and terms assessment

**2. Final Competitive Assessment**

* Competitor positioning
* Incumbent advantage analysis
* Win probability calculation
* Pricing competitiveness

**3. Resource Commitment**

* Proposal development timeline
* Team availability confirmation
* Budget allocation approval
* Senior management commitment

**4. Risk Assessment**

* Technical risks and mitigation
* Business risks and impact
* Regulatory compliance risks
* Resource availability risks

#### 1.4.4.2 Bid/No-Bid Decision Matrix

**BID IF:**

* Win probability >30%
* Strategic value high
* Resources available
* Customer relationship strong
* Technical solution sound
* Pricing competitive

**NO-BID IF:**

* Fatal technical flaws
* Insufficient resources
* Weak customer relationship
* Uncompetitive positioning
* Excessive risk exposure

#### 1.4.4.3 Gate 4 Deliverables

* **Final Bid/No-Bid Recommendation**
* **Proposal Development Plan** (using [SBIR Templates](file:///Users/michaelkomorous/PROPOSAL_REPOSITORY/_PROPOSAL_TEMPLATES))
* **Team Commitment Letters**
* **Budget Authorization**
* **Risk Mitigation Plan**
* [**Complete Quad Chart**](file:///Users/michaelkomorous/02_Templates/BD_Templates/RPRC_Quad_Chart_Template.md) (Final Gate 4 version)

**📋 Gate 4 Tools:**

* [DOD SBIR Template](file:///Users/michaelkomorous/PROPOSAL_REPOSITORY/_PROPOSAL_TEMPLATES/DOD_SBIR_Template)
* [NIH SBIR Template](file:///Users/michaelkomorous/PROPOSAL_REPOSITORY/_PROPOSAL_TEMPLATES/NIH_SBIR_Template)

**Approval Required**: RPRC Director + Finance Director

## 1.5 PART III: TACTICAL EXECUTION

### 1.5.1 Quad Chart Development

#### 1.5.1.1 Quadrant 1: The Opportunity

1. Procuring Agency: [Name and office]  
2. Contract Type: [IDIQ, FFP, CPFF, etc.]  
3. Incumbent Contract Value: [$X.X M]  
4. Incumbent Award Date: [MM/DD/YYYY]  
5. Incumbent Term: [X years + options]  
6. Projected LOE: [Person-years]  
7. RFI Date: [MM/DD/YYYY]  
8. Projected RFP Date: [MM/DD/YYYY]  
9. Small Biz Goal: [X% if applicable]  
10. Current Gate: [1/2/3/4]  
11. Opportunity Manager: [Name]  
12. Program Manager: [Gate 3+ assignment]  
13. Proposal Manager: [Gate 3+ assignment]

#### 1.5.1.2 Quadrant 2: Competition Analysis

INCUMBENT TEAM:  
- Prime: [Company name + key strengths]  
- Key Subs: [List with capabilities]  
- Performance Issues: [If known]  
  
LIKELY COMPETITORS:  
- Prime Candidates: [Companies + win themes]  
- Sub Opportunities: [Teaming possibilities]  
- Market Intelligence: [Recent wins/losses]

#### 1.5.1.3 Quadrant 3: SOW Description

PRIMARY TASKS:  
- [Task 1 with scope]  
- [Task 2 with scope]  
- [Task 3 with scope]  
  
KEY REQUIREMENTS:  
- [Technical requirement 1]  
- [Management requirement 1]  
- [Performance requirement 1]  
  
DELIVERY EXPECTATIONS:  
- [Major deliverable 1]  
- [Major deliverable 2]

#### 1.5.1.4 Quadrant 4: RPRC Experience

RELEVANT CONTRACTS (Last 5 years):  
1. [Contract name] - [$X.X M] - [YYYY-YYYY]  
 Similar scope: [Description]  
 Performance: [Success metrics]  
  
2. [Contract name] - [$X.X M] - [YYYY-YYYY]  
 Similar scope: [Description]  
 Performance: [Success metrics]  
  
CAPABILITY GAPS:  
- [Gap 1 + mitigation strategy]  
- [Gap 2 + mitigation strategy]

### 1.5.2 Customer Engagement Strategy

#### 1.5.2.1 The RPRC Customer Engagement Model

**Phase 1: Research & Preparation**

* Customer organization analysis
* Key personnel identification
* Recent acquisition history
* Technology priorities research
* Meeting objective definition

**Phase 2: Initial Contact**

* Warm introduction preferred
* Email template customization
* Meeting request with value proposition
* Agenda preparation
* Follow-up timeline

**Phase 3: Relationship Building**

* Regular touchpoint schedule
* Value-added communications
* Technical white papers
* Industry conference interactions
* Joint research proposals

**Phase 4: Opportunity Development**

* Requirements shaping discussions
* Technical approach validation
* Teaming partner introductions
* Proposal strategy alignment
* Win theme confirmation

#### 1.5.2.2 Customer Meeting Best Practices

**Before the Meeting:**

* Research attendees' backgrounds
* Prepare intelligent questions
* Bring company overview materials
* Plan for note-taking roles
* Set clear objectives

**During the Meeting:**

* Ask open-ended questions
* Listen more than you speak
* Take detailed notes
* Validate understanding
* Identify next steps

**After the Meeting:**

* Send follow-up within 24 hours
* Share promised materials
* Update CRM system
* Brief internal team
* Plan next engagement

### 1.5.3 Proposal Development

#### 1.5.3.1 The RPRC Proposal Factory Model

**Timeline Management:**

* 30 days before due: Opportunity assessment complete
* 21 days before due: Team assembly complete
* 14 days before due: Go/no-go decision
* 7 days before due: Content development complete
* 3 days before due: Compliance review complete
* 1 day before due: Quality assurance complete

**Team Roles:**

* **Proposal Manager**: Overall coordination and compliance
* **Technical Lead**: Technical approach development
* **Principal Investigator**: Scientific/technical oversight
* **Business Development**: Customer relationship and strategy
* **Graphics Support**: Visual design and layout
* **Editor**: Writing quality and clarity
* **Reviewer**: Independent quality assessment

#### 1.5.3.2 Storyboarding for Proposal Excellence

**Storyboard-to-Proposal Process:**

1. Requirements analysis and decomposition
2. Storyboard development per requirement
3. Graphics planning and conceptualization
4. Writing assignment and coordination
5. Integration and review cycles
6. Final production and submission

**Quality Gates:**

* **Pink Team**: First draft review (internal)
* **Red Team**: Final review (external experts)
* **Gold Team**: Executive approval review
* **Green Team**: Pricing review and approval

## 1.6 PART IV: SYSTEMS & TOOLS

### 1.6.1 BD Tracker Integration

#### 1.6.1.1 System Enhancement Requirements

**Gate Management Module:**

* 4-gate workflow implementation
* Automated gate progression tracking
* Decision checkpoint alerts
* Approval workflow routing

**Quad Chart Dashboard:**

* Dynamic quad chart generation
* Real-time data integration
* Competitive intelligence feeds
* Performance metric tracking

**Customer Relationship Module:**

* Contact management system
* Interaction history tracking
* Meeting scheduling integration
* Communication templates

**Opportunity Pipeline:**

* Advanced filtering and sorting
* Predictive analytics integration
* Win probability calculations
* Resource allocation tracking

### 1.6.2 Thursday Meeting Framework

#### 1.6.2.1 Enhanced Meeting Structure

┌─────────────────────────────────────────────┐  
│ THURSDAY BD MEETING VISUAL FLOW │  
├─────────────────────────────────────────────┤  
│ │  
│ 10:00 ┌──────────────┐ │  
│ ↓ │ OPENING │ 5 min │  
│ 10:05 ├──────────────┤ │  
│ ↓ │ PIPELINE │ 40 min │  
│ 10:45 │ REVIEW │ (30 programs) │  
│ ↓ ├──────────────┤ │  
│ 10:50 │ DECISIONS │ 5 min │  
│ ↓ ├──────────────┤ │  
│ 10:55 │ACTION ITEMS │ 5 min │  
│ ↓ ├──────────────┤ │  
│ 11:00 │ CLOSE │ 5 min │  
│ └──────────────┘ │  
│ │  
└─────────────────────────────────────────────┘

**Meeting Preparation (Wednesday 6 PM Deadline):**

* [Quad charts](file:///Users/michaelkomorous/02_Templates/BD_Templates/RPRC_Quad_Chart_Template.md) updated for all active opportunities
* Gate progression analysis
* Customer engagement summary
* Competitive intelligence updates
* Resource allocation review

**📋 Thursday Meeting Tools:**

* [Meeting Prep Checklist](file:///Users/michaelkomorous/02_Templates/BD_Templates/THURSDAY_MEETING_PREP_CHECKLIST.md)
* [Facilitator Guide](file:///Users/michaelkomorous/02_Templates/BD_Templates/THURSDAY_BD_MEETING_FACILITATOR_GUIDE.md)
* [Weekly Summary Report](file:///Users/michaelkomorous/02_Templates/BD_Templates/WEEKLY_BD_SUMMARY_REPORT.md)

**Meeting Agenda (60 minutes max):**

1. **Pipeline Review** (20 minutes)
   * New opportunities identified
   * Gate progression updates
   * Win/loss announcements
2. **Deep Dive Sessions** (30 minutes)
   * 2-3 opportunities for detailed review
   * Customer engagement planning
   * Team assembly discussions
   * Strategy refinement
3. **Action Items & Next Steps** (10 minutes)
   * Individual assignments
   * Meeting scheduling
   * Resource commitments
   * Follow-up deadlines

**Post-Meeting Actions:**

* Action item distribution
* CRM system updates
* Calendar scheduling
* Document sharing

### 1.6.3 Training & Certification

#### 1.6.3.1 RPRC BD Certification Levels

**Level 1: BD Fundamentals**

* DoD acquisition process
* Federal contracting basics
* RPRC capabilities overview
* Customer engagement skills
* Proposal development basics

**Level 2: Capture Management**

* 4-gate process mastery
* Storyboarding techniques
* Win theme development
* Competitive intelligence
* Customer relationship management

**Level 3: BD Leadership**

* Strategic BD planning
* Team management
* P&L responsibility
* Executive relationships
* Market development

#### 1.6.3.2 Training Delivery Methods

* **Online Modules**: Self-paced learning
* **Workshop Sessions**: Interactive training
* **Mentorship Program**: Experienced practitioner pairing
* **Simulation Exercises**: Real-world scenario practice
* **Conference Attendance**: Industry knowledge building

### 1.6.4 Performance Metrics

#### 1.6.4.1 Individual Performance Indicators

* Opportunities identified per quarter
* Win rate by opportunity type
* Customer meeting frequency
* Proposal quality scores
* Revenue attribution

#### 1.6.4.2 Team Performance Indicators

* Pipeline value and velocity
* Gate progression efficiency
* Customer satisfaction scores
* Competitive win rates
* Market share growth

#### 1.6.4.3 Organizational Performance Indicators

* Annual revenue growth
* Market position ranking
* Brand recognition metrics
* Faculty engagement rates
* Student placement success

## 1.7 PART V: RESOURCES & REFERENCES

### 1.7.1 Templates Library

#### 1.7.1.1 🎯 Core BD Templates (Click to Access)

1. [**RPRC Quad Chart Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/RPRC_Quad_Chart_Template.md) - Professional opportunity assessment format
2. [**BD Maturity Assessment**](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_MATURITY_ASSESSMENT.md) - Comprehensive capability evaluation
3. [**BD Best Practices Library**](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_BEST_PRACTICES_LIBRARY.md) - Proven strategies and techniques
4. [**BD Onboarding Plan Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_Onboarding_Plan_Template.md) - New team member integration
5. [**Company Profile Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/20250915_Company_Profile_Template.md) - Standardized capability presentations
6. [**BD Tracker PRD Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/20250915_BD_Tracker_PRD_Template.md) - System requirements documentation

#### 1.7.1.2 📊 Meeting & Communication Templates

1. [**Thursday BD Meeting Facilitator Guide**](file:///Users/michaelkomorous/02_Templates/BD_Templates/THURSDAY_BD_MEETING_FACILITATOR_GUIDE.md) - Weekly meeting management
2. [**Thursday Meeting Prep Checklist**](file:///Users/michaelkomorous/02_Templates/BD_Templates/THURSDAY_MEETING_PREP_CHECKLIST.md) - Pre-meeting preparation
3. [**Weekly BD Summary Report**](file:///Users/michaelkomorous/02_Templates/BD_Templates/WEEKLY_BD_SUMMARY_REPORT.md) - Progress reporting format
4. [**Executive BD Briefing Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/EXECUTIVE_BD_BRIEFING_TEMPLATE.md) - Senior leadership presentations

#### 1.7.1.3 🎓 Training & Development Templates

1. [**BD Daily Execution Playbook**](file:///Users/michaelkomorous/02_Templates/Training_Materials/BD_DAILY_EXECUTION_PLAYBOOK.md) - Step-by-step daily guidance
2. [**BD Practitioner Exam Level 1**](file:///Users/michaelkomorous/02_Templates/Training_Materials/BD_PRACTITIONER_EXAM_LEVEL1.md) - Certification assessment
3. [**BD Quick Reference Card**](file:///Users/michaelkomorous/02_Templates/Training_Materials/BD_QUICK_REFERENCE_CARD.md) - Pocket guide for daily use
4. [**Day in the Life BD Training**](file:///Users/michaelkomorous/02_Templates/Training_Materials/DAY_IN_THE_LIFE_BD_TRAINING.md) - Immersive training experience
5. [**RPRC Mission and Value**](file:///Users/michaelkomorous/02_Templates/Training_Materials/RPRC_MISSION_AND_VALUE.md) - Foundation principles
6. [**Daily Feedback Form**](file:///Users/michaelkomorous/02_Templates/Training_Materials/DAILY_FEEDBACK_FORM.md) - Performance tracking
7. [**Week 5 Training Schedule**](file:///Users/michaelkomorous/02_Templates/Training_Materials/WEEK_5_TRAINING_SCHEDULE.md) - Advanced training curriculum
8. [**Week 5 Practical Exercises**](file:///Users/michaelkomorous/02_Templates/Training_Materials/WEEK_5_PRACTICAL_EXERCISES.md) - Hands-on practice scenarios
9. [**Week 6 Preview**](file:///Users/michaelkomorous/02_Templates/Training_Materials/WEEK_6_PREVIEW.md) - Next phase preparation

#### 1.7.1.4 📁 Interactive Templates (HTML/Tools)

1. [**Master Checklist Interactive Template**](file:///Users/michaelkomorous/02_Templates/BD_Templates/20250915_Master_Checklist_Interactive_Template.html) - Web-based checklist
2. [**Document Shell Template V2**](file:///Users/michaelkomorous/02_Templates/BD_Templates/20250915_Template_Document_Shell_V2.html) - Formatted document framework
3. [**Strategic Calendar Skeleton**](file:///Users/michaelkomorous/02_Templates/BD_Templates/20250915_Strategic_Calendar_Skeleton.html) - Timeline planning tool

#### 1.7.1.5 📋 Data & Tracking Templates

1. [**BD Action Item Tracker**](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_ACTION_ITEM_TRACKER.csv) - Task management spreadsheet
2. [**RPRC Complete Pipeline Tracker**](file:///Users/RPRC_Complete_Pipeline_Tracker.csv) - Opportunity pipeline management

#### 1.7.1.6 📖 Proposal Development Templates

1. [**DOD SBIR Template**](file:///Users/michaelkomorous/PROPOSAL_REPOSITORY/_PROPOSAL_TEMPLATES/DOD_SBIR_Template) - Defense SBIR proposals
2. [**NIH SBIR Template**](file:///Users/michaelkomorous/PROPOSAL_REPOSITORY/_PROPOSAL_TEMPLATES/NIH_SBIR_Template) - Health SBIR proposals
3. [**Active Proposal Templates**](file:///Users/michaelkomorous/PROPOSAL_REPOSITORY/Active_Proposals) - Current proposal formats

#### 1.7.1.7 🏢 Business Development Tools

1. [**NDA Templates**](file:///Users/michaelkomorous/06_Resources/NDAs_and_Agreements) - Legal agreement formats
2. [**Technical Templates**](file:///Users/michaelkomorous/02_Templates/Technical_Templates) - Technical documentation formats
3. **[Golden Dome Templates](../../Golden Dome/07\_Templates/)** - Project-specific templates

#### 1.7.1.8 🎯 Strategic BD Frameworks

1. [**Competitive Intelligence Framework**](#X685c83998df6529664eb34f13a2eeed356f0e33) - Market analysis and competitor tracking
2. [**Customer Relationship Matrix**](#appendix-f2-customer-relationship-matrix) - Strategic engagement management
3. [**Partnership Management Guidelines**](#X93d7c687a1252f82a33b80bc185b8a099b07d55) - Teaming and alliance strategies
4. [**Pricing Strategy Guidelines**](#appendix-f4-pricing-strategy-guidelines) - Competitive pricing frameworks
5. [**Document Management Framework**](#X4916155b1268ad27675b96582f5cfc14202332b) - Information organization

## 1.8 🔗 Quick Template Access Guide

### 1.8.1 By Use Case:

**Starting a New Opportunity?** → [Quad Chart Template](file:///Users/michaelkomorous/02_Templates/BD_Templates/RPRC_Quad_Chart_Template.md) + [Daily Playbook](file:///Users/michaelkomorous/02_Templates/Training_Materials/BD_DAILY_EXECUTION_PLAYBOOK.md)

**Preparing for Thursday Meeting?** → [Meeting Prep Checklist](file:///Users/michaelkomorous/02_Templates/BD_Templates/THURSDAY_MEETING_PREP_CHECKLIST.md) + [Facilitator Guide](file:///Users/michaelkomorous/02_Templates/BD_Templates/THURSDAY_BD_MEETING_FACILITATOR_GUIDE.md)

**Writing a Proposal?** → [SBIR Templates](file:///Users/michaelkomorous/PROPOSAL_REPOSITORY/_PROPOSAL_TEMPLATES) + [Proposal Quality Framework](#appendix-g1-proposal-quality-framework) + [Best Practices](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_BEST_PRACTICES_LIBRARY.md)

**Training New Team Member?** → [Onboarding Plan](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_Onboarding_Plan_Template.md) + [Level 1 Exam](file:///Users/michaelkomorous/02_Templates/Training_Materials/BD_PRACTITIONER_EXAM_LEVEL1.md) + [Daily Feedback Form](#appendix-g2-daily-training-feedback-form)

**Assessing BD Maturity?** → [Maturity Assessment](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_MATURITY_ASSESSMENT.md) + [Action Tracker](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_ACTION_ITEM_TRACKER.csv)

**Analyzing Competition?** → [Competitive Intelligence Framework](#X685c83998df6529664eb34f13a2eeed356f0e33) + [Customer Relationship Matrix](#appendix-f2-customer-relationship-matrix)

**Managing Customer Relationships?** → [Customer Relationship Matrix](#appendix-f2-customer-relationship-matrix) + [Best Practices Library](file:///Users/michaelkomorous/02_Templates/BD_Templates/BD_BEST_PRACTICES_LIBRARY.md)

### 1.8.2 Best Practices

#### 1.8.2.1 The RPRC BD Excellence Standards

**Customer Engagement:**

* Always bring value to every interaction
* Listen more than you speak
* Follow up within 24 hours
* Keep detailed interaction records
* Build relationships beyond opportunities

**Opportunity Development:**

* Qualify early and often
* Understand customer hot buttons
* Develop unique differentiators
* Build win themes around benefits
* Position before competing

**Proposal Development:**

* Start with storyboards
* Focus on customer benefits
* Use graphics on every page
* Review with external experts
* Submit error-free proposals

**Team Management:**

* Set clear expectations
* Provide regular feedback
* Celebrate wins and learn from losses
* Invest in team development
* Maintain high performance standards

### 1.8.3 Quick Reference Cards

#### 1.8.3.1 Gate Decision Quick Reference

GATE 1: Can we compete?  
✓ Real opportunity  
✓ Customer identified  
✓ Capability match  
✓ Adequate timeline  
  
GATE 2: Should we pursue?  
✓ Customer access  
✓ Win probability >20%  
✓ Resources available  
✓ Strategic value  
  
GATE 3: Are we positioned to win?  
✓ Customer engagement successful  
✓ Win themes validated  
✓ Team assembled  
✓ Technical approach sound  
  
GATE 4: Should we bid?  
✓ Win probability >30%  
✓ Resources committed  
✓ Competitive position  
✓ Acceptable risk

#### 1.8.3.2 Customer Engagement Quick Reference

BEFORE MEETING:  
□ Research attendees  
□ Prepare questions  
□ Set objectives  
□ Plan note-taking  
  
DURING MEETING:  
□ Ask open questions  
□ Listen actively  
□ Take detailed notes  
□ Identify hot buttons  
  
AFTER MEETING:  
□ Follow up <24 hours  
□ Update CRM  
□ Brief team  
□ Plan next steps

#### 1.8.3.3 Proposal Quality Quick Reference

STORYBOARD ELEMENTS:  
□ SOW requirement  
□ Customer hot button  
□ RPRC feature  
□ Customer benefit  
□ Discriminator  
□ Win theme  
□ Supporting graphic  
  
REVIEW CHECKPOINTS:  
□ Pink Team (draft)  
□ Red Team (final)  
□ Gold Team (executive)  
□ Green Team (pricing)

### 1.8.4 Troubleshooting Guide

#### 1.8.4.1 Common BD Challenges & Solutions

**Challenge**: Customer won't meet with us **Solution**: Find warm introduction, offer value-added briefing, attend industry events

**Challenge**: Win themes feel generic **Solution**: Deeper customer research, identify specific hot buttons, develop unique differentiators

**Challenge**: Team assembly delays **Solution**: Maintain active talent pipeline, early engagement, backup plans

**Challenge**: Proposal quality issues **Solution**: Enhanced review processes, external expertise, more time allocation

**Challenge**: Low win rates **Solution**: Better qualification, customer engagement improvement, competitive positioning

**Challenge**: Resource constraints **Solution**: Priority-based allocation, strategic partnerships, investment planning

#### 1.8.4.2 Emergency Procedures

**Last-Minute Opportunity:**

1. Rapid qualification assessment (2 hours)
2. Executive decision on pursuit (1 hour)
3. Team assembly (24 hours)
4. Accelerated proposal process
5. Quality assurance shortcuts

**Customer Crisis:**

1. Immediate response team activation
2. Executive engagement
3. Problem resolution plan
4. Relationship repair strategy
5. Lessons learned capture

**Proposal Emergency:**

1. Crisis team assembly
2. Resource reallocation
3. Extended review process
4. Executive involvement
5. Quality vs. timeline balance

## 1.9 CONCLUSION: THE RPRC BD ADVANTAGE

This BD Team Bible represents the culmination of strategic vision, tactical expertise, and operational excellence. By integrating proven capture management techniques with RPRC's unique academic strengths, we create an unassailable competitive advantage.

**Key Success Factors:**

1. **Disciplined Process**: 4-gate methodology ensures quality decisions
2. **Customer Focus**: Every action driven by customer value
3. **Speed & Agility**: Faster response than any competitor
4. **Intelligence-Driven**: Data-based decision making
5. **Continuous Improvement**: Learn and adapt from every engagement

**Implementation Priority:**

1. Train entire BD team on 4-gate process
2. Deploy enhanced BD tracker system
3. Establish customer engagement protocols
4. Implement storyboarding methodology
5. Execute performance measurement system

**Expected Outcomes:**

* 35% win rate achievement within 12 months
* $150M annual revenue by 2027
* Top 3 national ranking in academic research
* Market leadership in DoD rapid prototyping
* Sustainable competitive advantage establishment

Remember: BD excellence is not about luck or natural talent. It's about systematic execution of proven processes, relentless focus on customer value, and continuous improvement based on data and feedback.

**The RPRC BD Team Motto**: "We don't just compete for opportunities - we create them."

# 2 APPENDICES: COMPLETE TEMPLATE & TRAINING LIBRARY

## 2.1 TABLE OF APPENDICES

### 2.1.1 APPENDIX A: CORE BD TEMPLATES

* [A1: RPRC Quad Chart Template](#appendix-a1-rprc-quad-chart-template)
* [A2: BD Maturity Assessment](#appendix-a2-bd-maturity-assessment)
* [A3: BD Best Practices Library](#appendix-a3-bd-best-practices-library)
* [A4: Company Profile Template](#appendix-a4-company-profile-template)
* [A5: BD Onboarding Plan](#appendix-a5-bd-onboarding-plan)

### 2.1.2 APPENDIX B: MEETING & COMMUNICATION TEMPLATES

* [B1: Thursday Meeting Facilitator Guide](#Xfa5258404e1dffd5072fca52157fa8c42591dc2)
* [B2: Thursday Meeting Prep Checklist](#Xab5c247fc06ed4b24627694d7421a1ed72b1e86)
* [B3: Weekly BD Summary Report](#appendix-b3-weekly-bd-summary-report)
* [B4: Executive BD Briefing Template](#Xd969d8c9a9ab15ac02e3cafbed2f5bcd57ff68b)

### 2.1.3 APPENDIX C: TRAINING & CERTIFICATION MATERIALS

* [C1: BD Daily Execution Playbook](#appendix-c1-bd-daily-execution-playbook)
* [C2: BD Practitioner Exam Level 1](#appendix-c2-bd-practitioner-exam-level-1)
* [C3: BD Quick Reference Card](#appendix-c3-bd-quick-reference-card)
* [C4: Day in the Life BD Training](#appendix-c4-day-in-the-life-bd-training)
* [C5: RPRC Mission and Value](#appendix-c5-rprc-mission-and-value)

### 2.1.4 APPENDIX D: TRACKING & DATA TEMPLATES

* [D1: BD Action Item Tracker](#appendix-d1-bd-action-item-tracker)
* [D2: Pipeline Tracking Template](#appendix-d2-pipeline-tracking-template)

### 2.1.5 APPENDIX E: PROPOSAL DEVELOPMENT TEMPLATES

* [E1: DOD SBIR Template Guide](#appendix-e1-dod-sbir-template-guide)
* [E2: NIH SBIR Template Guide](#appendix-e2-nih-sbir-template-guide)

### 2.1.6 APPENDIX F: STRATEGIC BD FRAMEWORKS

* [F1: Competitive Intelligence Framework](#X685c83998df6529664eb34f13a2eeed356f0e33)
* [F2: Customer Relationship Matrix](#appendix-f2-customer-relationship-matrix)
* [F3: Partnership Management Guidelines](#X93d7c687a1252f82a33b80bc185b8a099b07d55)
* [F4: Pricing Strategy Guidelines](#appendix-f4-pricing-strategy-guidelines)
* [F5: Document Management Framework](#X4916155b1268ad27675b96582f5cfc14202332b)

### 2.1.7 APPENDIX G: PROPOSAL EXCELLENCE & TRAINING

* [G1: Proposal Quality Framework](#appendix-g1-proposal-quality-framework)
* [G2: Daily Training Feedback Form](#appendix-g2-daily-training-feedback-form)
* [G3: Week 5 Practical Exercises](#appendix-g3-week-5-practical-exercises)
* [G4: Advanced Training Materials](#appendix-g4-advanced-training-materials)

### 2.1.8 APPENDIX H: CRITICAL BD OPERATIONAL TEMPLATES

* [H1: Thursday BD Meeting Facilitator Guide](#X3a01c5e5f59ae585e4b0cf9b6f16db48c6b2dbc)
* [H2: BD Best Practices Library](#appendix-h2-bd-best-practices-library)
* [H3: Weekly BD Summary Report](#appendix-h3-weekly-bd-summary-report)
* [H4: Executive BD Briefing Template](#X8be9f989602eb4cb4c894f512480ff2a0316210)

### 2.1.9 APPENDIX I: OPERATIONAL HOW-TO GUIDES

* [I1: How to Add a New Opportunity](#appendix-i1-how-to-add-a-new-opportunity)
* [I2: How to Add a Teaming Partner](#appendix-i2-how-to-add-a-teaming-partner)
* [I3: How to Run a Compliance Check](#X021e3bfd648507ce20679be852426d3ab74aec3)
* [I4: How to Use the Analytics Dashboard](#X18827bd35e9279b91edf5005017a3bab9272e8c)

## 2.2 APPENDIX A1: RPRC Quad Chart Template

### 2.2.1 Professional Opportunity Assessment Format

**Opportunity Name**: [Enter opportunity title] **Quad Chart ID**: [RPRC-YYYY-XXX] **Date Created**: [MM/DD/YYYY] **Last Updated**: [MM/DD/YYYY] **Current Gate**: [1/2/3/4]

### 2.2.2 📊 QUADRANT 1: THE OPPORTUNITY

┌─────────────────────────────────────┐  
│ VISUAL TIP: Use color coding: │  
│ 🟢 Green = On track │  
│ 🟡 Yellow = Attention needed │  
│ 🔴 Red = Critical issue │  
└─────────────────────────────────────┘

#### 2.2.2.1 Basic Information

| Field | Value |
| --- | --- |
| **Procuring Agency** | [Agency name and specific office] |
| **Contract Type** | [IDIQ, FFP, CPFF, T&M, etc.] |
| **Incumbent Contract Value** | $[X.X]M |
| **Incumbent Award Date** | [MM/DD/YYYY] |
| **Incumbent Contract Term** | [X years + Y option years] |
| **Projected LOE** | [X.X person-years] |

#### 2.2.2.2 Key Dates

| Milestone | Date |
| --- | --- |
| **RFI Date** | [MM/DD/YYYY or TBD] |
| **Projected RFP Release** | [MM/DD/YYYY] |
| **Proposal Due Date** | [MM/DD/YYYY] |
| **Expected Award Date** | [MM/DD/YYYY] |

#### 2.2.2.3 Management

| Role | Name | Assignment Gate |
| --- | --- | --- |
| **Opportunity Manager** | [Name] | Gate 1+ |
| **Program Manager** | [Name or TBD] | Gate 3+ |
| **Proposal Manager** | [Name or TBD] | Gate 3+ |

#### 2.2.2.4 Contract Details

* **Small Business Goal**: [X% if applicable, or N/A]
* **Security Clearance Required**: [Level or None]
* **Number of Awards Expected**: [Single/Multiple/IDIQ]
* **Performance Period**: [Base + option years]

### 2.2.3 🏢 QUADRANT 2: INCUMBENT & COMPETITION

#### 2.2.3.1 Current Incumbent Team

**Prime Contractor**: [Company Name]

* **Strengths**: [Key advantages and capabilities]
* **Weaknesses**: [Known performance issues or gaps]
* **Key Personnel**: [Critical staff if known]

**Major Subcontractors**:

1. [Subcontractor 1] - [Capability/Role]
2. [Subcontractor 2] - [Capability/Role]
3. [Subcontractor 3] - [Capability/Role]

#### 2.2.3.2 Expected Competition

**Likely Prime Competitors**:

1. **[Company A]**
   * Win Theme: [Their likely positioning]
   * Strengths: [Competitive advantages]
   * Weaknesses: [Potential vulnerabilities]
2. **[Company B]**
   * Win Theme: [Their likely positioning]
   * Strengths: [Competitive advantages]
   * Weaknesses: [Potential vulnerabilities]

**Potential Subcontracting Opportunities**:

* [Company X] - Looking for [specific capability]
* [Company Y] - Seeking [specific expertise]

#### 2.2.3.3 Market Intelligence

* **Recent Similar Wins**: [Competitor track record]
* **Pricing Trends**: [Cost expectations]
* **Technical Preferences**: [Customer technology priorities]

### 2.2.4 📋 QUADRANT 3: SCOPE OF WORK DESCRIPTION

#### 2.2.4.1 Primary Tasks (from previous RFP/market research)

**Task 1**: [Task Name]

* **Scope**: [Detailed description]
* **Deliverables**: [Key outputs]
* **Timeline**: [Duration/milestones]

**Task 2**: [Task Name]

* **Scope**: [Detailed description]
* **Deliverables**: [Key outputs]
* **Timeline**: [Duration/milestones]

**Task 3**: [Task Name]

* **Scope**: [Detailed description]
* **Deliverables**: [Key outputs]
* **Timeline**: [Duration/milestones]

#### 2.2.4.2 Key Requirements

**Technical Requirements**:

* [Requirement 1 with performance standards]
* [Requirement 2 with performance standards]
* [Requirement 3 with performance standards]

**Management Requirements**:

* [Requirement 1 (e.g., project management approach)]
* [Requirement 2 (e.g., quality assurance)]
* [Requirement 3 (e.g., reporting/communications)]

**Performance Standards**:

* [Standard 1 with metrics]
* [Standard 2 with metrics]
* [Standard 3 with metrics]

#### 2.2.4.3 Major Deliverables

1. [Deliverable 1] - [Description and due date]
2. [Deliverable 2] - [Description and due date]
3. [Deliverable 3] - [Description and due date]

### 2.2.5 🎯 QUADRANT 4: RPRC CORPORATE EXPERIENCE

#### 2.2.5.1 Relevant Past Performance (Last 5 Years)

**Contract 1**: [Contract Name]

* **Value**: $[X.X]M
* **Period**: [Start Date] - [End Date]
* **Customer**: [Agency/Organization]
* **Similar Scope**: [How it relates to current opportunity]
* **Performance**: [Success metrics, customer feedback]
* **Key Personnel**: [Staff who could support new opportunity]

**Contract 2**: [Contract Name]

* **Value**: $[X.X]M
* **Period**: [Start Date] - [End Date]
* **Customer**: [Agency/Organization]
* **Similar Scope**: [How it relates to current opportunity]
* **Performance**: [Success metrics, customer feedback]
* **Key Personnel**: [Staff who could support new opportunity]

**Contract 3**: [Contract Name]

* **Value**: $[X.X]M
* **Period**: [Start Date] - [End Date]
* **Customer**: [Agency/Organization]
* **Similar Scope**: [How it relates to current opportunity]
* **Performance**: [Success metrics, customer feedback]
* **Key Personnel**: [Staff who could support new opportunity]

#### 2.2.5.2 Capability Analysis

**Strengths**:

* ✅ [Capability 1 with evidence]
* ✅ [Capability 2 with evidence]
* ✅ [Capability 3 with evidence]

**Capability Gaps**:

* ⚠️ [Gap 1] → **Mitigation**: [Strategy to address]
* ⚠️ [Gap 2] → **Mitigation**: [Strategy to address]
* ⚠️ [Gap 3] → **Mitigation**: [Strategy to address]

#### 2.2.5.3 Facilities & Resources

* **Security Clearance**: [Current facility clearance level]
* **Specialized Equipment**: [Relevant labs, tools, software]
* **Certifications**: [ISO, CMMI, etc.]
* **Academic Resources**: [Faculty expertise, student researchers]

### 2.2.6 📈 ASSESSMENT SUMMARY

#### 2.2.6.1 Opportunity Score

| Factor | Weight | Score (1-10) | Weighted Score |
| --- | --- | --- | --- |
| **Strategic Fit** | 25% | [X] | [X.X] |
| **Win Probability** | 30% | [X] | [X.X] |
| **Financial Value** | 20% | [X] | [X.X] |
| **Capability Match** | 25% | [X] | [X.X] |
| **TOTAL SCORE** | **100%** | **--** | **[XX.X]/10** |

#### 2.2.6.2 Gate Progression Status

* ✅ **Gate 1 Complete**: [Date] - Opportunity qualified
* ⏳ **Gate 2 Status**: [In Progress/Complete/Pending]
* ⏳ **Gate 3 Status**: [Pending]
* ⏳ **Gate 4 Status**: [Pending]

#### 2.2.6.3 Recommendation

**Current Recommendation**: [Pursue/Monitor/Pass] **Confidence Level**: [High/Medium/Low] **Key Success Factors**:

1. [Factor 1]
2. [Factor 2]
3. [Factor 3]

**Critical Risks**:

1. [Risk 1 with mitigation]
2. [Risk 2 with mitigation]
3. [Risk 3 with mitigation]

### 2.2.7 📞 NEXT ACTIONS

#### 2.2.7.1 Immediate Actions (Next 30 Days)

* [Action 1 - Owner - Due Date]
* [Action 2 - Owner - Due Date]
* [Action 3 - Owner - Due Date]

#### 2.2.7.2 Medium-term Actions (30-90 Days)

* [Action 1 - Owner - Due Date]
* [Action 2 - Owner - Due Date]
* [Action 3 - Owner - Due Date]

#### 2.2.7.3 Long-term Actions (90+ Days)

* [Action 1 - Owner - Due Date]
* [Action 2 - Owner - Due Date]
* [Action 3 - Owner - Due Date]

### 2.2.8 🗂️ DOCUMENT CONTROL

**Document Owner**: [BD Team Member Name] **Approver**: [BD Director Name] **Classification**: RPRC Internal Use **Review Frequency**: Monthly **Next Review Date**: [MM/DD/YYYY]

**Change Log**: | Date | Version | Changes | Author | |------|---------|---------|--------| | [MM/DD/YYYY] | 1.0 | Initial creation | [Name] | | [MM/DD/YYYY] | 1.1 | [Change description] | [Name] |

## 2.3 APPENDIX C3: BD Quick Reference Card

### 2.3.1 Print and Keep at Your Desk

### 2.3.2 🎯 THURSDAY BD MEETING - 10:00 AM SHARP

#### 2.3.2.1 MY PROGRAMS:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_M PWin: \_\_\_\_%
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_M PWin: \_\_\_\_%
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_M PWin: \_\_\_\_%

#### 2.3.2.2 FOUR QUESTIONS (60 seconds total):

1. **What's the project?** (1 sentence, no jargon)
2. **Value & timeline?** (Exact $, not "about")
3. **What do you need?** (Specific, actionable)
4. **Last week's wins?** (Top 3 concrete items)

#### 2.3.2.3 CONFERENCE PITCH FORMULA:

• **Which?** [Name, dates, location] • **Why?** [Specific customer/outcome] • **Cost?** [Registration + travel] • **ROI?** [Measurable result]

**GOOD ROI**: "Meet DARPA PM who requested F2F" **BAD ROI**: "Good networking opportunity"

### 2.3.3 🚫 MEETING KILLERS (AVOID THESE)

❌ Reading from notes verbatim ❌ "About" or "around" numbers ❌ Technical deep dives ❌ Philosophical discussions ❌ "We've always done it this way" ❌ Vague needs like "support" ❌ Activity vs achievement ❌ Finger-pointing ❌ Rambling stories

### 2.3.4 💡 RPRC'S 6 WAYS TO WIN WORK

1. **Prime Contracts** - Direct to agency
2. **Congressional Plus-Ups** - Need sponsor & PE
3. **STTR Programs** - Partner with small biz
4. **Subcontractor** - Under large primes
5. **Grants** - NIH, NSF, DARPA
6. **Independent** - Foundations, allies

### 2.3.5 🎯 CUSTOMER CALL CHECKLIST

**BEFORE:** ☐ Research person (LinkedIn) ☐ Review program history ☐ Prepare 5 questions ☐ Have calendar ready

**DURING:** ☐ "What's your biggest challenge?" ☐ "How are you measuring success?" ☐ "What's your timeline?" ☐ "Who else should I talk to?"

**AFTER:** ☐ Log in CRM (immediately) ☐ Send thank you (2 hours) ☐ Schedule follow-up ☐ Update PWin if changed

### 2.3.6 📊 REAL RPRC PROGRAMS (EXAMPLES)

**Current Programs:**

* MATI - $10M (NAVAIR) - Communications
* NITRO - $900k (USAF) - Navigation
* Jack in the Box - $1M (Classified)

**Capture Targets:**

* NITRO OSAF - $5M @ 80% PWin
* MATI FY26 - $6.5M @ 75% PWin
* L3Harris - $3M @ 70% PWin

### 2.3.7 📈 GO/NO-GO QUICK SCORE

**MUST HAVE (all):** ☐ Funded within 12 months ☐ We have 75%+ capabilities ☐ Can identify decision maker ☐ 60+ days to capture

**SHOULD HAVE (3+):** ☐ Existing relationship ☐ No/weak incumbent ☐ >15% margin ☐ Strategic value ☐ Good teammates available

**Score <40 = NO GO**

### 2.3.8 ⏱️ GATE TIMELINE TARGETS

* **Gate 0→1**: Market research (30 days)
* **Gate 1→2**: Capture planning (90 days)
* **Gate 2→3**: Bid decision (60 days)
* **Gate 3→4**: Proposal dev (45 days)

**Total: 6-8 months minimum**

### 2.3.9 📞 KEY CONTACTS

**BD Director**: Eric Vollmecke **Army Portfolio**: Kevin McKelvy **Navy/USMC**: Joe Bricio **Air Force**: Jason Houser **Space**: Jeff King **Intel**: Pat Cobb

### 2.3.10 ⚡ EMERGENCY NUMBERS

**Proposal Emergency**: [Number] **Contract Emergency**: [Number] **IT Support**: [Number] **Executive Escalation**: [Number]

**DEADLINE REMINDERS:** 🗓️ Wed 6PM - BD Quad Charts due 🗓️ Fri 5PM - Action items complete 🗓️ Daily - Update CRM

*Keep this card visible during BD meetings* *Version 2.0 - September 2025*

## 2.4 APPENDIX C1: BD Daily Execution Playbook

### 2.4.1 Your Step-by-Step Guide to BD Excellence

#### 2.4.1.1 MORNING ROUTINE (9:00-9:30 AM)

**Daily Startup Checklist:** ☐ Check CRM for overnight updates ☐ Review today's calendar ☐ Check email for urgent items ☐ Review your active opportunities ☐ Set 3 priority actions for today

#### 2.4.1.2 BD ACTIVITY FRAMEWORK

**Monday: Pipeline Planning**

* Review all active opportunities
* Update PWin assessments
* Plan weekly customer outreach
* Schedule key meetings

**Tuesday: Customer Engagement**

* Make customer calls
* Send follow-up emails
* Research new contacts
* Update relationship maps

**Wednesday: Proposal Preparation**

* Prepare for Thursday meeting
* Update quad charts
* Review gate status
* Complete action items

**Thursday: BD Meeting & Strategy**

* Attend weekly BD meeting
* Present opportunity updates
* Get feedback and guidance
* Plan next week's activities

**Friday: Administration & Planning**

* Update all CRM entries
* Complete weekly reports
* Plan next week's priorities
* File important documents

#### 2.4.1.3 CUSTOMER ENGAGEMENT DAILY ACTIONS

**Target: 3 customer touches per day**

**Call Scripts:**

* "Hi [Name], just checking in on [specific project/opportunity]..."
* "I saw [recent news/event], thought you might be interested in..."
* "Following up on our conversation about [specific topic]..."

**Email Templates:**

* Weekly check-in emails
* Value-added content sharing
* Meeting follow-ups
* Introduction requests

#### 2.4.1.4 OPPORTUNITY TRACKING DAILY ACTIONS

**Update Requirements:** ☐ Log all customer interactions ☐ Update PWin if changed ☐ Note any timeline changes ☐ Record new intelligence ☐ Update next action items

**Gate Progression Monitoring:** ☐ Check if opportunities ready for next gate ☐ Prepare gate review materials ☐ Schedule gate review meetings ☐ Complete gate deliverables

#### 2.4.1.5 END-OF-DAY ROUTINE (5:00-5:30 PM)

**Daily Wrap-up:** ☐ Complete all CRM updates ☐ Send any pending emails ☐ Update action item status ☐ Plan tomorrow's priorities ☐ File documents in proper folders

**Weekly Planning (Fridays):** ☐ Review week's accomplishments ☐ Assess pipeline changes ☐ Plan next week's customer outreach ☐ Prepare materials for Thursday meeting

## 2.5 APPENDIX D1: BD Action Item Tracker

### 2.5.1 CSV Template Format

Item\_ID,Opportunity,Owner,Description,Due\_Date,Status,Priority,Dependencies,Notes  
001,Golden Dome,John Smith,Schedule customer meeting,2025-09-25,In Progress,High,Customer availability,Waiting for PM response  
002,MATI FY26,Jane Doe,Update technical approach,2025-09-30,Not Started,Medium,Engineering review,Need SME input  
003,NITRO OSAF,Bob Johnson,Complete quad chart,2025-09-22,Completed,High,None,Submitted for review  
004,L3Harris Teaming,Alice Brown,Negotiate workshare,2025-10-05,In Progress,Medium,Legal review,Draft agreement received  
005,DARPA Proposal,Mike Wilson,Write past performance,2025-09-28,In Progress,High,Contract documents,60% complete

### 2.5.2 Usage Instructions:

**Status Options:**

* Not Started
* In Progress
* Completed
* On Hold
* Cancelled

**Priority Levels:**

* High: Mission critical, immediate attention
* Medium: Important, complete within timeline
* Low: Background task, complete when possible

**Update Frequency:**

* Daily: Status updates
* Weekly: Add new items from Thursday meeting
* Monthly: Archive completed items

## 2.6 APPENDIX F1: Competitive Intelligence Framework

### 2.6.1 Strategic Market Intelligence and Competitor Analysis

#### 2.6.1.1 🔍 INTELLIGENCE OVERVIEW

**Mission**: Develop comprehensive understanding of competitive landscape to:

* Anticipate competitor moves
* Identify market opportunities
* Develop winning strategies
* Protect market position

**Intelligence Scope**:

1. **Direct Competitors** - Organizations bidding same opportunities
2. **Indirect Competitors** - Adjacent market players
3. **Emerging Threats** - New entrants and disruptors
4. **Market Dynamics** - Industry trends and shifts
5. **Customer Preferences** - Buying pattern analysis

#### 2.6.1.2 👥 COMPETITOR CLASSIFICATION

**Tier 1 Prime Contractors**: | Company | Revenue | Strengths | Weaknesses | Threat Level | |---------|---------|-----------|------------|-------------| | **Lockheed Martin** | $67B | Scale, relationships | Agility, cost | High | | **Boeing** | $62B | Engineering, brand | Culture, speed | Medium | | **Raytheon** | $57B | Technology, R&D | Integration | High | | **General Dynamics** | $39B | Systems, quality | Innovation | Medium | | **Northrop Grumman** | $35B | Advanced tech | Market focus | High |

**Tier 2 Competitors**: | Company | Revenue | Focus Areas | RPRC Overlap | |---------|---------|-------------|-------------| | **SAIC** | $7.1B | IT Services, Engineering | 85% | | **CACI** | $6.5B | Intelligence, IT | 60% | | **ManTech** | $2.5B | Mission solutions | 75% | | **Peraton** | $3.0B | Space, Intel, Cyber | 70% | | **L3Harris** | $18B | Communication, ISR | 40% |

**Small Business Competitors**: | Company | Revenue | Specialization | Direct Threat | |---------|---------|---------------|-------------| | **Novetta** | $200M | Analytics, AI | High | | **Rebellion Defense** | $50M | AI/ML, Software | Medium | | **Shield AI** | $100M | Autonomous systems | Medium | | **Palantir** | $1.5B | Data analytics | Low |

#### 2.6.1.3 🕵️ INTELLIGENCE COLLECTION METHODS

**Open Source Intelligence (OSINT)**:

* Annual reports and SEC filings
* Press releases and news articles
* Conference presentations
* Patent filings
* Job postings
* Social media activity
* Government contract awards
* Industry publications

**Human Intelligence (HUMINT) - Ethical Collection**:

* Industry conferences
* Professional networking
* Former employee insights
* Customer feedback
* Partner intelligence
* Vendor relationships

#### 2.6.1.4 🎯 COMPETITIVE POSITIONING

**RPRC Competitive Advantages**:

1. **Innovation Speed** - Rapid prototyping capability
2. **Academic Partnership** - University research access
3. **Cost Structure** - Lower overhead than large primes
4. **Agility** - Quick response to customer needs
5. **Technical Depth** - PhD-level expertise
6. **Collaboration** - Strong teaming relationships

**Competitive Messaging Framework**:

*Against Large Primes*:

* "Agility vs. Bureaucracy"
* "Innovation vs. Status Quo"
* "Partnership vs. Vendor"
* "Speed vs. Process"

*Against Peer Competitors*:

* "Proven vs. Promised"
* "Depth vs. Breadth"
* "Results vs. Resources"
* "Quality vs. Quantity"

#### 2.6.1.5 📊 INTELLIGENCE METRICS

**Collection Effectiveness**: | Metric | Target | Current | |--------|--------|---------| | Sources Monitored | 50+ | 42 | | Intelligence Reports | 12/year | 8 | | Competitive Wins | 5+ | 3 | | Market Share | 2.5% | 1.8% | | Threat Identification | 100% | 85% |

**Intelligence ROI**:

Value Delivered:  
- 3 opportunities protected ($45M)  
- 2 competitive displacements ($28M)  
- 5 pricing optimizations ($12M)  
- 10 strategy adjustments  
  
Total Intelligence Investment: $150K  
Total Value Protected/Gained: $85M  
ROI: 56,667%

#### 2.6.1.6 ✅ INTELLIGENCE CHECKLIST

**Daily Activities**:

* Monitor competitor news
* Track contract awards
* Review industry publications
* Update competitor movements

**Weekly Activities**:

* Compile situation report
* Analyze pricing intelligence
* Review partnership changes
* Update battle cards

**Monthly Activities**:

* Conduct deep competitor analysis
* Brief leadership team
* Update competitive positioning
* Assess market trends

## 2.7 APPENDIX F2: Customer Relationship Matrix

### 2.7.1 Strategic Engagement Management

#### 2.7.1.1 🎯 RELATIONSHIP MAPPING

**Engagement Levels**: | Level | Description | Frequency | Activities | |-------|-------------|-----------|------------| | **5 - Champion** | Advocates for RPRC | Weekly | Strategic partnership | | **4 - Supporter** | Prefers RPRC | Bi-weekly | Regular collaboration | | **3 - Neutral** | No preference | Monthly | Building relationship | | **2 - Skeptical** | Prefers others | Quarterly | Proving value | | **1 - Unknown** | No relationship | None yet | Initial outreach |

#### 2.7.1.2 🏛️ KEY CUSTOMER ORGANIZATIONS

**DoD Agencies Priority Matrix**: | Agency | Relationship | Revenue | Growth | Priority | |--------|--------------|---------|--------|----------| | **DARPA** | Level 4 | $3.2M | 🔼 High | P1 | | **Space Force** | Level 3 | $2.1M | 🔼 High | P1 | | **Army Research Lab** | Level 5 | $4.5M | → Stable | P2 | | **Naval Research Lab** | Level 3 | $1.8M | 🔼 High | P1 | | **Air Force Research Lab** | Level 4 | $3.7M | → Stable | P2 | | **DISA** | Level 2 | $0.5M | 🔼 High | P1 | | **DIA** | Level 2 | $0.3M | 🔼 High | P2 | | **SOCOM** | Level 1 | $0M | 🔼 High | P1 |

#### 2.7.1.3 👥 STAKEHOLDER INFLUENCE MAP

**Decision Maker Hierarchy**:

Program Executive Officer (PEO)  
├── Program Manager (PM)  
│ ├── Technical Lead  
│ ├── Contracting Officer (CO)  
│ └── COTR/COR  
├── Chief Engineer  
│ ├── System Architect  
│ └── Technical SMEs  
└── Resource Manager  
 ├── Budget Analyst  
 └── Financial Manager

#### 2.7.1.4 📈 CUSTOMER ENGAGEMENT TRACKER

**Top 10 Strategic Relationships**: | Contact | Organization | Role | Level | Last Contact | Next Action | |---------|-------------|------|-------|--------------|-------------| | COL Smith | Army PEO IEW&S | PM | 4 | 9/10/25 | Quarterly review 10/10 | | Dr. Johnson | DARPA | Program Mgr | 5 | 9/12/25 | Tech demo 10/1 | | CAPT Davis | Naval Research | Director | 3 | 8/28/25 | Intro meeting 9/30 | | Mr. Wilson | Space Force | Acquisition | 3 | 9/5/25 | Capability brief 10/5 | | Ms. Chen | AFRL | Tech Lead | 4 | 9/14/25 | Follow-up call 9/21 |

#### 2.7.1.5 🎯 ENGAGEMENT STRATEGIES

**By Relationship Level**:

*Level 5 - Champions*:

* Executive briefings
* Strategic planning sessions
* Joint innovation initiatives
* Reference for new opportunities

*Level 4 - Supporters*:

* Regular program reviews
* Technical demonstrations
* Collaborative problem-solving
* Early opportunity insights

*Level 3 - Neutral*:

* Capability presentations
* Industry day participation
* White paper submissions
* Relationship building events

*Level 2 - Skeptical*:

* Success story sharing
* Competitive differentiation
* Risk mitigation focus
* Small pilot projects

*Level 1 - Unknown*:

* Initial introductions
* Capability overviews
* Conference networking
* Warm referrals

#### 2.7.1.6 🎆 RELATIONSHIP ROI

**Metrics That Matter**:

Champion Customers:  
- Win Rate: 65%  
- Revenue per: $2.8M  
- Growth Rate: 35%  
  
Neutral Customers:  
- Win Rate: 28%  
- Revenue per: $0.8M  
- Growth Rate: 10%  
  
ROI of Relationship Investment:  
- Every level increase = 15% higher win rate  
- Champions generate 3.5x more revenue  
- Referrals from champions close 2x faster

## 2.8 APPENDIX G1: Proposal Quality Framework

### 2.8.1 Excellence Standards for Winning Proposals

#### 2.8.1.1 🎯 QUALITY OVERVIEW

**Quality Mission**: Deliver consistently excellent proposals that:

* Meet all customer requirements
* Demonstrate clear value proposition
* Showcase technical excellence
* Minimize compliance risk
* Maximize win probability

**Quality Standards**:

* **Zero defects** in compliance
* **Superior** technical solutions
* **Compelling** value propositions
* **Professional** presentation
* **On-time** delivery

#### 2.8.1.2 📋 THREE-TIER QUALITY SYSTEM

**Tier 1: Compliance Excellence**

* Requirements adherence
* Format compliance
* Submission standards
* Administrative accuracy

**Tier 2: Technical Excellence**

* Solution innovation
* Technical approach quality
* Risk mitigation
* Implementation feasibility

**Tier 3: Competitive Excellence**

* Differentiation strategies
* Value proposition clarity
* Win theme integration
* Competitive positioning

#### 2.8.1.3 ✅ COMPLIANCE CHECKLIST

**Administrative Compliance:**

* Page limits observed
* Font and format requirements met
* Required sections included
* Proper document naming
* Submission deadline met
* Required signatures obtained
* Certifications included
* Cost/price separation maintained

**Technical Compliance:**

* All SOW requirements addressed
* Technical specifications met
* Deliverable descriptions complete
* Schedule requirements satisfied
* Performance standards defined
* Quality assurance plans included

#### 2.8.1.4 📊 PROPOSAL QUALITY SCORE (PQS)

PQS = (Compliance Score × 0.3) +  
 (Technical Score × 0.4) +  
 (Competitive Score × 0.3)  
  
Scoring Scale:  
90-100: Excellent (High win probability)  
80-89: Good (Competitive)  
70-79: Acceptable (Marginal)  
<70: Poor (Low win probability)

┌────────────────────────────────────────────┐  
│ VISUAL QUALITY GAUGE │  
├────────────────────────────────────────────┤  
│ │  
│ Poor Marginal Good Excellent │  
│ │ │ │ │ │  
│ ◄0────────70────────80────────90────100► │  
│ 🔴 🟡 🟢 💚 │  
│ │  
│ Your Score: [\_\_\_] = [Status Indicator] │  
│ │  
└────────────────────────────────────────────┘

#### 2.8.1.5 🏆 WIN THEME DEVELOPMENT

**Primary Win Themes (3-5 maximum):**

1. **Theme Statement**: Clear, compelling message
2. **Proof Points**: Supporting evidence
3. **Differentiation**: How we're unique
4. **Benefit**: Customer value delivered

**Win Theme Quality Criteria:**

* ✅ Customer-focused (not company-focused)
* ✅ Specific and measurable
* ✅ Believable and provable
* ✅ Competitive differentiator
* ✅ Integrated throughout proposal

#### 2.8.1.6 🔄 REVIEW PROCESS STANDARDS

**Pink Team Review (75% Complete)**

* Proposal strategy validation
* Technical approach assessment
* Win theme integration
* Competitive positioning

**Red Team Review (90% Complete)**

* Customer perspective simulation
* Compliance verification
* Competitive assessment
* Overall proposal quality

**Gold Team Review (98% Complete)**

* Production quality check
* Final compliance review
* Submission readiness
* Go/no-go decision

#### 2.8.1.7 ✅ PRE-SUBMISSION FINAL CHECK

* 100% compliance verified
* All requirements addressed
* Win themes integrated
* Technical approach validated
* Graphics professional
* Writing error-free
* Competitive positioning clear
* Value proposition compelling
* Red team recommendations incorporated
* Production quality confirmed

## 2.9 APPENDIX G2: Daily Training Feedback Form

### 2.9.1 Phase 2 - Week 5 Training | RPRC Business Development Program

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Day:** ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Department:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 2.9.1.1 1. TODAY'S SESSION RATING

**Overall Quality:** ☐ Excellent (5) ☐ Very Good (4) ☐ Good (3) ☐ Fair (2) ☐ Poor (1)

**Content Relevance:** ☐ Highly Relevant (5) ☐ Very Relevant (4) ☐ Relevant (3) ☐ Somewhat (2) ☐ Not Relevant (1)

**Instructor Effectiveness:** ☐ Excellent (5) ☐ Very Good (4) ☐ Good (3) ☐ Fair (2) ☐ Poor (1)

**Pace of Training:** ☐ Too Fast ☐ Just Right ☐ Too Slow

#### 2.9.1.2 2. LEARNING OBJECTIVES

**How well did today's session meet the stated learning objectives?** ☐ Exceeded (5) ☐ Fully Met (4) ☐ Mostly Met (3) ☐ Partially (2) ☐ Not Met (1)

**Which topics were most valuable?** (Check all that apply) ☐ Gate Process Understanding ☐ PWin Calculation Methods ☐ Customer Engagement Techniques ☐ Proposal Development Skills ☐ Technical Integration ☐ System Navigation ☐ BD Meeting Format ☐ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Which topics need more coverage?**

#### 2.9.1.3 3. PRACTICAL APPLICATION

**How confident are you in applying what you learned today?** ☐ Very Confident (5) ☐ Confident (4) ☐ Somewhat (3) ☐ Not Very (2) ☐ Not at All (1)

**The hands-on exercises were:** ☐ Very Helpful (5) ☐ Helpful (4) ☐ Adequate (3) ☐ Not Helpful (2) ☐ Confusing (1)

**I had enough time to complete the exercises:** ☐ Strongly Agree ☐ Agree ☐ Neutral ☐ Disagree ☐ Strongly Disagree

#### 2.9.1.4 4. SUPPORT NEEDED

**Do you need additional help with any topics?** ☐ Yes ☐ No

If yes, which topics: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Would you benefit from:** (Check all that apply) ☐ One-on-one coaching ☐ Additional practice time ☐ Supplementary materials ☐ Peer mentoring ☐ Follow-up session

#### 2.9.1.5 5. NET PROMOTER SCORE

**How likely are you to recommend this training to a colleague?**

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

Not Likely ←→ Extremely Likely

#### 2.9.1.6 6. SPECIFIC FEEDBACK

**What worked particularly well today?**

**What could be improved?**

**Any concepts that remain unclear?**

#### 2.9.1.7 7. ADDITIONAL COMMENTS

**Thank you for your feedback! Your input helps us improve the training program.**

*Please submit this form to the training coordinator at the end of each day.*

## 2.10 APPENDIX H1: Thursday BD Meeting Facilitator Guide

### 2.10.1 How to Run an Effective 60-Minute BD Meeting

#### 2.10.1.1 ⏰ THE CARDINAL RULE: 60 MINUTES MAX

**10:00 AM START - 11:00 AM HARD STOP**

If you go over 60 minutes, you've failed. Period.

#### 2.10.1.2 📋 PRE-MEETING CHECKLIST (Wednesday by 6 PM)

**Must Have Ready:**

* All 30 BD Quad Charts submitted and reviewed
* Action items from last week tracked
* Decision items identified and briefed
* Conference/travel requests compiled
* Critical issues flagged for discussion
* Attendance confirmed (no surprises)
* Backup facilitator identified

**Tech Setup (Thursday 9:45 AM):**

* Teams/Zoom link tested
* Screen sharing working
* Timer visible to all
* Dashboard pulled up
* Mute all on entry enabled

#### 2.10.1.3 🎯 MEETING STRUCTURE (60 Minutes)

**Opening (10:00-10:05) - 5 Minutes**

Facilitator Script:

"Good morning everyone. It's 10 AM, let's get started.  
  
First, wins from this week?"  
[Allow 30 seconds for wins]  
  
"Any losses to discuss?"  
[Allow 30 seconds - keep it brief]  
  
"Critical items for today:  
1. NITRO OSAF - Oct 1 deadline  
2. L3Harris TA status  
3. Three capture manager positions  
  
We have 30 programs to review. Let's move quickly."

**Pipeline Review (10:05-10:45) - 40 Minutes**

THE MATH: 40 minutes ÷ 30 programs = **80 SECONDS PER PROGRAM**

For Each Program:

* Facilitator Says: "Next: [Program Name] - [Capture Manager Name]"
* Capture Manager Has 60 Seconds to Cover:
  1. What changed since last week? (15 sec)
  2. What's happening this week? (15 sec)
  3. What help is needed? (15 sec)
  4. PWin change? (5 sec)
  5. Next milestone? (10 sec)

Time Management Tricks:

* **GREEN LIGHT Programs** (No Issues) - 30 seconds
* **YELLOW LIGHT Programs** (Minor Issues) - 60 seconds
* **RED LIGHT Programs** (Critical) - 2 minutes MAX

**Decision Time (10:45-10:50) - 5 Minutes**

* No analysis in meeting - come prepared
* Simple yes/no votes
* Defer complex decisions to offline
* Document all decisions immediately

**Action Items (10:50-10:55) - 5 Minutes**

* Review all action items
* Confirm owners and due dates
* Reminder: BD Quad Charts due Wednesday 6 PM

**Close (10:55-11:00) - 5 Minutes**

* Key reminders
* Next week's focus
* Meeting adjourned by 11:00 AM

## 2.11 APPENDIX H2: BD Best Practices Library

### 2.11.1 Proven Tactics from RPRC Winners

#### 2.11.1.1 🏆 CUSTOMER ENGAGEMENT BEST PRACTICES

**The Golden Rules:**

1. **Listen 70%, Talk 30%**
2. **Follow up within 24 hours**
3. **Bring value every interaction**
4. **Document everything immediately**

**Customer Call Scripts That Work:**

*Opening That Gets Attention:* "Hi [Name], I know you're dealing with [specific challenge from research]. We just helped [similar customer] solve this exact problem. Worth a 20-minute discussion?"

*Discovery Questions That Uncover Needs:*

* "If you had unlimited budget, what would you fix first?"
* "What keeps you up at night about this program?"
* "How would your boss measure success?"
* "Who else loses sleep over this problem?"

*Closing That Gets Commitment:* "Based on what you've shared, I'd like to bring our technical lead to show you exactly how we'd solve this. Does Tuesday or Thursday work better?"

#### 2.11.1.2 🎯 WIN THEME DEVELOPMENT

**The Win Theme Formula:** Customer Pain + Our Unique Solution + Proof = Win Theme

**Examples of Powerful Win Themes:**

✅ **STRONG:**

1. **Speed**: "While competitors study the problem for 6 months, we deliver working prototypes in 30 days - just like we did for NAVAIR."
2. **Experience**: "Our team wrote the original system in 2018, maintained it for 5 years, and knows every line of code - no learning curve."
3. **Innovation**: "University research + rapid prototyping = solutions that don't exist anywhere else."

❌ **WEAK:**

* "We provide excellent customer service"
* "We are committed to quality"
* "We have extensive experience"

#### 2.11.1.3 📊 COMPETITIVE INTELLIGENCE

**Legal Intelligence Gathering:**

✅ **ALLOWED:**

* Public contract awards (SAM.gov)
* Company websites and presentations
* LinkedIn profiles and job postings
* Conference presentations
* Published articles
* Customer feedback (what they tell you)

❌ **NOT ALLOWED:**

* Asking for competitor pricing
* Recruiting just for intel
* Misrepresenting identity
* Hacking/unauthorized access
* Stealing documents
* Recording without permission

#### 2.11.1.4 💰 PRICING STRATEGIES

**Price to Win Framework:**

1. **Establish Ceiling**: Historical procurement, budget documents, customer conversations
2. **Assess Competition**: Incumbent rates, competitor margins, their desperation
3. **Find Sweet Spot**: 5-10% below average, above our floor, differentiated value

**Pricing Psychology:**

* **5,000,000** (psychological barrier)
* **Option years** reduce sticker shock
* **Performance incentives** show confidence
* **Volume discounts** encourage larger awards

#### 2.11.1.5 🤝 TEAMING BEST PRACTICES

✅ **Good Reasons to Team:**

* Fill capability gaps
* Add past performance
* Improve socioeconomic goals
* Customer requests them
* Reduce performance risk

❌ **Bad Reasons to Team:**

* They asked nicely
* Afraid to compete
* Split the B&P cost
* Personal relationships only

## 2.12 APPENDIX I1: How to Add a New Opportunity

### 2.12.1 Purpose

Standardize intake so fields and tags align with templates and analytics.

### 2.12.2 Steps

1. **Review Calendar**: Check relevant dates in Strategic Calendar
2. **Create/Update PRD**: Use BD Tracker PRD Template as reference
3. **Capture Core Fields**:
   * Mission work areas
   * Funding vehicle
   * Required capabilities
   * Classification level
   * Timeline status
4. **Link Partners**: Use Company Profile Template for partner records
5. **Add to Tracker**: Enter in CRM and cross-link all references
6. **Verify Compliance**: Check requirements and critical dates

### 2.12.3 Validation Checklist

* Monetary values within program ceilings
* Milestones align with the calendar
* Capabilities map to approved taxonomy
* All required fields populated
* Gate 1 qualification criteria complete

## 2.13 APPENDIX I2: How to Add a Teaming Partner

### 2.13.1 Purpose

Standardize partner intake and ensure compliance artifacts are captured.

### 2.13.2 Steps

1. **Create Profile**: Use Company Profile Template
2. **Complete Identity & Contacts**: Full organization details
3. **Fill Compliance & Security**:
   * ITAR/EAR status
   * TAA requirements
   * CFIUS clearance
   * TCP/LAA status
   * DFARS compliance
   * NIST 800-171 posture
4. **Define Teaming Role**:
   * Prime/Sub/JV/Research designation
   * Scope areas and workshare
5. **Link Legal Artifacts**:
   * NDA status and location
   * Teaming Agreement (TA)
   * Technical Assistance Agreement (TAA)
   * CFIUS documentation
   * SharePoint folder links
6. **Map Capabilities**:
   * Approved taxonomy alignment
   * Technology Readiness Level (TRL) by capability

### 2.13.3 Validation Requirements

* RPS (R-1.1) cleared
* Ownership diligence recorded (R-1.2)
* NDA (R-2.1) recorded if applicable
* TA (R-2.2) documented if signed
* All compliance checks complete

## 2.14 APPENDIX I3: How to Run a Compliance Check

### 2.14.1 Purpose

Ensure legal/regulatory prerequisites are satisfied before proceeding.

### 2.14.2 Steps

#### 2.14.2.1 1. Due Diligence (R-1)

* **R-1.1**: Restricted Party Screening
* **R-1.2**: Ownership/government ties diligence

#### 2.14.2.2 2. Preliminary Legal (R-2)

* **R-2.1**: NDA executed
* **R-2.2**: Teaming Agreement drafted/executed

#### 2.14.2.3 3. Licensing & Review (R-3)

* **R-3.1**: ITAR/EAR classification
* **R-3.2**: TAA status verification
* **R-3.3**: CFIUS safe harbor confirmation

#### 2.14.2.4 4. Security & Contract Readiness (R-4)

* **R-4.1**: Technology Control Plan (TCP)
* **R-4.2**: Limited Access Authorization (LAA) if needed
* **R-4.3**: DFARS flow-down requirements
* **R-4.4**: NIST SP 800-171 compliance verification

### 2.14.3 Required Artifacts

* Link signed NDA/TA documents
* TAA/CFIUS filings and approvals
* TCP plan location and status
* Compliance certification documents

### 2.14.4 Critical Notes

⚠️ **WARNING**: Do not store controlled technical data in this repository ⚠️ **REMINDER**: All compliance checks must be current within 90 days

## 2.15 APPENDIX I4: How to Use the Analytics Dashboard

### 2.15.1 Purpose

Provide leaders with a fast, consistent way to assess pipeline health and risks.

### 2.15.2 Available Views

1. **Pipeline Overview**:
   * Totals by status
   * Value by phase
   * Gate progression metrics
2. **Win Probability Analysis**:
   * Top opportunities by score
   * PWin trending
   * Risk factors
3. **Gaps & Risks Assessment**:
   * Upcoming deadlines
   * Capability gaps
   * Compliance flags
   * Resource constraints

### 2.15.3 Steps to Generate Reports

1. **Verify Data Currency**: Confirm authoritative dates in calendar are current
2. **Apply Filters**:
   * Mission area selection
   * Classification level
   * Phase/Gate status
   * Time horizon
3. **Export Snapshot**:
   * Select format (PDF/PPT/Excel)
   * Include executive summary
   * Link to PRD sections for context
4. **Quality Check**:
   * Validate data freshness
   * Cross-reference with CRM
   * Verify calculations

### 2.15.4 Dashboard Best Practices

* **Daily**: Check critical deadlines and actions
* **Weekly**: Review pipeline changes and PWin shifts
* **Monthly**: Analyze trends and performance metrics
* **Quarterly**: Strategic assessment and forecasting

### 2.15.5 Notes

* Always validate data freshness before reporting externally
* Use consistent time periods for trend analysis
* Include assumptions and data sources in reports

*This Bible is a living document. Update quarterly based on lessons learned, market changes, and strategic evolution. Version control and change management ensure all team members work from current guidance.*

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