Opportunity Development Guide

INITIAL GO/NO-GO DISCUSSION

1 PHASE 1: Capture Planning

OPPORTUNITY ASSESSMENT
- Review Strategic BD plans; Identify possible projects/clients to pursue
- Speak w/ client; conduct research to understand project/client needs; & discuss/document **90-day plan**
  - Client's percieved competition
  - ATG capabilities
  - Ask/listen for potential opportunities

OPPORTUNITY IN VISION
- **Opportunity Lead Originator** submits Opportunity (Opp) as a "Lead" to **Marketing Coordinator** via email for creation of Opp & Prop numbers in Vision
  - The Opp record is used for tracking all data related to the Opp.
  - The Prop record is used to track time spent on the Opp.
- Start Date, End Date, Est. ATG Revenue, Probability need to be kept up-to-date
- Begin **Capture Plan** & update continuously
- Update **90-day plan,** as appropriate
- Document all Activities such as emails, phone calls, and meetings in Vision linked to the Opp
- Schedule follow-up meeting &/or phone calls
- Once qualified, change stage to "Pursuit"

OPPORTUNITY PURSUIT
- Define ATG's role as prime or sub
- Conduct initial strategy meeting and document **Capture Plan**:
  - Identify gaps in client information
  - Analyze strengths, weaknesses, & differentiators
  - Analyze Competition
  - Discuss teaming partners
  - Determine **Hot Buttons** & client issues
  - ID key WIN messages
  - ID key personnel
  - Gather project descriptions & resumes
  - Determine preliminary win strategy. Examine what it will take to win, looking at:
  - Technical expertise
  - Political climate/funding
  - Teaming partner relationships & connections

GO/NO-GO
- Complete **GO/NO-GO** form
- Update **Capture Plan**
- Assess scope, schedule, costs
- Asses relevant firm & staff experience
- Obtain initial Sr. Mgmt approval
- Determine & implement plan to fill in information gaps & conduct initial recon
- ID **Capture Manager** & **Proposal Coordinator**

PRE-PROPOSAL ACTIVITIES
- Review debriefs for other proposals carried out for this client or of a very similar nature
- Notify proposal team of the opportunity & its timing so they can allocate resources
- Determine preliminary proposal writing assignments
- Conduct Black Hat Review

2 PHASE 2: Proposal Process *continued left bottom*

NOTIFY CLIENT OF 'NO BID' ← STOP

RFP RELEASE
- Notify proposal team & stake holders of RFP release & due date
- Change stage to "Advertised"
- Closely read and analyze the RFP
- Attend any pre-proposal conferences or site-visits
- Reaffirm Go decision or if not already done, complete **Go/No-Go** Form
- Update **Capture Plan**
- Begin a **Proposal Checklist** and continuously update

PROPOSAL KICK-OFF
- Hold **Proposal Kickoff Meeting**
- Finalize strength & weakness analysis, client hot buttons/issues, key messages, differentiation & overall WIN strategy
- Agree on proposal schedule & basic outline, discuss strategy to respond to the RFP & allocate proposal tasks
- Discuss client's hot button issues & our solutions
- Develop organizational chart
- Select firm project experience & references
- Submit clarification questions to client by deadline
- Identify information to be collected from teaming partners

PROPOSAL PREPARATION
- Develop proposal outline with subsection headings; develop annotated outlines or story boards to guide authors
- ID, discuss, develop templates based on RFP submission instructions
- Distribute writing assignments with instructions on content/guidelines
- Request necessary information and completed forms required from accounting or senior management, outside the proposal team
- Ensure all participants understand assignments & schedule
- Write content for all sections & fill out any forms
- Implement graphics, layout, & color scheme
- Tailor staff resumes
- Conduct status update meetings to ensure forward progress on assignments
- Conduct **Pink Team Review** & incorporate comments to 90%

PRICING
- Identify pricing team members
- Develop pricing strategy
- Request pricing from teaming partners if needed

PHASE 2: PROPOSAL PROCESS CONTINUED

PROPOSAL REVIEW
- Conduct **Red Team Review** of proposal from client perspective & ensure proposal addresses all scope items & hot button issues, and that the approach is logical, methodical, & attainable
- Invite technical experts, key managers, & proposal team to review
- Ensure graphics are compelling & text reads clearly & concisely, while conveying key messages
- Conduct **Gold Review** and incorporate comments.
- Conduct the **Compliance Review** to ensure proposal in compliant with all evaluation criteria
- Incorporate any final review comments to 100%

$ PRICING
Review pricing/ pricing strategy

PROPOSAL PRODUCTION
- Perform a final review, especially noting items in the Proofreading Checklist, and incorporate edits to fine tune graphics and correct any pagination, spelling or grammatical errors
- Obtain signatures where necessary
- Quality check all elements of proposal and attachments
- Produce additional internal copy for PM & Marketing Department

$ PRICING
Finalize pricing/ obtain approvals

3 PHASE 3: Submission/Interview/ Presentation

PROPOSAL DELIVERY
- Quality check all final bound copies
- Verify that printing, binding, shipping, labeling, &/or uploading requirements are followed
- Verify delivery of proposal
- Change the Opportunity stage to "Submitted"
- Perform clean-up & reorganization of proposal folder

INTERVIEW PREPARATION
- Establish a schedule for interview presentation preparation
- Identify presentation team & ensure presenters have read & are familiar with the proposal
- Develop understanding of requirements, outline/format, & logistics/time limits, format, room set-up, participants, etc.
- Draft presentation outline/format
- Prepare boards, presentation slides & "leave behinds"
- Ensure presentation reinforces win theme/key messages from proposal or addresses other criteria established specific to the interview
- Identify potential interview questions & formulate appropriate answers
- Conduct presentation rehearsals & practice Q&A session
- Determine appropriate attire & when/where to meet prior to the interview

PRESENTATION
- Conduct a winning interview/presentation
- Send any additional information the client may request or design
- Send a thank you note to client
- Conduct an internal debrief on the interview/presentation

WIN

LOSS

4 PHASE 4: Debrief

INTERNAL/EXTERNAL DEBRIEFS
(WIN OR LOSS)
- Change the Opportunity's stage to "NS-Proposal," "NS-Interview," "On-Call" or "SNC"
- If it becomes "SNC" then the **Project Manager** and **Principal-in-Charge** should be assigned and the project will be transitioned to the Project Manager and **Project Accountant** for contract negotiations
- Request & schedule a debrief with client
- Conduct **internal debrief** and meeting to determine questions to be asked at the debrief
- Attend & document **external debrief** with client
- Complete & distribute Debrief Summary memo to proposal and management teams
- Follow-up on action items & discuss lessons learned