

# MANAGING OPPORTUNITIES

## UPDATING OPPORTUNITY RECORDS

### ESSENTIAL FIELDS CHECKLIST

- ☐ Capture Manager
- ☐ Est. ATG Net Revenue
- ☐ Probability
- ☐ Est. Job Start Date
- ☐ **Est. Advertisement Date**
- ☐ Stage
- ☐ Practice
- ☐ Discipline

**Must be correct the last day of each billing period!**

### GENERAL CHECKLIST

- ☐ Are the essential fields correct?
- ☐ Is the **Probability** commensurate with the **Stage**? If not, is it good?
- ☐ **Is the relationship of Est. Advertisement Date and Est. Job Start Date correct?**
- ☐ Is the relationship of **Est. Job Start Date** and **Est. Job Start Completion Date** correct?
- ☐ Have the Opportunity Roles Changed?
- ☐ Have the Project Roles Changed?
- ☐ Is the Prime Consultant properly designated?
- ☐ Are the Client and Owner properly designated?
- ☐ Are On-Call WA's are accurate and linked correctly?
- ☐ Do any opportunities need to be closed?

**Opportunity Stages and Probabilities**  
**Revised 20200924**

STAGE	PROBABILITY	DESCRIPTION
Lead	1 – 10%	Opportunity that ATG is aware of but has not made the Blue Hat decision to invest in pursuing.
Pursuit	11 – 30%	Indicates ATG is proactively pursuing, i.e. it passed the Blue Hat review and CM is leading development of the Capture Plan.
Advertised	Same as Pursuit	An RFP has been issued. ATG is developing and reviewing the Black Hat.
Proposal	25 - 60%	ATG is preparing a response, i.e. it passed the Black Hat review
Direct Proposal	25 – 75%	Proposal provided by CM direct to client. Stage remains the same and probability updated to reflect progress during client review and discussions. Then updated to SNC and follows process below.
Work Authorization Pending	5 – 75%	Work solicited under an On-Call. Stage remains the same and probability updated to reflect progress during client review and discussions. Then updated to SNC and follows process below.
Submitted	25 - 60%	Proposal has been submitted and received by client for this pursuit.
Short-Listed	50 – 75%	ATG has been notified that the team has been short-listed.
Interview	50 – 75%	ATG team or an ATG staff member is participating in the interview/presentation for this opportunity.
SNC (Selected No Contract)	90%+	ATG has been notified that the team has been selected. After negotiations, Accounting updates to Contract.
NS-Proposal	As was at close	ATG not selected after submitting a proposal.
NS-Interview	As was at close	ATG (or ATG team) not selected after participating in an interview.
NS-Short-List	As was at close	ATG not selected after being short-listed in an instance where an interview was not conducted.
On-call	0%	ATG will receive multiple Work Authorizations based on a Master Agreement or IDIQ contract that includes negotiated rates.
Prequals	0%	ATG has been qualified to work for a particular client. These do not include a signed contract or negotiated rates, as On-calls do.
Contract	100%	ATG has a fully executed contract and a corresponding EGDV/PLDV/DATA project exists.
No Go	0%	ATG made a decision not to pursue.
Cancelled	0%	Client or prime decided not to advertise or pursue.