

SUMMARY OF NORTHSTAR GPS MODULES

Module	Description	Associated Sub-Options (Menu)
Plan	the proposal manager plans for developing the proposal and establishes the proposal repository, proposal schedule, proposal kickoff, and other key proposal planning documents	<ul style="list-style-type: none"> -Initialize Workspace -Proposal Info -Business Logic (proposal level) -Partner Info -Requirements -Personnel -Past Performance -Proposal Roles -Proposal Schedule -Proposal Task List -Proposal Kickoff
Build	the proposal manager builds the proposal outlines - Build the proposal outline using templates uploaded by the customer. The outline is built based on the opportunity requirements. There should be a drag and drop feature to build the outline and then place the resulting headers and other components into the customer's outline. Customer shall be able to associate a specific template with the opportunity.	<ul style="list-style-type: none"> -Formatting Guidelines -Template Selection -Define Volumes -Build Outlines -Prepopulate Content -WRAM (writer & reviewer assignment matrix)
Write	content is developed within the proposal outline in response to the requirements	<ul style="list-style-type: none"> -Content Collaboration & Development -Data Calls
Recover	proposal outlines are locked down and the proposal manager infuses all content and the result is a cohesive document that's ready for further enhancements	<ul style="list-style-type: none"> Check out document in SharePoint to pause all collaboration Make any updates - Address content contributed by authors and finalize doc for the next iteration Post recovered doc back in SharePoint and send announcement to the team Any Programming??
Review	conduct peer reviews of the proposal at various intervals; the final review will be accommodate with a compliance matrix; – the proposal manager is responsible for reviewing and compiling all content and posting the next iteration of the outline for further development and enhancement	<ul style="list-style-type: none"> -Build Compliance Matrix -Peer Review -Conduct Compliance Review
Evaluate	develop an evaluation rubric based on the evaluation criteria and conduct a review scoring the proposal against the evaluation criteria	<ul style="list-style-type: none"> -Eval Criteria -Build Eval Rubric -Conduct Evaluation
Finalize	finalize the proposal conducting checks such as spelling, grammar, conciseness; develop the acronyms listing	<ul style="list-style-type: none"> -Build proposal checklist -Finalize all docs, convert to PDF, Conduct final review (senior management) -Set a flag that the proposal is finalized and ready for submission
Submit	Submit the proposal; email should use standard submission verbiage; delineate submissions for questions, RFIs, RFPs etc.	<ul style="list-style-type: none"> -Set finalized flag (approval) -Submit the proposal using the submission info defined under proposal info – generate email with all finalized docs
Archive	Lock down all proposal assets in the proposal repository with access to the final versions only	<ul style="list-style-type: none"> -Storage – lock versions – Place finalized proposal knowledgebase -Revoke permissions to the SharePoint site (set a flag) -Set completion flag / archive flag
Post Submission	Inform the team of submission Set up a reminder to check the status of the proposal at 60, 90, 120 day intervals. Intervals may be set by the proposal manager. Complete lessons learned	<ul style="list-style-type: none"> -Inform the team of submission -Set up a reminder to check the status of the proposal at 60, 90, 120 day intervals. Intervals may be set by the proposal manager. -IFNs/BAFO Management

NorthStar GPS – Epics & User Stories

Module	Description	Associated Sub-Options (Menu)
Doc Generator	view, download, and print proposal artifacts	-Doc Generator
PAL – Proposal Asset Library Management	Parse the proposal by topic to build the topical library Create the knowledgebase of finalized proposals Set a flag as to whether the proposal should be included in the knowledgebase build the library with content from proposals submitted, graphics, past performance, resumes etc.	-Proposal Library -Content Library -Graphics Library -Resume Library -Master Past Performance Refs -Custom Past Perf Refs
Analytics, Insights, & Reports	Enter in performance metrics (goals i.e. 20 props per year) Show metrics on the entry screen in the dashboard section Run reports regarding overall performance (meeting deadlines, data calls completed, number of RFIs, RFPs, etc) – dashboard of performance	-Performance Metrics -Reports Generator -Lessons Learned -Strengths Registry -Proofpoints -Partner Evals -Debrief Info -CPARS Info
Settings	Custom settings that each company can set up for their NorthStar GPS instance	-Org Info -User Access & Permissions -Template Library -Business Logic (company level) -Proposal Activities -Preferred Partner Listing

EPICS & USER STORIES

EPIC	Associated Modules	Sub-Options	User Stories
EPIC 1	All	Wireframe/mock screens (user interface) – New Opp, Opp In Process, Completed Opps Plan, Build, Write, Recover, Review, Evaluate, Finalize, Submit, Archive, Post Submission, Doc Generator, PAL – Proposal Asset Library Management, Analytics, Insights, & Reports, Settings	As the product owner, I want to see mock screens, so I can validate the flow of the application.
EPIC 2	Plan	-Initialize Workspace	As the proposal manager, I want to set up a workspace, so the team can work collaboratively on the proposal.
		-Proposal Info	As the proposal manager, I want to capture the proposal information, so that I can use it to develop key proposal planning artifacts.
		-Business Logic (proposal level)	As the proposal manager, I want to identify business logic rules that are relevant to the proposal, so that we meet any proposal-related constraints.
		-Partner Info	As the proposal manager, I want to identify our partners, so that I can make assignments to the appropriate individuals.
		-Requirements	As the proposal manager, I want to track the requirements, so that I can make sure that solutions/approaches are provided in the technical proposal and to build the capabilities matrix.
		-Personnel	As the proposal manager, I want to identify the personnel required, so that I can inform the recruiting team for sourcing.
		-Past Performance	As the proposal manager, I want to identify the past performance references to use, so that I can send out the past performance questionnaires and complete the associated past performance reference.
		-Proposal Roles	As the proposal manager, I want to identify the points of contact supporting the different aspects of the proposal, so that I know who to contact and who will be writing and reviewing the proposal.
		-Proposal Schedule	As the proposal manager, I want to develop a proposal schedule, so that the proposal is developed and submitted on time.
		-Proposal Task List	As the proposal manager, I want to track all of the proposal related tasks, so that I can ensure that all tasks are being completed timely to ensure a timely submission.
		-Proposal Kickoff	As the proposal manager, I want to generate the proposal kickoff brief using the information entered into NorthStar, so that I can conduct the proposal kickoff.
	Build	-Formatting Guidelines	As the proposal manager, I want to ensure that the templates are in accordance with the defined formatting guidelines, so that the proposal is compliant.
		-Template Selection	As the proposal manager, I want to select the type of template needed, so that the template is in alignment

NorthStar GPS – Epics & User Stories

EPIC	Associated Modules	Sub-Options	User Stories
			with the type of opportunity.
		-Define Volumes	As the proposal manager, I want the ability to define the volumes relative to the particular proposal, so that the team can develop content within the volumes.
		-Build Outlines	As the proposal manager, I want to build comprehensive outlines, so that the writers can provide content that directly addresses the requirements.
		-Prepopulate Content	As the proposal manager, I want to leverage content that I have already developed, so that the writers have something to start with versus a blank canvas when addressing the requirements and to save time in the writing phase of the proposal process.
		-WRAM (writer & reviewer assignment matrix)	As the proposal manager, I want to track who is responsible for writing and reviewing, so that I know who is responsible for what and who to contact if I have questions or require additional information.
	Settings	-Org Info	As the organization, I want to enter my information, so that it can be used across all proposals as needed.
		-User Access & Permissions	As the organization, I want to control user access and permissions, so that only people that need access can access the system and make any adjustments in accordance with their permissions.
		-Template Library	As the organization, I want to use approved templates, so that we have consistency in the proposal assets we submit.
		-Business Logic (company level)	As the organization, I want to set business logic that applies across all proposals, so that we can better measure performance.
		-Proposal Activities	As the proposal manager, I want to define the core proposal activities and proposal specific activities, so that I can pick the activities when developing the proposal schedule.
		-Preferred Partner Listing	As the organization, I want to build a list of preferred partners, so that I can quickly identify potential partners when we have gaps in capabilities or customer recognition.
EPIC 3	Write	-Content Collaboration & Development	As the proposal manager, I want to provide the ability for the team can collaborate and co-author the proposal documents, so that I don't have to collect and merge feedback from the team into one document.
		-Data Calls	As the proposal manager, I want to issue data calls, so that I can target the specific information needed from specific individuals supporting the proposal.
	Recover	Check out document in SharePoint to pause all collaboration Make any updates - Address content contributed by authors and finalize doc for the next iteration Post recovered doc back in SharePoint and send announcement to the team Any Programming??	As the proposal manager, I want to lock down the proposal documents, so that I can go through it and address any comments/feedback and prepare the next iteration of the proposal.
	Review	-Build Compliance Matrix	As the proposal manager, I want to develop a compliance matrix using the requirements defined in the solicitation documents, so that I can ensure that we have addressed all of the requirements.
		-Peer Review	As the proposal manager and writer, I want to conduct peer reviews directly in the document using the guidance in the outlines, so that I can ensure that the content is compliant and to request specific

NorthStar GPS – Epics & User Stories

EPIC	Associated Modules	Sub-Options	User Stories
			information from writers so that the proposal remains on schedule.
		-Conduct Compliance Review	As the reviewer, I want to conduct a compliance review of the document, so that we can catch any weaknesses and/or deficiencies and address them.
EPIC 4	Evaluate	-Eval Criteria	As the proposal manager, I want to ensure that we are addressing the evaluation criteria, so that we get a good score/rating on the proposal.
		-Build Eval Rubric	As the proposal manager, I want to build an evaluation rubric with the evaluation criteria, so that evaluators can have a tool to score the proposal.
		-Conduct Evaluation	As the evaluator, I want to score/rate the proposal, so that we can ensure we get the highest rating available.
EPIC 5	Finalize	-Build proposal checklist	As the proposal manager, I want a proposal checklist, so that I can make sure that we are submitting everything that's required per the solicitation.
		-Finalize all docs, convert to PDF, Conduct final review (senior management)	As the proposal manager, I want to finalize all docs for submission so that I can obtain approval from senior management to submit.
		-Set a flag that the proposal is finalized and ready for submission	As the proposal manager, I want to notify senior management that the proposal is ready for review by setting a flag, so that they are notified that the proposal is ready for a final review.
	Submit	-Set finalized flag (approval)	As the proposal manager, I want senior management to set a flag, so that I am notified that the proposal is approved and is ready for submission.
		-Submit the proposal using the submission info defined under proposal info – generate email with all finalized docs	As the proposal manager, I want to submit the proposal to the appropriate POC, so that the proposal can be evaluated.
	Archive	-Storage – lock versions – Place finalized proposal knowledgebase	As the proposal manager, I want to lock the proposal versions and place them in the knowledgebase, so that they cannot be changed but made available for use in the development of future proposals.
		-Revoke permissions to the SharePoint site (set a flag)	As the proposal manager, I want to revoke permissions to the SharePoint site so that users no longer have access to the proposal documents.
		-Set completion flag / archive flag	As the proposal manager, I want to set a flag that the proposal is completed/archived, so that we know that the proposal is completed.
	Post Submission	-Inform the team of submission	As the proposal manager, I want to communicate with the team, so that they know that the proposal has been submitted.
		-Set up a reminder to check the status of the proposal at 60, 90, 120 day intervals. Intervals may be set by the proposal manager.	As the proposal manager, I want to check on the award status of the proposal, so that I can inform senior management during meetings.
		-IFNs/BAFO Management	As the proposal manager, I want to respond to IFN's/BAFOs issued by the contracts manager, so that our proposal remains viable.
EPIC 6	Doc	-Doc Generator	As the proposal manager, I want the capability to print off the documents needed, so I can have access to

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EPIC	Associated Modules	Sub-Options	User Stories
	Generator		information in the templates required by the organization.
EPIC 7	PAL	-Proposal Library	As the proposal manager, I want a library of proposals, so that I can pull information as needed.
		-Content Library	As the proposal manager, I want a content library, so that I can pull information by topic.
		-Graphics Library	As the proposal manager, I want a graphics library, so that I can repurpose graphics previously developed.
		-Resume Library	As the proposal manager, I want a resume library, so that I can have access to formatted resumes to submit on proposal efforts for key personnel requirements.
		-Master Past Performance Refs	As the proposal manager, I want a library of master past performance references, so that I can select the past performance references to use on proposal efforts and to tailor them accordingly.
		-Custom Past Perf Refs	As the proposal manager, I want a library of custom past perf refs, so that I can repurpose them for future proposal efforts.
EPIC 8	Analytics, Insights, & Reports	-Performance Metrics	As senior management, I want to define the performance metrics for the proposal development, so that I can determine if we are meeting our goals.
		-Reports Generator	As senior management and the proposal manager, I want to run reports, so that I can see how the proposal department is performing.
		-Lessons Learned	As the proposal manager, I want to track lessons learned on each proposal effort, so that I can implement things that went well and avoid repeating things that didn't go so well.
		-Strengths Registry	As the proposal manager, I want a strengths registry, so that I can use them in the proposals.
		-Proofpoints	As the proposal manager, I want a proofpoints list, so that I can use them in the proposals.
		-Partner Evals	As the proposal manager, I want to evaluate the performance of our partners, so that we know if we should use them on future opps.
		-Debrief Info	As the proposal manager, I want to track information received from debriefs, so that we can make future proposals stronger.
		-CPARS Info	As the proposal manager, I want to track CPARS information, so that I can use the information in future proposals.