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Location shown below appears to be incorrect. As of 4-27-21, located in:
Z/Project Delivery System Policies
and Procedures

Alan Hudson



Role Definitions

Alliance staff serve in various capacities throughout the Project Delivery System lifecycle. The goal in defining roles for pursuits or projects is that no one person fulfill multiple roles. These descriptions are not intended to be comprehensive.

Corporate Assigned Roles

Business Development (BD) Executive

This individual is responsible for strategic development and implementation of Business Development and Marketing plans for the company, across divisions, disciplines, practice and geographic areas. This individual will guide the Capture Manager, as needed, through the pursuit and provide input for go / no go decisions.

Client Service Manager (CSM)

This individual is responsible for developing and maintaining client relationships and successfully promoting all viable Alliance services to clients. They will provide in depth knowledge of the client and assist the Capture Manager in strategy, capture plans, contact plans, setting goals for specific clients, making connections to the client's staff, identifying pursuits, and creating marketing, proposal and interview materials. This individual will provide input for go / no go decisions

Division Director (DD)

This individual is responsible for Division oversight and implementation of the Divisions Strategic Business and Marketing Plan. They will coordinate with the BD Executive Officer, Practice Leader, Client Manager and Capture Manager on the resource needs and be the final authority for go / no go decisions. The Division Director will:

- Set strategic direction for their Division in collaboration with the Executive Management Team
- Oversee all aspects of the division operations and technical product delivery
- Support business development being carried out by Practice Leaders
- Develop and maintain client / teaming partner relationships
- Promote continuous improvement in division technical and operational capabilities through use of best practice quality management principles
- Create a positive and productive workplace
- Empower staff to grow professionally

Practice Leader (PL)

This individual is responsible for management of the practice where the pursuit / proposal / project will be developed. They will coordinate with the BD Executive Officer, Division Manager, Client Manager and Capture Manager on the resource needs, content development and Provide guidance to the CM for go / no go decisions. The Practice Leader role includes:

- Responsible for Practice goals and metrics

Role Definitions

- Manage, monitor and forecast metrics including: Profit, Job Starts, Net Revenue, Utilization and Accounts Receivables for their practice
- Representing the company and leading BD efforts for the entire practice / across all regions
- Guide a team of project managers and technical staff to ensure high morale, consistent quality, customer satisfaction and financial performance is achieved.
- Provide guidance and review during contract negotiations
- Mentor staff to develop a deep expertise in the practice area and develop project leadership capacity
- Work with senior management to define the strategic role of the practice in overall enterprise business development
- Identify Training Needs
- Responsible for workload balancing
- Lead recruiting efforts for the Practice
- Lead the market direction for the Practice
- Identify and attend relevant conferences, network with industry leaders. and seek appropriate speaking opportunities
- Address Practice / Staff related complaints and resolve problems
- Determines labor, resource, and financial needs of the Practice
- Recommends expenditures of Practice
- Staff Goal Setting and Evaluations
- Reviews Salary and Bonus and provides comments to Sr. Leadership

Opportunity Assigned Roles

Opportunity Lead Originator (LO)

This individual is responsible for representing the company and assisting BD efforts for practices / geographic areas. This individual discovers and leads BD efforts and provides market awareness. Responsible for coordinating with other roles to move the lead forward into a pursuit. Once the Lead Originator is defined, it should not be changed.

Capture Manager (CM)

This individual is responsible for a specific opportunity from initial stages through SNC and ensures that all Processes and Procedures are followed and adhered to correctly. An individual can only be assigned this role when they are able to fulfill ALL the CM duties. The Division Director is responsible for confirming the CM designation. The duties of a CM include:

- Lead the capture team
- Identify strategy, resource needs, appropriate Project Manager, subconsultants / team firms / people

Role Definitions

- Lead the go / no go decision. Take responsibility for the discussion and forms and make the request for the decision
- Ensure Vision entry(ies) are up to date and include all required information
- Set the pursuit / proposal schedule
- Assist the Proposal Coordinator in action item follow up
- Review the final proposal
- Verify the checklists are being used
- Train Deputy Capture Managers

Note: When a pursuit becomes an on-call, the CM for that contract is to be listed as CM for all work authorizations or task orders under that master contract.

Deputy Capture Manager (DCM)

This individual is responsible for assisting the Capture Manager in proposal process through SNC. The DCM is encouraged to learn and take on as much of the Capture Manager responsibilities for developing pursuits as they are capable of leading. Fulfillment of all elements of Capture Manager duties as a Deputy Capture Manager is necessary for future assignment as a Capture Manager. When completing Vision entries, leave blank if there is not a DCM.

Proposal Coordinator (PC)

This individual, from the marketing staff, is responsible for coordinating the efforts of the Capture Team throughout the process. This individual is responsible for ensuring proposals meet all client requirements and are created within the appropriate Alliance standards. Duties include:

- Coordinate with the Capture Manager to set an appropriate schedule for all pursuit activities
- Create meeting minutes and action items, timely
- Follow up on action items to ensure completion
- Request appropriate subconsultant information
- Respond to prime requests
- Read and suggest edits on all text
- Maintain and ensure checklists are completed

Project Assigned Roles

Principal-in-Charge (PIC)

This individual is responsible for executing contracts in accordance with implementation of the Strategic Business and Marketing Plan. This role is assigned when the project reaches the SNC stage. The individual will coordinate with the Capture Manager, Project Manager and Project Accountant on the resource and budget needs for executing the project, including category rates for staff. This role should only be assigned to staff with contract signatory authority for the firm. This role accepts responsibility as the final reviewer and signatory authority for the Contract. This role and should not be filled by the CM, PM or CSM.

Role Definitions

- Ensure executed contracts are in accordance with the strategic direction for the company.
- Support business development being carried out by division directors and practice leaders.
- Develop and maintain client / teaming partner relationships
- Promote continuous improvement in technical and operational capabilities through use of best practice quality management principles across the company
- Create a positive and productive workplace
- Empower staff to grow professionally

Project Manager (PM)

This individual is responsible for management of the work product that will be provided to the client, i.e. project, for the opportunity that is being pursued. The Project Manager is finalized at SNC stage and will work coordinate with the Principal-in-Charge and Project Accountant to provide scope, budget and staffing information for use negotiation of the contract. During Project Execution, the PM role includes:

- Ultimate responsibility for all project outcomes
- Service as the main point of contact to collect and share project information
- Manages budgets and schedules
- Primary POC to client
- Plans and delegates work tasks
- Ensures project quality
- Project documentation
- Uses ATG standard procedures
- Assists accounting with invoices and prepares progress reports
- Owns the project
- Maintains communication with the entire project team (internal/external)
- Provide leadership
- Successfully prepare, review and coordinate execution of a contract
- Review and interpret a scope and develop an appropriate work breakdown structure
- Develop a budget and schedule
- Set up a project
- Develop a Project Management Plan
- Develop project-specific QC plan and direct QC activities
- Appoint Project QC Manager (if separate from Project Manager)
- Develop and maintain an effective communications plan
- Monitor and control a project (in terms of budget, schedule and deliverables)

Role Definitions

- Coordinate QA audits with Division QA Manager
- Resolve deficiencies and implement corrective actions
- Conduct project lessons learned meetings; document and distribute lessons learned to project team, Division QA Manager, Practice Leader and Division Manager.
- Close a project out

Assistant Project Manager (APM)

This individual is responsible for assisting the Project Manager in management of the work product that will be provided to the client. They should take on as much of the Project Manager responsibilities as they are capable of leading. Fulfillment of all elements of Project Manager duties as an Assistant Project Manager is necessary for future assignment as a Project Manager. When completing Vision entries, leave blank if there is not an APM.

Quality Manager

This is the individual who will be responsible for directing project QC activities and reporting results to Project Manager as well as, coordinating QA audits with Division QA Manager.

Project Accountant

This individual assists in development of project scope and fee information by providing rate sheets and other support for use in initial contract scoping through final contract negotiations. These includes the applicable multiplier and/or negotiated rates, when appropriate, and the required time that should be incorporated for Accounting staff in the Project Plan. The Project Accountant is also responsible for Project Set-up and Monthly Invoicing.

Task Leader (TL)

This individual assists the PM and APM in development of projects and typically leads a specific scope or portion of the project. Although it is not a defined field in Vision, Task Leaders should be assigned on the team tab in Vision.