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|  | Opportunity Development…......Lead through Blue Hat Review | |
| LEAD | ***OPPO/PROP Creation (Lead Documentation)*** | **Coordinator(s): Opportunity Lead Originator, OPPO/PROP Creator**  **Attendee(s): Opportunity Lead Originator, OPPO/PROP Creator**  **Objective:** Documentation of a Lead for potential work through creation of OPPO/PROP records.  **Activity:** Submission of completed **OPPO/PROP Request Form** to the assigned **OPPO/PROP Creator** indicated in the form.  **Outcome:** Creation of OPPO and PROP records in Vision and the PROP folder on the network for the Lead. |
| ***Blue Hat Review*** | **Coordinator(s): Opportunity Lead Originator, Marketing Manager**  **Attendee(s): Opportunity Lead Originator, Practice Lead** and **Marketing Manager**, at a minimum.  **Objective:** Determine if ATG should continue to pursue an opportunity.  **Activity:** Complete and periodically review the **Blue Hat Review Form** based on additional knowledge at EITHER the weekly BD Meeting or in a separately scheduled independent meeting, as needed.  **Outcome**:   * If the **Blue Hat Review Form** has a value of 35 or greater, then it is it is determined to be a GO * **Capture Manager** initiates the **Capture Plan**, including the Estimated Effort. * **Capture Manager** provides **Blue Hat Review form** with the signature of the Practice Lead and the Estimated Effort from the **Capture Plan** to **Marketing Manager**. * **Marketing Manager** identifies **Proposal Coordinator.** * If determined to still be a Go BUT DOES NOT have a **Blue Hat Review Form** value of at least 35, the **Opportunity Lead Originator** will continue to monitor as a Lead and it will be tabled for evaluation at a subsequent Blue Hat Review. * If determined to be a No Go, process accordingly and remove from lists. |
|  | ***Capture Plan Development*** | **Coordinator(s): Capture Manager, Marketing Manager or Proposal Coordinator**  **Attendee(s):** Separate meetings, not required, BUT CAN BE SCHEDULED AS NECESSARY.  **Objective:** Increase knowledge of the lead by developing a **Capture Plan** that improves ATG’s position for winning the work.  **Activities: Capture Manager** and **Proposal Coordinator** prepare background research and discuss at weekly BD Meeting and/or additional independent meetings as necessary to gather information for the **Capture Plan.**  **Outcome: Capture Plan** that improves ATG’s position for winning the work. |

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| *PURSUIT* |  | Opportunity Development…......Lead through Blue Hat Review |
| ***Strategy Meeting and Pre-Proposal Activities*** | **Coordinator(s): Capture Manager, Marketing Manager**  **Attendee(s): Capture Manager, Opportunity Lead Originator, Practice Lead, Client Service Manager, Proposed Project Manager, Proposed PIC, Proposal Coordinator** and any other senior staff with relevant knowledge of the project or client.  **Objective:** Increase knowledge of the **Pursuit** by developing a **Capture Plan** that improves ATG’s position for winning the work.  **Activities:**   * Conduct strategy meetings and other pre-proposal activities to develop key components of the **Capture Plan**, such as * Anticipating competitor’s likely proposed strategies and solutions * Documenting complete and necessary research * Designating teaming arrangements * Identifying important key points for the pursuit. * Assigning future activities for * Opportunity evaluation * Team development * Continuously review the **Capture Plan** based on current knowledge including background research on the client, previous similar projects, likely competitors, etc. * **Capture Manager** and **Proposal Coordinator** continuously update the **Capture Plan** and assign additional activities as appropriate.   **Outcome:** Develop a successful **Capture Plan** that is sufficiently complete so that when an RFP is issued a Black Hat Review and decision can be made within 48 hours of RFP release. |
| ***Black Hat Review*** | **Coordinator(s): Capture Manager, Marketing Manager**  **Attendee(s): Capture Manager, Practice Lead,** and **Proposal Coordinator**, at a minimum. Should also include **Opportunity Lead Originator, Practice Lead, proposed Project Manager, Proposed PIC, and Proposed Quality Manager**, when necessary.  **Objective:** Review the updated **Capture Plan**, Go/No Go, confirmed/unconfirmed team members and/or significant information. Go/No-Go reviews occur periodically during pursuit stage; however a Black Hat review with the minimum attendees above is required to advance from Pursuit to Proposal stage after an RFQ is issued.  **Activities:** As knowledge increases **AND WITHIN TWO (2) BUSINESS DAYS OF AN RFQ** being issued, a **Black Hat Review** should be conducted**.** The **Black Hat Review** should be attended by the **Capture Manager, Practice Lead,** and **Proposal Coordinator**, at a minimum.  **Outcome:**   * If the **Black Hat Review Form** has a score of 15+ then it is determined to be a Go and advanced to the **Proposal** stage with the signature of the **Practice Lead**. * If the **Black Hat Review Form** has score of 12-14, it should be presented to the **BD Executive**. It may only be determined to be a go and advanced to the **Proposal** stage with a signature and explanation from the **BD Executive**. * It is determined to be a No Go, it is processed accordingly and removed from lists.   **Note**: An opportunity cannot reach the **Proposal** stage until an official RFQ is issued AND a **Black Hat Review** is conducted. |