



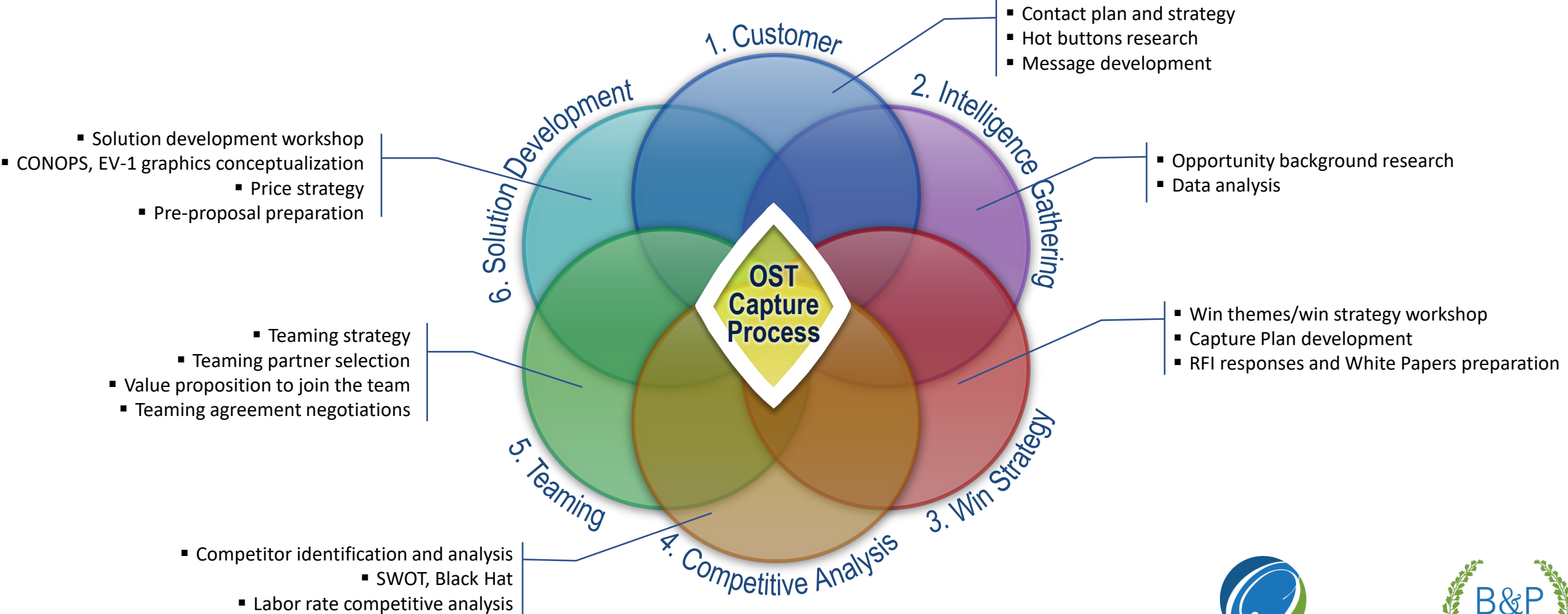
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Keeping Capture Momentum

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Let's Define Capture

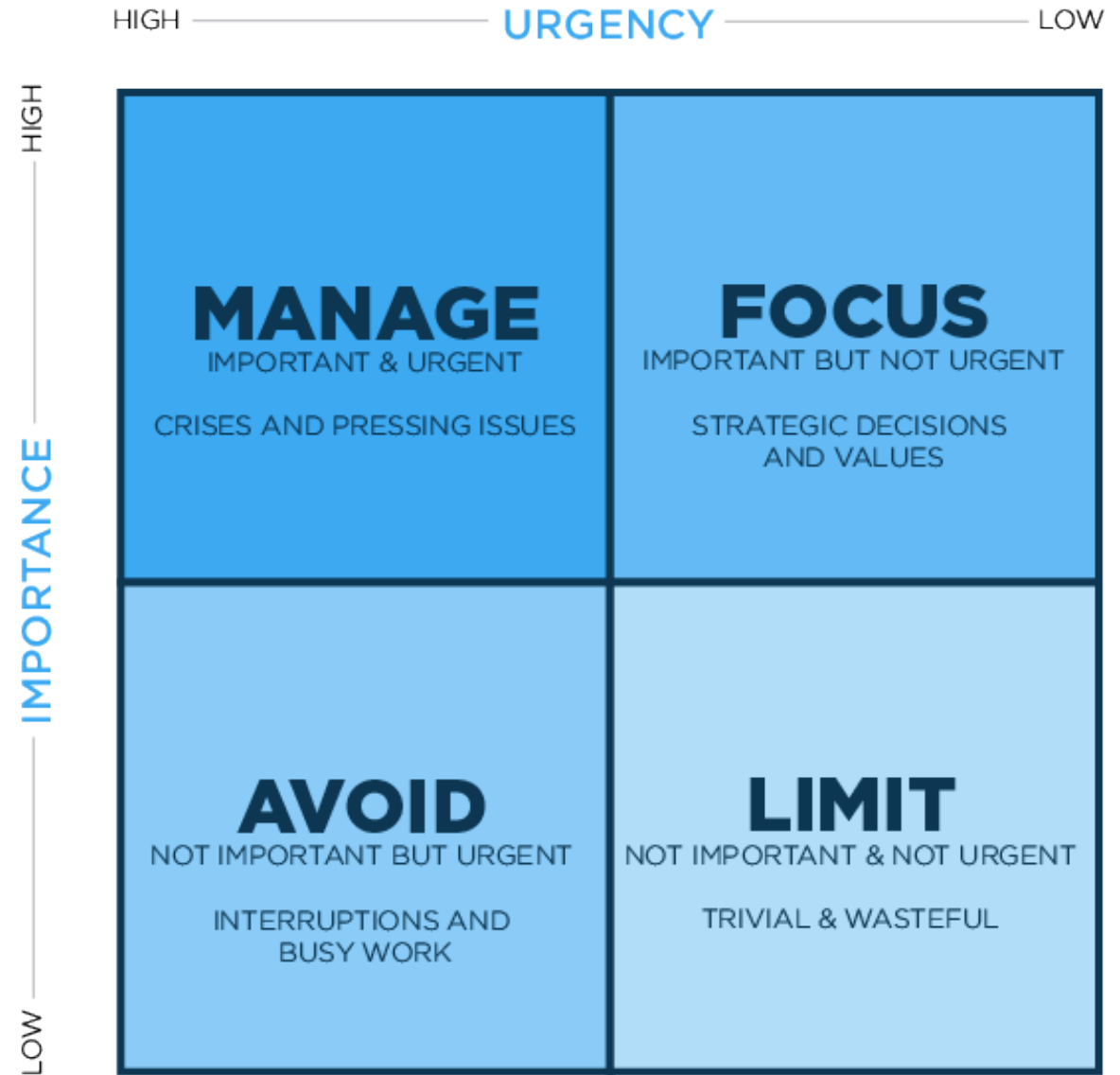




Don't Postpone Capture Because You Are Trying to Save on Budget

- Per APMP survey, companies with high win rates (75% and higher) spend more than 60% of B&P budget on capture
- With an average win rate of 33-36% on proposals submitted in a competitive environment for new work per the Grant Thornton report, most companies fail to realize their full potentials
- Other problems:
 - Staff burnout
 - Lowered morale
 - Impeded growth, loss of key resources, etc.
- The worst pitfall of all – believing that you have conducted solid capture when in fact you have not

Prioritize Capture
Consciously
Because it's an
Important but Not
Urgent Activity



Another Way of
Looking At It:
Rocks, Pebbles,
Sand in a Jar



Perpetual Capture Dilemma

- The team starts out motivated and preparing for the proposal, but the RFP keeps slipping
- The sense of urgency disappears
- Action items stop getting done on time
- There's still a ton of work to be done but little progress is being made

SNOOZE



Keep the Team Focused on the Win

- It takes leadership and will power to keep the team motivated and focused on the win
- Run regular meetings, at least monthly
- Enforce deadlines using peer pressure
- Focus on developing proposal artifacts vs. general strategy
- Keep plugged into the rumor mill



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Scheduling – Long Time is an Illusion

- Some of the capture tasks are monumental in nature and take long periods of time to build:
 - Relationship building takes a long time
 - Researching and recruiting superstar personnel may take time until the right piece of information emerges
 - Teaming selection and positioning for effective negotiations may take time
 - Getting the right facilities, credentials, and resources may take a long time
- Start laying out all the tasks you have to do versus your specific customer's acquisition lifecycle
- The RFP release is not the only milestone

Create an Action Items Roster



For Cost Proposal and Labor Category Pricing: Develop full detail of the methodology and assumptions utilized as the basis for estimating costs. Use Korn Ferry data, HR/Benefits market research info and compare that to our benefits to show competitiveness.	2-7-19	Matt	
For Cost Proposal and Labor Category Pricing: Reverse-engineer incumbent's labor rates. Note the old RFP requirement: Offerors shall address at a minimum all escalation factors applied to base costs, the basis for estimating labor utilization and the calculation of the hourly labor rate(s), the basis and rate calculations of all indirect cost factors to include historical and audited rates.	2-7-19	Julian and Matt	
Collect subs' inputs on labor rates/personnel availability.	2-7-19	Bryan	
For Cost Proposal and Labor Category Pricing: Discuss insurance with the CFO	2-7-19	Dave and Jerry	



Scheduling Tips

- Be keenly aware of the time when you can still talk to the customer versus the time when you can no longer talk to the customer
- This period tends to end earlier and earlier:
 - Schedule your customer interfaces quickly
 - Do win strategy to determine key messaging
 - Do your preliminary solution development sessions so that you could vet the solution
 - Vet your teammates with the customer early



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Dealing with Scarcity

- Very few pursuits have enough budget and time, even at large companies: budget carefully
- Negotiate hours with high-cost resources
- Have clear agendas for every meeting and brainstorming session
- Document everything painstakingly
- Avoid duplication of effort – so have everyone's role and tasks clearly defined
- Track everyone's time and expenses weekly against your budget



Dealing with Slipping Deadlines

- The trick is to stay very close to the customer
- Do what's necessary to make sure you are doing well in all six aspects of capture at any given time
- Revisit the opportunity if necessary to ask all the key “metrics” questions to see how well you are doing
- Document everything meticulously so that all your work is never lost when you halt your efforts
- Start where you had left off when the pursuit reemerges by reviewing every capture artifact you have gathered
- Motivate people



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More Scheduling Tips

- Start your capture schedule 1-3 years out before the projected RFP release
- Balance out your activities so that you have something going on every month
- Your effort is usually slow up until the last six months before the projected RFP release – schedule weekly 15-minute status calls with the entire team
- After the Draft RFP gets released, treat it almost like the final proposal; even if there is no Draft RFP, the last 1-2 months should be treated almost like a formal proposal effort
- Remember, there is NEVER enough time to do the proposal right after the RFP comes out and no way to impact the requirements



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How to Organize Your Capture Team

- Create (and stick to) a schedule
- Set up regular calls:
 - Frequency depends on the capture stage
 - Early on: monthly call; Later on: weekly or bi-weekly
- Create action items and assign them to appropriate personnel – and track their completion
- Motivate the team as many don't perform if there is no pressing deadline
- Control the charge number as project personnel may bill countless hours to offload the project (some PMs fix their budget problems this way in large companies)
- Keep updating the capture plan slides
- Maintain a central repository of all capture artifacts



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Activity Doesn't Mean Progress

- “Tracking an RFP” is not a capture activity
- Use the extra time to perfect your win themes to make your proposal sizzle
- Vet your solution with the customer and uncover additional hot buttons
- Recruit superstar personnel that take a long time to find
- Develop a value proposition to attract great teammates

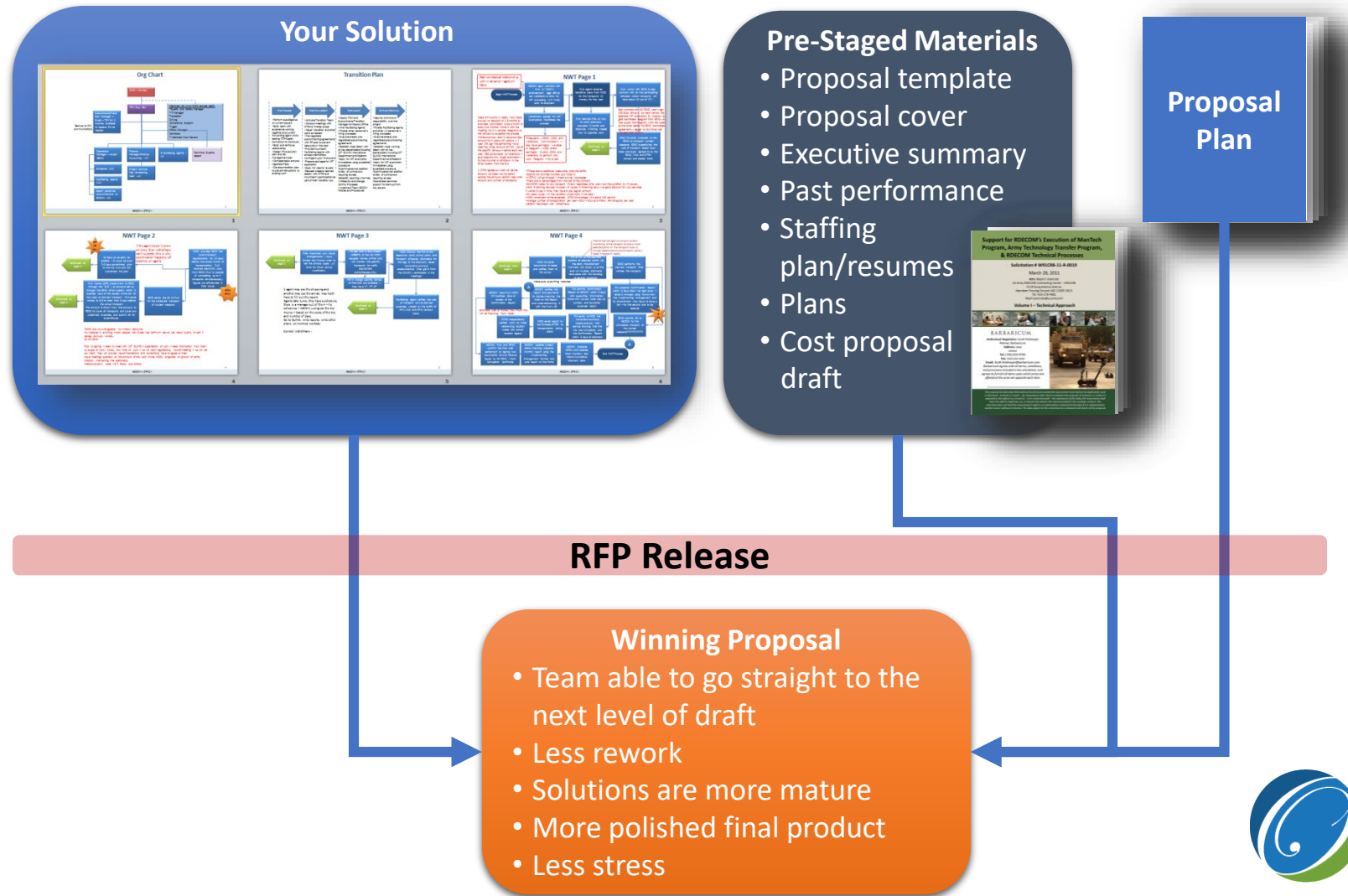


Start Drafting Proposal Sections

- Write proposal sections based on the Draft RFP or the previous solicitation, updated with your understanding of the changes
- Tailor past performance narratives to this solicitation
- Collect hero stories from project personnel
- Conduct a Review of your solution
- Address Review comments right away, without waiting for the Final RFP release



Thorough Solution Development is Key to Proposal Success

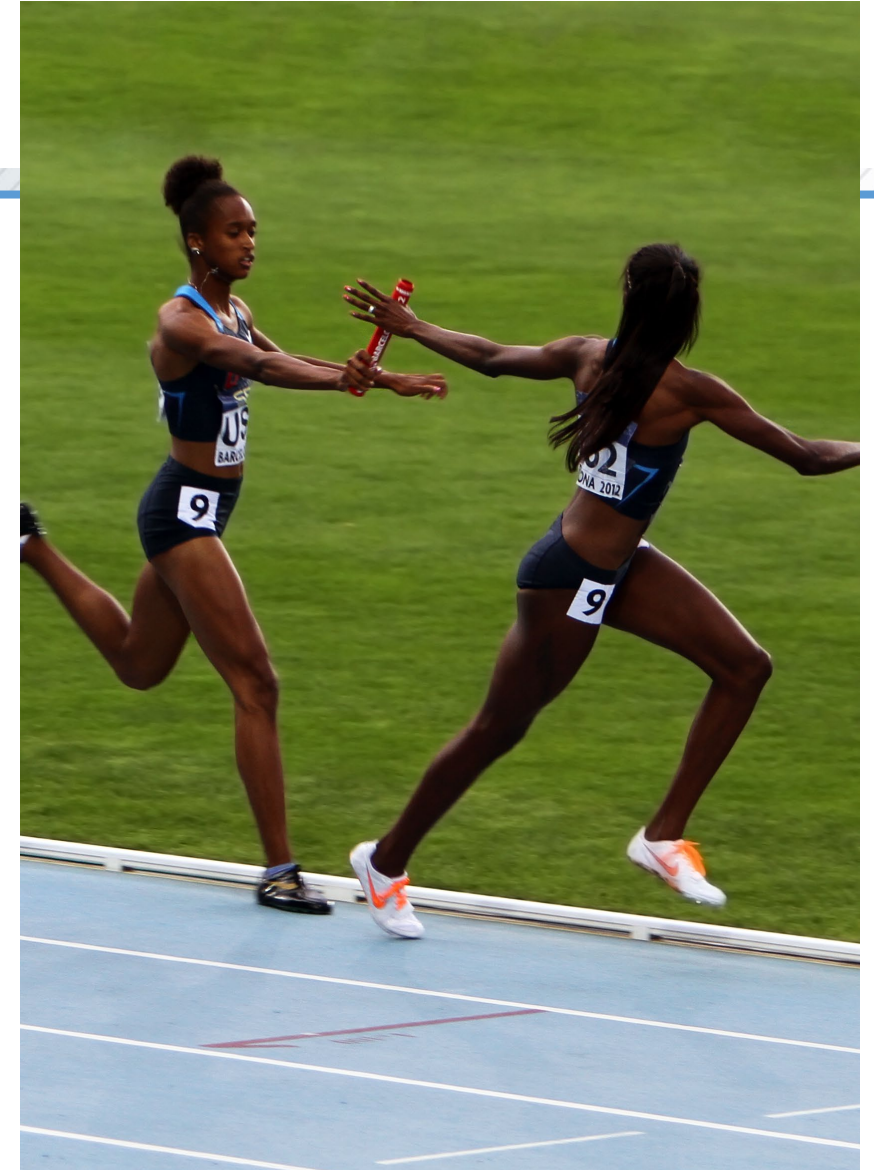


A Few Last Tips

- Invite your project personnel to the brainstorming meetings
- Watch for who is coming to visit your customer – continuously update your competitive analysis
- Keep completing action items, you don't have as much time as you may think
- DOCUMENT EVERYTHING!
- Always make progress – the goal in capture is to raise your win probability



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Capture Resources



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- Use our **Bid & Proposal Academy** course on **Advanced Capture Management** to learn how to masterfully facilitate brainstorming meetings
- Take our **Proposal Win Themes Development** on how to infuse hard-hitting, customer centric value propositions into your proposals
- Register for our **Foundations of Capture Management** if you're new to capture and need to learn the basics for success
- Call me at **240-246-5305** (Olessia Smotrova's cell) or email at **otaylor@ostglobalsolutions.com** to discuss your BD needs

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