Presentation Overview

1. Capture Planning Definition(s)

2. Key Elements of a Capture Plan

3. Is Your Capture Plan Effective?
So What?
What is Capture Planning?

Who?
What?
When?
Where?
How?

How Much?
How Many?
Why?
Why Us?
So What?
Survey Responses

- Identifying Opportunities
- Client Research
- Assessing the Environment
- Formulating and implementing winning strategies
It’s True…

• Selection decisions often involve what happens behind the scenes

• RFP’s are often Issued with favored contender(s) in mind

• Most BD and marketing veterans agree that clients decide the firm(s) they would prefer to work with before proposals are submitted
Remember:

• Clients have done their research

• They have a procurement plan

• To capture the best firm for the job
Capture Planning: Key Elements

Use a Well-Defined Structure that Covers:

- External Research
- Internal Research
- Strategy Development
- Implementation
- Monitoring
Capture Opportunity Analysis

Identify the need

Pinpoint hot buttons

Be cognizant of details that are important but do not make it to the RFP requirements

Assess your ability to provide value and solve problems

- Integrated Solution Worksheet
- Gap Analysis
- Opportunity Analysis Chart
<table>
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<tr>
<th>Customer Requirements</th>
<th>Available Solution</th>
<th>Gap</th>
<th>Competitor Solution</th>
<th>Discriminators</th>
<th>Strategy</th>
<th>Action Required</th>
</tr>
</thead>
</table>
Capture Planning: Key Elements

- Identify their Strengths
  - Can you do it better?

- What added value do you bring to the table?

- Assess your ability to provide value and solve problems
  - Competitor Comparison Sheet
  - Contender Research
  - Competitive Analysis Form
<table>
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<th>Issues</th>
<th>Weight</th>
<th>My Firm</th>
<th>Competitor A</th>
<th>Competitor B</th>
<th>Competitor C</th>
<th>Competitor D</th>
<th>Competitor E</th>
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Define & Develop Capture Strategy

1. Solution Plan
2. Customer Contact Plan
3. Technical Solutions
4. Contingency Plans
Define & Develop Capture Strategy

- Teaming
- Subcontractors
- Price To Win
- Strategic Hires
- Office Location
SMART Goals

Specific ➔ Measurable

Attainable ➔ Relevant

Time Bound
SMART Goals

Align strategic business objectives and investment with high-win probability opportunities

Be specific and realistic with detailed objectives:
- Actions
- Individual responsible for action item
- Timing
- Frequency of review
Structure does not mean inflexibility: Allow wiggle room and keep the plan current

Commit the right people to the capture team

Obtain Buy-In

Check progress (keep the plan current)

Establish regular reviews to resolve conflicts, assess progress, obtain feedback

Make adjustments accordingly
Prepare to Win

• Make sure the capture plan is the springboard for the proposal process

• Capture team involved in
  - RFP Review/Analysis
  - Color Team Reviews
  - Strategy sessions
  - Story boarding
  - Win themes
  Etc.
Is Your Capture Plan Effective?

• Win Rate!
• Win Rate!
• Win Rate!
Are you Column Fodder?
How do you know if you are column fodder?

1. No real relationship with client
2. You are bidding on everything (anything)
Responding to pop-up RFP's with short turnarounds

You are constantly told you were a “close second” when you lose
The best teaming partners and subcontractors are already taken

You have no knowledge of the client’s selection committee or internal process
Is Your Capture Plan Working?
Other Indicators (besides winning)

• Proposal/Marketers Creating Winning strategies from scratch?
• Technical staff aware of clients hot buttons?
• Is the capture process over after the win?
• Repeat Business?
• Cross Selling?
• Clarity, Simplicity, Implementable?
so what?
Benefits of Effective Capture planning

- More **realistic** understanding of each opportunity
- **Improved** bid decisions
- Greater consensus between everyone involved in **project** pursuit
- Seamless transfer of information among individuals pursuing each **opportunity**
- **Saved** time
- **Improved** win rates
Thanks for Participating!