

Capture Management

Art, Science or Sorcery?



DB4 Consulting



Loudoun County
Chamber Of Commerce

GovCon Initiative Training Session

October, 2015

- **What is “The Witches Brew”**
- **BD Cycle & Process – Just a ‘brief’ review**
- **The “6 C’s Of Capture”[©]**
- **The 10 Tenets of Capture**
- **The 6 Points of Capture**
- **Summary**

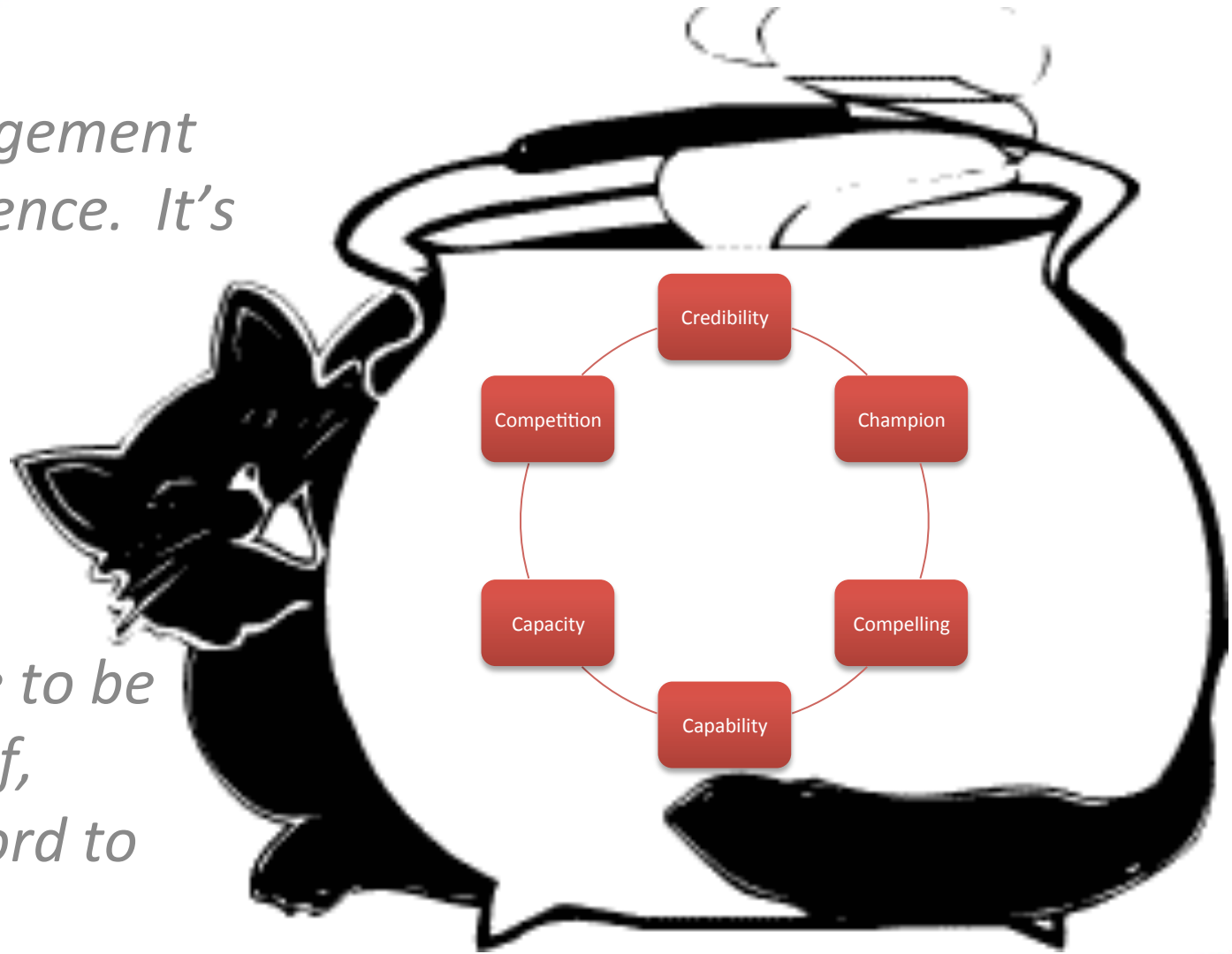


What is “The Witches Brew”?

Capture Management isn't rocket science. It's not magic.

You don't have to be named Gandalf, Merlin or Elf Lord to win contracts.

Although . . . it does help !



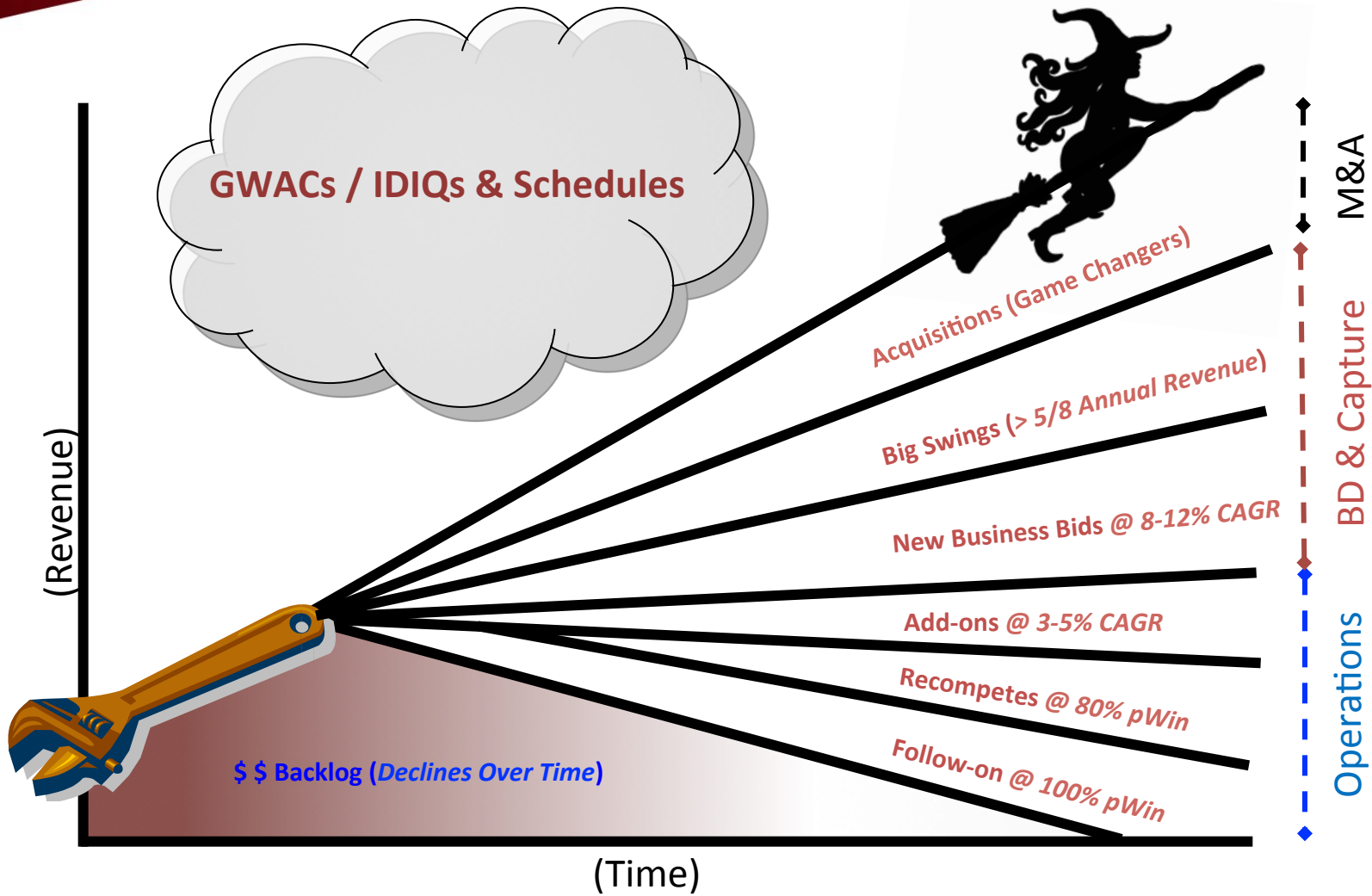


A Little Review

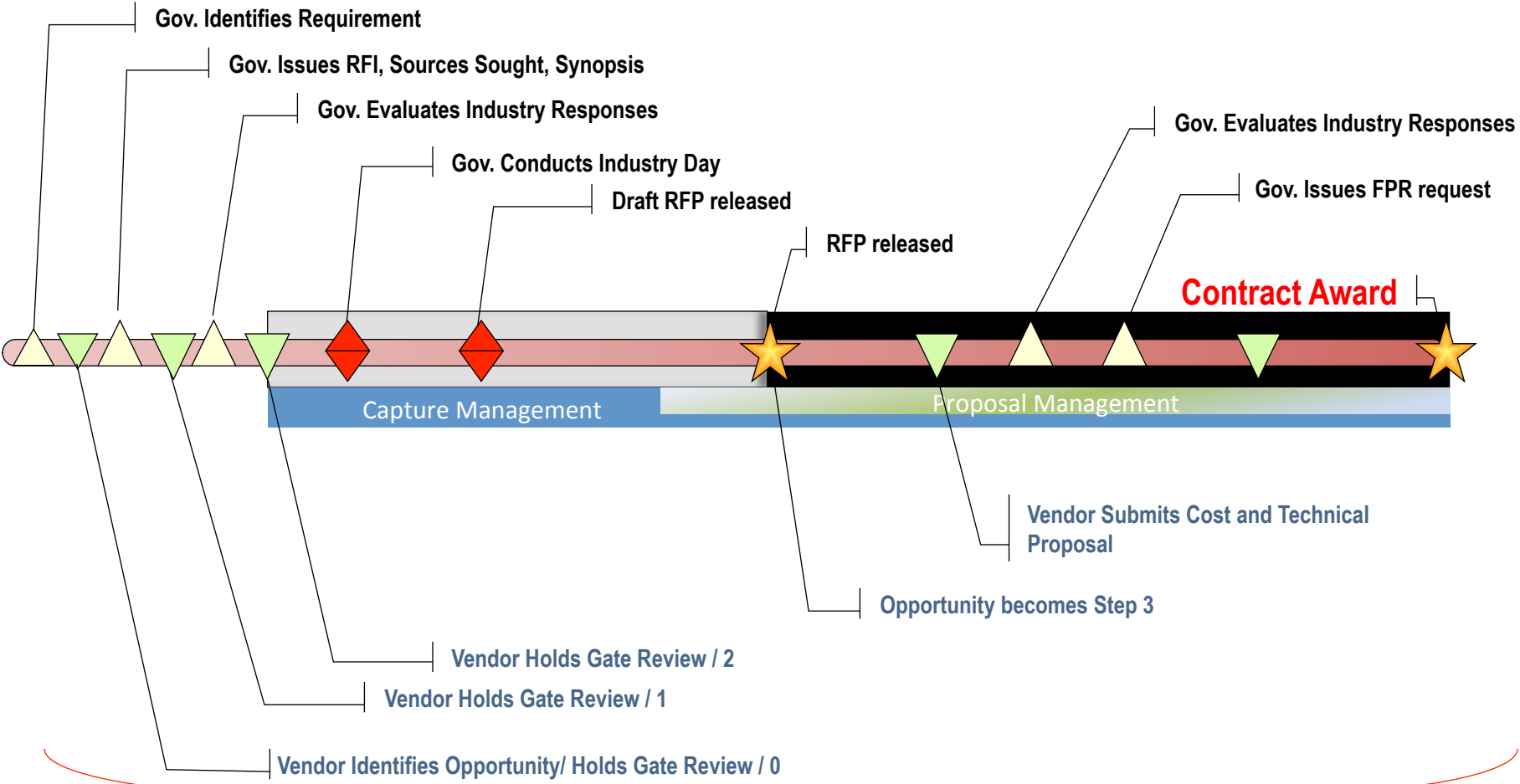
For Those of You Here At The Hogwarts School of
Witchcraft & Wizardry



Components Of Growth



Process Timeline



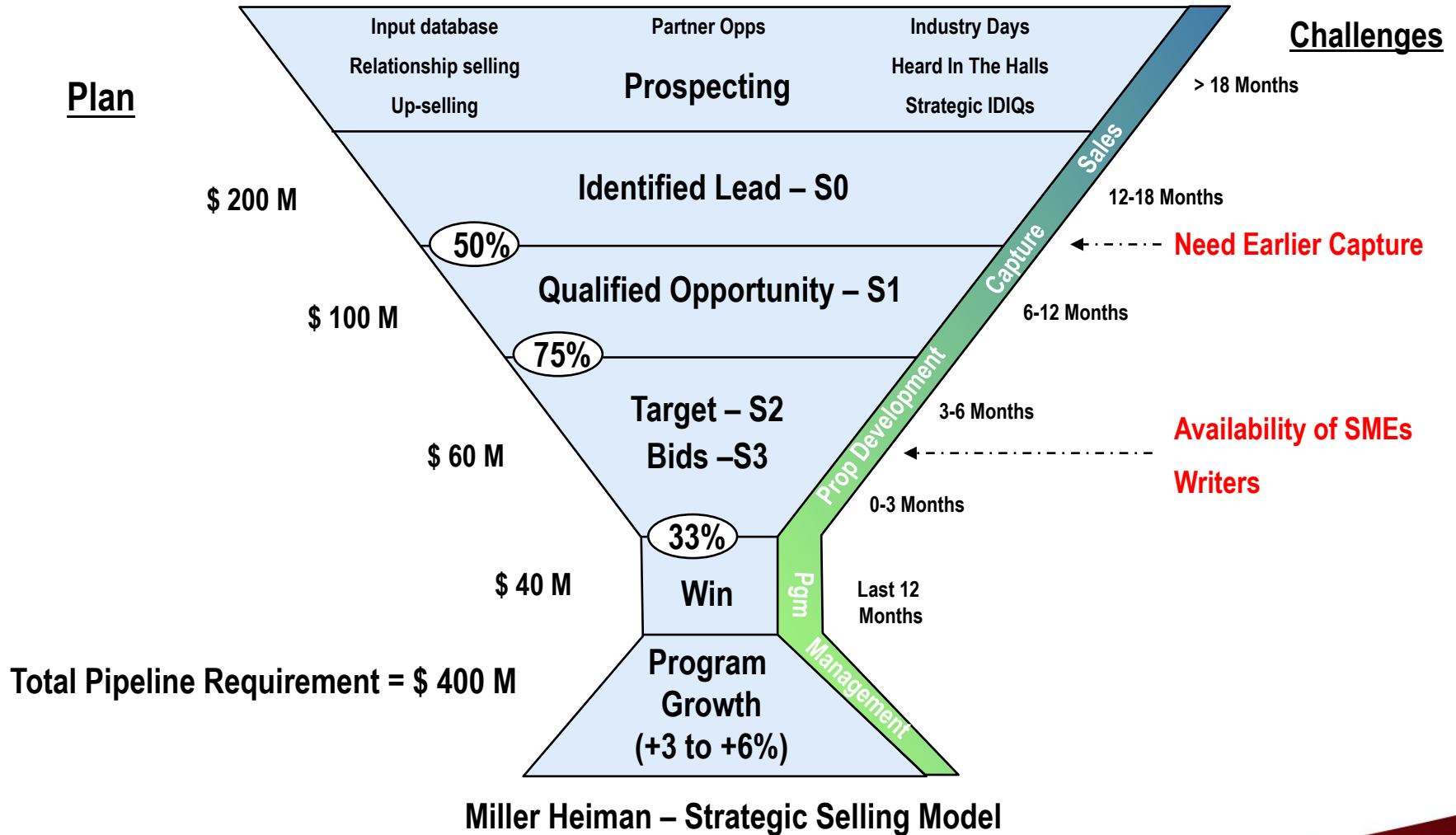
18 – 36 Month Life Cycle

Why a pipeline ?

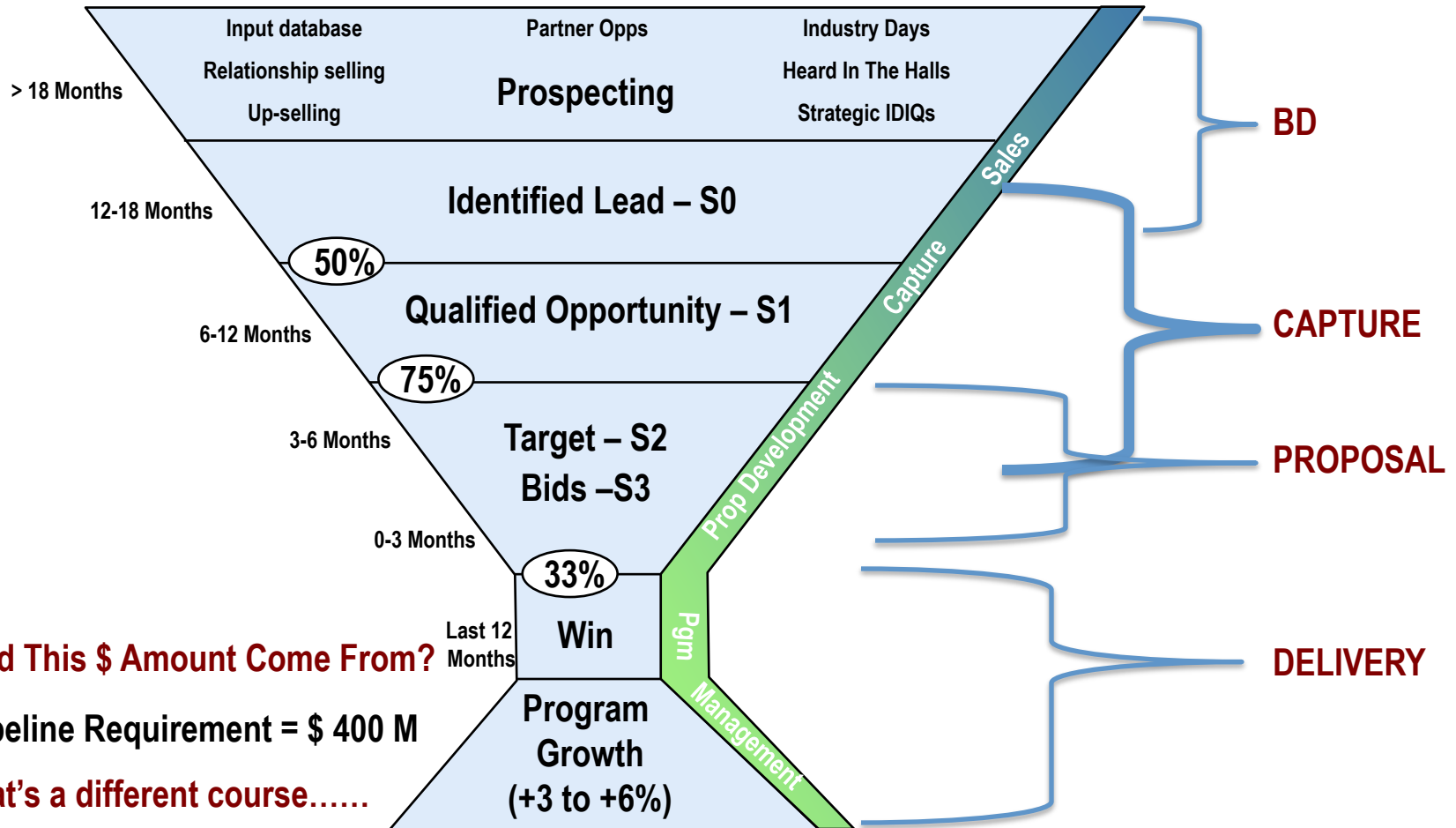
- **Pilots use checklists, PM's use the PMBOK, BDers use the Miller Heiman SSM, combined with the Shipley capture methodology.**
- **A pipeline allows a company to:**
 - **Predict, with some degree of accuracy, success in new business acquisition**
 - **Apply the same rigor and discipline to BD as we've long expected from Operations, Finance, and Accounting**
 - **Plan for Capture Management Requirements/Staffing**
 - **Provide management oversight into BD activities**

- **Miller – Heiman Strategic Selling Model**
 - Based on the ‘funnel’ precept – start with 10 opportunities at the beginning, one should come out the other end
 - Combined with Shipley, provides for a ‘step’ process to winnow down ‘identified’ opportunities (the 10) to ‘qualified’ opportunities (the 5) to biddable opportunities (the 3) to the win (the 1).
 - Actual numbers (10-5-3-1) should be tailored to meet:
 - Industry actualities
 - Individual firms history, win rates, and capabilities
 - Current market conditions

A Graphic Miller – Heiman Funnel



Where Do The Pieces Fit ?



Miller - Heiman Strategic Selling Model

Who Are These Guys ?

A Philosophy

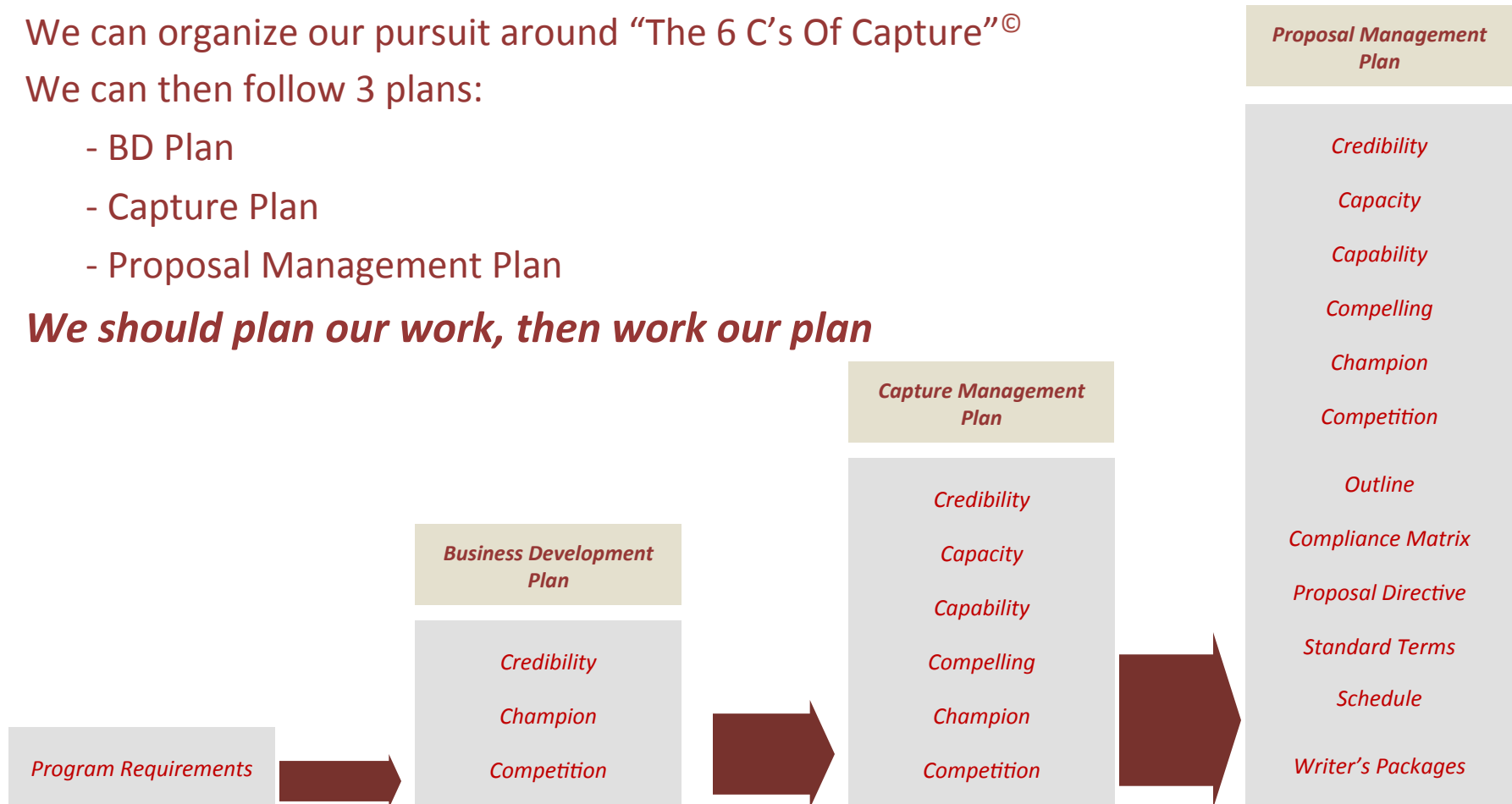
How the “6 C’s Of Capture” Support the Plans

We can organize our pursuit around “The 6 C’s Of Capture”[©]

We can then follow 3 plans:

- BD Plan
- Capture Plan
- Proposal Management Plan

We should plan our work, then work our plan



The “6 C’s of Capture”[©]

Credibility

Capacity

Capability

Compelling

Champion

Competition



Does the opportunity fit in our strategic plan?

Does our portfolio and technical capability match the requirements – can we respond?

Do we have the experience and past performance?

Do we have the required facilities?

Do we have the resources to pursue, bid, and execute?

Credibility – Capacity – Capability – Compelling – Champion - Competition

Credibility is the ability of your firm to convince customers, prospective team members, and your own employees that the bid you submit will be seriously evaluated by the customer.

You've heard this in other ways:

“They didn't have the chops for it”

“We saw their bid, but it lacked the gravitas we desired”

“They're too small to prime that job”

“We didn't know who they were”

Capacity refers to your ability to actually write the proposal:

- Do you have the writers & leaders who know the subject ?
- Do you have the facility for the proposal team ?
- Do you have the technical support infrastructure?
- PM? PDM? CM? Graphics? Spreadsheet jockey ?

Capability refers to the actual job itself.

- Does this job require technical capabilities you don't have?
- Does this job require facilities, certifications, clearances, or other specialized differentiators that you need to acquire or team for?
- Does this job put your firm at risk in any way?
- Can you show past performance ?

This section refers to the proposal process itself. The CM, in concert with the PDM, tech writers, and corporate leadership, needs to craft a solution that simply exceeds customer expectations so greatly they can't select anyone else.

- Can you craft such a solution ?
- Can you tell a story that compels the buyer ?

Customer intimacy is another way of looking at it, but in it's final analysis, '**Champion**' refers to one simple question: Once you submit your proposal, is there **at least** one evaluator (preferably a senior one, an important influencer, or (best case) the decision maker) who will lean towards settling ties in your direction?

The vast majority of government evaluators take their jobs seriously, and are very even-handed in their process. However, they are human, and if they have a pre-disposition to thinking that your firm is acceptable, then your proposal gets better consideration.

In the final analysis, all you want to do is 'break a tie'.

Just what it says: Do you understand who the competition is?

How do you stack up ?

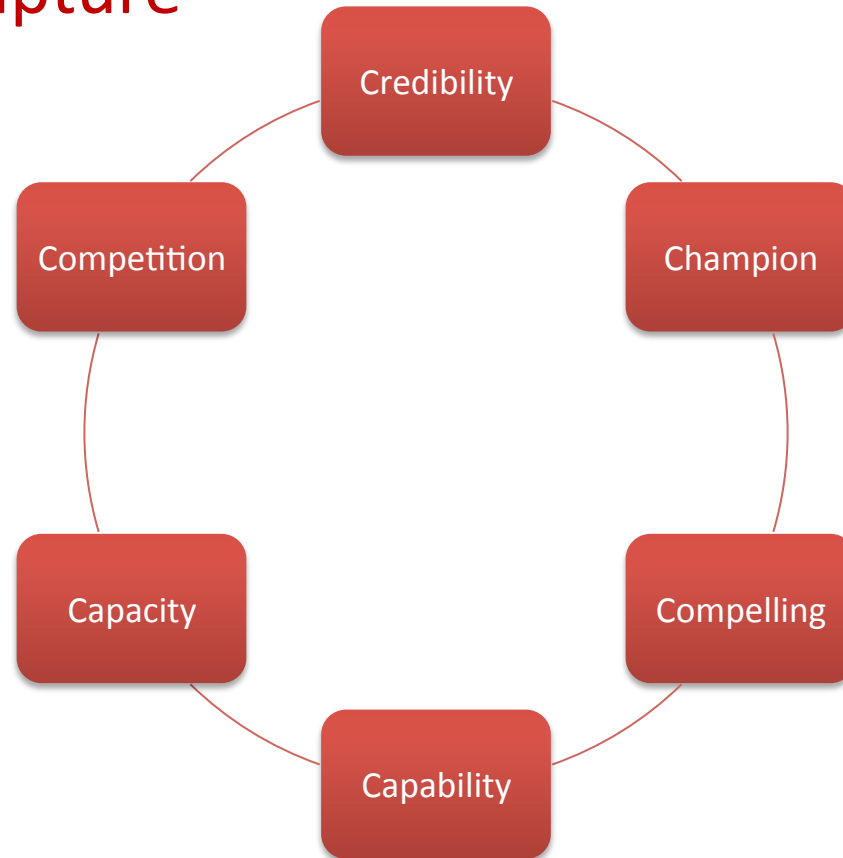
What are they saying about you ?

What are you saying about them ?

Final analysis: Are you the most expensive house on the block, or do you fit within the comps ?

The “6 C’s of Capture”[©]

*If you can
answer
positively in all
six of these
areas, your
pWin should
exceed 60%*



Internal Focus on 6 C's Recap

Does the opportunity fit in our strategic plan?

Does our portfolio and technical capability match the requirements – can we respond?

Do we have the experience and past performance?

Do we have the required facilities?

Do we have the resources to pursue, bid, and execute?

Credibility – Capacity – Capability – Compelling – Champion - Competition

- 1. Discipline**
- 2. Structure**
- 3. Relevancy**
- 4. Flexibility**
- 5. Thoroughness**
- 6. Buy In**
- 7. Teamwork**
- 8. Taskings**
- 9. Reviews**
- 10. Reusability**

10 Tenets Of CM

1. Be disciplined in the process – establish process, and be efficient.
2. Define a structure for periodic reviews and written capture plans
3. Keep that process current and relevant to your current business model.
4. Maintain flexibility – planning and execution must be balanced.
5. Don't skip steps – always do reviews and capture planning, even if time is short.
6. Ensure everyone's on board – especially program personnel & senior management.
7. Build a robust capture team - and restock it as you go.
8. Assign all taskings in writing & by name, with suspense dates.
9. Establish regular reviews during the process, even before RFP release.
10. Develop your capture artifacts to feed the proposal document – be efficient.

Bid Assessment

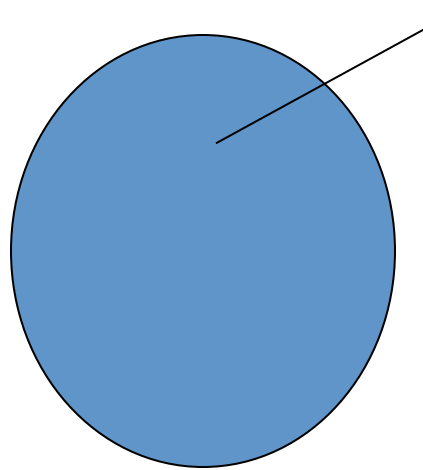
“Bid-and-Win” Assessment Criteria		Readiness	Action or Investments to Advance to	Status
		Score		
1	• Aware of acquisition– before announced			
2	• We know the customer well			
3	➤ The customer knows us well			
4	➤ We are ‘viable’ in customer’s eyes			
5	• We know the work - - in detail			
6	➤ Customer believes we can do this work			
7	• Needed partner(s) committed			
8	• We know competitors that will bid			
9	• We have strategy to beat competitors			
10	• We have supporting PP references			
11	• We have compelling ‘key’ personnel			
12	• We have a convincing staffing plan			
13	• We have a convincing transition plan			
14	➤ Acquisition strategy is ‘Favorable’ to us			
15	➤ We can price within competitive range			
Overall Score and Color Assessment:		Score		

Color		Yellow	
Rating	Best	OK	No Bid

Legend:	•	= Our perception of our readiness to Bid-and-Win
	➤	= Our estimate of customer’s perception or action

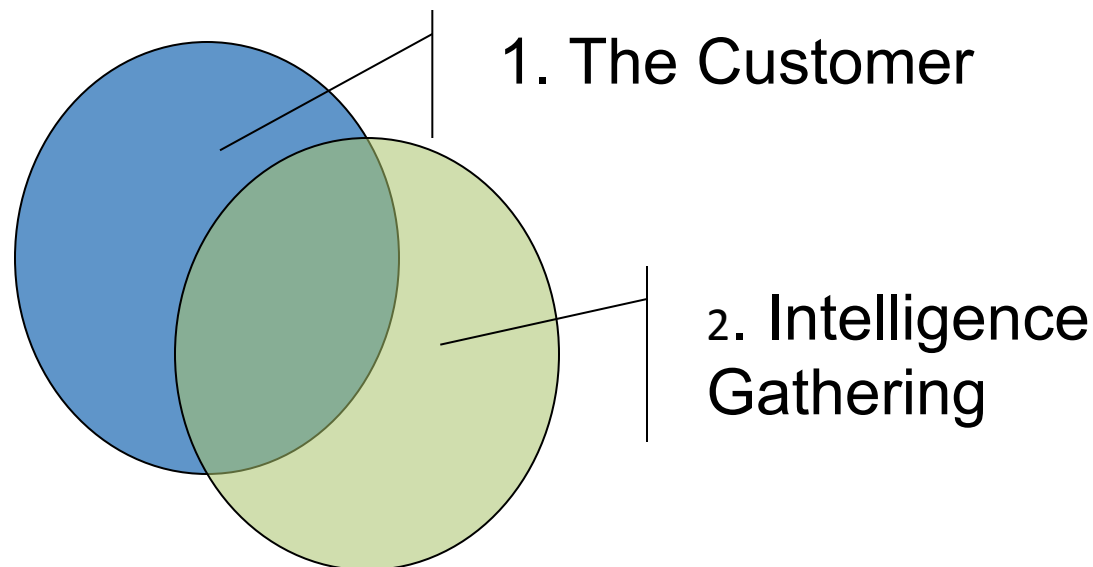
OK, all that's nice – *in theory*.

What Do I Do Next ?

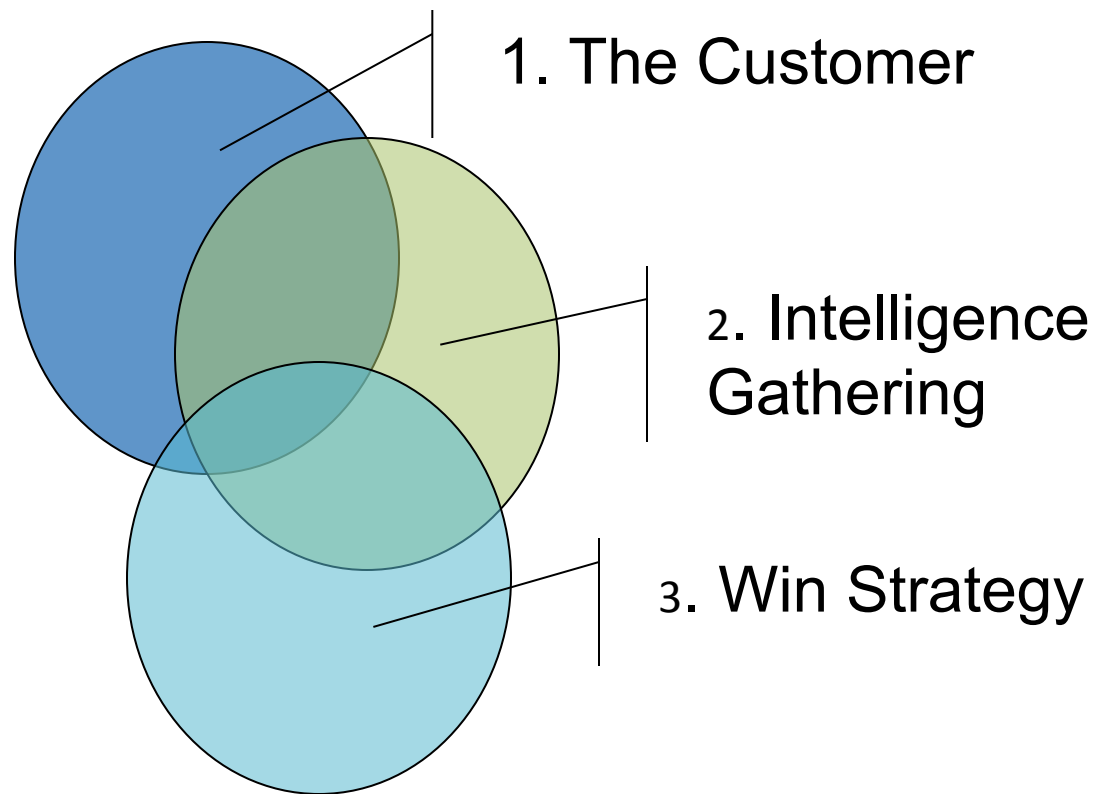


1. The Customer

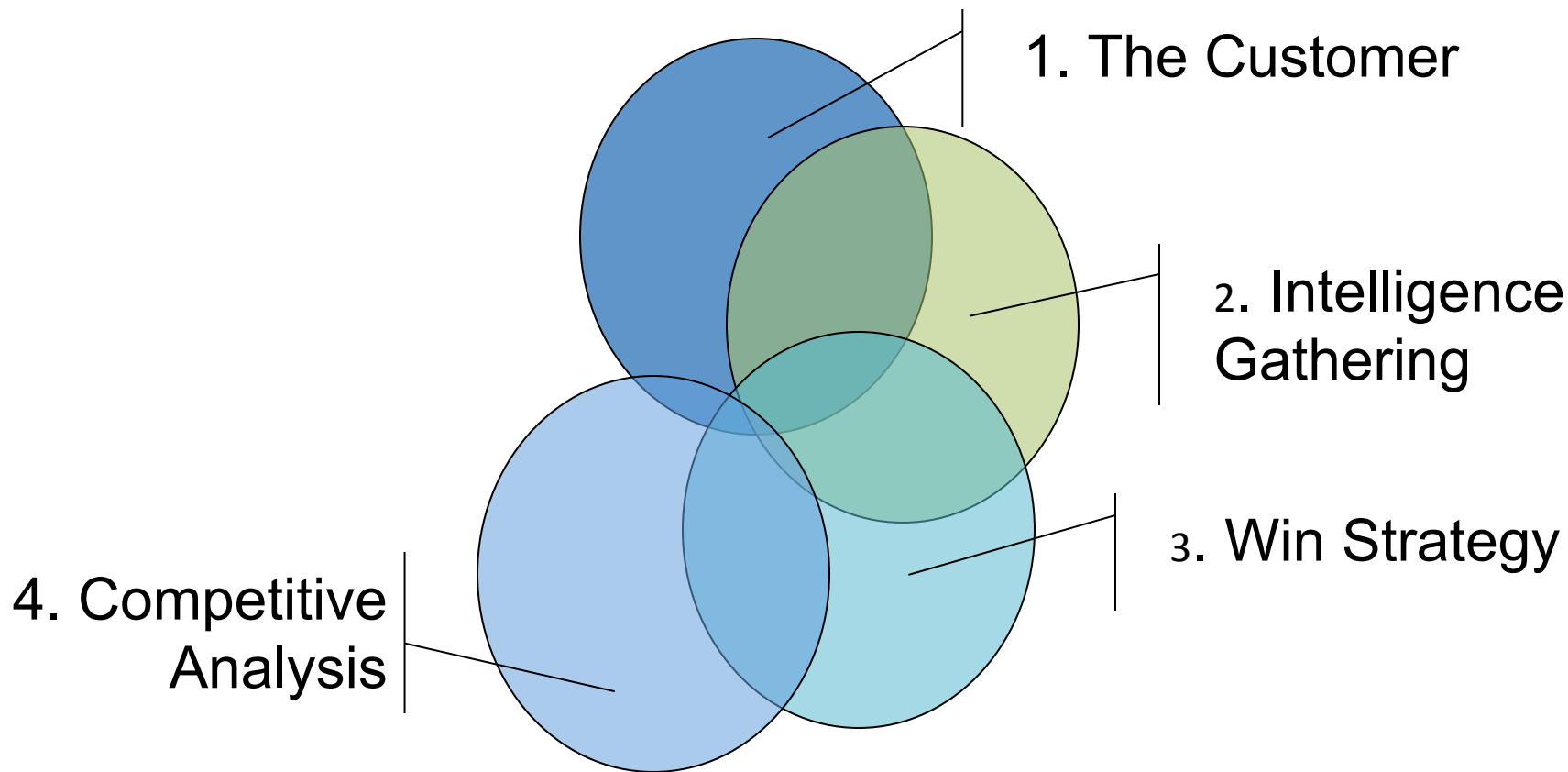
- Identify the decision-makers
- Build the relationship
- Collect and document issues/hot buttons
- Vet the solution
- Influence the requirements



- Get the right intelligence necessary to win
- Know your sources (govt., and industry)
- Pass the information to the proposal team in useful form



- Develop the strategic approach
- Effective Capture Planning and documentation

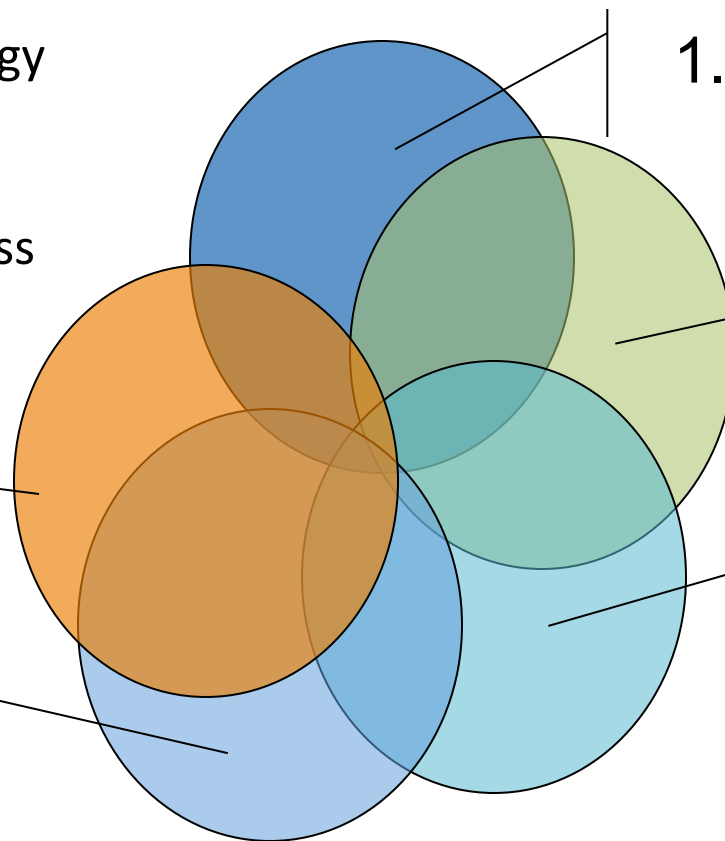


- Identify competitors
- Assess their position
- Includes analysis of our team

- Pick the right strategy
- Select the best teammates
- Negotiate for success

5. Teaming

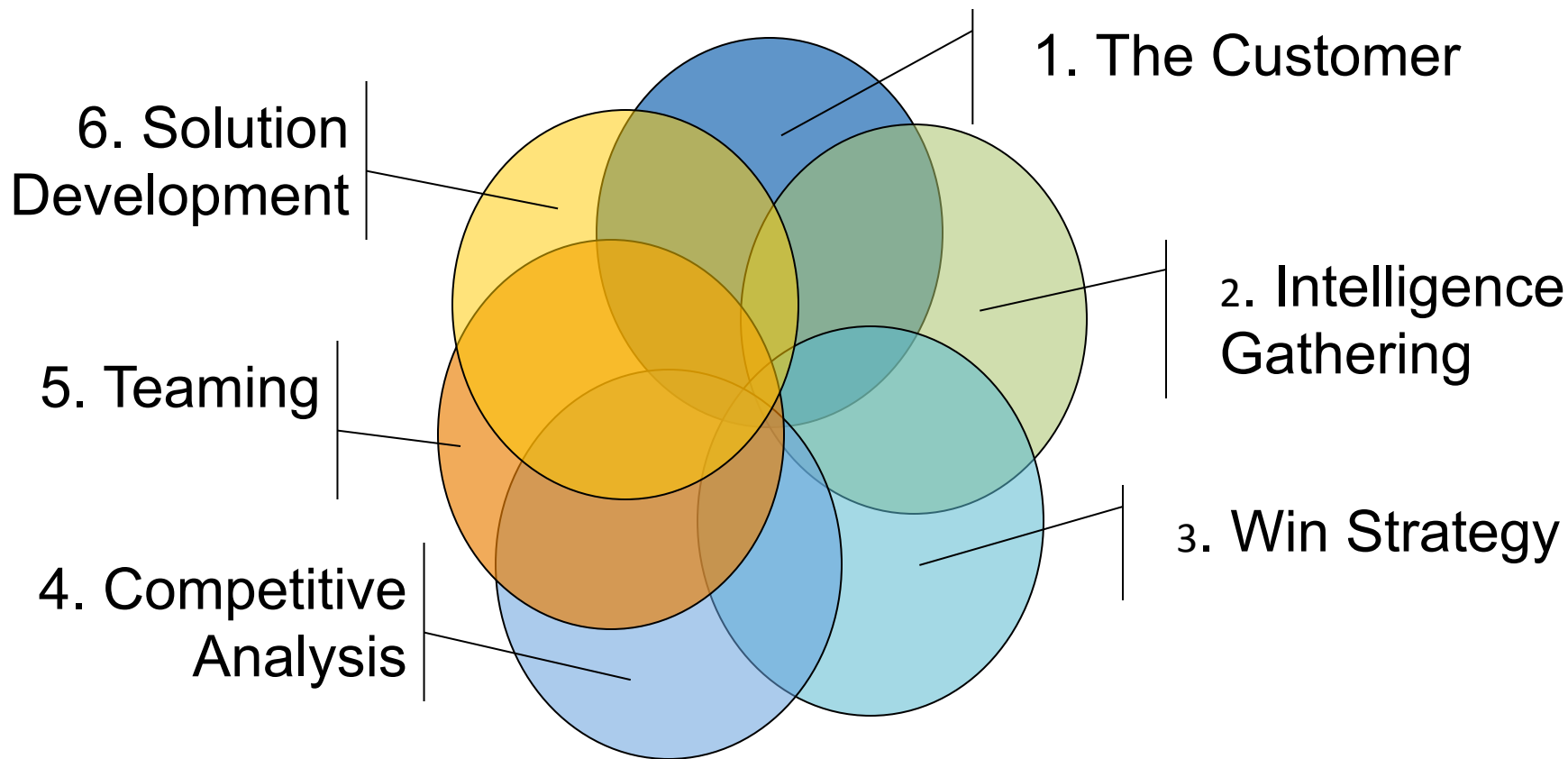
4. Competitive Analysis



1. The Customer

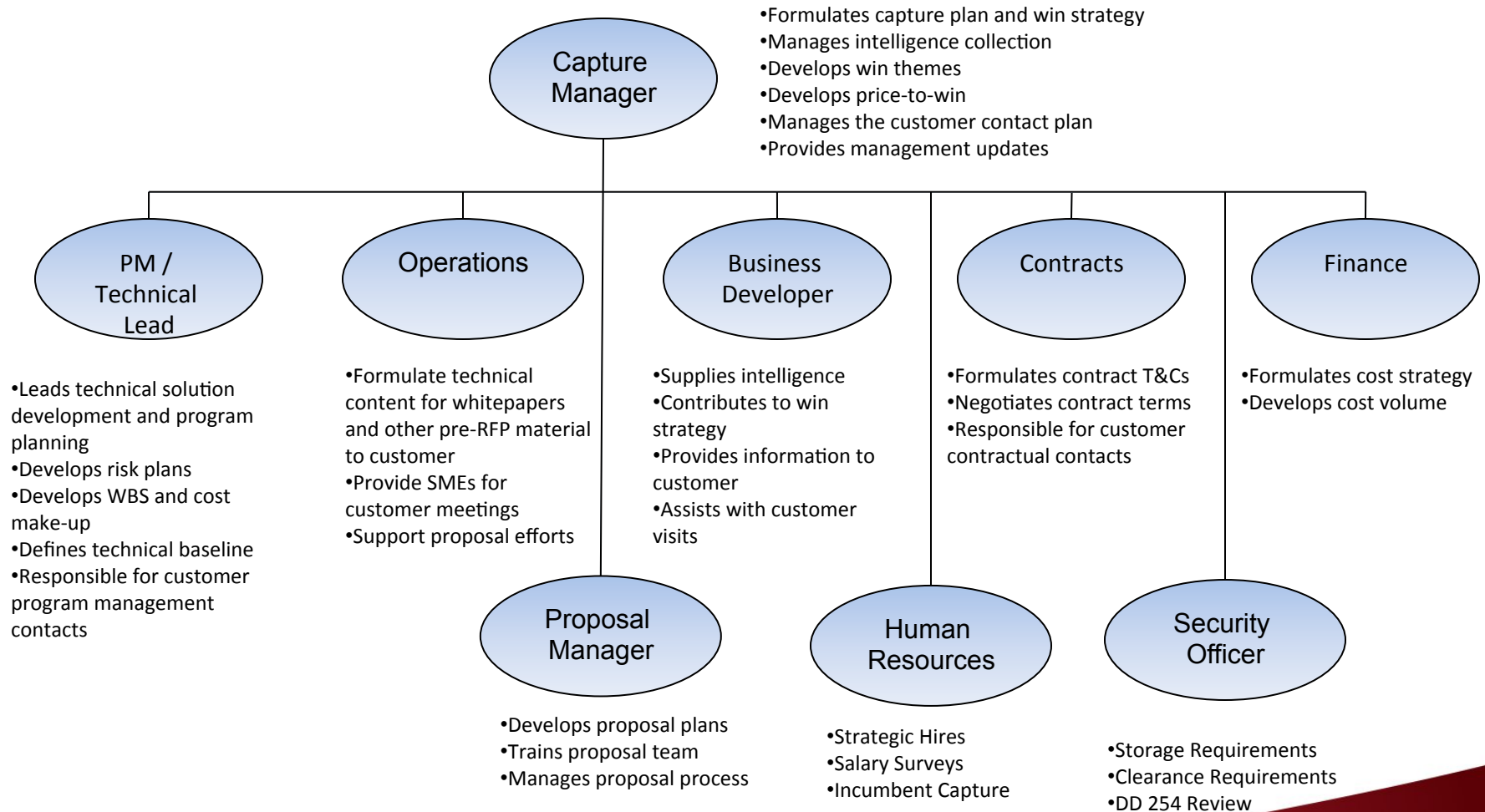
2. Intelligence Gathering

3. Win Strategy



- Brainstorm the solution
- Develop Technical & Management approach
- Determine Price to win

Organizational Involvement



Review (*or create!*) your BD and Capture Processes

Do the same for your proposal development process

Catalog your ***referenceable*** past performance citations (*what does that mean?*)

Build a bank of resumes & capabilities

Identify strategic opportunities that meet your corporate capabilities (manage your pipeline)

And Finally.....***BE COMPETITIVE !!!***

Final Thoughts

We didn't cover everything – this was just a précis of the capture phase – just one phase of a successful BD process. So, unfortunately – no pointy hats, broomsticks, or magic wands for you guys. You're all still Muggles.

We didn't cover the BD process, the gate review process, the sorcery of the business developer, how proposals are created by magic, or why Capture Managers are demi-gods. All of these magical ingredients are taught by the disciples of Minerva McGonagall to create a disciplined BD environment in your firm.

One more thought: *If the RFP is already out - you need a Proposal Manager, not a Capture Manager.*

Were you prepared?

- Small & Mid-Tier Business Specialists
- Market Experienced
- Focused Services
- Priced To Win !



DB4 Consulting

www.db4consulting.com

Dennis B. Boykin IV

Principal

1302 Barksdale Drive NE

Leesburg, VA 20176

(703) 346-4857

Dennis@db4consulting.com

Competitive Pipeline Management (CPM)[©]

Strategic Business Development & Capture

Merger & Acquisition Support

