Targeted Business Development Approaches to Strategically Enhance Small Business Marketability, Proposal Development, and Win Probability

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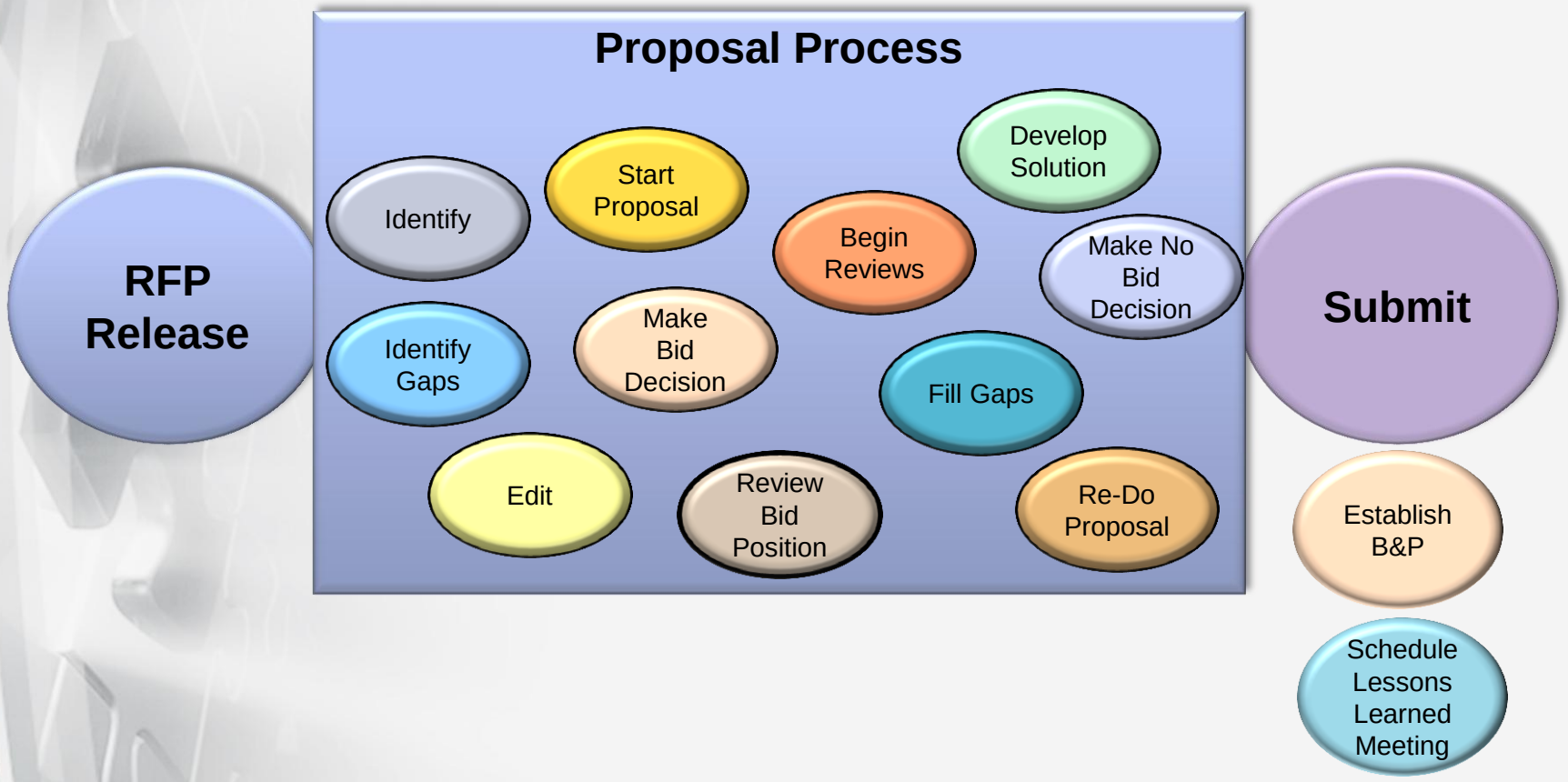
Designs That Work.

The Business Development Roadmap

Before

Have You Ever Experienced Something Similar To This?



After

Identify
Opportunities Identified
Re-Do Proposal
Establish B&P
Apply Strategic Filters
Schedule Lessons Learned Meeting
Identify Gaps
Fill Gaps
Develop Solution
Develop Win Strategies (Capture)
Make No Bid Decision
Review Bid Position
Review Competitive Position
RFP Release
Make Bid Decision
BID Decision
Start Proposal
Begin Reviews
Edit
Submit
Develop Proposal

Common Pitfalls

Common Pitfalls	Why this Happens
❖ False Starts on Proposals	• Key Bid Decision Considerations Not Assessed or Applied • Resources Not Aligned • Lack of Capture Where Key Customer Positioning and Knowledge is Essential • Outside Core Competency Areas Where an Inability to Respond Accurately is Compromised and Identified During Proposal
❖ Lack of Consolidated Pipeline and Uncertainty of Pipeline Health	• Lack of Consistently Updated Pipeline Where Entries Were Approved Per Company Guidelines • Lack of Continuous Monitoring of Approved Opportunities • Inability to Determine Win Probabilities • Lack of Communications Collections on Key Topics Regarding the Opportunity
❖ Lack of Customer Understanding/Knowledge	• Ineffective Customer Marketing/Contact Plan • Opportunities Often Identified too Late to Perform Effective Call Plans • Lack of Responsibility Assignments for Call Plans • Not Considered a Core Company Practice
❖ Proposal Resources Drain/Burnout	• Lack of Specified and Mandated Roles and Responsibilities • Ineffective Procedures to Hold, Store, and Reuse Information • Ineffective Systems to Continually Update Key Proposal Information Needed • Procedures Not Applied Systematically Throughout the Organization • Lack of Optimal Utilization of Core Skill

Critical Success Factors

Key	Rationale	Effects
❖ Centralized Decision Making of Pipeline Entries	Enables consistency in application of company objectives and strategies	An active pipeline that is viable and used in determining optimal placement of resources and future strategic objectives.
❖ Application of Company-Specific BID Decision Guidelines	Enables consistency of strategic filter application to all opportunities	Eliminates false starts on opportunities that do meet strategic goals, or are not within core areas, or do not meet ROI goals, or have a low probability of win.
❖ Dedication of Key Individuals with Specific Areas of Responsibility Within BD	Ensures clarity of purpose in identifying, pursuing, and proposing on pipeline opportunities	A logical building effort is able to be achieved where specific skills are applied a the right time, the right place.
❖ Core Company-Specific Processes	Must be aligned for the reality of the company position, devised for future growth, and are mandated at the corporate level	Elimination of person-dependent processes which can often change as personnel change (creates many restarts over time and drain resources)
❖ Effective Identification Process	In the identification phase, corporate strategies and goals are reviewed to ensure a strategic alignment occurs within the parameters of the opportunity	This phase generates a pipeline of possible pursuit efforts typically with a minimum of 18 months to effectively pursue and capture the opportunity.
❖ Effective Pursuit/Capture Process	Allows adequate time to apply effective customer marketing and competitive positioning	Development of win strategies is optimized prior to RFP release instead of during proposal process.
❖ Effective Proposal Process	Combined with a capture strategy, the win strategies are developed prior to the proposal process	The proposal process is greatly enhanced as the development of core solutions is complete prior to RFP release.

Current to Future

Current State Characteristics Common to Small Businesses

- Reactive BD
- Continuous Re-invention of Processes on the Fly
- Lack of Clear and Vetted Bid Decisions
- Many False Starts—No Strategic Filtering
- Unclear Roles and Responsibilities for BD Stakeholders
- Reduced Competitiveness in Shrinking Market Where Winners Exploit Large Business BD Models

Enhanced Competitiveness Transition Line

Desired State Characteristics for Small Businesses in Current Market

- Strategically Filtered Opportunity Identification and Qualification
- On-target and Timely Analysis and Bid Decisions
- Standard Integrated Processes That Optimize Resources
- Clear Roles and Responsibilities for Stakeholders
- Enhanced Business Winning

TMR Model: A Roadmap for Achieving Organizational Business Development Excellence

Where Are You Today….Where Do You Want To Go?

	Phase 1	Phase 2	Phase 3	Phase 4	
	Compliant	**Efficient**	**Differentiated**	**Innovative**	
Train People	**Responsive Proposals** ▪ RIMs, Outlining, Basic WBS, etc. ▪ Basic Proposal Writing Capabilities	**Resource Efficiency** ▪ Defined Roles and Responsibilities ▪ Company Specific Processes	**Create an Offering** ▪ Skills to Asses Customer Needs and Potential Competitor Positions	**Inspire Innovation** ▪ Skills to Think Creatively and "Change the Game"	Business Issue Capabilities Needed
Maintain Processes	**Defined BD Process** ▪ Basic Business Process Documentation, Reviews, and Opportunity Tracking	**Cross Company BD Process** ▪ Centralized Analyses, Collaboration, and Dissemination of BD Information	**Connect with Subs and Partners** ▪ Ability to Assemble, Organize and Manage Large Capture Processes	**Build Collaborative Hubs** ▪ Ability to Utilize Partner Strengths to Assemble, Innovative New Solutions	Business Issue Capabilities Needed
Retain Progress	**Reduce Regeneration** ▪ Ability to Maintain Corporate Past Performance, Certifications and Capability Data	**Standardize Methodologies** ▪ Ability to Maintain Functional Best Practices / Tools	**Track Effectiveness** ▪ System for Post-Proposal De-Brief, Retention, and Revision	**Mature Continuous Improvement Processes** ▪ Ability to Confidently Propose Forward-Looking, Innovative Solutions Based on Experience	Business Issue Capabilities Needed
Benefits	✓ Reduce BD Waste	✓ Increase Volume of Bids While Reducing Cost per Bid	✓ Dramatically Increase Win Rates	✓ Dramatically Increase Business Growth Rates	

Implementing Effective Business Development Processes

Critical Success Factors

- Must be right for your company right now
- Must be achievable
- Must be set for future growth
- Must be mandated
- Must not be person dependent but process dependent
- Stakeholders identified who own parts of the process
- Stakeholder accountability

Activity Management and Placement

- Opportunity Identification
- Strategic Target Development
- Research and Intelligence Gathering
- Feasibility Determination
- Pursuit Approval
- Bid Decision
- B&P Budget Development
- B&P Budget Approval
- B&P Master Budget Management
- Teaming Decisions
- Teaming Agreement Requests
- Teaming Agreement Execution
- Teaming Agreement Tracking
- NDA Requests
- NDA Execution
- NDA Tracking
- Solution Development
- Pricing Development
- Capture Plan Development
- Capture Plan Execution
- Capture Plan Approval
- RFP Review Analysis
- RFP Questions Developed
- RFP Questions Submitted
- RFP Compliance Matrix
- Contractual Risk Assessment
- Technical Risk Assessment
- Technical Risk Mitigation
- Contractual Risk Mitigation
- Proposal Development
- Proposal Approval
- Proposal Production
- Proposal Submission
- Contract Negotiation
- Win/Loss Notification
- Industry Day/Pre-Proposal Conferences
- Debriefs
- Proposal Boilerplate Management
- Proposal Library
- Past Performance Library
- Resume Library
- Proposal Production
- Pipeline Management

Process Considerations

Roles and Responsibilities

- Identifiers
- Qualifiers
- Capture Managers
- Bid Decision Makers
- Proposal Managers
- Proposal Support
- Pipeline Managers
- Customer Call Plan
- Information Managers

BDIPT

- Areas of Responsibilities and Authorities
- Authorizing B&P
- Frequency and Types of Meetings

Pipeline

- Methods of Tracking
- Updating
- Reporting

Capture

- Capture plans for small opportunities
- Capture plans for larger opportunities

Proposal

- Template Management
- Methods
- Processes for Large and Small
- Proposal Reference Management

Benefits of Your Own Process

Element	Benefits
Identification and Assessments	▪ Innovative methods to identify long term opportunities. ▪ Opportunities are assessed and qualified based on alignment with COMPANY strategic filter prior to pursuit. ▪ Budgets are established and estimated for the duration of the pursuit of the opportunity.
Pursuits (Capture)	▪ Formal capture plan and guidance will ensure opportunities are correctly managed to ensure COMPANY is highly competitive. ▪ Phases established which contain specific processes to guide the opportunity through each phase to achieve key objectives.
Roles and Responsibilities	▪ Anyone affected by an opportunity will be a designated stakeholder whose needs are fully integrated into the processes. ▪ Team member roles are clearly defined ensuring continuity of purpose throughout day to day activities.
Automated Centralization	▪ Through a SharePoint solution, all opportunities and related parameters will be tracked in a centralized data base providing an audit trail of all opportunities, team viewing, and consistent tracking and reporting of opportunity activities.
Management Insight	▪ Management will be provided real time key data including unqualified and qualified pipeline data, opportunity status per phase in the pipeline, opportunity typing and tracking by win/loss of type.
Proposal Generation	▪ Process and guidelines in place for proposal development to ensure compliance and responsiveness and integration of capture elements gathered. ▪ Formal proposal library and tracking system for future references and use

Your Pipeline: Making Effective Pursuit and Bid Decisions

Establishing the Pipeline

What It Is:
A pipeline is one place the company stores all opportunities, without exception, that tracks all bid decisions, funding approved, and key actions of each opportunity. It lists all upcoming proposal dates, summary of consolidated statistics, and assigns ownership to each opportunity.

What It is Not:
It is not a collection of individual tracking sheets combined periodically for review.

Integrity and Health of the Pipeline is Key

The Role of the Bid Decision

In essence, the bid decision is your guide to implementing the correct actions and strategies to increase your win chances.

The effective bid decision process will ensure consistent application of company strategic objectives, reveal key actions to take, eliminate false starts during the proposal, and ensure optimal company strategic positioning.

- **Does It Fit Company Objectives and Capabilities?**
- **What Risks Do We Have?**
- **Can We Meet/Exceed Customer Needs?**
- **Can We Be Competitive?**
- **Can We Perform?**

What a Bid Decision Should Provide

The effective Bid Decision should provide decision makers with the data needed to assess viability, risk, and actions required to make the right decision BEFORE proposal development.

Strategy Match

- Target Customers, Locations
- Target Offerings/Services/ Products
- Growth Objectives
- Sustainment Objectives

Customer Revelation

- How well customer is known and knows us
- Do we know their top issues and can we respond?

Competitor Revelation

- Do we know who they are and how we can mitigate them?

Self Revelation

- What are our weaknesses and strengths?

The effective bid decision is based upon total assessment of all components.

When there is time, weaknesses and risks result in actions and the bid decision is reassessed more than once in a controlled phased manner.

Characteristics of an Ineffective Bid Decision Process

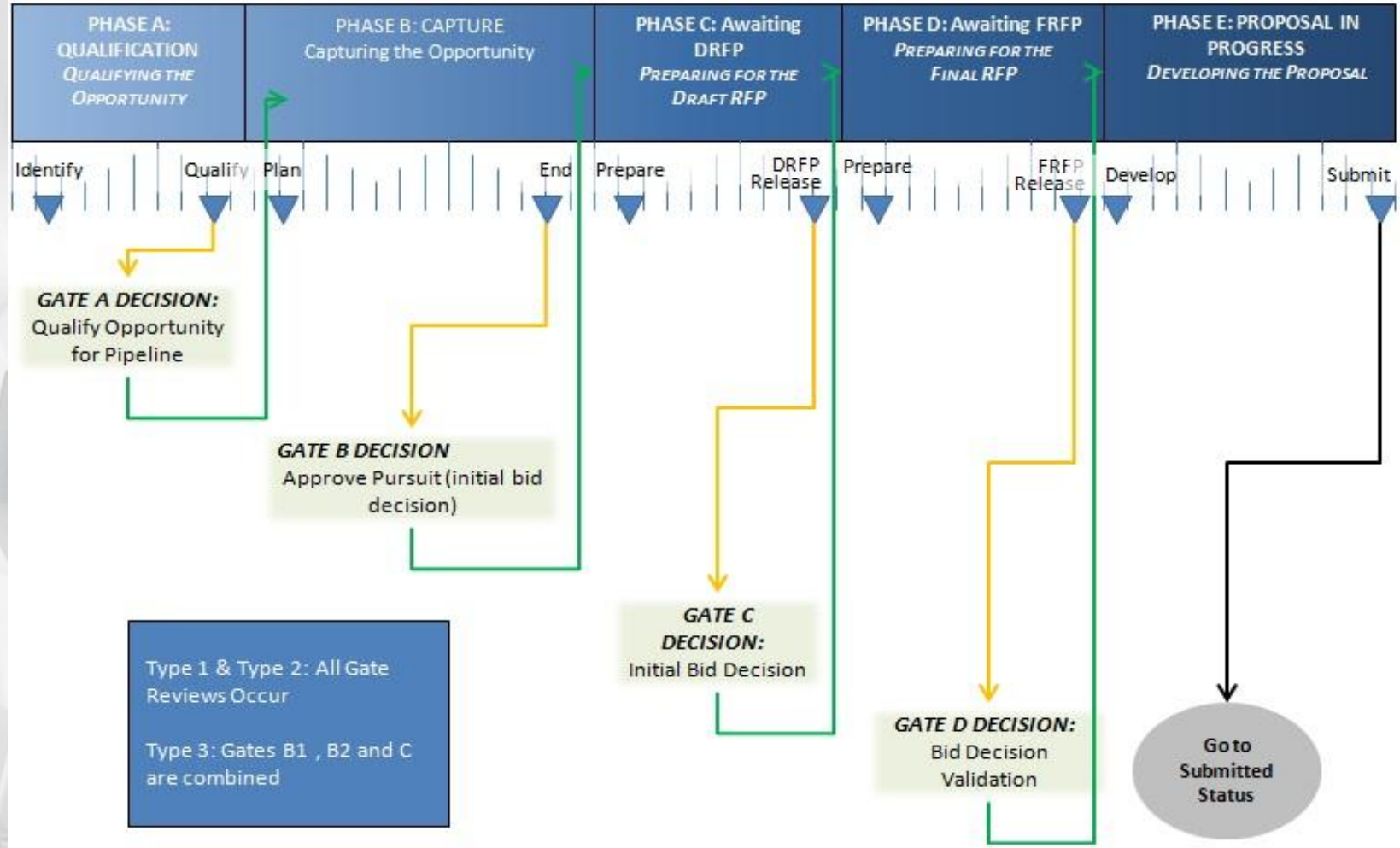
A controlled and disciplined bid decision process eliminates the negative results of common bid decision mistakes:

Excitement	Assumptions	Strategic Absence	Back Hall	Lack of Impact Assessment
• Looks great! • High dollar value • Title looks like key match	• Someone else already assessed the requirements • Should be an easy win	• Pressure to fill the pipeline resulting in random opportunities in pipeline • Lack of filtering to core strategic targets	• Group 1 makes the call • Group 2 finds out later • Group 1 and 2 meet to assess during the proposal	• Key inputs/ assessment absent of things such as HR, security, technical ability, pricing/contracts concerns

Results of these bid decisions characteristics are usually only revealed during the proposal process when it is too late.

Pipeline Phases

Typically, a pipeline and associated process consists of these phases:



Phase A - Qualification (Does it Fit?)

Critical Success Factors:

- ✓ Anyone should identify opportunities, but only certain authorities (area owners) should allow opportunities to be entered into the pipeline.
- ✓ Once entered, any opportunity should be scrubbed for common acceptance criteria by the "area owner".
- ✓ From there, any type (long term or short term) should be subject to a company mandated procedure for pursuit, bid decision, and proposal.

Strategic Filter	Yes	No
Customer		
Do we know the customer?		
Do we know their needs/issues?		
Does the customer know us?		
Competitors		
Do we understand the competitors?		
Is there an incumbent?		
Can we beat the competition?		
Company		
Is this a core target?		
Is this a core capability?		
Does this provide future growth?		

★ Subjecting all opportunities to an initial scrub will yield a quantitative score that will aid your decision to include the opportunity as a viable opportunity.

Phase B - Capture Decision (How Do We Win?)

Critical Success Factors:

- ✓ Each opportunity should be assigned a capture manager that is responsible for ensuring all solution aspects are addressed.
- ✓ For larger, strategic opportunities, an end to end capture plan is optimal.
- ✓ The capture schedule should end with a bid decision. For short term opportunities, this is often combined with the pursuit decision, **but the same criteria apply.**

Phase C - Initial Bid Decision (Begin Proposal at DRFP)

Critical Success Factors:

- ✓ Revisit the updated capture opportunity review as decision focus
- ✓ Review DRFP considerations as part of opportunity review
- ✓ Allocate appropriate resources and plans to begin DRFP activities

Phase D - Final Bid Decision (Finalize Proposal at FRFP)

Critical Success Factors:

- ✓ Revisit the updated capture opportunity review as decision focus
- ✓ Review FRFP considerations as part of opportunity review
- ✓ Allocate appropriate resources and plans to begin FRFP activities

Opportunity Review and Capture Decision

Making the Decisions

Many companies institute an “opportunity review” process at each stage/gate. Typically, this is based on a company-defined format to present key information about the opportunity. We advocate the use of a scoring mechanism at the end of any such review to better summarize and provide a quantitative score as a guide.

- **Where are we weakest?**
- **Where are we strongest?**
- **Does time permit the application of actions required?**
- **How are we positioned overall?**

Bid Decision Summary

- ✓ A weighted scale will often prove invaluable in assessing all primary considerations of making a bid decision.
- ✓ It may seem like a lot, but the same considerations eventually wind up being considered (or uncovered) at less optimal times during the process.
- ✓ Ensures, and actually forces, a more disciplined, recognized, expected, and streamlined approach to business development yielding more effective use of company resources.

Capture Overview - Marketing to the Government, Assessing Competition, Devising Winning Solutions

What is Capture?

Effectively Positioning the Company for Win Prior to RFP Release

Customer	Competitors	Company
• Identifying Stakeholders • Identifying Top Needs and Issues • Marketing Company/Team Position • Influencing Requirements	• Identifying Top Competitors • Ranking Competitors • Research and Intelligence Gathering	• Developing Customer Win Strategies • Developing Competitor Mitigation Strategies • Developing Solutions and Win Position

Creativity

Framework

Part 1: Customer Top Needs
- Confirming Top Issues and Needs This Customer Has (Overall)
- Identifying Key Stakeholders and Their Hot Buttons

Part 2: Competitor Analysis
- Identifying Top Competitors
- Competitor SWOT (Advantages and Challenges to Us)

Part 3: Company Analysis
- Team SWOT and Discriminators

Part 4: Top Level Strategies and Solutions (Features, Benefits, Proofs)

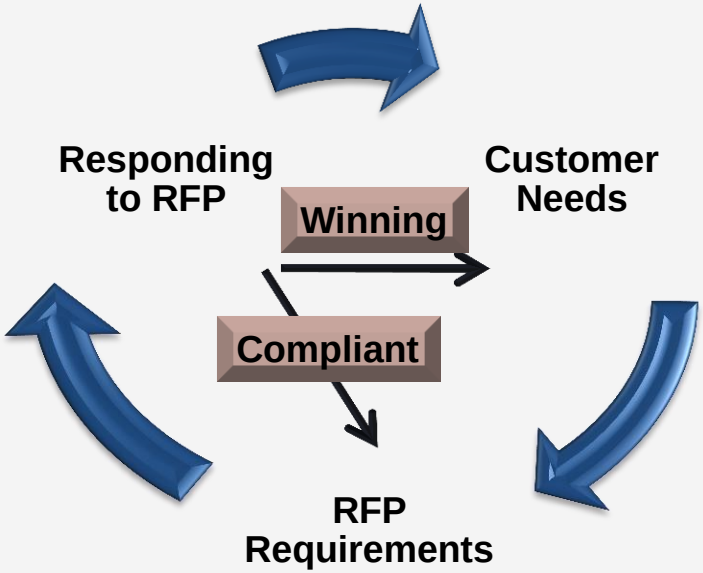
Part 5: Win Themes

Marketing and Understanding the Customer

Actions	Purpose
Develop and Implement Contact Plan	• Identify and Meet with customer decision makers • Obtain hot buttons/needs • Market company as offeror • Identify potential evaluation members
Research and Intelligence Gathering	• Perform market research on customer, buying habits, history • Determine prior contractual actions by customer (FOIA, for example)

Identifying Top Issues and Needs

- It is helpful to obtain directly from the customer what their primary issues and needs are that drive the requirements.
- Often during capture, it is possible to suggest solutions to key customer problems/needs (this can cover things such as size standards/set asides as well).
- Only by visiting with the key stakeholders can you accurately develop win solutions that will resound with them.



Competitor and Company Analysis

Rank Your Competitors Across Key Evaluation Areas Noting Rationale

Competitor	Management	Technical	Past Performance	Cost
ABC	• Incumbent and Well Liked	• Meets All Requirements	• Significant Past Issue Will Haunt Them	• Known to be Higher
XYZ	• Known for Exceptional Management Controls	• Meets All Requirements	• Exceptional Record for Exact Same Type Work	• Exceptional Cost Control and Rate Structure
National Firm	• Significant Recent Management Issues	• Meets All Requirements	• Meets All Requirements	• Competitive Rates
Company	• Known for Exceptional Management Controls	• Meets All Requirements	• Missing Core Past Performance	• Competitive Rates

Exceptional **Strength** **Weakness**

Competitor Strategies (Advantages)

Begin Devising Strategies

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Exceptional

Strength

Weakness

→ Advantages for us

Competitor Strategies (Threats)

Begin Devising Strategies

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Exceptional

Strength

Weakness

→ Threats for us

Understanding Ourselves

What We Bring, What We Possess, What We Lack

BID DESIGNS

SWOT- Where Are We?

Strengths	Weaknesses
– ISO, CMMI, Processes Repeatable* – 3 pronged approach - delivery method options	– Missing some core past performance – Not well known
Opportunities	**Threats**
– We can bring innovations to get to blue in technical - mobile aps! QR code.	– Incumbentitis – Not standing out/differentiating ourselves