Webinar Agenda

- Capture Manager roles
- Goals and milestones for capture managers
  - Key decision gates
  - Key reviews
- Opportunity identification and qualification
- Capture plan development
  - Elements of a capture plan
  - Managing the plan
- Win strategy development
- Proposal support
- Action planning and execution
## Capture Manager Roles

### Primary Responsibilities

- Lead all opportunity and sales activities
- Manage the capture process
- Develop the opportunity/capture plan
- Form the core pursuit team
- Determine and prioritize customer hot buttons and issues
- Assess competitive position
- Determine discriminators, win strategy, solution set
- Initiate teaming agreements and small business plan, as needed
- Actively participate in key Decision Gates
- Facilitate lessons learned

### Secondary Responsibilities

- Assist proposal writers/managers in organizing the proposal team
- Collaborate on proposal planning, development - help craft the sales message
- Ensure price, management, and technical volumes are consistent
- Respond to customer questions
- Assist leadership in customer negotiations
- Keep leadership well-informed
- Help program/project manager transition to contract execution
FIVE GOALS AS A CAPTURE MANAGER

1. Assess competitive position in the market
2. Strengthen your position, pursuit readiness, and customer relationship
3. Determine real discriminators through SWOT
4. Develop win themes
5. Establish go-forward action plan (game plan)
Let’s Take a Poll

How would you rate your capture discipline?
The Ultimate Playbook Goal: Advance to a Favored Position

1. Identify Opportunity
2. Qualify Opportunity and Assess Competitors
3. Help Customer Shape the Requirements
4. Improved Position
5. Position to Bid and Win
6. Favored Position

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Lots of Moving Parts in a Playbook
Know the Essential Pursuit Milestones

Start with essential milestones. Add steps as you experience success.
Focus on What Influences Your $P_{\text{win}}$

Four Cs in Probability of Winning
- Customer
- Competitor
- Capabilities
- Cost (Value)

1. Know/Qualify the Customer
   - Do we know them?
   - Do they know us?

2. Assess Competitors
   - Who is competing?
   - What is our competitive position?

3. Assess our Capabilities
   - What are our capabilities?
   - Can we discriminate?

4. Analyze Cost (Value)
   - What is our value proposition?
IDENTIFY AND QUALIFY THE OPPORTUNITY
Identify Opportunities

*Use a Variety of Sources*

- **RESEARCH**
- **SUBSCRIPTION SERVICES**
- **MARKETING AND EVENTS**
- **RELATIONSHIPS**
- **DATABASES**
- **PROSPECTING AND NETWORKING**
- **DEMAND CREATION AND LEAD DEVELOPMENT**
- **NEWS, WEBSITES, ANNUAL REPORTS**
Qualify the Opportunity
*Peel the Onion*

What is “it?”

Is it real?

Can we provide it?

Will the customer buy from us?

What is the budget?

How will it be funded?

What is the schedule?

Where will it take us?
Manage the Opportunity Funnel

- Define our markets
- Identify Opportunities
- Assess Opportunities
- Qualify: Competitive Position
- Data Collection & Analysis

Market Fit
Business/Strategic Fit
Opportunity Assessment
Opportunity Qualification
Pursuit Decision
Know the Customer Decision-Makers

1. Identify influencers and key decision-makers
2. Define their role in the company and in the buying decision
   - Financial buyer
   - Technical buyer
   - Leadership stakeholder
3. List their primary and secondary “hot button” issues
4. Get to know them
   - Social media
   - Networking
Know and Study the Competitors
Make a Sound Pursuit Decision with this Checklist

- Do we have adequate business development resources to aggressively develop the opportunity?
- Does the opportunity require teaming?
- Are there acceptable profit margins or other strategic reasons for wanting to win?
- Do we know the key decision makers and their issues and hot buttons?
- Do the key customer stakeholders know us?
- Do we have a clear understanding of our anticipated role?
- Are there any potential conflicts of interest for us?
- Have we identified probable competitors?
- Have we established a price to compete?
- Do customer’s likely requirements match our competencies?
- Do we have a baseline solution aligned to the price to compete?
CAPTURE PLAN (PLAYBOOK) DEVELOPMENT
Why Develop a Capture Playbook

- Enhance thinking of the pursuit team
- Impose discipline in opportunity management
- Build consensus internally and with teaming partners
- Transfer information from sales to proposal development
- Identify gaps in win strategy and capabilities
- Save money and reduce wasted resources
- Win more business, more efficiently
Elements of Your *Capture Manager Playbook*

- **Customer Overview**
- **Opportunity Overview/Description**
- **Competitor Assessment**
- **Internal Assessment (Solution, Capability, Pricing)**
- **Bidder Comparison**
- **Win Strategy**
- **Strategic Positioning**
  - **Action Plan**
    - Intelligence Collection Plan
    - Solution Development Plan
    - Contingency Plan
    - Customer Call Plan
- **Action Plan Schedule**
Iterative Steps to Develop Your Playbook

**Populate**
- Populate capture plan sections.
- Maintain customer focus and perspective.
- Research from various sources.

**Validate**
- Use multiple sources for customer and competitor information.
- Confirm agreement and support for internal information and decisions.

**Update**
- Seek information to fill gaps.
- Add new information as it becomes available.
- Use multiple sources for updates.

**Implement**
- Communicate across the team.
- Gain management support.
- Use the capture plan to guide action.
- Talk to your team members; do not rely on the capture plan as your sole means of communication.

*Implementation is the most important. By starting early, it is possible to create and implement strategies that improve your Pwin.*
WIN STRATEGY DEVELOPMENT
Clarify Customer Issues, Motivators, and Hot Buttons

- **Issues** are the customer’s concerns. Issues are the *worry items that keep the customer awake at night*.

- **Motivators** are the *objectives that the customer is trying to achieve*.
  - Improve sales and profits
  - Expand globally
  - Reduce costs and redundancy
  - Improve customer satisfaction
  - Achieve mission – support end user

- **Hot Buttons** are a *consolidated set of issues and motivators*. 
Identify Discriminators Using SWOT

- **Strengths**
  - Positive Discriminators
  - Potential Positive Discriminators

- **Weaknesses**
  - Negative Discriminators
  - Potential Negative Discriminators

- **Opportunities**
  - Competitor Weaknesses

- **Threats**
  - Competitor Strengths
Apply the *Win Strategy Formula* for Your Playbook

1. **Leverage** our Strengths
2. **Mitigate** our Weaknesses & Risks
3. **Neutralize** our Competitors’ Strengths
4. **Exploit** our Competitors’ Weaknesses
5. **Focus** on our Discriminators

**WIN!**
Conduct a Blue Team (Win Strategy) Review

**Inputs**
- Opportunity Description
- Customer Intelligence
- Baseline Solution
- Own Competitive Position
- Suggested Win Strategy
- Early Phase Action Plans

**Outputs**
- Strengths, Weaknesses, Gaps
- Recommended Solution Enhancements
- Agreed Win Strategy
- Approved Action Plans
Make Preliminary Bid Decision with this Checklist

Do we have a clear understanding of the deliverables and schedule?
Are we sure of the evaluation process to be used?
Do we know the customer’s perception of competitors?
Has an objective *bidder comparison* been completed?
Do we have firm commitments from needed teammates?
Do we have strong, relevant past performance (proof)?
Will our management approach provide added value (impact)?
Will our technical solution provide added value (impact)?
Are our discriminators unique and important to the customer?
Can the customer justify selecting us based on our discriminators and cost?
Has a price to win been determined, and is it acceptable to management?
Is the customer adhering to the expected buying schedule?
If not, why not, and what does that tell us about the opportunity?
Develop and Execute the Playbook Action Plan
Game Planning

The Action Plan Has Many Elements

- Customer Overview
- Opportunity Overview/Description
- Competitor Assessment
- Internal Assessment (Solution, Capability, Pricing)
- Bidder Comparison
- Win Strategy
- Action Plan
  - Intelligence Collection Plan
  - Solution Development Plan
  - Contingency Plan
  - Customer Call Plan
- Strategic Positioning
- Action Plan Schedule
The Game Plan Must Answer...

Tracking and Reporting Are Essential to Capture Management Success
Action Plan Elements for Your Playbook

- Intelligence Collection Plan
- Contingency Plan
- Solution Development Plan
- Customer Call Plan
- Schedule
PROPOSAL SUPPORT
Include Win Strategy Statements in Your Playbook to Help the Proposal Team

We will leverage our strength in __________________ by_______________________________ to achieve ______________________________.

(meeting deadlines)
(providing 3 past performance examples)
(customer confidence and improve credibility)

Win Strategy Statements Help Us:

✔ Focus on hot button issues
✔ Remember key discriminators
✔ Provide proposal writers with key sales messages
Draft Theme Statements and Win Themes to Jump Start the Proposal

<Customer>  <Quantified Benefit>  <Specified Feature>  <Discriminator>  <Proofs>

Start Here
Customer and Benefit First

Outdoor Sports Global will reduce the cost of sales tracking and lead nurturing campaigns by selecting Vibrant to implement a CRM system that promises immediate results and long-term support of your objectives.
A Theme with a *Value Proposition* is Stronger

Outdoor Sports Global will **reduce the cost** of sales tracking and lead nurturing campaigns by selecting Vibrant to implement a **CRM system** that reduces overall marketing costs **by 35 percent**.
Outdoor Sports Global will reduce marketing costs by 35 percent over two years by implementing Vibrant’s CRM system at cost savings of over $225,000 per year compared to the current OSG system and support personnel.
Draft an Executive Summary Focused on Hot Buttons

- Establish context in customer’s terms
- Theme
- Vision
- Linking Statement
- Announce priority and ownership of hot buttons
- Intro
  - Hot Buttons
  - HB 1
  - HB 2
  - HB 3
- Discuss each HB in order introduced
- HB 1 Title
  - Benefit, Solution, Proof
  - Visual
- Close with cost, summary, next steps
- Costs
  - Discuss & summarize graphically
- Summary & Next Step
Summary:
The Capture Manager Playbook...Simplified
Questions and Discussion
THANK YOU

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