Webinar Agenda

- Common Pitfalls of Color Team Reviews
- Color Team Reviews vs. Decision Gate Reviews
- Where color teams fit
- Best practices and best approach
  - Flexibility
  - Scalability
  - Consistency
- Questions/answers
Common Color Team Review Pitfalls

- No Structure
- Wrong People
- No Accountability
- Poor Planning
- Too Little Time
Pursuit Decision Gates vs. Color Team Reviews

What’s the Difference?

**Pursuit Decision Gates**

**Purpose:** To make decisions regarding allocation or withdrawal of BD resources

- Led by leadership stakeholders
- Address business and strategic issues
- Limited outcomes (advance, end, or defer)
- Subordinates execute outcomes

**Color Team Reviews**

**Purpose:** To improve quality of the bid or proposal

- Performed by management, staff, subject matter experts
- Address tactical and execution issues
- Wide variety of outcomes (qualitative and quantitative)
- Staff and peers execute outcomes
# Decision Gate Qualification Questions

<table>
<thead>
<tr>
<th>No.</th>
<th>Phase</th>
<th>Gate</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Market Segmentation</td>
<td>Campaign/Marketing</td>
<td><em>Is market niche congruent with goals in strategic plan?</em></td>
</tr>
<tr>
<td>1</td>
<td>Long-Term Positioning</td>
<td>Interest</td>
<td><em>Does opportunity merit expending resources to research and assess it?</em></td>
</tr>
<tr>
<td>2</td>
<td>Opportunity Assessment</td>
<td>Pursuit</td>
<td><em>Should we commit resources to developing capture plan and influencing customer to prefer our solution?</em></td>
</tr>
<tr>
<td>3</td>
<td>Capture Planning</td>
<td>Preliminary Bid</td>
<td><em>Have capture activities positioned us favorably enough with customer to justify planning proposal?</em></td>
</tr>
<tr>
<td>4</td>
<td>Proposal Planning</td>
<td>Bid Validation</td>
<td><em>Is opportunity still worth pursuing and proposal worth preparing, considering final details of RFP?</em></td>
</tr>
<tr>
<td>5</td>
<td>Proposal Development</td>
<td>Proposal Submittal</td>
<td><em>Should we submit completed proposal? Is programmatic risk justified by probable financial reward?</em></td>
</tr>
<tr>
<td>6</td>
<td>Post-Submittal Activities</td>
<td>Final Offer</td>
<td><em>After negotiations, is programmatic risk still justified by financial reward considering terms of contract?</em></td>
</tr>
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</table>
A Qualification Checklist

Sample Pursuit Checklist
Do we have adequate resources to aggressively develop the opportunity?
Might 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 gathered evidence and impact of the need or problem?
Will customer’s likely requirements match our competencies?
Do we have a baseline solution aligned to the price to compete?
Poor Decisions Waste Time and Resources
Color Teams Fit the Timeline – Flexibility is Key

Customer Milestones

Phase
- Market Segmentation
- Long-Term Positioning
- Opportunity Assessment
- Capture Planning
- Proposal Planning
- Proposal Development
- Post-Submittal Activities

Decision Gates
- Marketing/Campaign
- Interest
- Pursuit
- Preliminary Bid
- Bid Validation
- Proposal Submittal
- Final Offer

Color Team Reviews
- Blue Team
- Black Hat
- Pink Team
- Red Team
- Green Team
- Gold Team
- White Hat

Key Documents
- Multi-year strategic plan
- Annual operating plan
- Marketing plan
- Opportunity analysis report
- Capture plan
- Story-boards
- Mockups
- Final draft proposal
- Proposal revision
- Lessons learned
- Contract

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Timeline for Bid Decisions and Color Team Reviews

Marketing/Campaign
Interest
Pursuit
Blue Team
Black Hat
Preliminary Bid
Pink 1
Pink 2
Bid Validation
Red Team
Gold Team
Submit
Sign
Lessons Learned

Capture Phase
Proposal Phase
## Reviews During the *Capture Phase*

### Support Decision Gates

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<tr>
<td>0</td>
<td>Market Segmentation</td>
<td><strong>Blue Team:</strong> Reviews initial capture planning, focusing on development of win strategy</td>
</tr>
<tr>
<td>1</td>
<td>Long-Term Positioning</td>
<td><strong>Black Hat:</strong> Predicts competitors’ solutions to support strategy development and infuse proposal with competitive focus</td>
</tr>
<tr>
<td>2</td>
<td>Opportunity Assessment</td>
<td><strong>Black Hat:</strong> Predicts competitors’ solutions to support strategy development and infuse proposal with competitive focus</td>
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<td>3</td>
<td>Capture Planning</td>
<td><strong>Blue Team:</strong> Reviews initial capture planning, focusing on development of win strategy</td>
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**Blue Team:**
- Reviews initial capture planning, focusing on development of win strategy

**Black Hat:**
- Predicts competitors’ solutions to support strategy development and infuse proposal with competitive focus
## Color Team Reviews During Proposal Phase

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<td>4</td>
<td>Proposal Planning</td>
<td><strong>Pink Team:</strong> Reviews storyboards and mockups for compliance and execution of win strategy</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Red Team:</strong> Reviews proposal to predict scoring and improve effectiveness</td>
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<td></td>
<td></td>
<td><strong>Green Team:</strong> Reviews pricing, consistency across volumes</td>
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<td></td>
<td></td>
<td><strong>Gold Team:</strong> Reviews final proposal and price</td>
</tr>
<tr>
<td>5</td>
<td>Proposal Development</td>
<td><strong>White Hat:</strong> Documents lessons learned to improve capture and proposal processes</td>
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The Agile Manifesto: 12 Agile Principles

- **Principle 4**: Business people and developers must work together daily throughout the project.

- **Principle 5**: Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.

- **Principle 12**: At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.
### Aligning Agile Stages with Color Team Reviews

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<tr>
<th>Agile Project Stages</th>
<th>Proposal Milestones</th>
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<tr>
<td><strong>In Stage 1</strong>, the product owner identifies the product vision.</td>
<td>Blue Team – Capture Manager shares buying vision/win strategy</td>
</tr>
<tr>
<td><strong>In Stage 2</strong>, the product owner creates a product <strong>roadmap</strong>.</td>
<td>Proposal Manager establishes core team and milestones – Kickoff</td>
</tr>
<tr>
<td><strong>In Stage 3</strong>, the product owner creates a release plan.</td>
<td>Proposal Manager publishes schedule and assignments – Kickoff</td>
</tr>
<tr>
<td><strong>In Stage 4</strong>, the product owner, the master, and the development team plan sprints, also called <strong>iterations</strong>, and start creating the product within those sprints.</td>
<td>Pink Team – First iteration of draft sections, themes, win strategies, and messaging</td>
</tr>
<tr>
<td><strong>In Stage 5</strong>, during each sprint, the development team has <strong>daily meetings</strong>.</td>
<td>Daily status or stand-up meetings</td>
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<tr>
<td><strong>In Stage 6</strong>, the team holds a <strong>sprint review</strong>. In the sprint review, at the end of every sprint, you demonstrate the working product created during the sprint to the product stakeholders.</td>
<td>Red Team – Final draft review for consistency, compliance, competitive focus</td>
</tr>
<tr>
<td><strong>In Stage 7</strong>, the team holds a <strong>sprint retrospective</strong>. The sprint retrospective is a meeting where the team discusses how the sprint went and plans for improvements in the next sprint.</td>
<td>White Hat / Lessons Learned review. Document successes and areas for improvement</td>
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Adapt Your Approach for Reviews, But Remain Disciplined

**PREPARE**
- Adapt to environment
- Plan and schedule
- Identify members
- Train reviewers
- Develop in-briefing

**CONDUCT**
- Virtual, in-person, blended
- Present in-briefing
- Review individually
- Discuss as group
- Report

**RESPOND**
- Debrief staff
- Support team
- Distribute and post outcomes and assignments
- Archive materials
- Execute and verify

Make reviews comprehensive, positive, and constructive.
Blue Team Review During Capture Planning

The Blue Team reviews knowledge of the customer and opportunity, provides guidance on your solution, and agrees on win strategy.
Blue Team Inputs and Outputs

**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

In: Marketing/Campaign, Interest
Out: Preliminary Bid, Bid Validation
The Black Hat Review predicts competitors’ solutions and strategies so you can counter them in capture planning and proposal development.
Black Hat Inputs and Outputs

**Inputs**
- Opportunity Description
- Customer Hot Buttons
- Competitor Response Profiles
- Competitors’ Historical Cost/Price Approaches
- Competitors’ Technical Capabilities
- Competitors’ Past Performance

**Outputs**
- Competitors’ Probable Solutions on Each Hot Button
- Competitors’ Discriminators
- Competitors’ Projected Strategies
- Recommended Win Strategy Refinements
The Pink Team reviews storyboards and mockups to ensure your win strategy and solution set will be presented effectively in your proposal.
Pink Team Inputs and Outputs

**Inputs**
- Capture and Proposal Strategies
- Proposal Instructions
- Evaluation Factors
- Proposal Outline
- Master Compliance Checklist
- Completed Storyboards
- Section Mock-ups

**Outputs**
- Confirmation or Redirection on Strategy
- Documented Comments and Recommendations
- Verified Compliance Checklist

Marketing/Campaign → Pursuit → Preliminary Bid → Bid Validation
Red Team Review Leads to Submittal

The Red Team predicts how well your proposal will score against customer evaluation criteria and recommends improvements.
Red Team Inputs and Outputs

**Inputs**
- Final Proposal Draft
- Red Team Kickoff Briefing
- Evaluation Factors
- Red Team Assignments
- Red Team Instructions
- Review Forms
- Master Compliance Checklist

**Outputs**
- Quantitative Scoring Prediction
- Qualitative Assessment
- Documentation of Findings

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**Stages:**
- Marketing/Campaign
- Pursuit
- Preliminary Bid
- Bid Validation
Tools to Conduct Red Team

- Red Team Review Form
- Red Team Horizontal Review
- Red Team Summary
- Red Team Debriefing
**Green Team Review Focuses on Cost and Price**

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<td>Market Segmentation</td>
<td>Draft RFP</td>
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<td>Long-Term Positioning</td>
<td>Final RFP</td>
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<td>Opportunity Assessment</td>
<td>Proposals Due</td>
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<td>Capture Planning</td>
<td>Award</td>
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| Key Documents | Multi-year strategic plan | Annual operating plan | Marketing plan | Opportunity analysis report | Capture plan | Story-boards | Mockups | Final draft proposal | Proposal revision | Lessons learned | Contract |

*The Green Team checks pricing for consistency with your proposed solution set and alignment with your price to win.*
Green Team Inputs and Outputs

**Inputs**
- Green Team Instructions
- Statement of Work/Objectives
- Evaluation Factors
- Customer Budget Intelligence
- Pricing-to-Win Strategy
- Solution Definition (Non-Price Proposal)
- Work Breakdown Structure
- Bases of Estimates
- Pricing Calculations

**Outputs**
- Approval or Required Changes to Pricing
- Required Changes to Pricing Documentation
- Impacts to Non-Price Sections of Proposal

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Marketing/Campaign  
Pursuit  
Preliminary Bid  
Interest  
Bid Validation
The **Gold Team** reviews the final proposal, confirming changes from Red and Green Teams, and checking proposal quality.
Gold Team Inputs and Outputs

**Inputs**
- Completed Proposal
- Red Team Action Items
- Green Team Action Items

**Gold Team Review**

**Outputs**
- Approved Proposal Documents
- OR
- List of Required Changes

Flow:
- Marketing/Campaign
- Pursuit
- Preliminary Bid
- Bid Validation
The White Hat Review documents lessons learned from the capture and proposal efforts to improve future pursuits.
White Hat Inputs and Outputs

**Inputs**
- Internal Successes
- Internal Problems and Workarounds
- Customer’s Formal Debriefing
- Customer’s Informal Comments

**Outputs**
- Documentation of Successes
- Documentation of Problem Resolutions
- Recommendations for Process Improvements

**White Hat Review**

**Phases:**
- Marketing/Campaign
- Pursuit
- Preliminary Bid
- Bid Validation
Lessons Learned Toolkit

- Lessons Learned Instructions
- Lessons Learned Planner
- Lessons Learned Review Checklist
- Lessons Learned Survey
Making Color Team Reviews Work

- Agree on a single, documented approach
- Tailor and scale the approach
- Identify key personnel and outcomes from each review
Commit to a Single, Disciplined Approach

**BENEFITS**
- Reduced costs and re-work
- Increased productivity
- Improved forecasting
- Increased visibility and control

**FEATURES**
- Flexible and agile
- Tailorable
- Scalable
- Based on best practices
- Championed at executive level
Tailor Your Approach to Color Team Reviews

1. Define an approach with phases and reviews
2. Fit your approach to your environment
3. Document roles and responsibilities
4. Make your approach an executive priority
Key Factors for Effectiveness

Consistency
- Disciplined process
- Standardized decision gates
- The right people
- Formal and consistent color team reviews

Flexibility
- Number of phases
- Number of gates
- Number, type, standards for color team reviews
- Number, type, size of documents reviewed

Key Factors
- Time available
- Size, risk, importance of opportunity
- Number of people involved
- Commitment from leadership
Our Next Webinars

Proposal Habits Worth Breaking

Sadly, we all develop bad habits—even those of us who thrive on proposal excellence. Experts will discuss some of these bad habits and ideas for overcoming them to improve the quality of our proposals.

August 12, 2020 1pm ET

You Snooze You Lose - Qualify to Win!

Have you ever felt like you didn’t have a fair shot at winning a competitive bid? That the odds were against you? Well, they probably were. Companies that win more business are often the ones out front—building a relationship, helping shape requirements, understanding customer needs and issues. Don’t hit the snooze button. Experts will share ideas on how to qualify opportunities and position to win.

September 15, 2020 1PM ET

https://www.shipleywins.com/webinars/
Today’s Webinar Summary

- Avoid common pitfalls to avoid
- The importance of decision gates and color team reviews
- The purpose of each color team review
- Flexibility in an approach to reviews
- The importance of consistency

These best practice ideas will help you be more effective and efficient in winning business.
Final Thoughts, Questions, and Discussion
THANK YOU

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