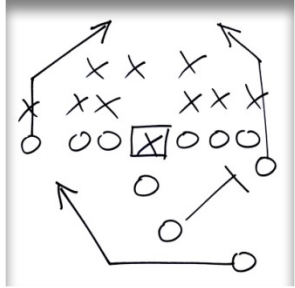# ATLANTA
2016

USDOE'16

15th Annual DOE Small Business Forum & Expo
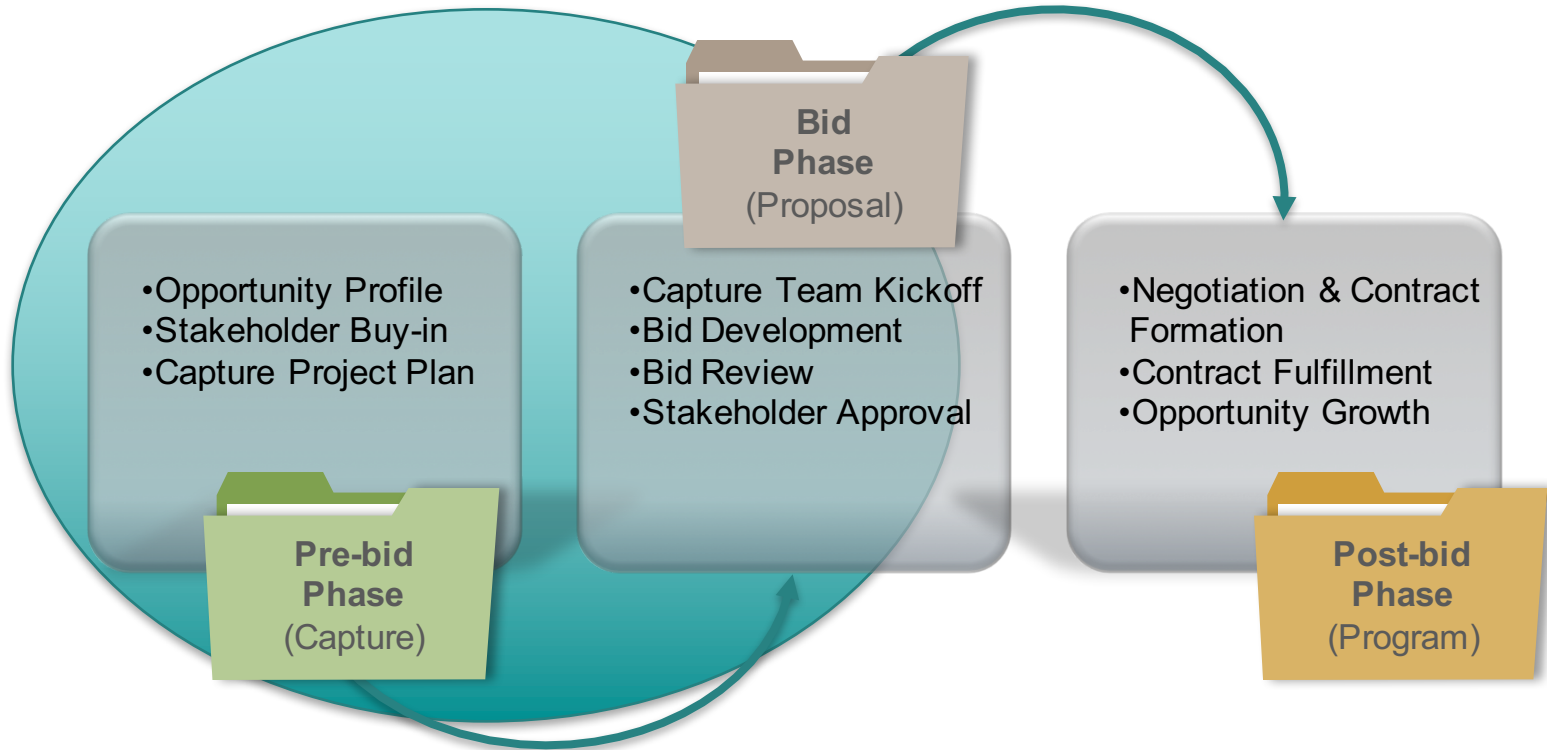**MAY 23 – 25, 2016 | ATLANTA, GA**

Bid Decision Gate Reviews

Tan V. Wilson, PMP

President of Entellect, LLC

Session Topics

- **Understanding BD lifecycle and stages of capture**
- **Importance of pipeline**
- **Stages of a pipeline**
- **People, processes, and tools**
- **Shipley Color Team Review definitions and timeline**
- **Purpose of each Gate Review**
- **Each Gate Review and the corresponding Color Team Review**

Business Development Lifecycle

Bid Phase (Proposal)

- Opportunity Profile
- Stakeholder Buy-in
- Capture Project Plan

- Capture Team Kickoff
- Bid Development
- Bid Review
- Stakeholder Approval

- Negotiation & Contract Formation
- Contract Fulfillment
- Opportunity Growth

Pre-bid Phase (Capture)

Post-bid Phase (Program)

Why is a qualified pipeline important?

- **Stability**
  - Minimizes the ebbs and flows
  - Forecasts and visualizes new potential business to help set and maintain business goals
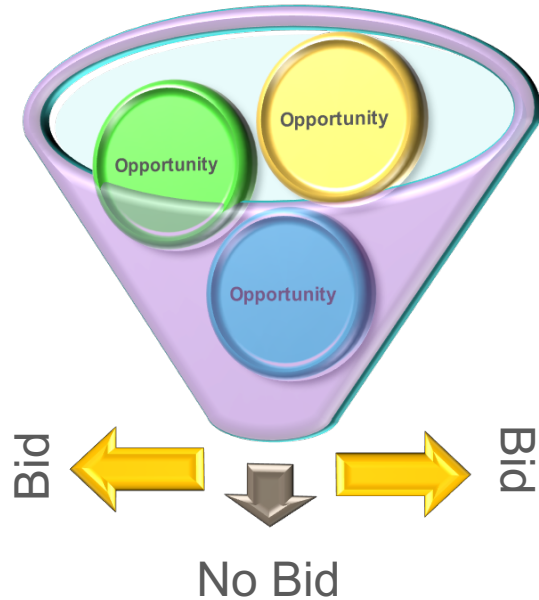 - Balances short- and long-term opportunities
- **Long-term Focus**
  - Minimizes the immediacy to produce sales now
  - Forces more critical and strategic review and consideration of potential new opportunities
- **Better Allocation of Resources**
  - Align the appropriate BD professional with the best opportunities for success
  - Allows BD professionals to better qualify and nurture new opportunities

Stages of a Developing a Pipeline

Bid ← **No Bid** → **Bid**

- **Identification**
  - Are your leads aligned with your services and qualifications?
  - Have you identified short and long term opportunities?
  - Are your leads too heavily focused towards GWAC/IDIQ/MATOC or single-award contracts?
  - Are your leads aligned with your Tier 1 (current work) and Tier 2 (future or similar work) agencies/customers?
- **Qualification**
  - Do you know the customer, scope of work, have the right past performance, etc.?
  - Is there an incumbent, is it wired, or does it require esoteric certifications or experience?
  - Have you performed an SWOT analysis?
  - Have you conducted critical gate reviews?

Stages of a Pipeline (continued)

- **Pursuit**
  - Have you made bid/no bid decisions?
  - Do you have the resources to develop a compliant and compelling proposal?
  - Are there too many bids?
  - How may bids are outstanding?
  - Are you able to bid and make a reasonable profit and provide an adequate return on investment?
- **Award**
  - Allows BD professionals to better qualify and nurture new opportunities

Shipley Defined Color Review Teams

Team	Objective
Purple Team	Approves opportunity analysis report
Blue Team #1	Reviews initial capture plan and approves capture strategy
Black Hat Team	Predicts competitor solutions
Blue Team #2	Approves updated capture plan and solution set for use in kickoff meeting packet
Pink Team	Reviews storyboards and mockups to verify alignment with capture strategy and execution of customer issues
Red Team	Reviews final draft to predict proposal scoring
Green Team	Reviews cost/price solution and alignment with strategy
Gold Team	Approves final proposal and price
White Team	Compile "lessons learned" to improve future competitiveness

Right People, Processes, and Tools

Executive Leadership, Business Development Managers, Capture Managers, Proposal Managers, Program Managers, Consultants, SMEs
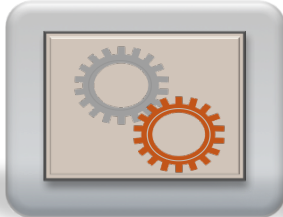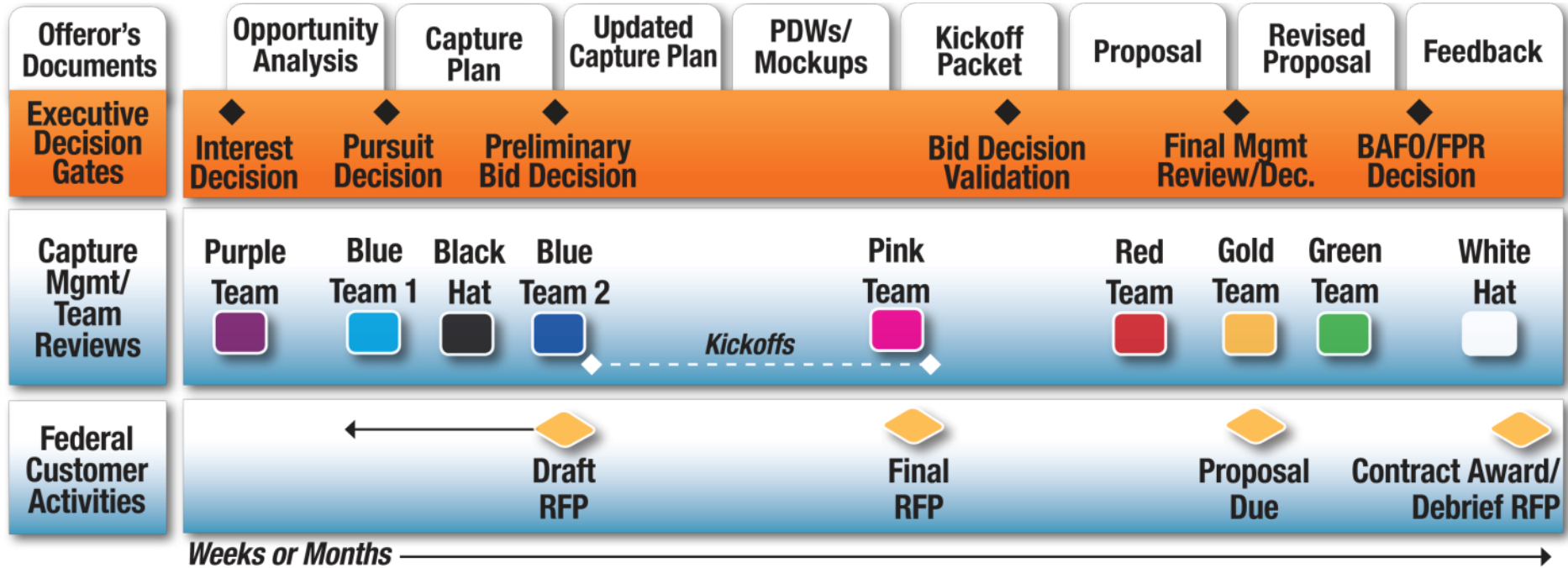
Pre-bid (BD and Capture)
Bid Gate Reviews
Bid (Proposal)   Post-bid (Program/Project)

EZGovOpps, GovWin, Bloomberg Government, FPDS, Capture Plan, Checklists, Score Sheets

"Surround yourself with the best people you can find, delegate authority, and don't interfere." **– Ronald Reagan**

Shipley Timeline Capture and Proposal Activities

Offeror's Documents	Opportunity Analysis	Capture Plan	Updated Capture Plan	PDWs/ Mockups	Kickoff Packet	Proposal	Revised Proposal	Feedback
Executive Decision Gates	◆ Interest Decision	◆ Pursuit Decision	◆ Preliminary Bid Decision		◆ Bid Decision Validation		◆ Final Mgmt Review/Dec.	◆ BAFO/FPR Decision
Capture Mgmt/ Team Reviews	Purple Team	Blue Team 1	Black Hat	Blue Team 2		Pink Team	Red Team	Gold Team · Green Team	White Hat

Kickoffs

Federal Customer Activities		Draft RFP		Final RFP		Proposal Due	Contract Award/ Debrief RFP

Weeks or Months →

Recommended Review Time Goals (New Opportunities)

	OPPORTUNITY SIZE		
Stage	**Up to $5M**	**$5+M –$15M**	**> $15M**
Identification	Within 15 days of adding opportunity into pipeline	Within 15 days of adding opportunity into pipeline	Within 15 days of adding opportunity into pipeline
Qualifications/Pursuit	At least 45 days before expected RFP release	At least 90 days before expected RFP release	At least 180 days before expected RFP release
Preliminary Bid/No Bid	At least 30 days before expected RFP release	At least 60 days before expected RFP release	At least 90 days before expected RFP release

Purpose of Different Review Stages

- **Gate Review 1: Interest Decision**
  - Verify that the opportunity is aligned to your corporate capabilities and qualifications
  - Determine whether the opportunity is sufficiently defined
  - Validate if opportunity is real and funding is available
- **Gate Review 2: Pursuit Decision**
  - Determine whether to initiate formal capture process
  - Determine key customer hot buttons
  - Determine key win themes
  - Validate or adjust win strategy
  - Develop price to win analysis/strategy

Purpose of Different Review Stages (continued)
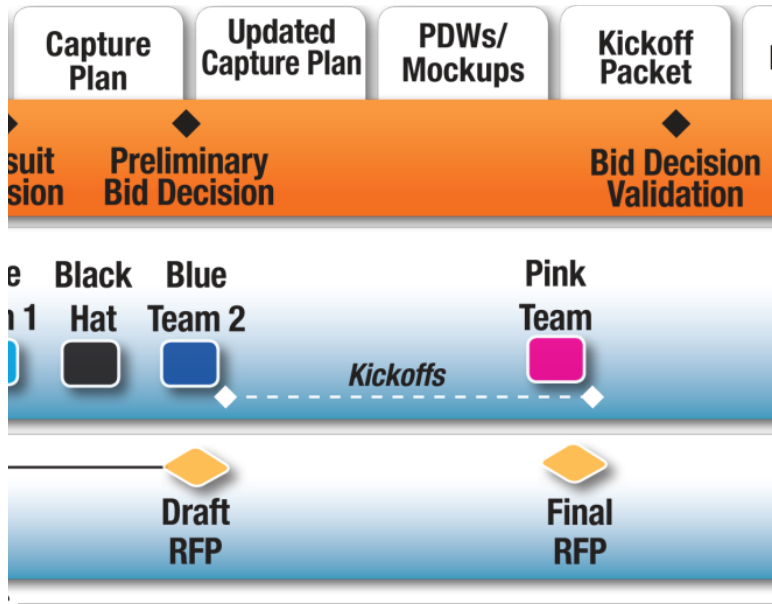
- **Gate Review 3: Preliminary Bid/No-bid Decision**
  - Verify the ability to win (win themes, discriminators, key personnel, team members, etc.)
  - Address any gaps or proposal risks
  - Complete capture process
- **Gate Review 4: Bid Decision Validation**
  - Conduct after final RFP is released
  - Determine if there are any "deal breakers"

Same Process for Any Color Review

- Consistent application of a successful review process earns respect and acceptance
- Prior to the review, "train" the proposal team in what to expect from the reviewers
- Likewise, train the reviewers as to their "mood & manner" used with the proposal team on debriefs
- Use simple techniques like a "red-marked" copy for each appropriate proposal team member
- Provide "one-on-one" debriefs
- Post corrections required and require proof of compliance - signed off by PM and author

Gate Review 1: Interest Decision

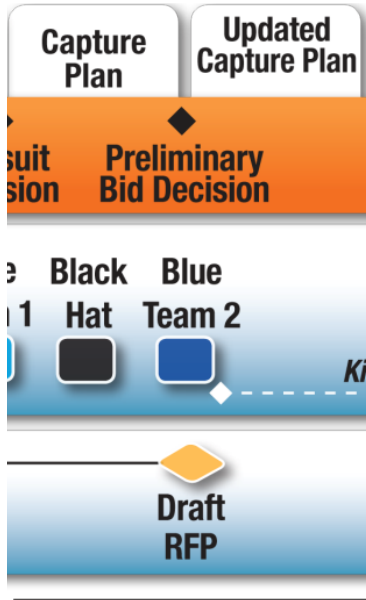| Purple Team Review	
Objective: *Review the Opportunity Analysis Report to assess the opportunity's early Pwin (win probability) and its alignment with organizational goals*	**Inputs and Tools:** • Opportunity report • Business intelligence • Agency budgets and forecasts
Focus: • Quality and quantity of information available • Determine current Pwin • Align with corporate, business, and strategic goals	**Outcomes:** • Recommendation to bid, no bid, or reassess • Develop strategic teaming development • Begin Capture Process for potential bid opportunities
Participants: Executive Managers, BD Managers, Program / Technical Manager	

"Winning isn't everything, but wanting to win is." **– Vince Lombardi**
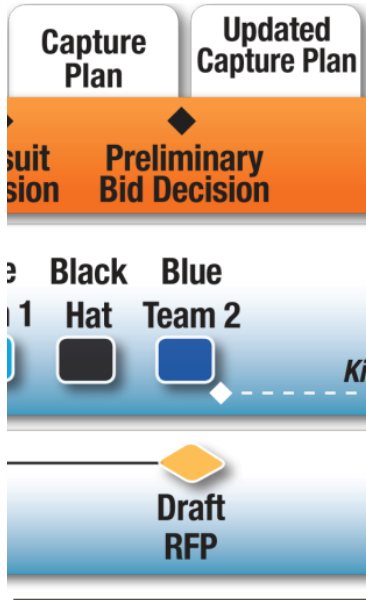
Gate Review 2: Pursuit Decision

Blue Team 1 Review	
Objective: *Review the Opportunity Analysis Report to assess the capture plan to validate the win strategy and solution set*	**Inputs and Tools:** • Capture Plan • Strength, Weakness, Opportunity, and Threats (SWOT)
Focus: • Determine required activities to increase Pwin and reassess new Pwin • Better understanding of customer hot buttons, issues, and requirements • Competitor SWOT Analysis • Perform risk assessment and mitigation	**Outcomes:** • Recommendation to either bid or no bid • Continue to develop customer relationships • Win Strategies against competitors
Participants: BD Managers, Program / Technical Manager	

Gate Review 3: Preliminary Bid/No Bid Decision

Black Hat Review	
Objective: *Assesses the win positions of all known competitors and form the basis for improving our strategy and competitive advantage*	**Inputs and Tools:** • Capture Plan • Competitor's business, pricing, and technical/program data
Focus: • Customer preference of successful Offeror • Competitors' likely win strategies • Our strategy to diffuse competitors and/or incumbents	**Outcomes:** • Recommendation to bid, no bid, or team • Develop strategic teaming if necessary • Win Strategies
Participants: Executive Managers, BD Managers, Program / Technical Manager, BD Consultant, Subject Matter Expert (SME)	

Gate Review 3: Preliminary Bid/No Bid Decision

Blue Team 2 Review	
Objective: *Review the capture plan, updated to reflect findings of Black Hat and post review activities and analysis of customer hot buttons and competitors' strategies*	**Inputs and Tools:** • Capture Plan • Draft RFP, previous RFP • Industry Day / Pre-proposal Conference Materials
Focus: • Clear and thorough win strategies over competitors • Win strategies to address customer requirements, hot buttons, and issues • Reassess Pwin	**Outcomes:** • Win Strategies for the proposal • Solution to meet customer requirements
Participants: BD Managers, Program / Technical Manager, External Consultants or Staff	

"If you change the way you look at things, the things you look at change." – Wayne Dyer

Gate Review 4: Bid Decision Validation

Pink Team Review	
Objective: *Review storyboards and/or mockups (drafting writing) to validate that the approved win strategy and solution*	**Inputs and Tools:** • Capture and proposal strategies • Compliance matrix of RFP / DRFP • Industry Day / Proposal Kick Off Conference Materials • Storyboards, Mockups, Writing Outlines
Focus: • Address all RFP/DRFP requirements • Communicate win strategies • Review and validate past performance references • Solution to meet customer requirements	**Outcomes:** • Verified Compliance Matrix • Win Strategies integrated in the proposal • Compliant draft response • Recovery guidance for writing team
Participants: Senior Managers, BD and Capture Managers, Key Personnel, Key Subcontractors, SMEs	

Key Takeaways

- **Plan and understand the pre-RFP timelines**

- **Color Team and milestone gate reviews become more difficult and require more information the closer you are to the final RFP release**

- **Develop a repeatable and scalable processes tailored to your company and bid opportunity**

- **Plan, Prepare, and Expect to Win!**

Session Evaluations

SPEAKER/SESSION EVALUATION

USD⊕E'16

Please place the completed evaluation into the evaluation box in the back of your session room or bring it to the registration desk.

SESSION TITLE: _____

Please rate each of the following:	Poor		Fair		Great
Overall Session Rating.	1	2	3	4	5
Session content matches the program description.	1	2	3	4	5
The speaker(s) appeared organized, informed, and delivered effective presentation.	1	2	3	4	5
Would you recommend that this/these speaker(s) return for future presentations?	❑ Yes ❑ No				

*Turn over for additional questions

SPEAKER/SESSION EVALUATION

Please place the completed evaluation into the evaluation box in the back of your session room or bring it to the registration desk.

What topics most interested you in this session?

_____

_____

What topics do you feel were missing in this session?

_____

_____

Additional comments: _____

_____

_____

Reminder
Please complete the Speaker/Session Evaluation Form located in your program guide and place the form in the basket in the back of the room.

Questions?

Tan V. Wilson, PMP

President of Entellect, LLC

Phone: 703.489.1947

Email: tanwilson@entellectllc.com

Website: www.entellectllc.com

®

entellect