



**Solutions, LLC**



*Software to automate your  
entire Capture Process and  
improve your **Pwin** every deal!*



# Business Intelligence How Captures are Won

MIKE NEFF

MIKE@BITSOLUTIONSLLC.COM

VP SALES, BIT SOLUTIONS, LLC

DECEMBER 15, 2016

# Agenda



- Forecast 2017
- BD Info – Where to get it?
  - Individual Sites
  - Accumulator Sites
- BD Info – What to do with it?
- Questions to ask
- Capture Management
  - Process
  - Strategy
- BD Info – People, Process, Tools
- Conclusion

# Forecast 2017



- **Contract Awards**
  - Straight on re competes are gone
  - TOs that were going to be on ENCORE III, split off on CIO/SP3, OASIS, Alliant and others because ENCORE III is still not available...
  - Incumbent win rates will most likely remain lower again in 2017 due to LPTA and new blood
- **Small Business**
  - Small businesses on IDIQs especially in tech services and knowledge based services market will do well
  - SBA new rules for small business teaming and women owned small business (WOSB), will start to take effect
- **Large and Medium Business**
  - Mid sized and large companies will have to even more competitive. M&A's
    - ✦ Booz Allen buys Aquilent
    - ✦ SAIC splits into SAIC & Leidos
    - ✦ LMCO splits into LMCO and LM IT Services
    - ✦ Leidos buys LM's IT Services group
    - ✦ Oracle drops GSA Schedule 70
    - ✦ Many others to consolidate and lower G&A costs and Wrap rates to better compete in the "new" market
- **Acquisition Reforms**
  - Don't hold your breath – OMB reform is still a few years out. New administration and the 2018 budget should be closely monitored especially in cyber security and Immigration reform

# BD Info – Where to get it?



## ● Public Websites

- FBO - Opportunities
- FPDS – Existing Contracts
- USASpending.gov – Award \$\$s
- FOIA
- NECO
- Dibbs
- Recovery.gov
- Whitehouse.gov
- SAM.gov
- SBA.gov
- GSA
- GSA Advantage
- GAO
- DSBS
- Milcon
- IT Dashboard
- Performance.gov
- Data.gov
- USA.gov

# Government Sources



- **Free!**
- **Presidential Budget**
  - If you are an IT company you should read the President budget exhibit 53 and 300
- **Agency Web Sites**
  - OSDBU or OSBO pages
  - Long range forecasts
  - Agency mission
  - Sub-agency organization
  - Personnel Directory
  - FOIA request

# Government sources



- **FedBizOpps (FBO)**

★ [FEDBIZOPPS.GOV](http://FEDBIZOPPS.GOV)

- Most current solicitations
- Look up what agencies buy
- How, when and where the Agencies buy your products and services

- **Federal Procurement data systems (FPDS)**



- Contract data Google type search for agency or contractor name, NAICS, PSC, etc

- **USA Spending.gov**



- Award data
- More user friendly interface
- Research competitors and suppliers to identify partners

# Market Data Research Firms



- **Paid!!**
- Dashboards, alerts, drill downs, and 30,000 ft view
  - How will legislation affect contractors.
  - Grouping and analytics of opportunities by industry or agency
  - Identify expiring contracts by agency, naics, geographic or set aside or type of contract.
  - Identify incumbents, competition, partners
  - Analyst to help connect the dots when large contracts are split or when an rfp is expected to release

# Market research firms



- GovwinIQ/Input/FedSources/Centurion/ Roper?
  - <https://iq.govwin.com/>
- Bloomberg Government Bgov
  - <https://about.bgov.com/>
- Govini
  - <http://www.govini.com/>
- EzGovOpps
  - <https://ezgovopps.com/home/>
- Onvia
  - <https://www.onvia.com/>
- SetAside Alert
  - <http://www.setasidealert.com/>

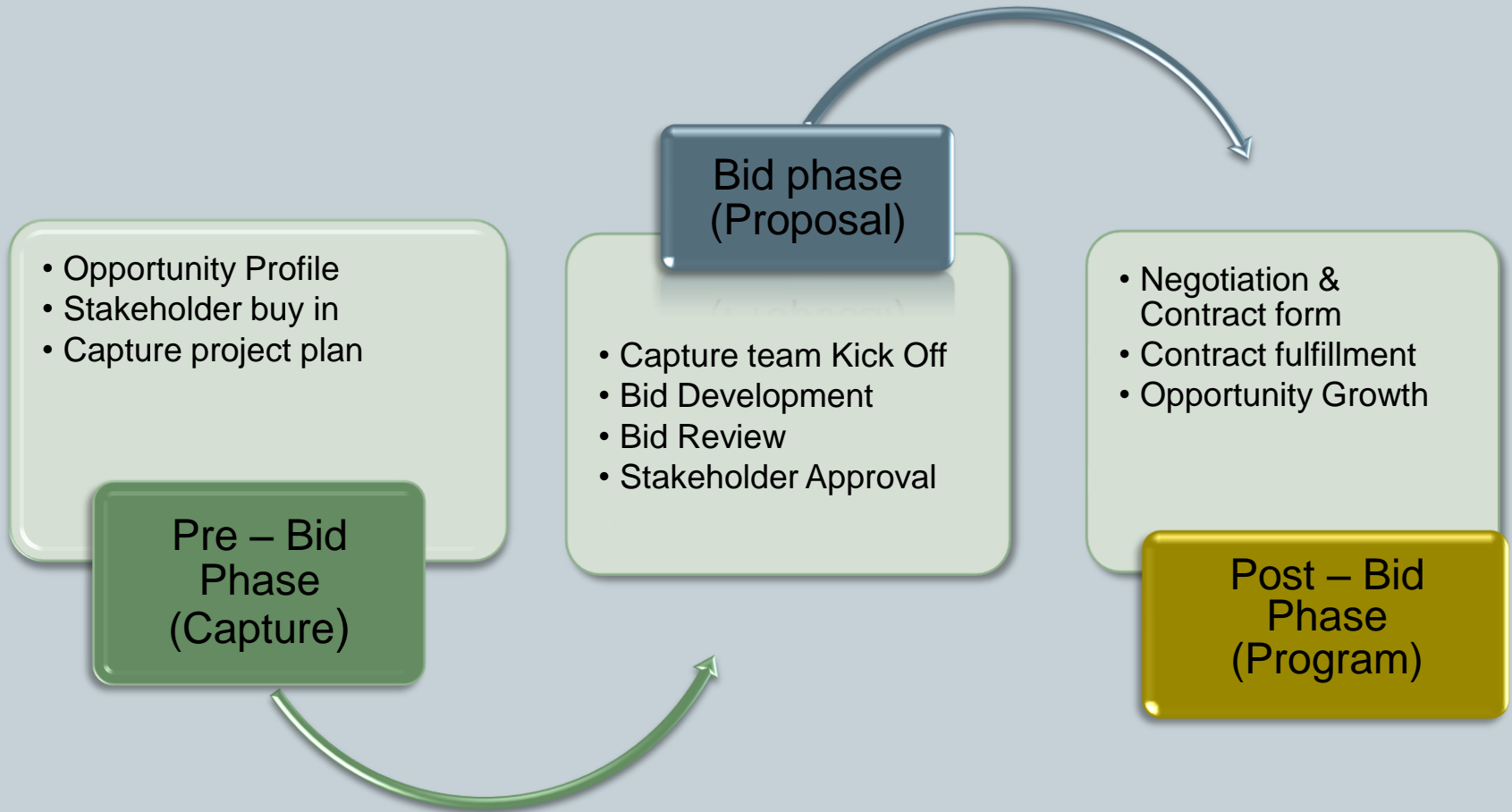


# Other BD resources



- Networking
- Industry Days
- Agency Websites Small Business Scorecard
- Industry events AFCEA, NDIA, NCMAHQ, APMP
- Teaming or Subcontracting
  - FBO' interested parties
- Meet directly with Agency leaders
  - Shape the deals
    - ✦ If you are SB, call the SBA (Small Biz Advocates) and OSDBU
    - ✦ Get org chart and call to setup meetings PMs, KOs & COs

# Business Development Life Cycle



# Capture Process



## Manage Capture Process

- Develop capture Plan
- Determine key Management Actions

## Build Relationships

- Form and train capture team
- Expand Customer Relationships

## Gather & Analyze & Assess Data

- Opportunity
- Customer
- Competitor
- Self

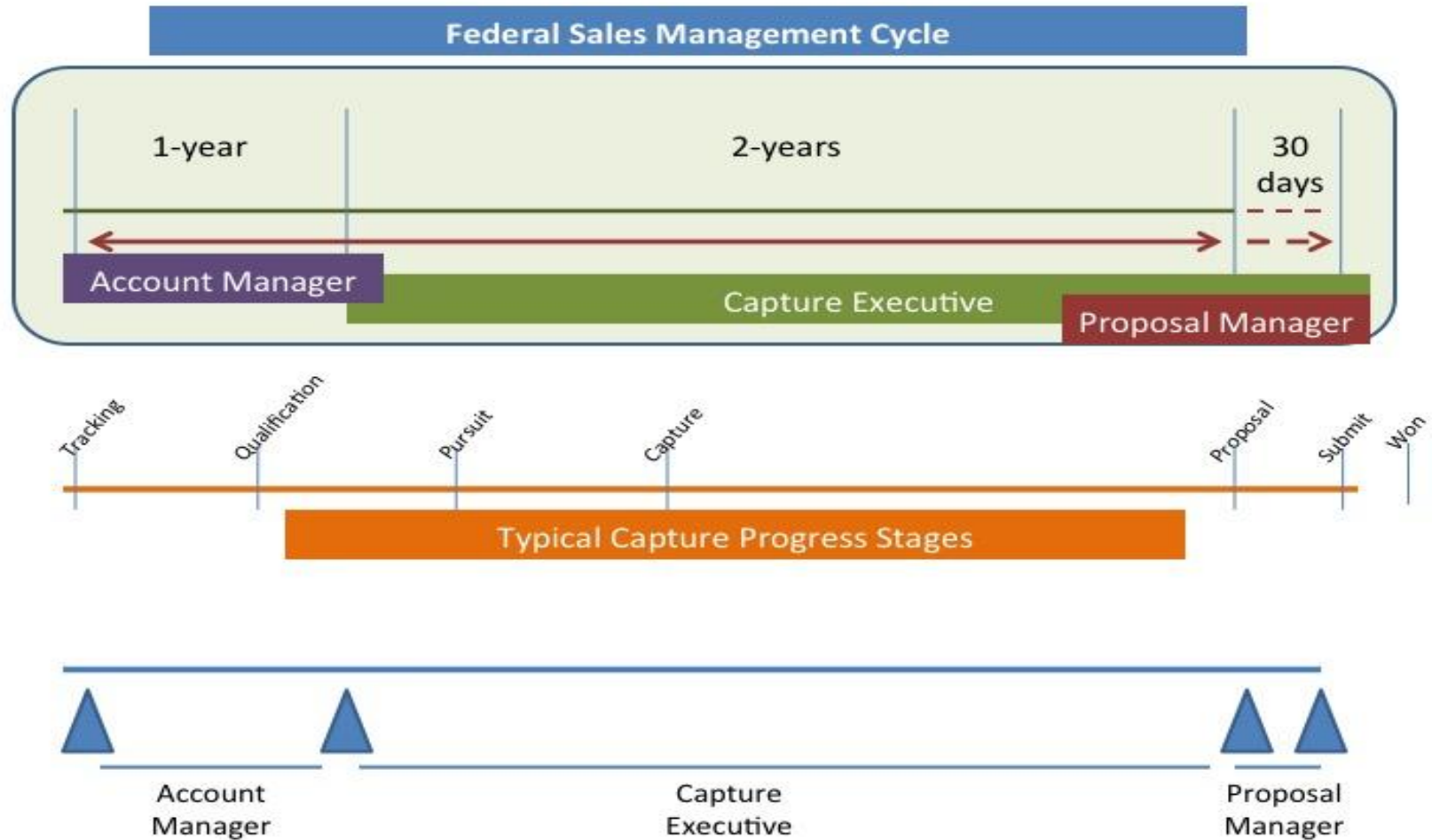
## Develop and Implement Strategies

- PTW
- Win
- Teaming
- Proposal
- Black Hat Review
- Program Management
- Execute Strategies

## Transition to Proposal Planning

- Identify Proposal Team
- Proposal Management Plan
- Proposal Strategy
- Exec Summary
- Collect High level Proposal Collateral

# Federal Sales Management Cycle



# Capture



## Capture Process

# Ask Questions !



- You must ask the right questions at the right time
- You need a repeatable Sales/Capture process
- Continuous improvement will come from constantly refining the questions, not from starting over. As your organization gets smarter about which questions to ask and when, it will get smarter and smarter. It will get more effective and achieve a higher win rate also, because your staff will not only get better at asking the right questions, they'll get better at showing up with the right answers.

# Sample Questions



- “What do we need to know to accept the lead as legitimate and worth investing in pursuing?”
  - Do we do what the customer needs?
  - Does the government need this? When?
  - Is it funded?
- “How do we gain an advantage that we can turn into superior bid strategies?”
  - Shape the deal
    - Unique product or service
    - Specialize experience of personnel
    - Specific past performance requirements
    - Small Business disadvantage
- “Do we know what it will take to win?”
  - What company does the customer like?
  - Do they really like the incumbent?
  - What are the requirements?
  - Develop SWOT chart of the competition
  - Price-to-Win so you know the price to bid

# Sample Questions



- “What will people need to know to design the best offering?”
  - What the Governments wants!
  - Ask this one long before the Proposal starts
- “How do we write the proposal from the customer’s perspective instead of our own?”
  - We do that by knowing what the customer’s perspective is!!
  - What is important to THAT person at the customer?
  - Does this deal involve a potential promotion (or worse a failure takes them out of the running)
- “How do we turn what we know into a winning proposal response?”
  - Write about WIN Themes that you learned from the Gov’t
  - Weave in GHOST Themes that you know about the competition weaknesses
  - Highlight the shaping points that you worked on with the Gov’t
  - Write a compelling response that talks about what the “real” issues were with the PM’s, CO’s



# Capture Management



- *Capture management involves activities focusing on:*
  - Opportunity identification and qualification
  - Client interaction and the importance of understanding requirements and objectives
  - Capture plan and capture team organization development
  - Shaping of the deal
  - Opportunity assessment reviews, positioning, competitive assessments, and establishing price-to-win
  - Bid/no-bid decisions
- *Capture planning*
  - A disciplined approach to establishing strategic and tactical activities
  - Builds customer intimacy to shape deals and win contracts

# Selecting the right people, processes and tools



- **People?**
  - Business Development Managers, Capture Executives, Proposal Managers, Program Managers
- **Are your processes defined and repeatable?**
  - Are the right questions being asked at the right time
    - ✦ Pre-Bid (Capture)
    - ✦ Bid ( Proposal)
    - ✦ Post-Bid ( Program/Project)
- **Are the tools being fully utilized and are they customizable?**
  - BI tools, Process tools, Proposal Management and Writing tools

# Conclusion

## Best practices



- *Develop and define clear roles and responsibilities for all BD, capture, and proposal team members*
- *Develop a repeatable and scalable processes tailored to **your** company*
- *Develop and properly maintain your knowledge management system*
- *Use technology to support and enable your company to keeps individuals focused on the common goal*
- *Pause to collect lessons learned and debrief your team after each capture and proposal effort*

# BIT Solutions, LLC



Services offered

# BIT Solutions, LLC



- What we do
  - **Software Division**
    - ✦ CaptureExec Software
      - Cloud-based, Enterprise, End-to-End Pipeline Management
        - Pipeline, Quotas, Sales management, Division management, Contracts management, Budget management, Reporting, Automated Gate Reviews and so much more.
  - **Consulting Division**
    - ✦ Strategic management and sales
      - Management support
      - PMO design and management
      - Capture training
      - Black/White Hat management
    - ✦ Tactical sales and capture (Pre-B&P)
      - Account Management
      - Capture Management
      - Pricing & PTW management
      - Team mate building
    - ✦ Proposal Management support (B&P)
      - Proposal Management
      - Compliance management
      - Technical writing
      - Color team reviewers
      - Orals coaching
      - Graphics development

# BIT Solutions, LLC - Software



- **CaptureExec Software**

- Automates every aspect of the Capture Process from Inception to Win.
- Enterprise Business solution

- Division Executive Dashboards
- Capture Manager Dashboards
- Contracts Executive Dashboards
- Contracts Manager Dashboards

- Finance Executive Dashboards
- Budget Manager Dashboards
- HR Executive Dashboards
- Recruiting Manager Dashboards

- User Maintained System – No custom software programming
- Integrated with FedBizOps (New BI Companies coming)
- Easy to Use, Easy to Report, Easy to Manage
- Simple enough for \$1M/year companies
- Complex enough for \$100B/year companies
- Inexpensive to License

# BIT Solutions, LLC - Resellers



- BIT Solutions, Resellers

- Three levels of Resellers

- ✦ Silver

- Find a prospect, do an introduction with us and when they purchase our software or consulting services, you receive a check!

- ✦ Gold

- Find a prospect, you sell them the software or consulting services, you receive a larger check!

- ✦ Platinum

- Find a prospect, you sell them the software or consulting services, you work as part of the consulting delivery team, then receive a larger check and be paid your consulting fees.

# BIT Solutions, LLC - Consulting



- **Consulting Expertise**

- Consultants available with specific backgrounds
- Consulting expertise in:

- Executive Strategy**

- Vehicle Analysis and Target Select
    - PMO Standup and Management
    - Capture Team Training
    - Black Hat, White Hat Management

- Capture Management**

- Account Management
    - Delivery Team Building
    - Pricing Development
    - Pipeline Management

- Proposal Management**

- Compliance Management
    - Graphics Design
    - Technical Writers
    - Management Writers

- Color Team Review
    - Color Team Grading
    - Orals Coaching



# BIT Solutions, LLC – Consulting Success Stories



## 1. Tactical Capture Executive Support

- Our customer needed additional Capture Management support on a very large, complex opportunity and Account Management (BD) support to understand all the contracting opportunities that were available at the Command for building the Pipeline with future opportunities.

BIT Solutions supported 500 hours meeting with the Government Agencies surrounding and including the Command, creating strategy, building a team, introducing our customer to individuals of interest and gathering valuable G2 to support the eventual bid when it is released by the Government.

## 2. Strategic RFP Support

- We had three separate customers who had brought their Responses through Pink-Team based on the Draft RFP/PWS and determined that they needed another strategic review to make certain they didn't miss any items, rework graphics to wow the customer and validate compliance. They also needed a Proposal Manager to pick up the current stage and guide the entire process to submission.

BIT Solutions assembled a team of two experienced writers/reviewers, a proposal manager and a graphics artist. The team strategized, injected and supported the response process through to submission. We refocused the team and educated, based on our experiences, on what the KO Shop, the Funding source and the Selection Board wanted, needed and would look for to make awards.

# BIT Solutions, LLC – Consulting Success Stories



## **3. Orals Coaching and Content Support**

- A customer came to us who had worked on their Draft RFP/PWS and was looking for an expert Orals coach who could work in their DC office to organize and coach their team to be prepared for the Government orals sessions.

BIT Solutions brought in an expert orals coach and content manager with over 20 years experience as the go to coach of one of the top 5 largest Government contracting companies in the world. The team strategized, built content and coached the customer team through to the orals session. We educated the team, based on our experiences, on what the Selection Board would need and would look for to make the award.

## **4. Complete Sales Team Support**

- Our customer wanted to standup a new office but the cost of hiring FTE's, New office standup and Management on top of pre-B&P and B&P funding was prohibitive. What they needed was a team to do Account Management work to build a pipeline and qualify opportunities; Capture Management work to shape the qualified deals and build the teams; and Proposal Management to win the deals.

BIT Solutions created a plan to meet with the Government Agencies surrounding and including the Command, creating strategy, building teams, introducing the customer to individuals of interest and gathering valuable G2 to support the eventual bid when it is released by the Government. The plan included a two-year commitment where at the end, we would help hire, train and support a new team to replace our Consultants on the ground once the pipeline and wins could support the business plan. Everything would be paid for using the Pre-B&P and B&P monies without carrying FTE costs, benefits and Management overhead including the costs of office space.

# BIT Solutions, LLC – Consulting Success Stories



## 5. Complete Proposal Response Team Support

- Our customer (a \$6.7B/yr company), wanted to outsource their entire Proposal Response requirements to a single company to support all RFI's, RFP's, TO's, Whitepapers, etc., for writing, compliance, graphics, reviews, grading and submission.

BIT Solutions created a team of 15 experts supporting all phases of the Response Team requirements. We defined a repeatable process for our customer to submit the response, upload Capture documentation to a shared environment, and have their SME's begin creating and drafting the technical solution. BIT Solutions also created a repeatable process internally for receiving the request, assigning the Proposal Manager, creating the Compliance matrix and Calendar, managing calendars and meetings, creating graphics, reviewing documentation and re-writing the SME content for One-Voice, compliance and "win-ability".

## 6. Complete Company Support

- Our customer wanted to find a company to support them on three areas of their business initially: (1) Strategic management support, (2) PTW analysis for each opportunity, and (3) outsource their entire Proposal Response requirements to a single company to support all RFI's, RFP's, TO's, Whitepapers, etc., for writing, compliance, graphics, reviews, grading and submission.

BIT Solutions created a team of 8 experts supporting all phases of the requirements. We are brought in 30-60 days prior to the RFP release date and begin learning from the Capture Managers all the G2 collected to date, determine the competitive analysis, begin the PTW process and work with the SMEs to understand the solution being delivered. Then our writers create the framework to achieve the Pink Team review and recovery before the RFP gets released. We then review the differences in the final released RFP and begin the writing process during the entire 30-day sprint.

# Comments / Questions

