

# What Capture Manager Can Do to Improve Your Competitive Advantage

Resource

CORTAC Group

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G R O U P



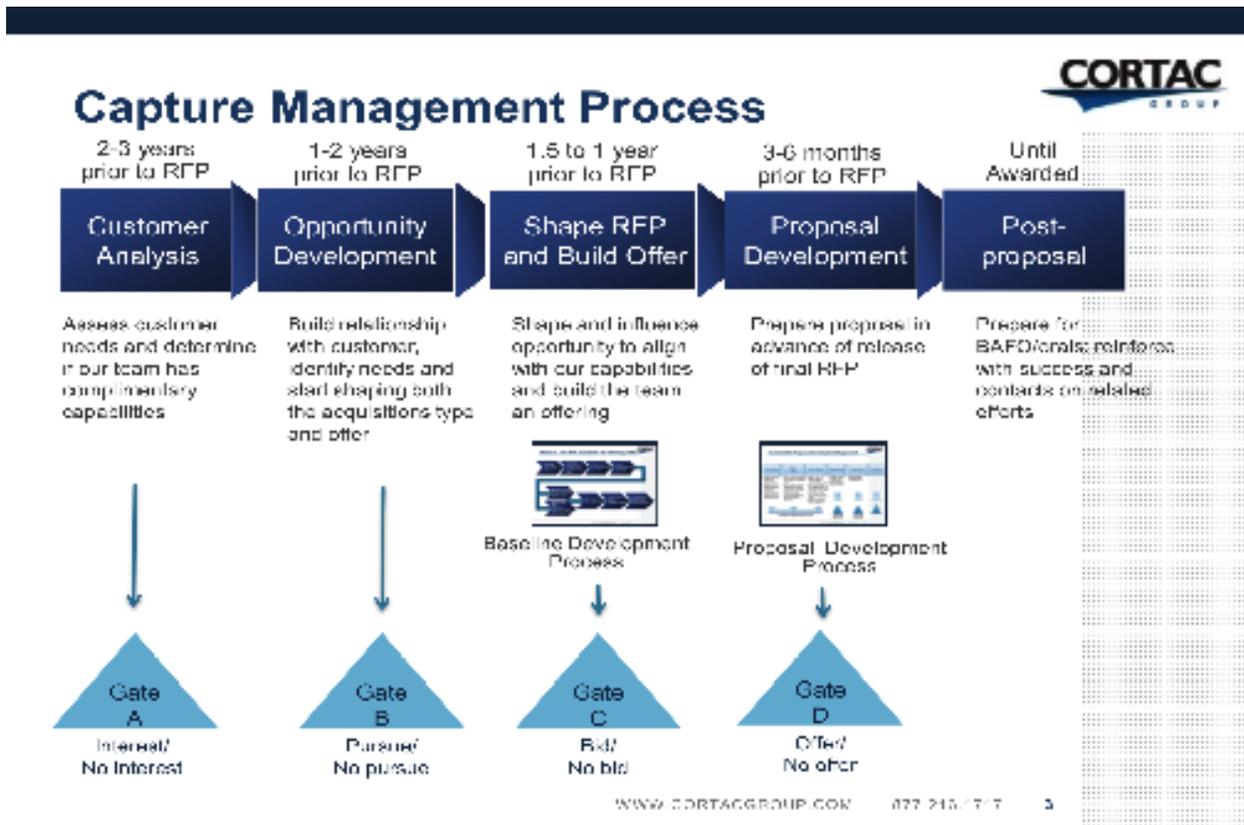
## The CORTAC Perspective.

Creating the environment that drives teams to a winning offer is a key element to Winning. A winning environment includes establishing a capture team organization that fosters positive, dynamic tension, where key leadership positions have common goals but different responsibilities and objectives. At CORTAC Group we found that the organization approach yielding the highest win rate consists of three key leadership positions: the Capture Manager, Proposal Manager, and Program Manager.

Each of these leaders is incentivized to win but they each have different responsibilities, authorities and accountabilities. The Capture Manager has the overall responsibility for winning the campaign and reports directly to the executive with Profit and Loss accountability and has the authority to manage and implement the win strategy that maximizes the win probability. The Program Manager has the responsibility to the P&L executive for executing the project after the win and is focused on making sure the offer is credible and executable and he controls the four capture baselines that define the winning offer; Program Organization, Program Plan, Cost and Technical baselines. The Proposal Manager has the responsibility for developing the proposal to include the processes, schedule, and managing the resources to write and deliver the proposal. The Proposal Manager monitors the four baselines early during the capture process to ensure the baseline elements are necessary and sufficient to complete the proposal development in accordance with the RFP.

The key position amongst these three is the Capture Manager since he is held accountable for winning the campaign. The Capture Manager manages the development and implementation of the capture strategy to maximize the probability of win (Pwin). The win strategy must consider the strengths, and weakness of ones own organization, those of the competitor, and the ambiguities that exist as the customer (the Government) tries to figure out how to set forth and best implement a competition. The job is complex and requires a talent not ordinarily found in firms that are primarily technical or predominately focused on execution. The Capture Manager needs to have a clear and objective view as to what is needed to win, the ability to articulate the strategy to the team that includes sorting through myriads of outside inputs, and the ability to effectively lead a shorthanded staff to accomplish a wide variety of tasks and duties.

The Capture Management role should start as early as possible in the campaign to have the highest impact on shaping the overall acquisition. However, for reasons typically not in the control of Capture Manager, the capture management activity may start as late as the final RFP release. Regardless of where in time the capture team is engaged in the campaign, the capture manager should ensure that the tasks and products required in the previous phases are developed. However, the level of maturity and review of these products will vary depending on the scale, scope, and schedule of the proposal.



**Figure 1 The Capture Management Process. These are the common elements in the Capture Management process that have proven to improve your competitive advantage**

The process to be followed by the Capture Manager in developing these products varies from organization to organization and at CORTAC Group we have collected and documented the process elements that have yielded high win rates from across a wide variety of clients (Figure 1). The steps and products in these processes can and should be tailored to be in line with the organization and executive expectations, especially when it comes to approvals to proceed from one gate to another. The goal of the process is to shape the acquisition approach, the customer’s objectives and evaluation elements, and the offering itself to achieve a high probability of win campaign approach.

The capture process is both internally focused and externally focused. The external focus is toward the customer with an objective to shape and influence two elements of the campaign 1) establishing the best competitive strategy consistent with the customer’s acquisition approach and; 2) influencing the customer’s perception of best value and the associated RFP evaluation elements. The customer focus and shaping requires extensive

marketing and customer interaction to gain a better understanding of all customer stakeholders within the program office and Headquarters.

Proven Methodology to Influencing the Acquisition and Customer	
1	A description of our team's understanding on what we believe are the key customer goals/objectives
2	A decomposition of the evaluation elements from an offeror's perspective on how we believe the criteria aligns with the customer goals – emphasize potential disconnects between what may be their goals and the criteria they defined.
3	A description of the key elements of our approach and what we are doing to meet their objectives and the defined RFP. This is used to help the customer understand how their award criteria is driving our offer/solution
4	Inform the customer on our approach so that they are never surprised in with the final proposal.
5	Discuss potential evaluation criteria that would lead to our team improving our modifying our offer in a direction that we think the customer may want
6	Provide our perspective of how offerors will respond their criteria and to our proposed modified criteria
7	Provide draft materials to the customer that they can use to get through their gate reviews and to help them release a proposal (Statement of Work, Specifications, Contract Elements)

As the Capture Manager works to shape the campaign with the customer he becomes the face of the organization to the customer for the proposal. The techniques used by Capture Managers that have had the highest impact to shaping the campaign consist of the following elements that are communicated in meetings and interactions with the customer.

This set of discussion topics help facilitate the Capture Manager in influencing the acquisition by providing perspectives from an offeror's point of view on how the procurement plan is really supporting the customer objectives. The interaction also provides the capture manager with a better understanding of what the customer goals are and guidance on how the team should adapt the offer to best meet the customer's objectives. This insight is a key step in the win strategy development process for the campaign.

CORTAC has also observed that successful Capture Manager's cannot just be externally focused. They must direct and manage elements internal to their organization and this includes the proposal team and executive leadership. The proposal team focus is directed to shape the offer and messaging in the proposal to maximize win probability. The team needs continuous and clear direction on how best to implement elements of both the strategy as it evolves over the course of the capture with inputs received from the customer and direction from executive leadership. This includes providing guidance on how to integrate executive leadership decisions and tailor the proposal so that it maximizes the Pwin. This can be especially challenging when the executive decisions are not always in line with the highest Pw strategy recommendations.

Since developing an offer that results in a high Pw can impose risk to the Capture Manager's corporation or organization, a big part of winning is proactively addressing the perceived risks and biases of the executive leadership team. This includes pre-briefing key leaders to understand their perceived concerns and implementing actions to resolve them prior to holding a capture gate decision review.

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Additionally, since building a winning offer often requires investment and time, getting early executive acceptance and approval of the overall win strategy is critical so that the required funding and resources are available to close on the strategic actions within the customer's acquisition schedule and needs. These actions can include Past Performance corrective actions on other company programs where the Capture Manager has little control and influence. The Capture Manager must leverage executive management to ensure implementation of these corrective actions.\

We summarize the key task products to be implemented by the Capture Manager across the three focus areas (Customer, Internal Team, and Executive Leadership) in Figure 2. The time phasing of these activities should be early in the acquisition cycle to allow sufficient time for the team to respond to the plans. Most of the team's results will be captured in one of the four capture baselines used to generate the actual proposal material.

Illustrating the types of products needed during a major acquisition, we offer an example of a Campaign Plan that is depicted on one page and it defines the key elements of the overall capture plan (Figure 3).

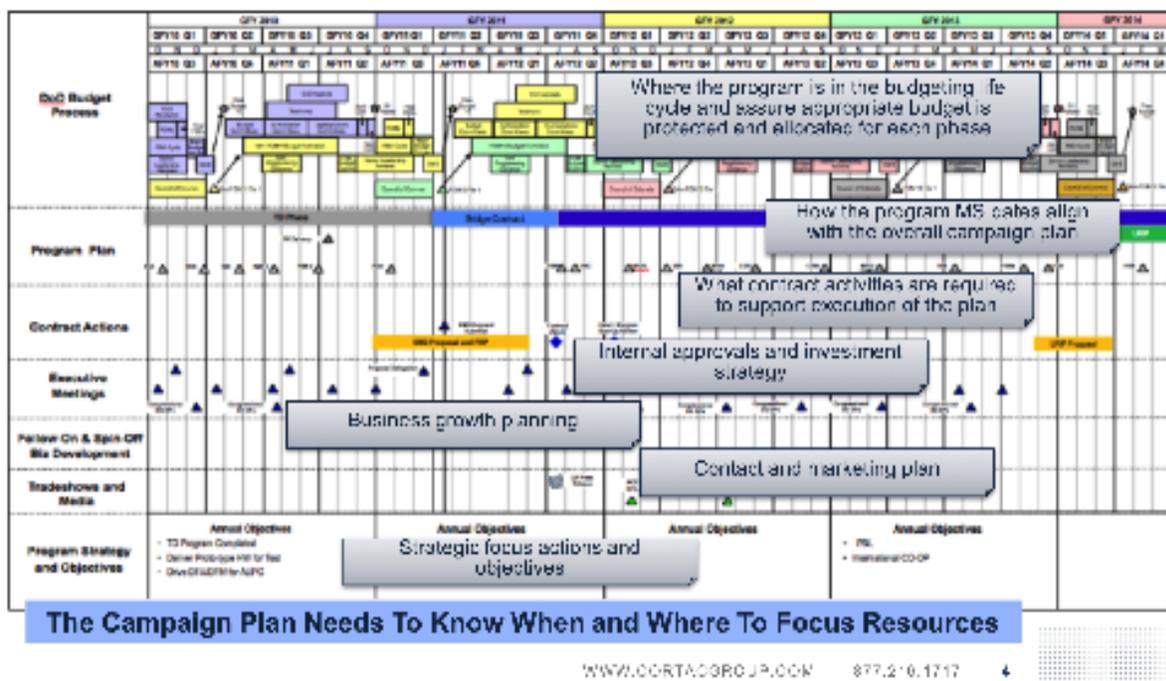
The figure shows the key decision gates, touch points, and strategic products to guide and direct the team and keep executive leadership informed. Additionally, the Capture Plan contains a set of schedules and descriptions of tasks to be accomplished. The plan leverages the top level capture strategy which contains a set of actions necessary to achieve the winning end state. Detailed tasks are generated to implement each of the strategy actions and position them in time against the known acquisition schedule.

Capture Manager Tasks	Products	Results
<b>External Facing Tasks</b>		
Analyze the potential acquisition approach and assess pros and cons	Most Likely Acquisition Approach Report	Identifies Targets of Opportunity that feed the capture strategy
Customer contact and executive message plan	Contact Plan	Contact rhythm with defined messages and objectives
Develop SOO, SOW, Spec or redline customer documents	Company drafts or customer redlined documents	Key customer influencers for major RFP elements
Draft RFP evaluation factors and criteria	Company drafts or customer redlined documents	Key customer influencers for will determine the winner
<b>Internal Facing Tasks</b>		
Build the winning team through strategic subcontracting	Teaming contact plan with definition of candidates, proposed scope and level of participation	Teaming strategy to enhance Pwin and reduce risk
Develop the capture plan that supports submitting the winning offer	Single page acquisition schedule with details in supporting Gant schedules with all major tasks	Time phased set of activities that must be complete prior to RFP release
Define the marketing tasks that support the capture	Augment contact plan with tasks to support marketing efforts	Time phased set of activities to influence the customer through marketing
Define the customer demonstration plan	Detailed risk mitigation plan linking pre-RFP activities with maturing the technical baseline	Risk burn-down plan that shows the proper level of technical risk at RFP, proposal submittal and beyond
Define the risk mitigation plan for internal requirements	Detailed risk mitigation plan linking pre-RFP activities with maturing all baselines	Risk burn-down plan that shows the proper level of program risk at RFP, proposal submittal and beyond
Develop Measure Of Effectiveness utility analysis	Series of trades and analyses that show the benefits of our solution	Defines why our offer provides best value to the customer
Define the program bid plan to develop costs consistent with PTW	Bid plan that describes the basis of estimates by program to be used to justify the proposal cost	Defines why our price is realistic, reasonable and complete with low cost risk
Define the baseline development and control plan	Detailed plan on the development of the 4 capture baselines	Linking tasks and cost with the strategy to justify the B&P budget
<b>Executive Facing Tasks</b>		
Develop the Capture Strategy	List the strategy actions needed to achieve the winning end state	Focus all efforts and expenditures on winning
Complete the competitive SWOT analysis	Plan to gather competitive intelligence and assess the likely competition against our offer	Provides guidance on what internal and external actions must be taken to ensure a win
Complete the Price To Win analysis	Detail price by CLIN, fiscal year and WBS element	Price compliant with RFP funding profile and competitive
Develop the company investment plan	Defines the amounts, types and sequencing of company funds to achieve the winning offer	Clear understanding of what funds are required to achieve which strategic actions for the win
Investigate and assess past performance impacts	List the actions needed to correct potential past performance evaluation impacts	Executive management sponsored action plan to achieve a Past Performance low risk assessment
Define the color team and gate review plan	Identifies the objectives, participants and commitments to complete these reviews	Sets the level of expectation with executive management on the offer maturity over the capture process
Define the risk mitigation plan for external requirements	Documents the actions to resolve company level issues and risks	Ensure the company executives address external issues that affect the competition

**Figure 2: Capture Management Products.** The capture management process provides an iterative approach that combines strategic planning and tactical execution activities to position the team to win.

The strategy and capture plan must be revisited and updated based on any major revelations developed during the competition. These changes could occur due to competitive actions, customer actions or revelations about the internal baselines as they are developed. All changes must be flowed to the implementation teams as they occur.

As one can see, the Capture Manager is very busy person and needs to allocate tasks to leaders across the capture team. They in turn must develop lower level plans to implement the strategic actions and report on progress on a regular basis. The plan also requires an understanding of the scope and resources required. Often the Capture Manager relies on the expertise of outside consultants such as those provided by the CORTAC Group. Our staff typically works one to three captures per year depending on size. Major acquisitions of \$1B+ often require bringing on this specific expertise early in the campaign to help identify the important aspects of the strategic actions and to help define the scope of these tasks.



**Figure 3 Campaign On A Page.** The overall plan to the Capture Management Plan guides the team on when and where to focus resources.

The expertise that we provide also helps your team during the transition from the early stages of the campaign to the proposal development phase when the proposal staff requires a complete understanding of the strategy as well as the program baselines that feed the proposal products.

**About CORTAC Group:** CORTAC was founded to foster and promote a team environment with leaders that have proven success. We provide training, project management, and proposal management resources and tailor our approach to best meet your business needs. Our experience allows us to quickly integrate with your team and help you achieve your goals. As part of our Proposal Development Services, we provide Capture Management, Proposal Management, Volume lead Management, and Price To Win capabilities. We work with your proposal team using a disciplined development process that is tailored to be compliant with your processes and needs.