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
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

- **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 many 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

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

**USDOE’16**

15th Annual DOE Small Business Forum & Expo
MAY 23 - 25, 2016 | ATLANTA, GA
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
  - Executive Decision Gates
    - Interest Decision
    - Pursuit Decision
    - Preliminary Bid 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
  - Federal Customer Activities
    - Draft RFP
    - Kickoffs
    - Final RFP

- Timeline:
  - Weeks or Months
  - PDWs/ Mockups
  - Proposal
  - Revised Proposal
  - BAFO/FPR Decision

15th Annual DOE Small Business Forum & Expo
MAY 23 - 25, 2016 | ATLANTA, GA
## Recommended Review Time Goals (New Opportunities)

<table>
<thead>
<tr>
<th>OPPORTUNITY SIZE</th>
<th>Stage</th>
<th>Up to $5M</th>
<th>$5M – $15M</th>
<th>&gt; $15M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification</td>
<td></td>
<td>Within 15 days of adding opportunity into pipeline</td>
<td>Within 15 days of adding opportunity into pipeline</td>
<td>Within 15 days of adding opportunity into pipeline</td>
</tr>
<tr>
<td>Qualifications/Pursuit</td>
<td></td>
<td>At least 45 days before expected RFP release</td>
<td>At least 90 days before expected RFP release</td>
<td>At least 180 days before expected RFP release</td>
</tr>
<tr>
<td>Preliminary Bid/No Bid</td>
<td></td>
<td>At least 30 days before expected RFP release</td>
<td>At least 60 days before expected RFP release</td>
<td>At least 90 days before expected RFP release</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Objective: Review the Opportunity Analysis Report to assess the opportunity’s early Pwin (win probability) and its alignment with organizational goals</th>
<th>Inputs and Tools:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus:</td>
<td></td>
</tr>
<tr>
<td>• Quality and quantity of information available</td>
<td></td>
</tr>
<tr>
<td>• Determine current Pwin</td>
<td></td>
</tr>
<tr>
<td>• Align with corporate, business, and strategic goals</td>
<td></td>
</tr>
<tr>
<td>Outcomes:</td>
<td></td>
</tr>
<tr>
<td>• Recommendation to bid, no bid, or reassess</td>
<td></td>
</tr>
<tr>
<td>• Develop strategic teaming development</td>
<td></td>
</tr>
<tr>
<td>• Begin Capture Process for potential bid opportunities</td>
<td></td>
</tr>
</tbody>
</table>

### Participants:
Executive Managers, BD Managers, Program / Technical Manager

“Winning isn’t everything, but wanting to win is.” – Vince Lombardi
## 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 | • 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**

<table>
<thead>
<tr>
<th><strong>Objective:</strong> Review the capture plan, updated to reflect findings of Black Hat and post review activities and analysis of customer hot buttons and competitors’ strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inputs and Tools:</strong></td>
</tr>
<tr>
<td>- Capture Plan</td>
</tr>
<tr>
<td>- Draft RFP, previous RFP</td>
</tr>
<tr>
<td>- Industry Day / Pre-proposal Conference Materials</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Focus:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Clear and thorough win strategies over competitors</td>
</tr>
<tr>
<td>- Win strategies to address customer requirements, hot buttons, and issues</td>
</tr>
<tr>
<td>- Reassess Pwin</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Outcomes:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Win Strategies for the proposal</td>
</tr>
<tr>
<td>- Solution to meet customer requirements</td>
</tr>
</tbody>
</table>

**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

### 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**

**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