

The Capture Manager Playbook

Presented By:

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Agenda

- ✓ Roles of a Capture Manager
- ✓ Capture Manager Goals and Milestones
 - Key Decision Gates
 - Key Reviews
- ✓ Identification and Qualification of Opportunities
- ✓ Capture Plan Development
 - Capture Plan Elements
 - Plan Management
- ✓ Win Strategy Development
- ✓ Proposal Support
- ✓ Action Planning and Execution



Roles of a Capture Manager

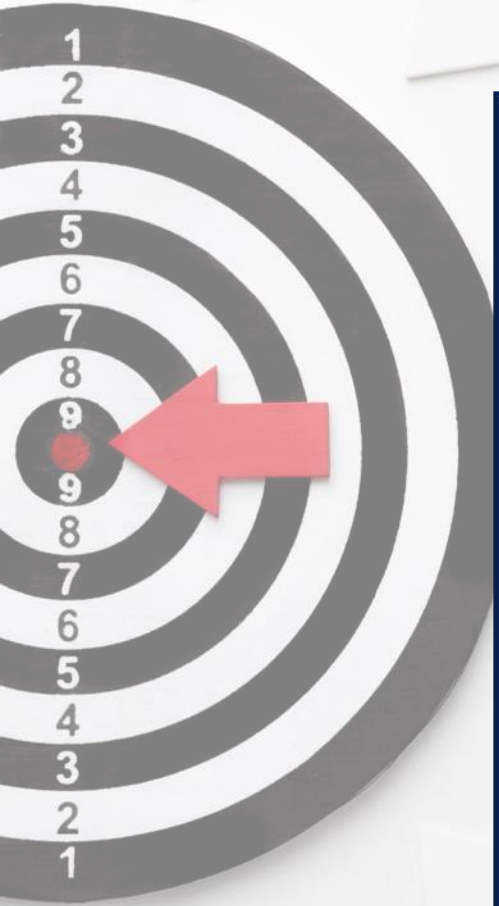
PRIMARY RESPONSIBILITIES

- ▶ Lead opportunities and sales activities
- ▶ Manage the entire capture process
- ▶ Develop opportunities/capture plan
- ▶ Create a core pursuit team
- ▶ Identify and prioritize the customer/s hot buttons and issues
- ▶ Assess the company's competitive position
- ▶ Identify discriminators, solution set, and win strategy
- ▶ Initiate small business plan and teaming agreements as needed
- ▶ Participate in key/major Decision Gates
- ▶ Facilitate all the lessons learned

SECONDARY RESPONSIBILITIES

- ▶ Assist proposal managers and writers in organizing the proposal team
- ▶ Collaborate on crafting a sales message and proposal planning/development
- ▶ Ensure the consistency of the pricing, management, and technical volumes
- ▶ Answer customer queries/questions
- ▶ Assist in customer negotiations
- ▶ Ensure the leadership is well-informed
- ▶ Help the project/program manager transition to contract execution

Capture Manager's 5 Goals



1. Assess the company's competitive position in the market
2. Strengthen the company's position, pursuit readiness, and customer relationship
3. Identify the real discriminators using SWOT Analysis
4. Develop the win themes
5. Establish a go-forward action plan/game plan

SURVEY TIME!

On a scale of
1 to 5, how
would you rate
your capture
discipline?

5

Outstanding

4

Very Satisfactory

3

Satisfactory

2

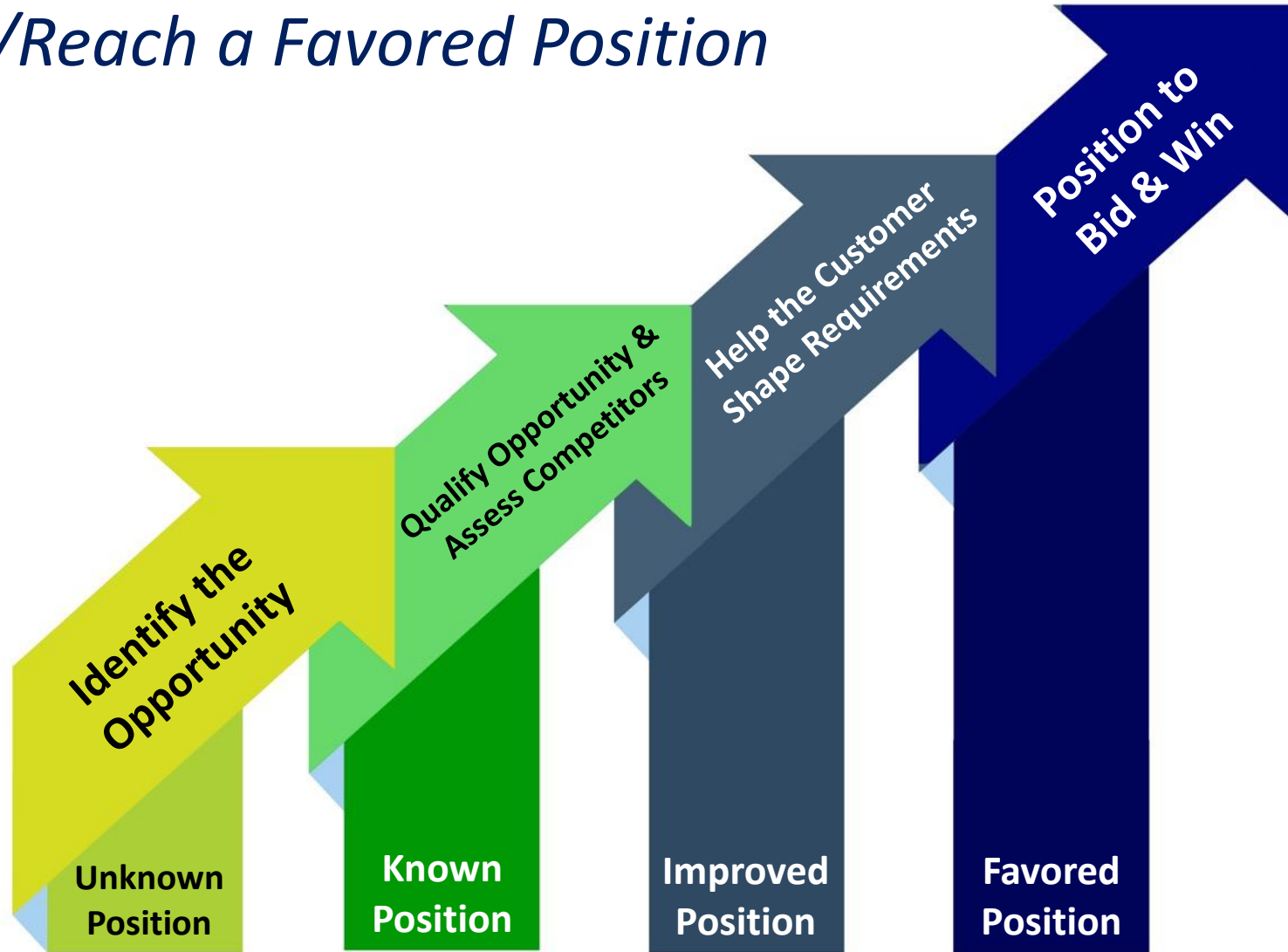
Unsatisfactory

1

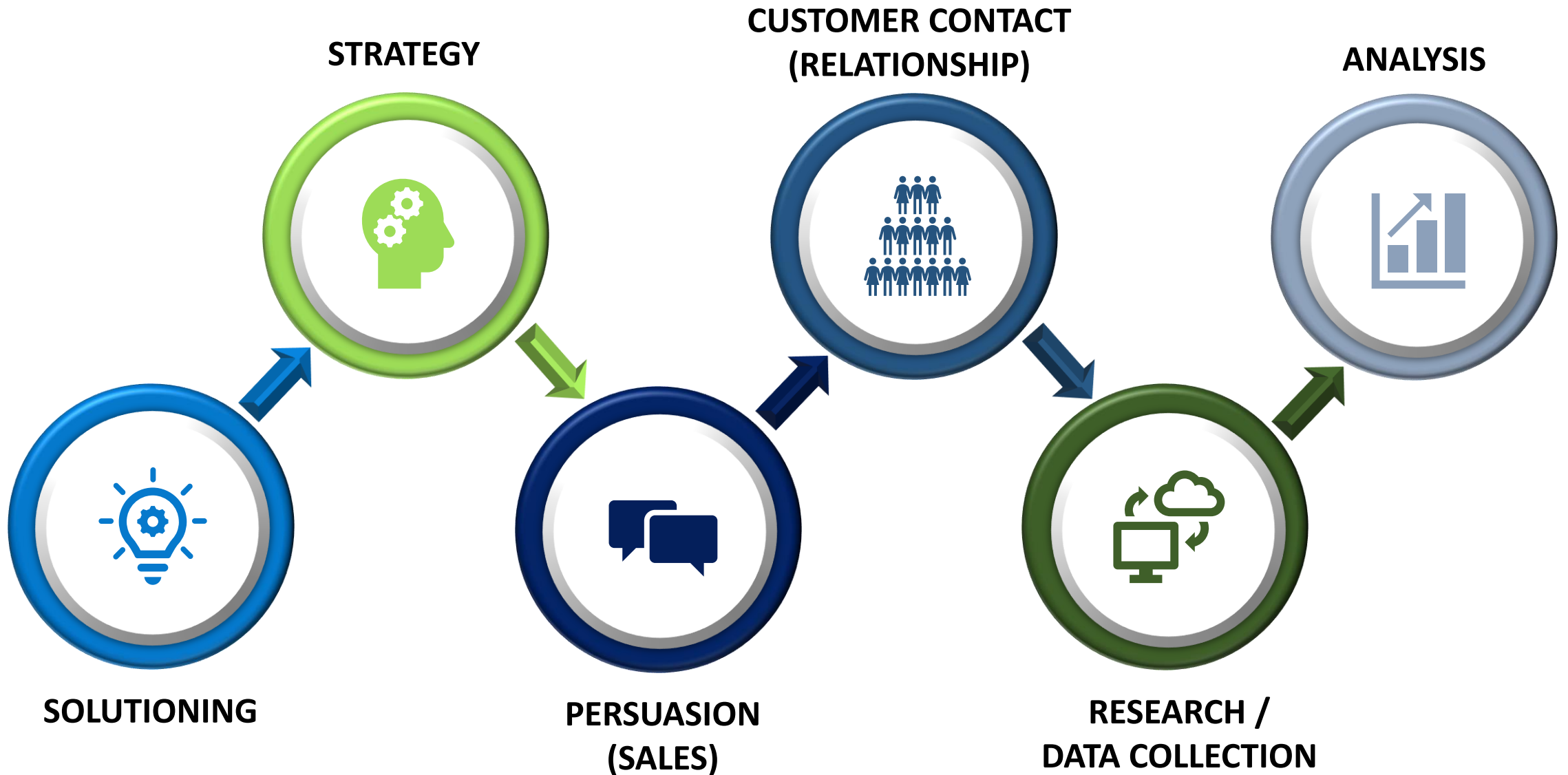
Poor

The Ultimate Playbook Goal:

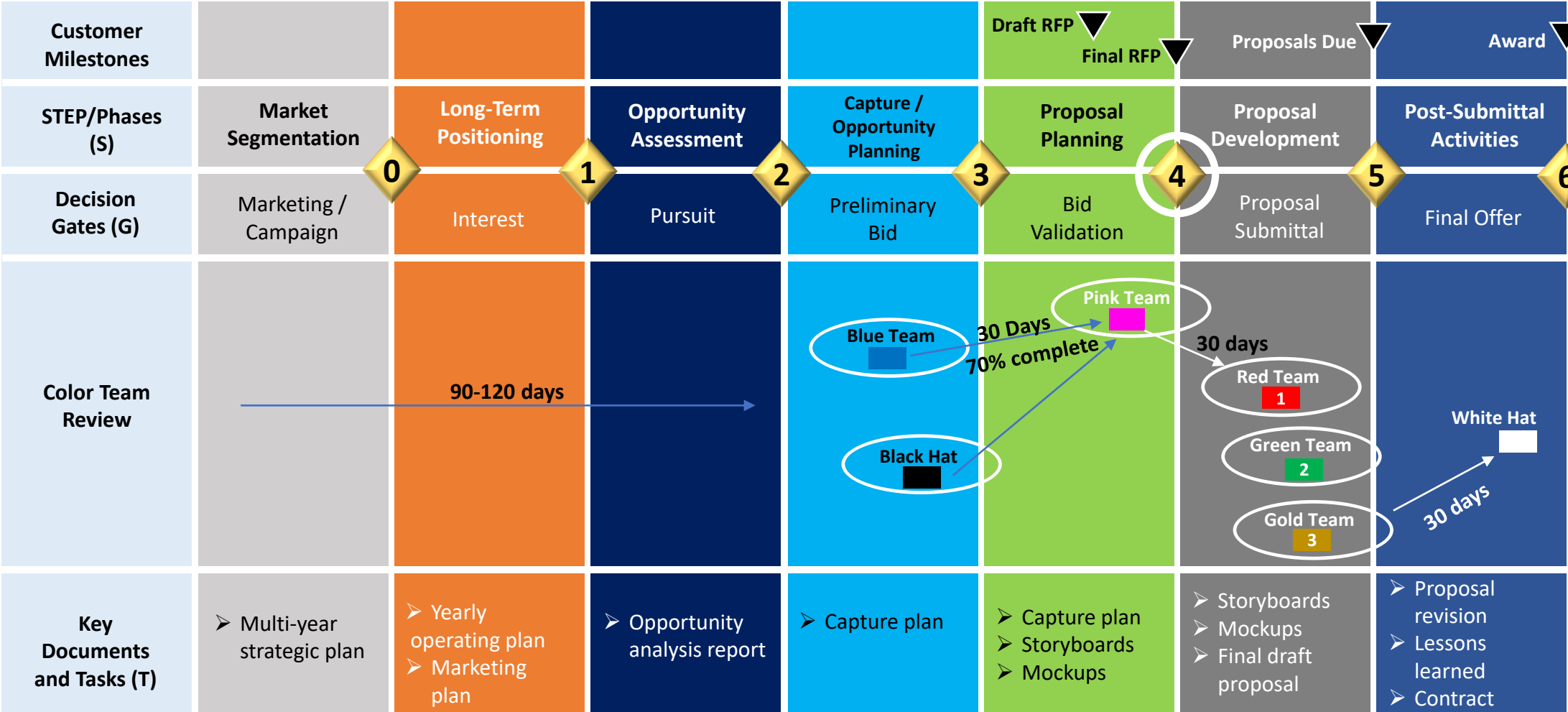
Advance/Reach a Favored Position



The Playbook Includes Lots of Moving Parts

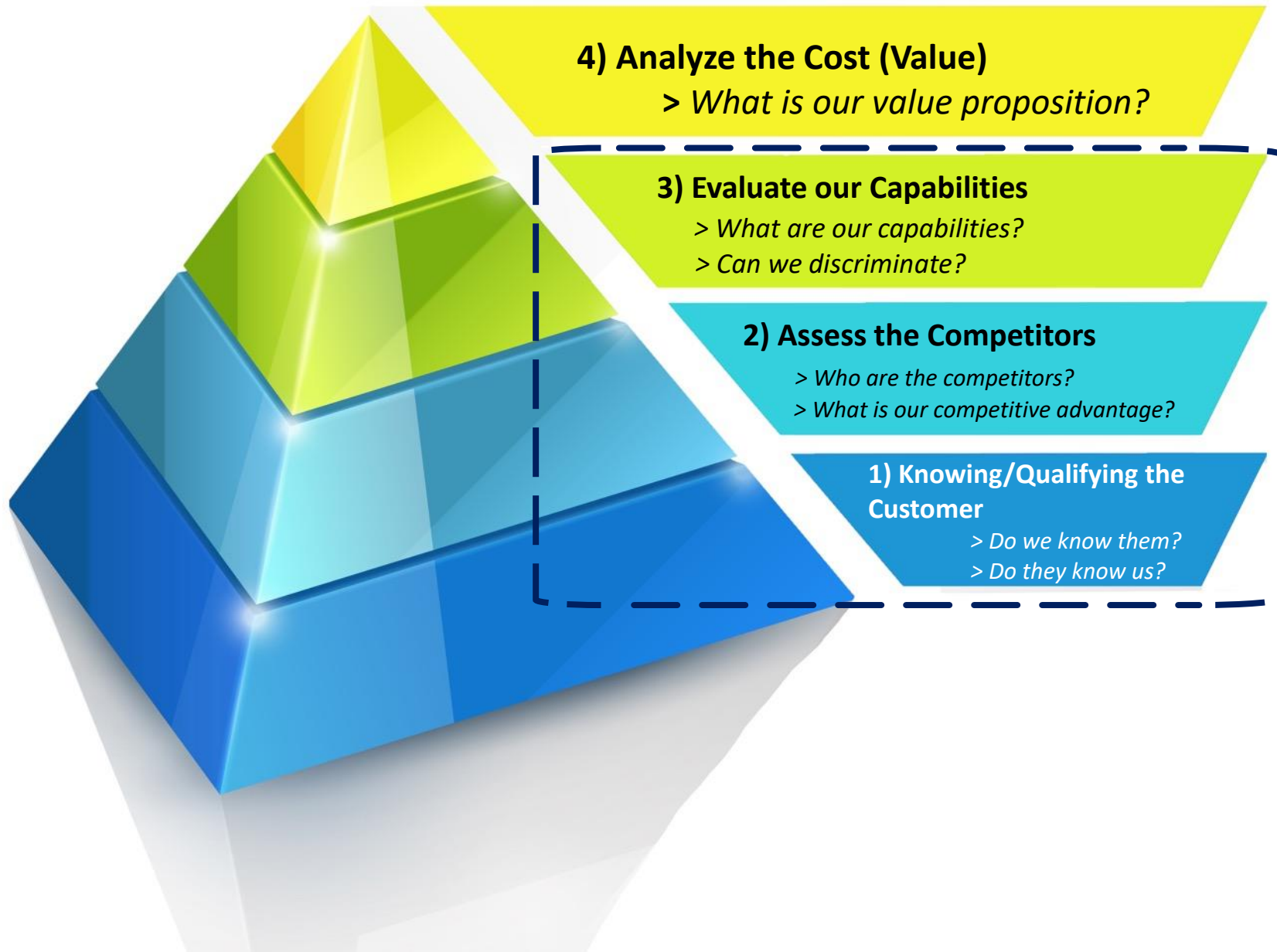


Learn the Important Pursuit Milestones (G-S-T Process)



Begin with the important milestones. Add more steps as you achieve success.

Focus on What Influences Your Pwin



The four C's in the Probability of Winning:

- Customer
- Competitor
- Capabilities
- Cost (Value)

IDENTIFY & QUALIFY OPPORTUNITY



Identify the Opportunities

Use Different/Varied Sources

SUBSCRIPTION
SERVICES



RELATIONSHIPS



MARKETING
& EVENTS



NEWS, WEBSITES, &
ANNUAL REPORTS



PROSPECTING &
NETWORKING



DATABASES



RESEARCH



DEMAND CREATION &
LEAD DEVELOPMENT





What is "it"?

Is it real?

Can we offer/provide it?

Will the customer/s buy from us?

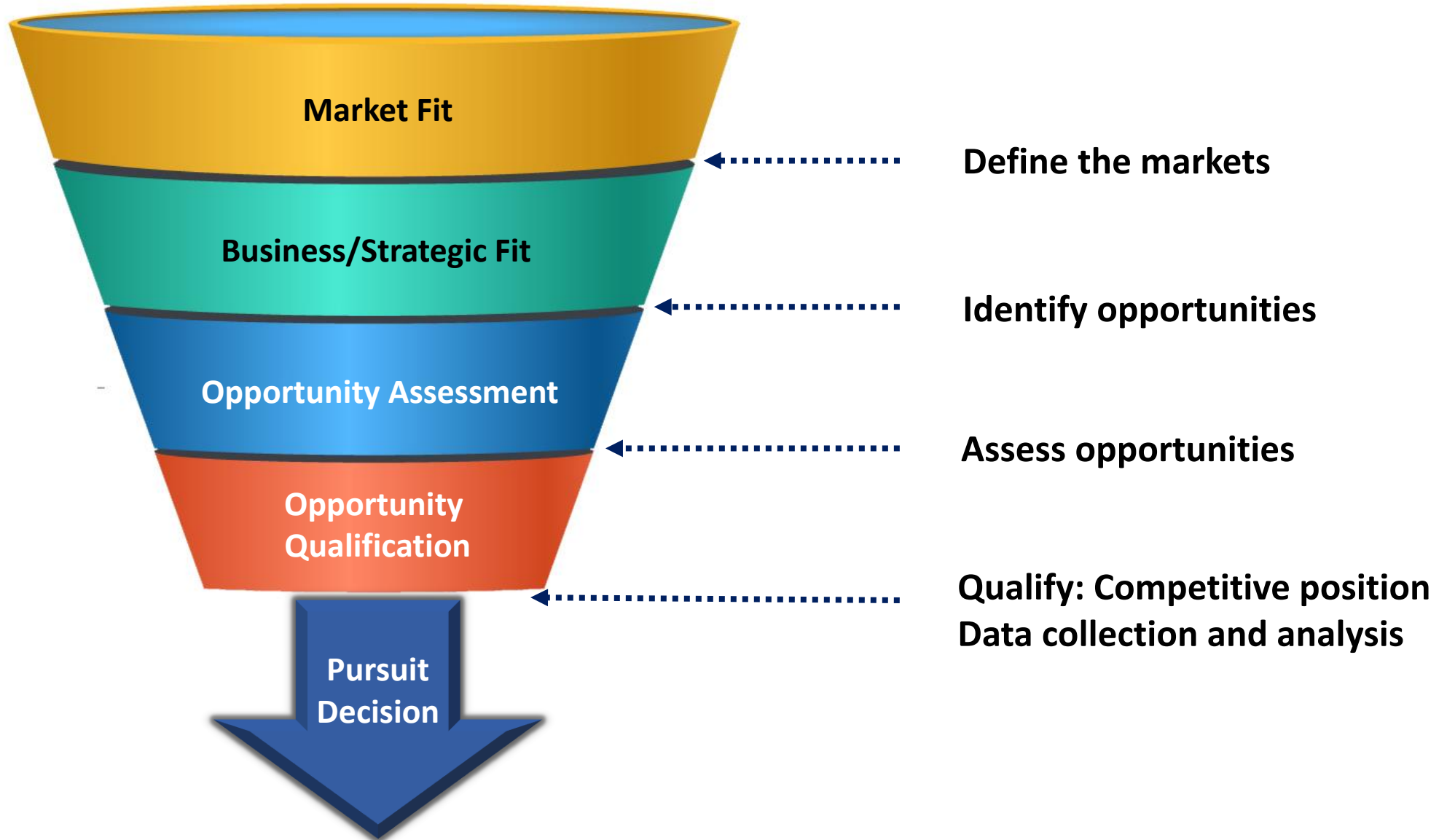
How much is the budget?

How will it be funded?

What is the schedule?

Where will it take our company?

Manage Opportunity Funnel





- 1) Determine the influencers and key decision-makers
- 2) Establish their roles in the company and the buying decision process
 - > *Leadership stakeholder*
 - > *Financial buyer*
 - > *Technical buyer*
- 3) Enumerate their primary and secondary "hot button" issues
- 4) Learn more about them
 - > *Networking*
 - > *Social media*

Know the Customer Decision-Makers

A group of seven business professionals, four men and three women, are silhouetted against a large, curved glass window. They are standing in a modern office space with a highly reflective floor that mirrors their figures. The scene is bathed in a cool blue light, and the window looks out onto a cityscape. The overall composition is sleek and professional.

Know & Study the Competitors

Unlock Your Success!

Our Call Plan and Acquisition Forecasts

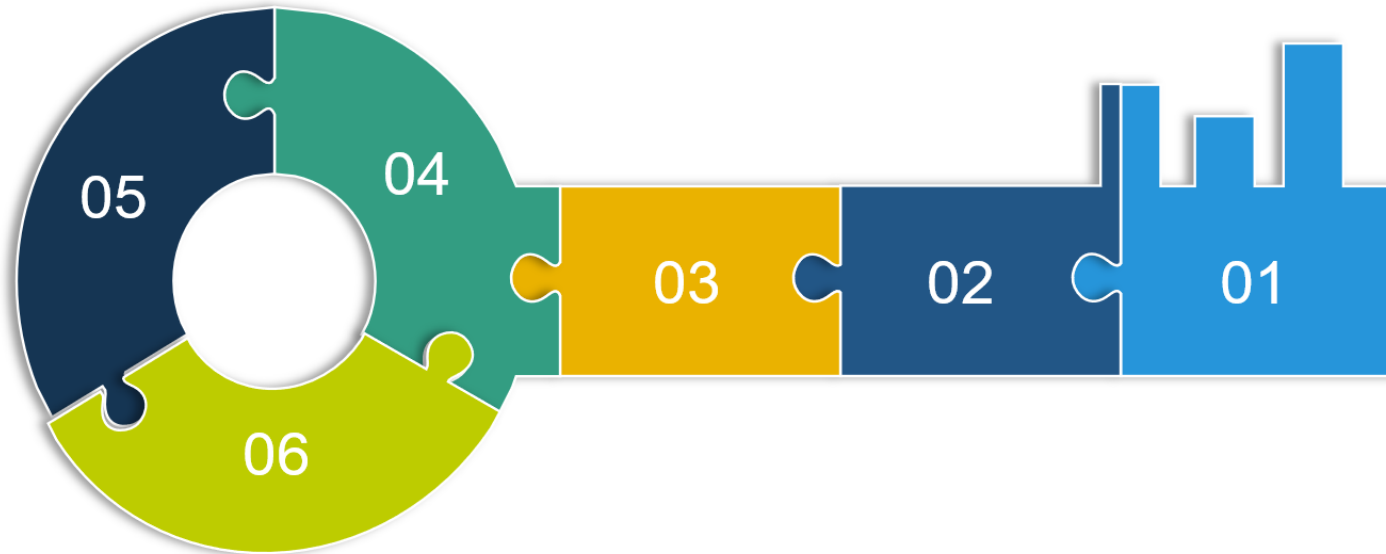
We have the most current up-to-date Acquisition opportunity Forecasts for key-buyer interaction.

Our Business Developers

Our CRM tracks, communicates, and maps our business development. We document our call plan interaction with our key-buyers on forecasted opportunities.

Our Govt-Buyer Relationships

Our focus Agencies are defined with key-buying office relationships to their Acquisition Forecast and databases



Our Strategy Focuses on Key Agencies

Agencies, both DoD and Civil, are listed with defined Buying offices, and Buyers, we have a monthly relationship year over year.

Our Vendor Selection is Eco-Buyer Friendly

Our business analyst research the buyer's current vendor list for CPAR excellence providing phycological and experienced advantages

Competitive Advantages

Our Buyer and Vendor Relationships provide us the ability verify competitive and incumbent information while positioning for success

Make a Sound Pursuit Decision using this Checklist:

- ☐ Are adequate business development resources available to develop the opportunity aggressively?
- ☐ Is teaming required for the opportunity?
- ☐ Are there any acceptable profit margins or other strategic reasons for wanting to win?
- ☐ Are the **key decision makers**, issues, and **hot buttons** known?
- ☐ Do the key customer stakeholders know us?
- ☐ Are our understanding of our anticipated roles clear?
- ☐ Are there any possible conflicts of interest for us?
- ☐ **Have we determined any probable competitors?**
- ☐ Is the price to compete already established?
- ☐ Do the customer's requirements match our competencies?
- ☐ Is a baseline solution that is aligned to the price to compete available?

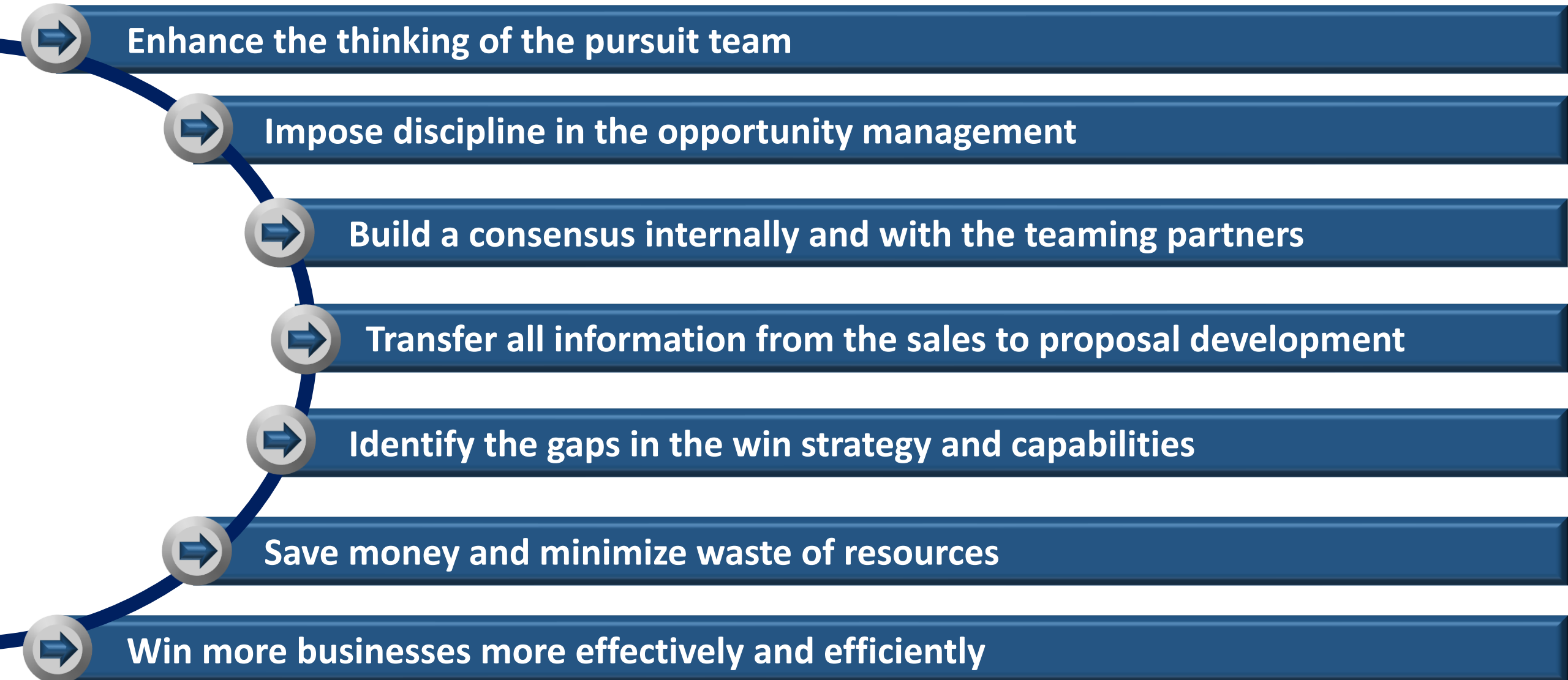
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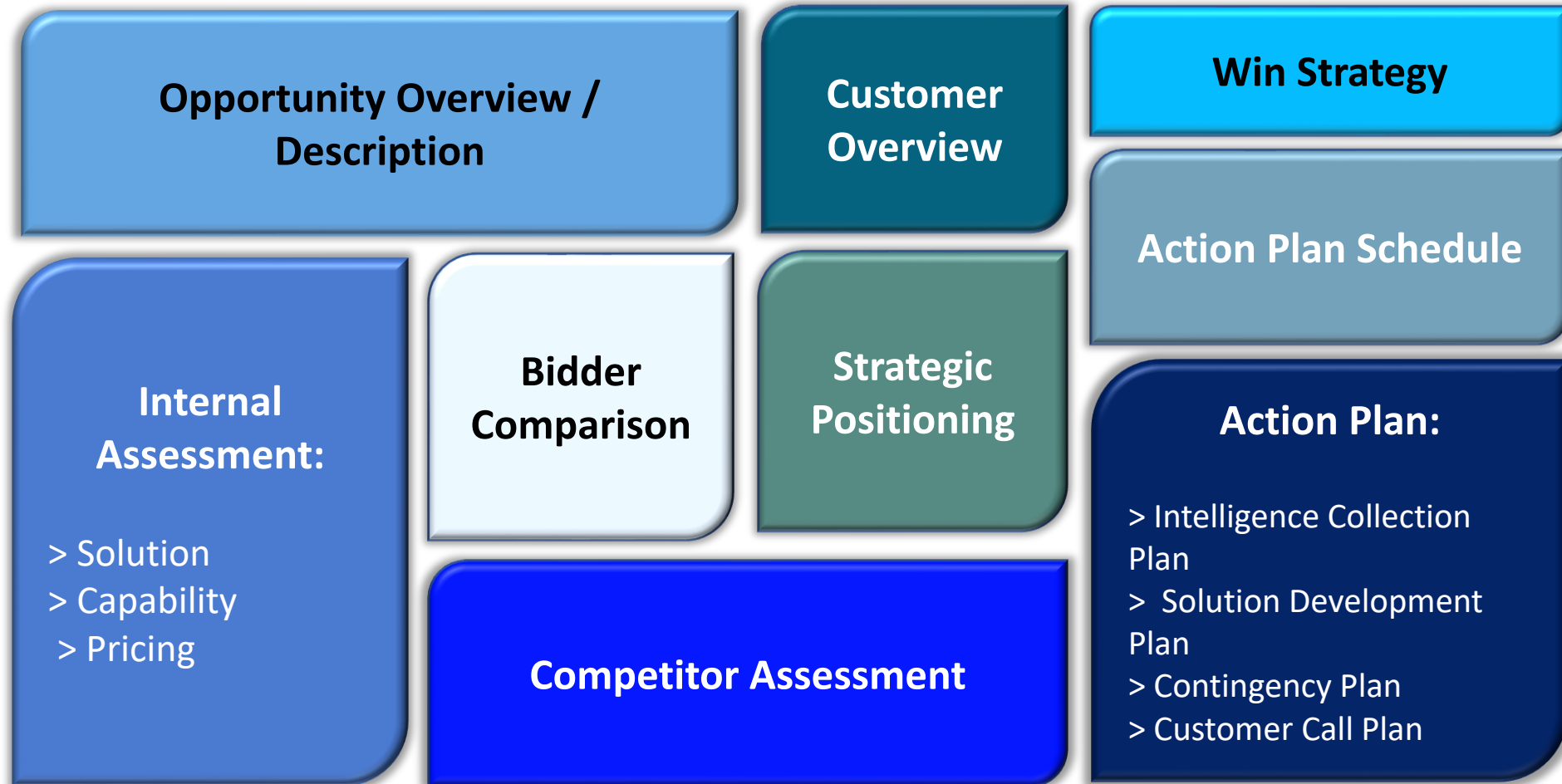
Capture Plan (Playbook) Development

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Importance of Developing a Playbook



Capture Manager Playbook Elements



Iterative Steps to Help Develop Your Playbook

Populate

- Populate the sections for the capture plan
- Maintain the customer focus and perspective
- Research information from various sources

Validate

- Use different sources for the customer and competitor information
- Confirm the agreement and support for the internal information and decisions

Update

- Look for information to fill the gaps
- Add new information as soon as it becomes available
- Use different sources for updates

Implement

- Keep communication open across the team
- Gain support from the management
- Use the capture plan to guide action
- Speak with your team members; avoid relying on the capture plan as your plan as a means of communication

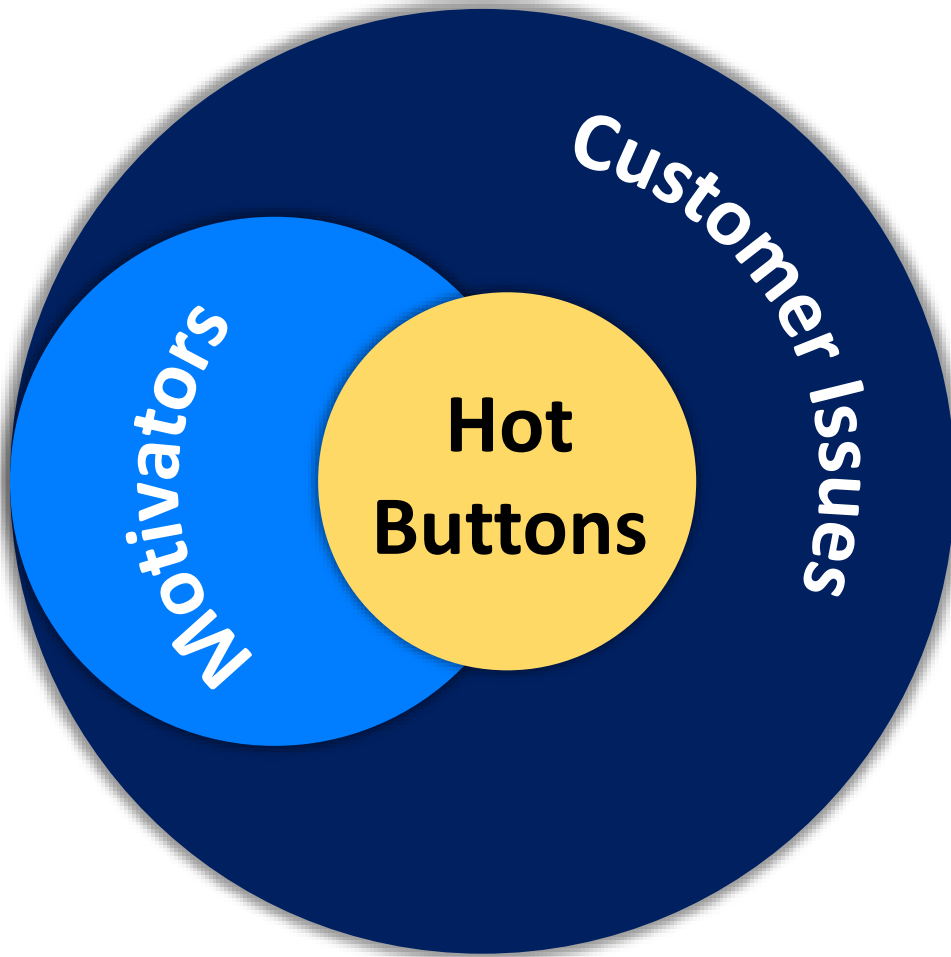
Implementation is the most important. It is possible to develop and implement strategies that help improve the Pwin by starting early.



Win Strategy Development

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Identify Customer Issues, Motivators, & Hot Buttons



- **Issues** are the customer's concerns or worries that keep them awake at night.
- **Motivators** are the objectives that the customer is trying to attain.
 - > Increase sales and profits
 - > Expand on a global scale
 - > Decrease costs and redundancy
 - > Improve customer satisfaction
 - > Achieve the mission – support the end user
- **Hot buttons** are a collective set of customer issues and motivators.

Identify the Discriminators through SWOT Analysis



Apply the *Win Strategy Formula* to Your Playbook



Conduct a Win Strategy/Blue Team Review

Inputs



Blue Team Review

Outputs





Develop & Execute the Playbook Action Plan

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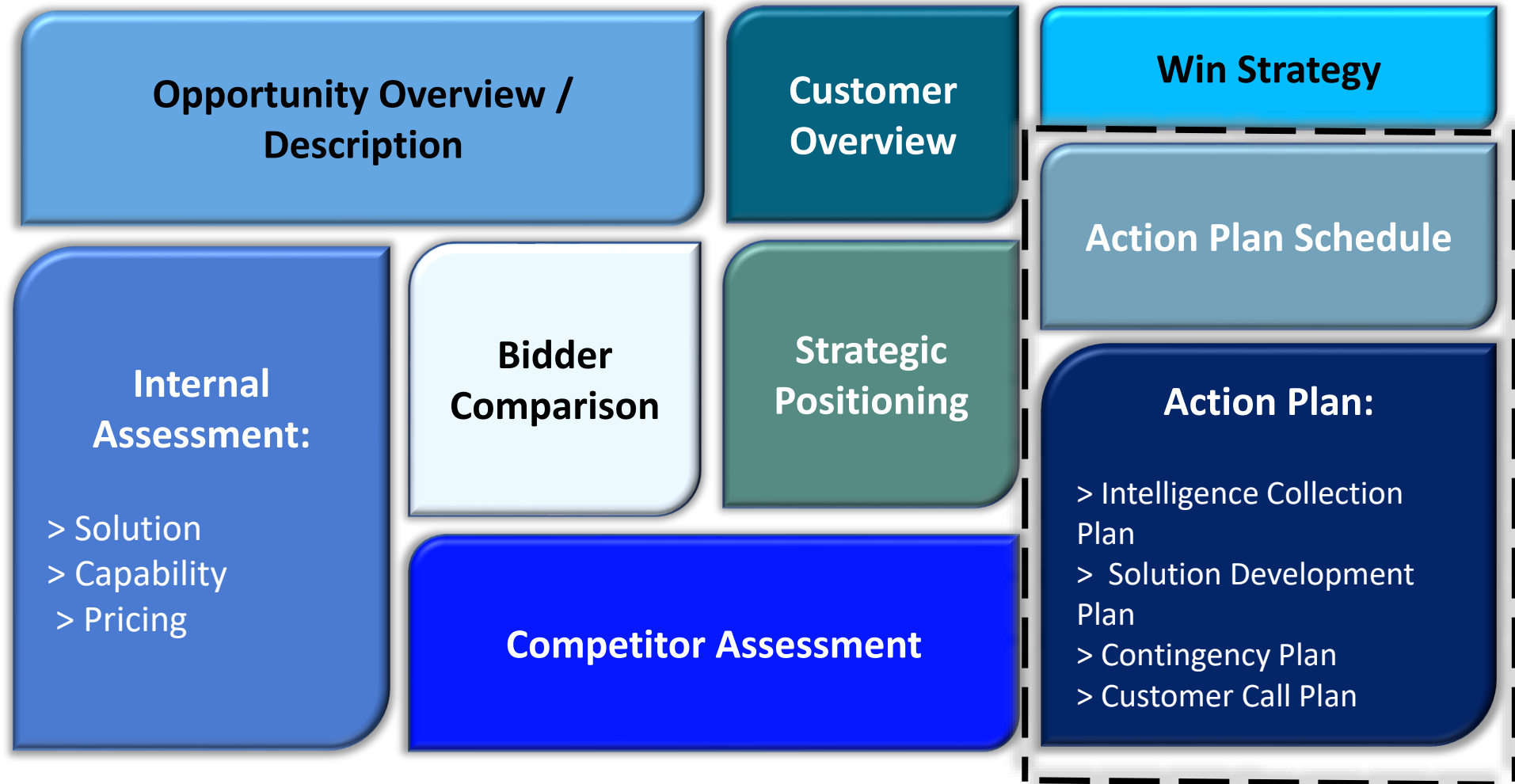
Make a Preliminary Bid Decision with this Checklist:

- ☐ Do we have a clear understanding of the deliverables and the schedule?
- ☐ Are we sure about the evaluation process we need to use?
- ☐ Do we know the customer's **perception of the competitors**?
- ☐ Was an objective **bidder comparison** completed?
- ☐ **Are there any firm commitments needed from essential teammates?**
- ☐ Do we have strong and relevant **past performance proof**?
- ☐ Will our management approach provide a value-added impact?
- ☐ Will our technical solution provide a value-added impact?
- ☐ Can the customer justify choosing us based on our **discriminators** and pricing/cost?
- ☐ Was the price to win determined? Is it acceptable to the management?
- ☐ Is the customer complying to the expected buying schedule? If not, what is the reason? What does this tell us about the opportunity?

☐☐☒☐☐

Game Planning:

The Many Elements of an Action Plan



The game plan must be able to answer...



Action Plan Elements in Your Playbook

**Intelligence Collection
Plan**

Contingency Plan

**Solution Development
Plan**

Schedule

Customer Call Plan



Proposal Support

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Include *Win Strategy* Statements in Your Playbook to Aid the Proposal Team

We will leverage our strength in _____ *(attaining deadlines)* by
_____ *(providing three past performance samples)* to attain _____ *(improved credibility and customer confidence)*.

Win Strategy Statements Can Help:

- > Shift focus on hot button issues
- > Remember the key discriminators
- > Provide key sales messages for the proposal writers

Draft the Theme Statements & Win Themes To Jumpstart the Proposal



Customer & Benefits First

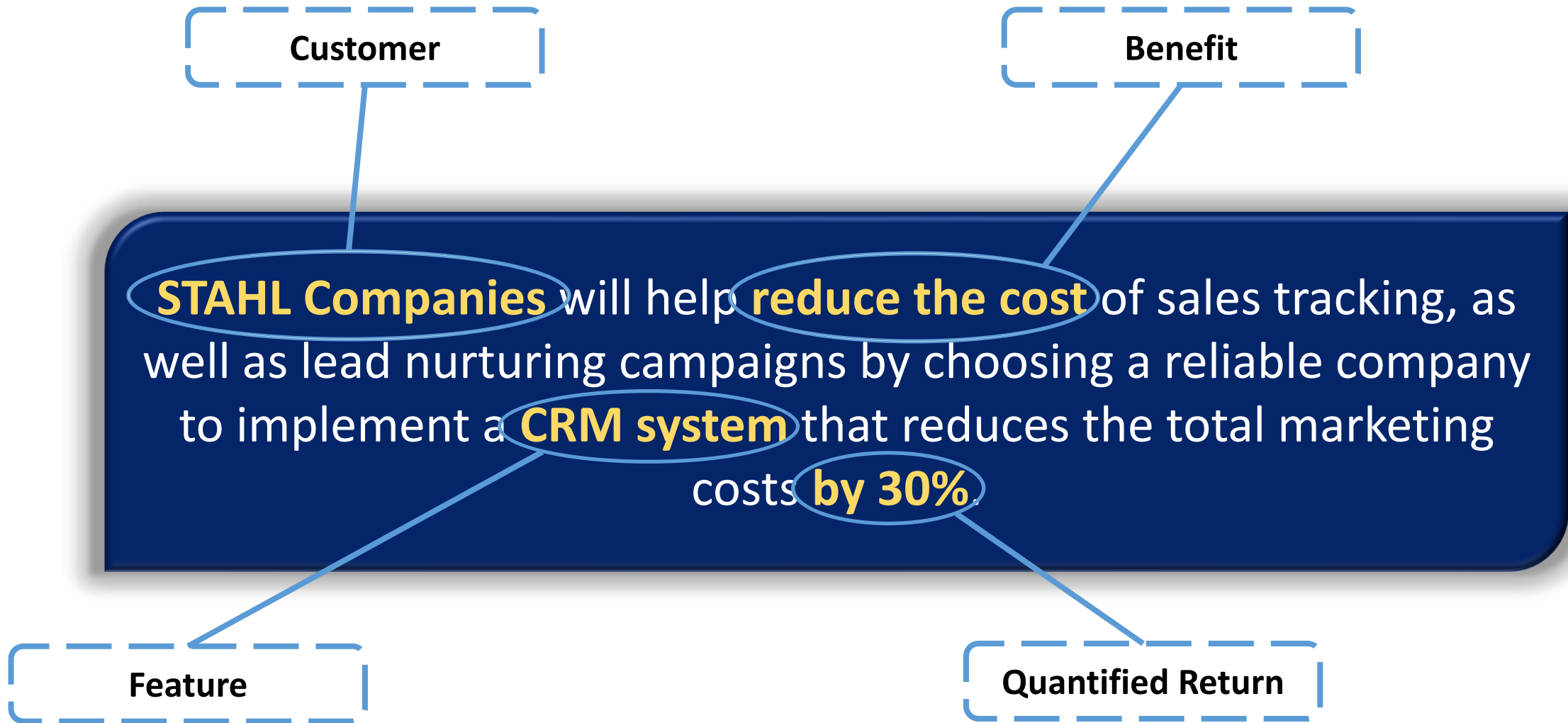
Customer

Benefit

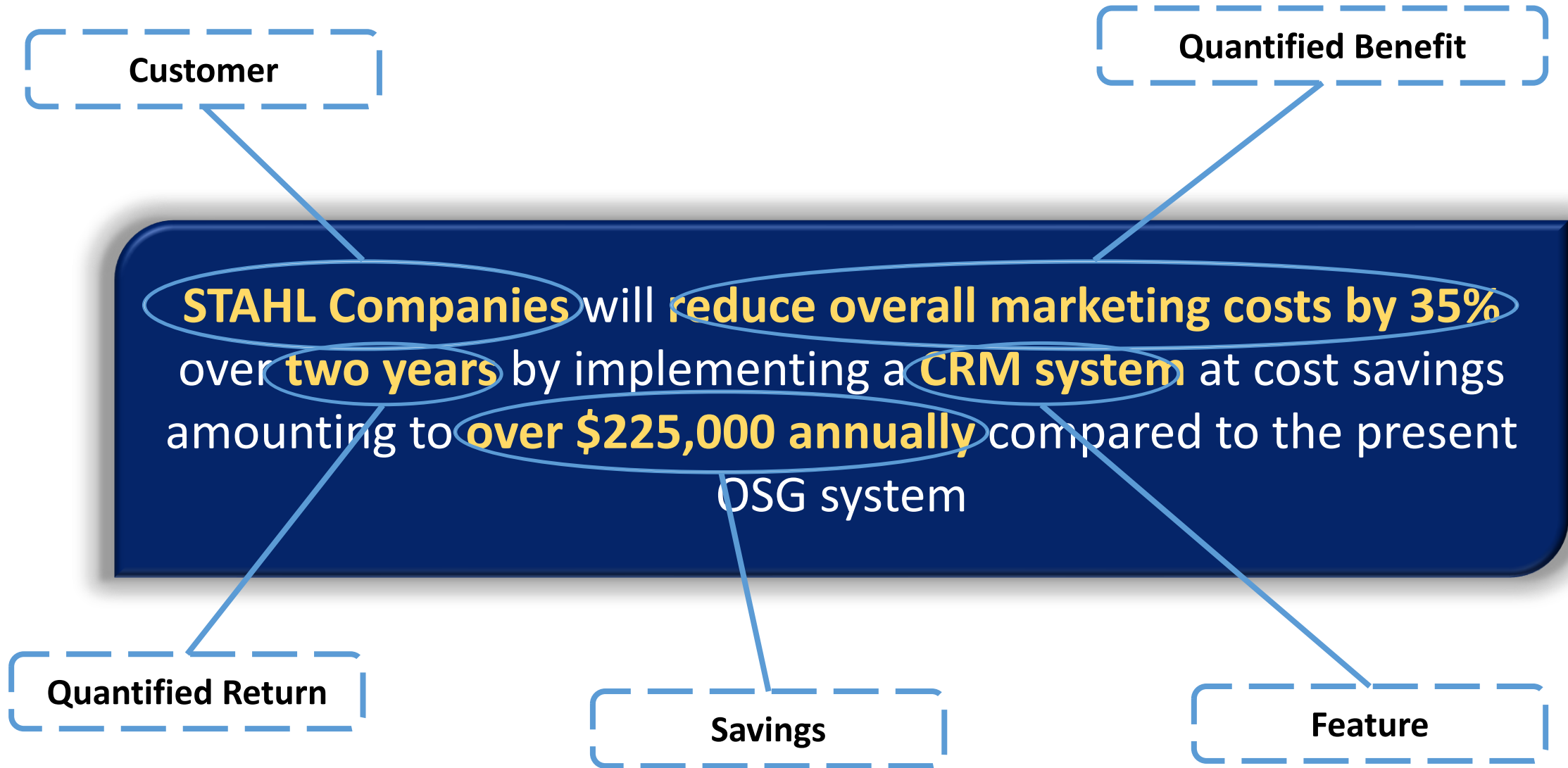
STAHL Companies will help **reduce the cost** of sales tracking, as well as lead nurturing campaigns by choosing a reliable company to implement a **CRM system** that guarantees immediate results and long-term support of your goals.

Feature

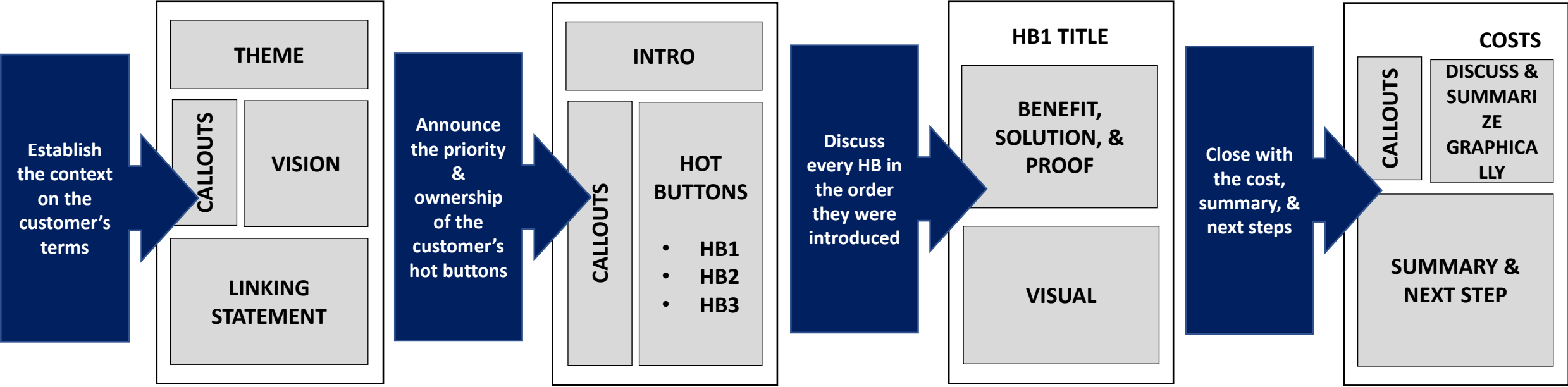
A Theme that Includes a *Value Proposition* is Stronger



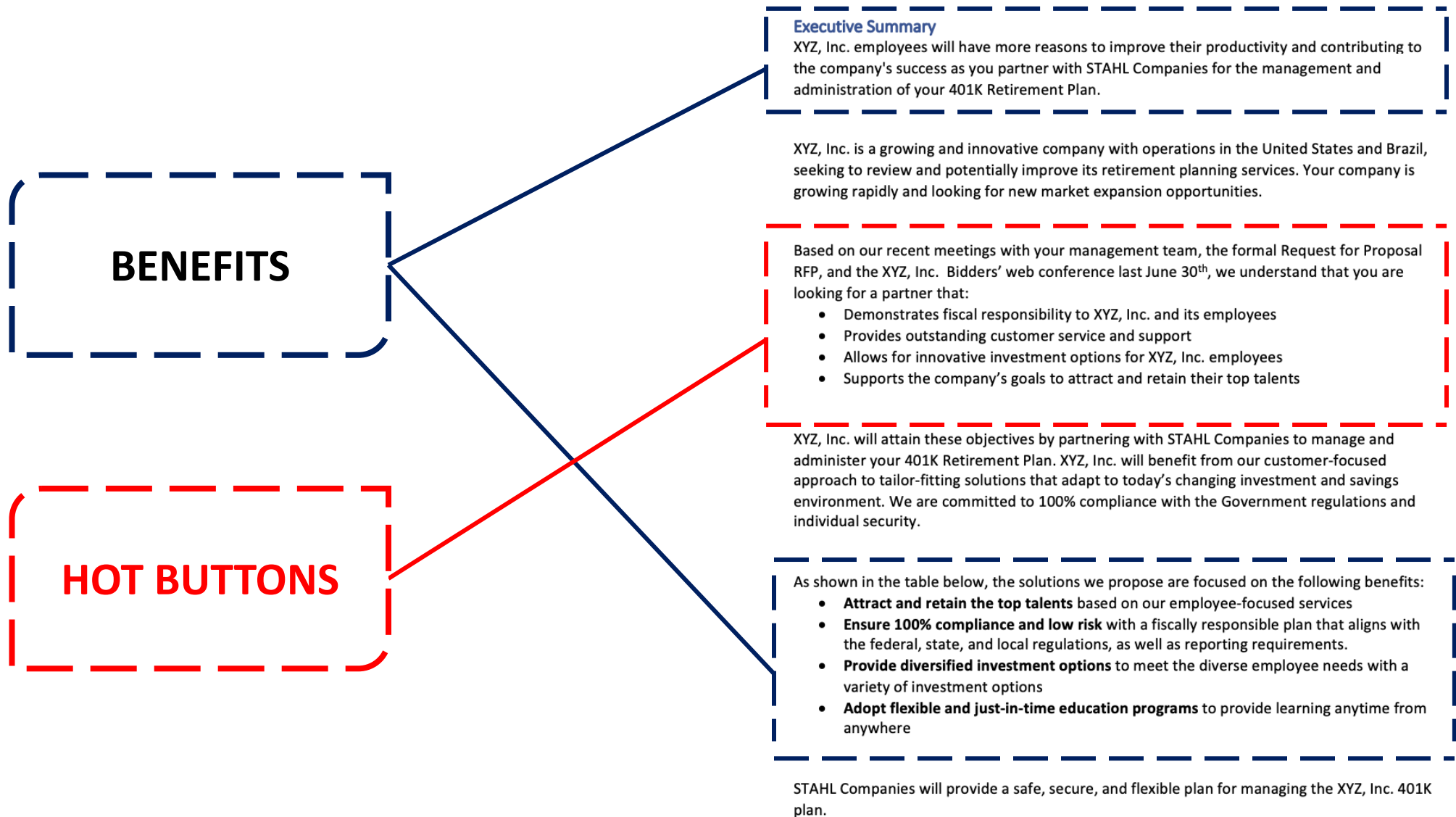
A Detailed Value Proposition is Even Stronger



Draft a Summary that Focuses on the Customer's Hot Buttons



Executive Summary Sample



Summary: *The Capture Manager Playbook – Simplified!*



**Competitor
Analysis**

**Customer
Analysis**

Capture Strategy Development

Action Planning & Execution

Questions & Discussion Time



THANK YOU!

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