



# GETTING REAL ABOUT CAPTURE TO PROPOSAL TRANSITIONS

*The transition from capture to proposals is rarely  
“textbook smooth” and is filled with challenges*



# Introductions

Brenda Crist has 25+ years of experience providing capture management, proposal management, and proposal writing support. She has been a Vice President at Lohfeld Consulting since 2008. She is certified by APMP at the Professional Level, is an APMP Fellow, and is an APMP Certification Instructor.



Martha Swift is the Sr. Manager of the Capture Advancement Team for Collins Aerospace. She leads a small team of capture center professionals, including proposal specialists and a graphic artist who support the Connected Aviation Solutions Capture Center. She is the President/Chapter Chair for the APMP Chesapeake Chapter. She is an APMP Proposal Manager with more than 25 years of proposal management experience. She has led proposal efforts spanning multiple industries (aviation/aircraft systems, construction, architecture, and engineering) for commercial, U.S., and foreign government clients for domestic and international projects up to \$300M in value.

# Agenda

1. The textbook transition from the capture to the proposal
2. The transition checklist
3. Address transition issues
  - RFP Surprises
  - Partner issues
  - Key personnel
  - Speedy handoffs
  - Handoffs of large and complex proposals
  - Twin transitions for multi-phase RFPs
  - No capture handoffs
4. Lessons learned
5. Next steps

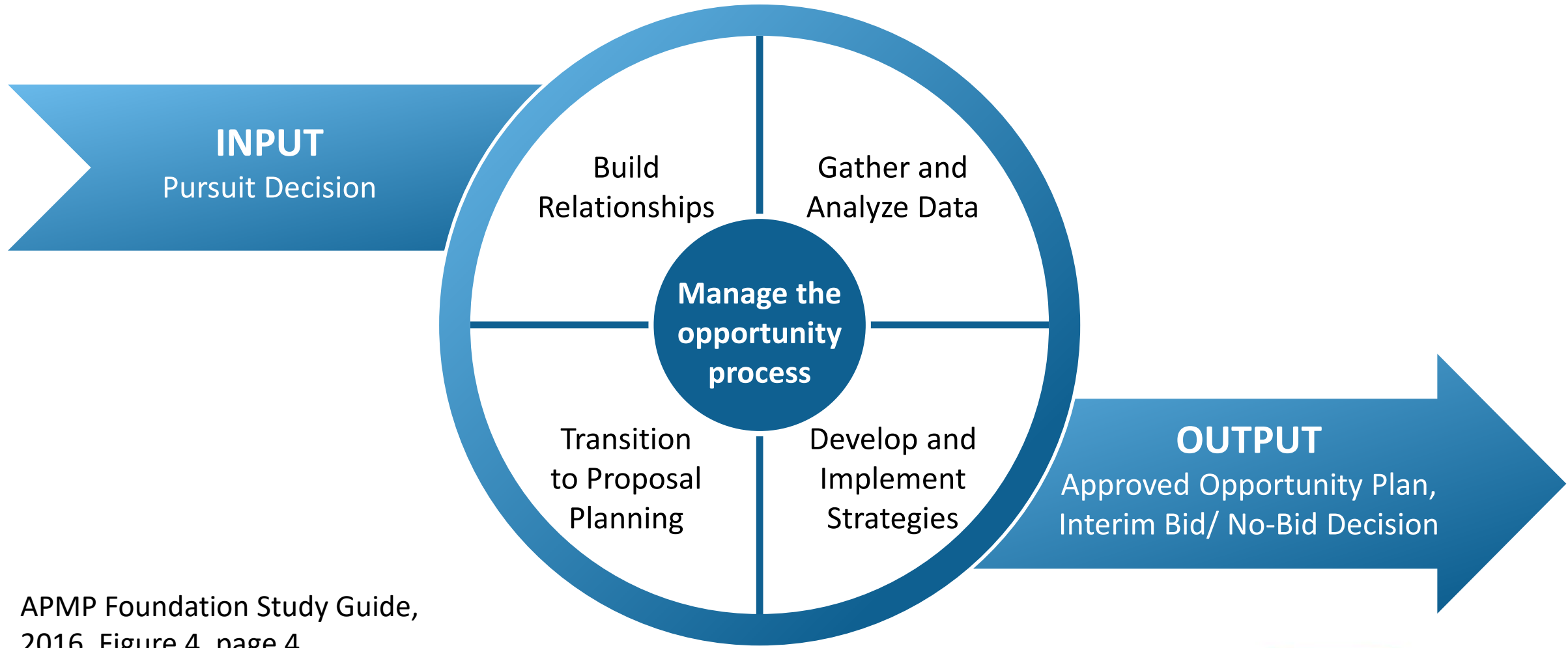




# The textbook transition from the capture to the proposal



# The textbook transition from the capture to the proposal



APMP Foundation Study Guide, 2016, Figure 4, page 4.

# Survey says

Let's do an informal poll of the audience with hands raised; upon transition to the RFP, what percentage of the capture is usually completed after your RFP drop?

76% or  
more

51% - 75%

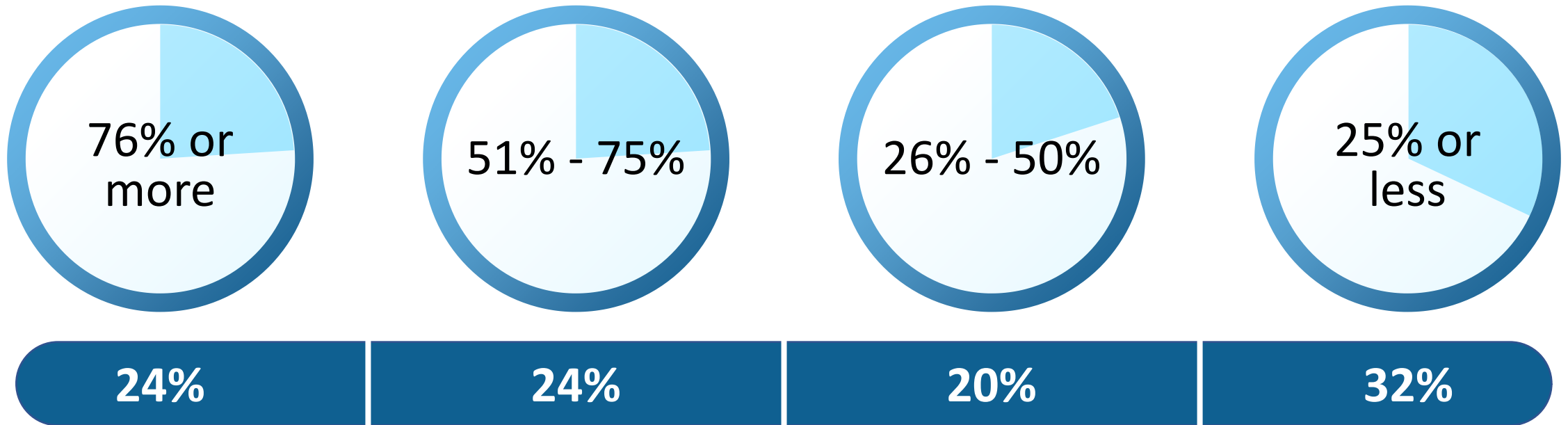
26% - 50%

25% or  
less

Would anyone like to expand upon their answer?

# External Poll = Survey says

When asked what percentage of capture is usually completed upon the transition to the proposal after the request for proposal (RFP) drops, LinkedIn respondents indicated:



# Typical transition gaps

Most likely, you will find once the RFP is released that gaps include:

- Post-RFP surprises
- Teaming partner issues
- No key personnel
- Short-term deadline
- Large complex proposal
- Multi-step transitions
- Dumpster fires (little to nothing is done)







# The transition checklist



# Transition checklist

## Bid history and overview

### Pre-RFP work

- Minutes from customer meetings
- Data calls information collected during the capture
- Content plans created during the capture

### Strategy information

- Draft executive summary/overview
- List of strengths across all evaluated criteria
- Relevant competitive information to share with writers

### Solution information

- Concept of operations diagram
- Solution descriptions or notes that are taken from solution development meetings
- Preliminary graphics depicting the solution
- Plans that support the solution

## Personnel information

- Staffing plan
- Staffing plan rationale
- Key resumes (in any condition)

## Past performance candidates or summaries

- Verification of past performance candidates
- Previously written past performance summaries
- Updated contact information for references

## Business or pricing information

- Preliminary pricing
- Draft bill of materials (BOM) or BOM quotes
- Draft basis of estimate (BOE)

## Partnering information

- Signed non-disclosure agreements
- Draft teaming agreement statements of work

## Contact list of proposal participants

## Communications and Access

## Internal signoff requirements list

# Rate the capture maturity and completeness

- **Highly Mature:** all strengths are documented, and the solution is complete with few risks, if any. The capture is complete with minor exceptions.
- **Very Mature:** most strengths are documented, and the solution is almost complete with few risks. The capture is mostly complete.
- **Somewhat Mature:** some strengths are documented, and the solution has some gaps and risks that need mitigation. The capture is somewhat complete.
- **Immature:** few strengths are documented, and the solution has gaps and significant risks. Very little of the capture is complete, with minor exceptions.
- **Dumpster Fire:** Little if anything is done.

Note: You can also use a range of automated tools to access your capture, such as OneTeam



# Address transition issues



# RFP surprises

- Scope changes
- Schedule changes
- Vague requirements
- Proposal size/price-to-compete changes
- Key personnel changes
- Past performance requirements change
- Deliverable changes
- Unexpected evaluation criteria
- Change from large to small business procurement



# Address surprises

- Plan for the worst-case scenario in advance
- Triage the existing assets upon release of the RFP
- Make an immediate bid / no-bid decision
- Acquire the resources to address the surprises



# Partner issues

- Produce proposal artifacts at their convenience
- Produce work that is uneven in quality
- Don't provide their most qualified personnel
- Game the process to try to increase their workshare
- Too many teaming partners

[Teaming Solutions - Beyond the APMP BoK | APMP TV | Video & Webinar Library](#)

# To improve relationships

- Identify key contributors and alternates
- Establish a status or standup meeting cadence
- Integrate teaming partners into meetings
- Integrate partners into the solution development team
- Use their knowledge of the customers and competitors to refine solutions
- Let them know they are appreciated and that their contributions are valued





# Integrate partners into reviews

- Train partners to review the proposal using your tools and processes
- Train partners to score and evaluate the proposal like the customer
- Provide teaming partners with enough time to review a proposal



# Partners and pricing

- Identify and, if time permits, negotiate unresolved pricing issues as soon as possible
- Send out data calls as soon as negotiations are complete
- Acquire business volume information via data calls
- Allow enough time to respond to pricing data calls

# Address rogue behavior early

- Confront misunderstandings and miscommunications early (through daily/weekly status meetings)
- Address poor performance immediately (if the partner is not doing their job, address issues immediately before risks occur)
- Develop an improvement plan and reward improvements
- Enforce the exclusivity of your relationship with the customer

# Missing key personnel

- Key personnel are often the longest pole in the tent and are often hard to find
- RFPs often require each key person's resume and commitment letter
- Depending on how hard they are to find, make an immediate bid/no bid decision



# Advance Preparation

- Keep resumes of senior managers and SMEs updated
- Identify key personnel and backups prior to RFP release
- Post-RFP preparation
- Identify personnel within the team first
- Concurrently source them from outside the company
- Dedicate enough time to developing exceptional resumes

# The speedy handoff of a quick-turn proposal

- 5 days or less
- 6-14 days
- 15-30 days

# Tips for a speedy handoff

- Draft or high-level executive summary
- List of strengths associated with each evaluated criteria
- Concept of operations diagram and/or annotated outline
- Staffing plan and rationale
- Key personnel resumes
- List of teaming partners their contacts, and previous data call results
- Past performance candidates
- Target price and pricing information
- Staff availability (leave/vacation days)

What else would you ask for?

# Transition large and complex proposals

- Managing large complex proposals is like steering a cruise ship; it has many parts and many people supporting it
- To put these bids in perspective, companies typically spend .05% to 1-2% of the contract's value on a complex proposal
- On a \$1B bid, it is not unusual for a company to spend \$10M in bid & proposal (B&P) dollars over a 2-year period or \$5M annually





# Checklist and transition kickoff required

- Completed transition checklist
- Transition meeting
- Assistance preparing for the kickoff meeting



# Transitions for multi-stage RFPs

- Multi-stage proposals help customers whittle down the competition with a small investment of time
- The first stage usually involves a review of offerors' past performance for recency and relevance
- The second state can vary from a written proposal to an oral proposal to a technical change with a price volume
- Customers typically send letters advising companies to advance to Stage II rather quickly (in about two to three weeks)

# Stage 1 and Stage 2 preparation

## Stage 1

Identify and transition the required past performance and verify they meet and consistently exceed the customer's requirements for recency and relevancy

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## Stage 2

Start this stage concurrent with Stage 1 and transition all the pre-RFP materials developed, as described in Slides 18-22, for a short turnaround proposal

# The dumpster fire – no capture has occurred



# Quick triage

1. Do we have a win strategy and strengths?  
If not, who can help develop it?
2. Do we have a solution?  
If not, what are our gaps?
3. What material can we reuse?
4. Do we have key personnel?  
If not, who can identify them?
5. Do we have past performance candidates?  
If not, which ones are the best fit?  
Where do we find the latest write-up?



# Quick triage continued

6. Do we have the resources to write the response? If not, what partners or consultant(s) can help us?
7. Do we need teaming partner to fill a solution, socio-economic, or experience gap? If so, who are the best candidates?
8. Do we have a bill of materials and product specifications? If not, who can get them?
9. Do we have a target price?
10. What risk are we willing to accept?

Suggestions?

# Dumpster fire case study

“A Must Win Bid” with no capture

- Executive’s pet project
- Drain of corporate resources
- Staff burnout
- Unplanned travel



What’s your story?

# Transitioning to the kickoff meeting

- During this period, there is pressure to hold the kickoff meeting immediately following the RFP release.
- Don't bend to that pressure! Hold a transition meeting with the capture team first.
- Use your checklist to verify that you have all the required materials and understand their maturity and completeness
- Refer to [Holding the Ultimate Kickoff Meeting | Winning the Business](#)

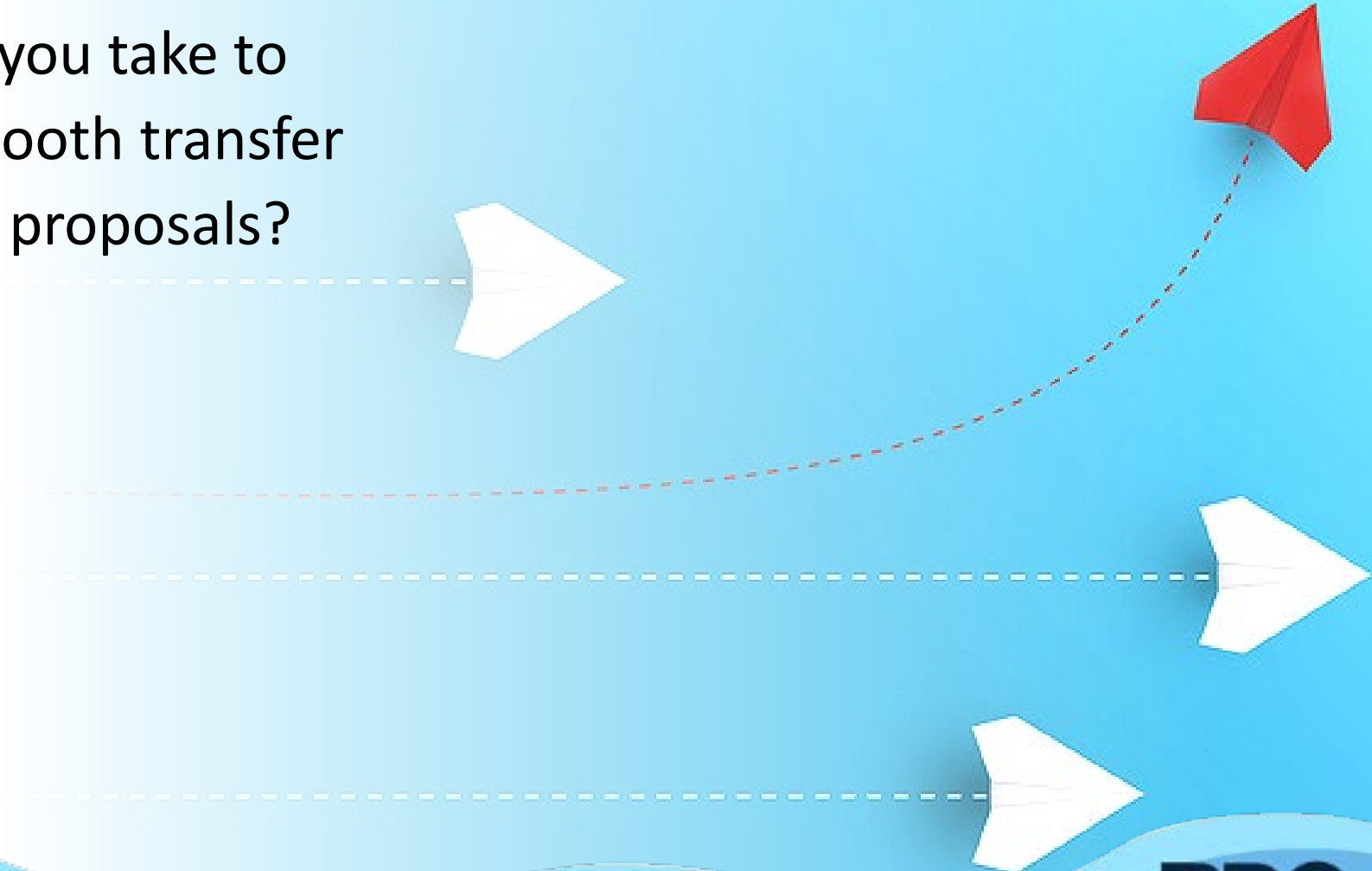


# Lessons learned

- Evaluate the maturity and completeness of the capture at the time of the RFP release using a checklist
- Conduct a triage and look for RFP surprises, teaming partners, personnel, short-term deadlines, large and complex proposals, multi-step bids, and “dumpster fire” issues
- Make an informed bid/no bid decision made based on the capture’s maturity and completeness
- Determine what resources you need to develop the proposal

# Next steps?

What steps will you take to facilitate the smooth transfer from capture to proposals?



# Questions





# CONTACT INFORMATION

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