| ASSESSMENT CRITERIA | GOAL | Point Score  1 = Yes  0 = No |
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| 1. People | | |
| * Core team for proposals | Does your core proposal team represent your best and brightest professionals—those who know how to create a winning proposal? |  |
| * Right proposal managers | Do your Proposal Managers have the right leadership qualities and experience to match the assignment, and if they don’t, do you go outside the company for consultant support? |  |
| * Professional development training program | Do you have a career development plan for capture and proposal professionals that includes professional development and skills training? |  |
| * Access to additional proposal resources to augment your team | Does your company embrace the use of consultants and other resources to accommodate fluctuating workloads or special skills needs? |  |
| 2. Process | | |
| * Business acquisition life cycle is defined and has 5 stages | Does your firm have a formal business acquisition life cycle that includes these phases: (1) Identification and Qualification, (2) Pursuit, (3) Pre-Proposal Preparation, (4) Proposal Development, and (5) Post-Proposal Submission? |  |
| * Capture and proposal processes are established and followed | Are your business acquisition processes documented, consistently followed, and supported by your management team? |  |
| * Library of written procedures, reusable templates and checklists established for capture and proposal work | Do you have documented procedures and templates available and accessible for planning and scheduling proposals, creating proposal outlines, building compliance matrices, developing annotated outlines, managing color reviews, preparing lessons learned, and supporting other activities? |  |
| * Performance is measured and analyzed and serves as a basis for capture and proposal processes improvement | Is your performance assessed during capture and proposal activities and correlated with wins/losses to provide a quantitative basis for process improvement? |  |

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| 3. Tools | | |
| * Desktop hardware, software and productivity tools | Does your team have fully capable desktop hardware with current software releases and appropriate productivity tools? |  |
| * Enterprise infrastructure used as a repository for capture and proposal development | Do you have an integrated enterprise infrastructure to automate the management of your capture and proposal activities, archive capture/proposal artifacts, and manage virtual proposals? |  |
| * Special purpose databases for resumes, past performance data, and proposal archives | Do you have online searchable databases for employee resumes, contract past performance data, and submitted proposals? |  |
| * Special purpose databases for pre-written proposal content, past proposals, and proposal graphics | Do you have a searchable library of all your proposal graphics and pre-written proposal content (company overview, management structure, recruiting, accounting, purchasing, travel, quality assurance)? |  |
| 4. Decision | | |
| * Pursuit and bid decisions | Are pursuit and bid decisions made on an informed basis, using well-known decision criteria communicated to the team with supporting rationale? |  |
| * Gate reviews used to measure progress and make go/no-go decisions | Do you conduct structured, repeatable gate reviews to measure progress at every stage in the capture/proposal life cycle and use these assessments to make go/no-go/continue decisions? |  |
| * Start pre-RFP planning and proposal development before RFP release | Does management fund and authorize pre-RFP planning and proposal development to begin before the RFP is released and not delay proposal start until after RFP release? |  |
| * Work/life balance | Do you achieve a reasonable balance between working life and personal life, avoiding burn-out from excessive workload? |  |

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| 5. Solution | | |
| * Solution development step | Is solution development a formal step in your capture and proposal processes where you review and approve the solution to ensure it is rich with features that are important to the customer? |  |
| * Structured writing process ensures the solution is conveyed in the proposal | Do you use annotated outlines or other proposal outlining techniques to structure your proposal writing and map your solution features into the appropriate sections of your proposal? |  |
| * Proposal writing begins after the solution and the structured writing guides are approved | Does writing only begin after your proposal outlines have been reviewed and approved? |  |
| * Creativity | Is creativity an important part of your solutioning process, and is emphasis placed on creating solutions that are better than previous solutions? |  |
| 6. Proposal | | |
| * Compliance | Are your proposals always easy to evaluate because they are clear and the outline is traceable to the RFP instructions and evaluation criteria? |  |
| * Responsive | Do your proposals always respond to what the RFP asks for with a solution that meets the customer’s requirements and objectives? |  |
| * Compelling | Do your proposals depict significant strengths and differentiators and present them in a way that builds advocacy for your offer? |  |
| * Error free | Are your proposals always error free without mistakes that could cause you to lose points? |  |

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| 7. Quality of Life | | |
| * Number of hours and days worked by you is reasonable | Are vacations and holidays observed by all staff, and when long days are required, are they offset by some form of compensatory time? |  |
| * Fostering a creative environment | Does management encourage innovation, experimentation, and creativity within the framework of your business acquisition process? |  |
| * Recognition | Does management recognize personal contributions to success and not chastise those who tried hard, but didn’t win? |  |
| * Supportive | Does your team support each other and encourage and motivate each other to be the best they can be? |  |
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| |  | | --- | | Win Rate and market | | | |
| What is the win rate for the business unit you are assessing? Win rate is defined as number of competitive wins divided by total number of competitive bids. Insert win rate percentage or indicate that you don’t know the win rate.   * Win rate percentage (insert number) \_\_\_\_\_\_ * I don’t know the win rate \_\_\_\_\_\_ | | |
| Who is the primary customer for the business unit you are assessing?   * Government \_\_\_\_\_\_ * Commercial \_\_\_\_\_\_ * Both Government and Commercial \_\_\_\_\_\_ * Other \_\_\_\_\_\_ | | |