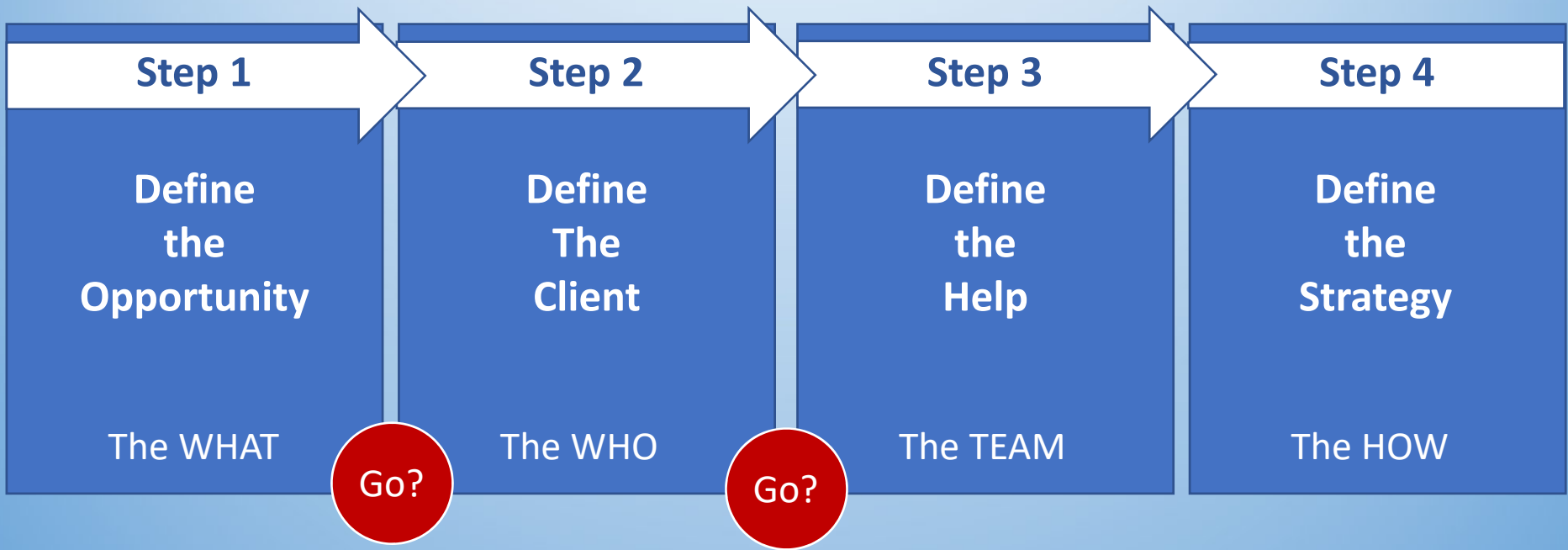


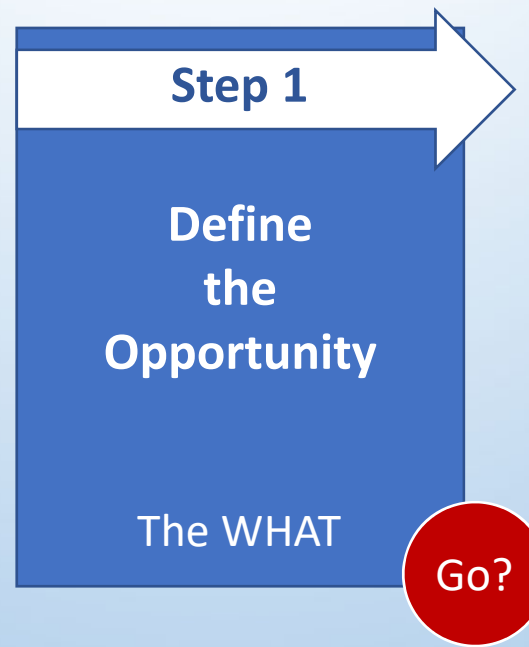
A photograph showing a person from behind, wearing a white cap and a yellow jacket, holding a long metal pole. At the end of the pole is a large whale, which is splashing water. The scene is set on a boat in the middle of the ocean under a clear blue sky.

How to Land a Whale

Capture Planning a
Mega-Million Dollar Pursuit

Presenters:
Cynthia Brown
Peter de la Mora
Kurt Young





Identify your #1
opportunity.

Write down all the answers that you
know to the Step 1 questions.

Step 1: Define the Opportunity

Client Name	Opportunity Name
Key Questions	Responses
What is project purpose or goal?	
What are project drivers?	
Who is the project champion?	
Is project funded? By whom?	
Which metrics are set? (Program, cost, size, schedule)	
What is schedule for selection?	
What are client's aspirations & concerns?	
What providers are currently in place?	
What are the preferred precedent projects?	

Initiate the Go/No Go Process

Criteria	Response (Y or N?)
Does the client know you / like you?	
Do you have any inside track, head start, or special knowledge or advocate? Does your competition?	
Would YOU hire your firm over the competition? Why?	
Is it a fit for the firm?	
Do you have the right experience?	
Do you have the right team available?	
Is it financially attractive?	
Is your risk/financial liability limited?	
Is the pursuit effort a reasonable investment?	
Do you want to deliver the project?	
Can you win?	72

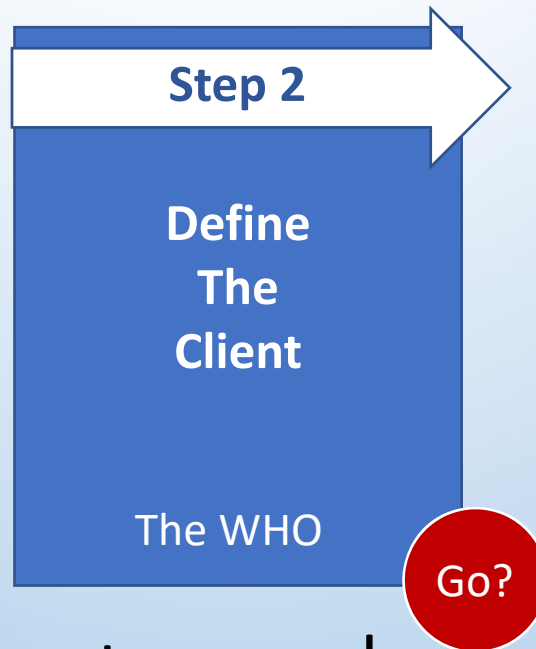
Go No Go Form

Client:	Ops Lead:	Proposal / Bid Due Date	Value	Precon Start / Finish	Construction Start / Finish	Location:
Project:						Delivery Method:

Proposal Factors		Decision Criteria						Points Assigned		
		Negative		Neutral		Positive		Vaughn	Competitor A	Competitor B
Points		1	2	3	4	5	6			
1	Client Contact and Rapport	Unknown to client		Known to client, but not well		Well-developed client relationship				
2	Marketing Intelligence/Presell	Did not expect RFP, project info limited to solicitation		Anticipatd RFP, have collected adequate info & client touches		Distinct insights into client needs and expectations				
3	Competitive Advantage	Competitor is strongly favored		Open competition/no favorite		Our firm in favored position				
4	Qualifications & Experience	Marginally qualified, limited or no relevant experience		Adequately qualified but no real edge over competitors		Technically superior to most competitors				
5	Project Team Availability	Needed team members are too busy or in distant offices		Needed team members have adequate availability		Very strong proposed team with good availability				
6	Profit Potential	Unlikely to make targeted profit on this project		Can meet profit goals if well managed		High likelihood to meet or exceed targeted profit				
7	Pricing Sensitivity	Selection primarily driven by price; commodity purchase		Client to balance price and qualifications in selection		Will select most qualified, then negotiate price				
8	Cost to Respond	High proposal costs relative to odds of winning		Proposal costs appropriate relative to odds		Excellent ROI, cost very appropriate for the odds				
9	Consistency with Market Strategy	Opportunity not consistent with stated market strategy		Opportunity fits within our stated market strategy		Opportunity can't be passed up relative to stated market strategy				
10	Odds of Winning	0 - 15%	16 - 30%	31 - 45%	46 - 60%	61 - 75%	76 - 90%			
11	Performance Risk - Contract terms, location, type of work, delivery method	1	High 2	3	Average 4	5	Low 6			
12	Likelihood of Future Work	1	Low 2	3	Medium 4	5	High 6			
Total Score (sum of points for 12 proposal factors)								0	0	0
Overall Rating (total score divided by 12)								0.00	0.00	0.00

Other Required Information			
A	Primary Decision Makers	A.	B. C. D.
B	Our Primary Advantages	A.	B. C. D.
C	No. of Competitors _____ Top 4 Competitors (by rank)	A.	B. C. D.

Make a Go/No Go decision
for your #1 opportunity.



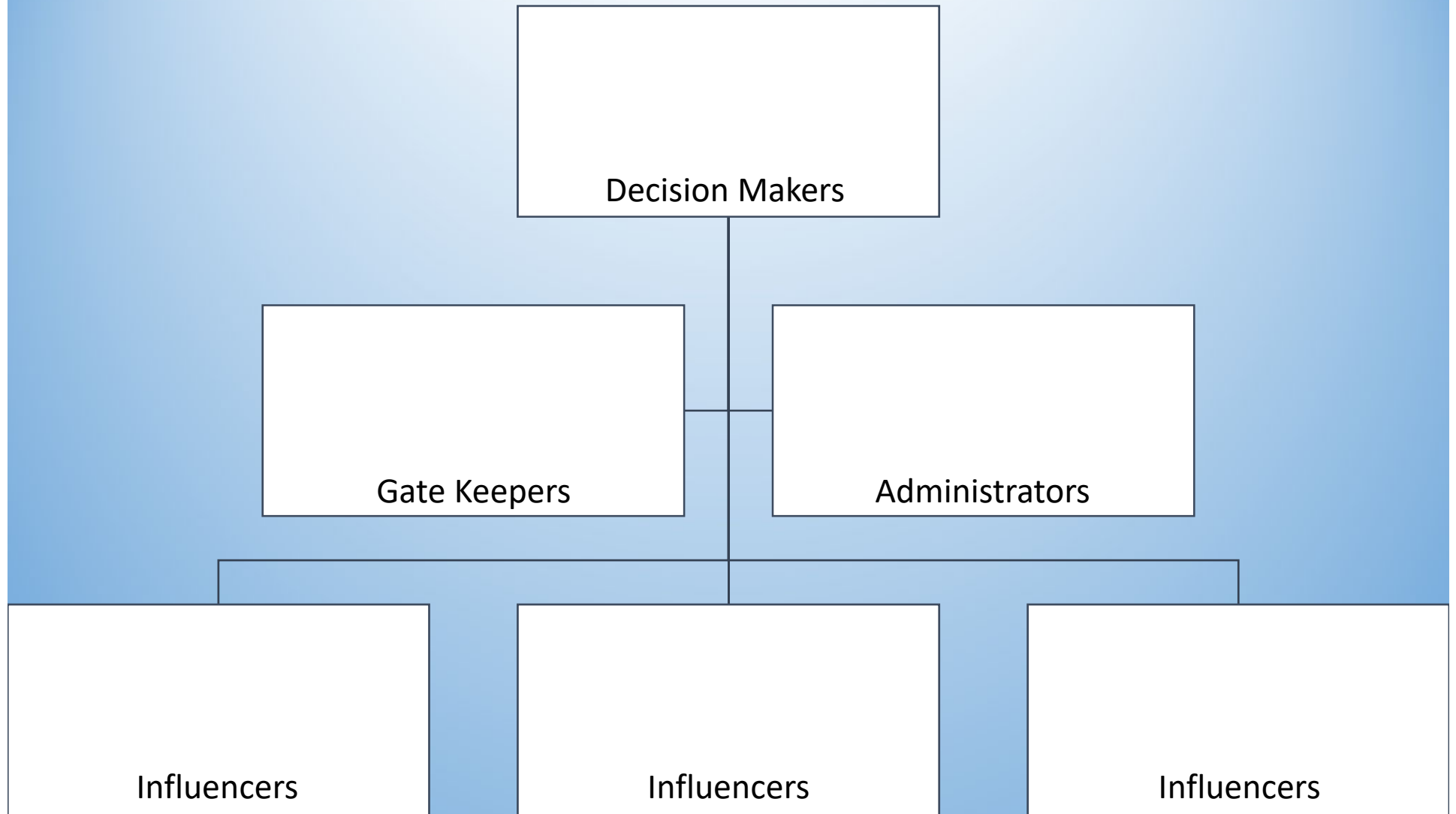
For YOUR capture plan, answer as many Step 2 questions as you can.

Start filling in the org chart.

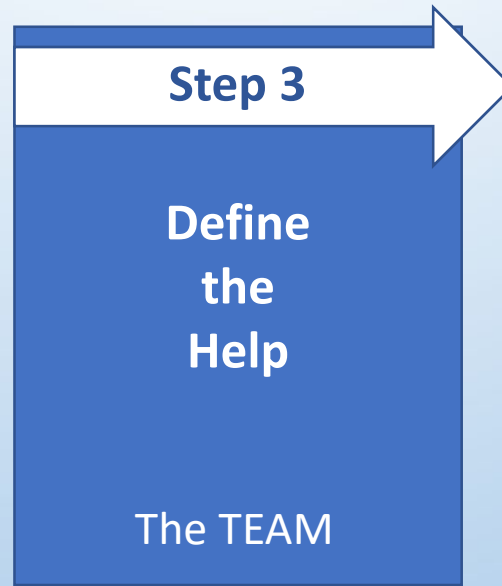
Step 2: Define the Client

Key Questions	Responses
Who would the client(s) be?	
Who is championing the project? (User group, CEO)	
Who will pay for it?	
Does the client have any service providers in place? (advisors, representatives, consultants)	
What is the client's usual procurement process, requirements, and selection history?	
Is an alternative delivery (procurement, construction, funding, etc.) a possibility?	

Create a Client Organization Chart



What is your role? Where does it fit?



For YOUR capture plan, start identifying contacts who can help.

Step 3: Define the Help

Type of Consultant	Who Do You Know
Candidate GC's/CM's	
Architects & other consultants	
Program & project managers	
Cost & market consultants	
Real estate firms	
Food service, waste management, maintenance firms	
Other providers to the client's ongoing or recent projects	

Step 3: Define the Help

What Activities Can You Conduct to Gather Intel?

Do What?	With Who	When	Where	How	Why – What Intel Do You Want
Pre-RFP meetings with decision makers					
Pre-RFP meetings with influencers					
Pre-RFP meetings with consultants					
Pre-RFP meetings with users					
News articles					
Internet research					
Relevant conferences					
Prior RFPs/Results					

Step 4

Define
the
Strategy

The HOW

For YOUR capture plan, try to answer to these questions.

More Questions to Answer	
Key Questions	Responses
What are the triggers for project milestones? (project launch, occupancy, funding approval, etc.)	
What are the project-specific challenges (site, design, management of constituent groups, funding, construction sequencing, etc.)	
Which competitors are best positioned and why?	
How will fees be negotiated? What net fees do we expect?	
What teaming will be expected?	
What opportunities exist to distinctly assist the client in realizing the project?	
What skills and expertise will be required to meet the client's expectations?	