Capture > Proposal Transition Checklist

Red Team understands how difficult the transition can be from the capture phase to the proposal development process. Sometimes capture activities are skipped due to rushed efforts, and more often, information is simply not shared with the proposal team. Red Team Consulting has gained unique insight into this challenge having worked with countless clients over the years on how to properly transition a pursuit from capture to proposal. We have also learned how to overcome common mistakes that companies make in the capture process and how that impacts the proposal team. While each opportunity and subsequent capture effort is unique, this list below shares what the capture team should execute pre-RFP and then share with the proposal team.

> Procurement background and history

- ☐ Prior RFP and summarized highlights of prior contract
- ☐ Details of prior competition (how was it competed, who won, protests if relevant)
- ☐ Current solicitation documentation (market research, sources sought, RFI, Draft RFP, SOW)
- ☐ Any news articles on the incumbent project highlighting project activities, issues, or success
- ☐ Other updated research on program

> Customer hot buttons, challenges, and objectives

- ☐ Agency and customer hot buttons
- ☐ Individual decision maker hot buttons
- ☐ Articles and other sources of data to substantiate hot buttons

> Competitive assessment of mostly likely competitors and especially the incumbent

- ☐ Competitor footprint/contract history with the customer
- ☐ Competitor SWOT
- ☐ Paraphrased thoughts on resultant themes the proposal team can use

> Win themes/strengths, mapped to the evaluation factors (This is critical for the proposal team)

- ☐ Win themes for each evaluation factor (include features, benefits to the customer, and examples that substantiate the claims)

> Solution information, including technical, management, past performance, staffing, etc.

- ☐ High level approach for the overall Statement of Work
- ☐ Specific approach for each technical requirement in the instructions and SOW
- ☐ Specific approach for management, staffing, and other non-technical requirements
- ☐ Candidate contracts to be considered for past performance

> Teaming updates

- ☐ Teaming meatball chart of capabilities and gaps they address
- ☐ Summarized teaming partner inputs and strengths