

**CAPTURE PLAN WORKSHEET©**  
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| <b>OPPORTUNITY OVERVIEW</b>            |   |  |                         |
|--|---|--|-------------------------|
| <u>SHORT NAME</u>                      | <u>BUSINESS SECTOR</u>  | <u>TODAY'S REVIEW DATE</u>                       | <u>NEXT REVIEW DATE</u> |
| <u>CUSTOMER</u>                        | <u>CAPTURE MANAGER/PROPOSAL MANAGER</u>   | <u>CAPTURE TEAM</u>                              |                         |
| <u>RFP/RFA RELEASE DATE</u>            | <u>PROBABILITY OF WIN</u>   | <u>EXPECTED VALUE &amp; RETURN ON INVESTMENT</u> |                         |
| <u>OPPORTUNITY DESCRIPTION (Brief)</u> | <u>OPPORTUNITY ASSESSMENT</u><br>POSITION VS. COMPETITORS<br><input type="checkbox"/> Exclusive <input type="checkbox"/> Dominant <input type="checkbox"/> Shared <input type="checkbox"/> Minor/Zero<br>PLACE IN SALES FUNNEL<br><input type="checkbox"/> Best Few <input type="checkbox"/> Middle <input type="checkbox"/> Top <input type="checkbox"/> Above - Outside<br>PRIORITY - TIMING<br><input type="checkbox"/> Urgent <input type="checkbox"/> Hot Pursuit <input type="checkbox"/> Routine <input type="checkbox"/> Later<br>CONFIDENCE IN WINNING<br><input type="checkbox"/> Euphoria <input type="checkbox"/> Secure <input type="checkbox"/> Comfortable <input type="checkbox"/> Okay<br><input type="checkbox"/> Concerned <input type="checkbox"/> Worried <input type="checkbox"/> Losing it<br>QUALITY OF INTELLIGENCE<br><input type="checkbox"/> Excellent <input type="checkbox"/> Small Gaps <input type="checkbox"/> Large Gaps <input type="checkbox"/> Near Zero | <u>CRITICAL ACTIONS UNDERWAY</u>                 |                         |
| <b>BACKGROUND</b>                      |   |  |                         |
| <u>CUSTOMER OVERVIEW</u>               |   | <u>CUSTOMER ISSUES</u>                           |                         |
| <u>PROCUREMENT OVERVIEW</u>            |   | <u>PROCUREMENT HISTORY/ISSUES</u>                |                         |

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|                            |                             |
|----------------------------|-----------------------------|
| <u>INCUMBENT STRENGTHS</u> | <u>INCUMBENT WEAKNESSES</u> |
| <u>PERFORMANCE RISKS</u>   | <u>CAPTURE RISKS</u>        |

### UNDERSTANDING THE DECISION MAKERS & INFLUENCERS

|                         |  |   |
|-------------------------|--|---|
| <u>NAME &amp; TITLE</u> | <u>INFLUENCE</u><br><input type="checkbox"/> Controls \$\$ <input type="checkbox"/> Technical <input type="checkbox"/> User <input type="checkbox"/> Coach | <u>RELATIVE TO OUR SOLUTION</u><br><input type="checkbox"/> Advocate <input type="checkbox"/> Supporter <input type="checkbox"/> Neutral<br><input type="checkbox"/> Negative |
|                         | <u>HOW DO WE CREATE A FAVORABLE ATTITUDE?</u>  | <u>WHO CAN HELP BUILD A FAVORABLE RELATIONSHIP?</u>   |
| <u>NAME &amp; TITLE</u> | <u>INFLUENCE</u><br><input type="checkbox"/> Controls \$\$ <input type="checkbox"/> Technical <input type="checkbox"/> User <input type="checkbox"/> Coach | <u>RELATIVE TO OUR SOLUTION</u><br><input type="checkbox"/> Advocate <input type="checkbox"/> Supporter <input type="checkbox"/> Neutral<br><input type="checkbox"/> Negative |
|                         | <u>HOW DO WE CREATE A FAVORABLE ATTITUDE?</u>  | <u>WHO CAN HELP BUILD A FAVORABLE RELATIONSHIP?</u>   |
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|                         | <u>HOW DO WE CREATE A FAVORABLE ATTITUDE?</u>  | <u>WHO CAN HELP BUILD A FAVORABLE RELATIONSHIP?</u>   |
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|                         | <u>HOW DO WE CREATE A FAVORABLE ATTITUDE?</u>  | <u>WHO CAN HELP BUILD A FAVORABLE RELATIONSHIP?</u>   |

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| <b>ACTIONS TO CAPTURE OPPORTUNITY</b>   |   |
|---|---|
| <u>INTELLIGENCE SHORTFALLS</u>  | <u>PLAN TO IMPROVE INTELLIGENCE</u>   |
| <u>PLAN TO INFLUENCE THE RFP/RFA</u>  | <u>PLAN TO INFLUENCE THE CUSTOMER</u><br><br><u>How can we demonstrate value now?</u> |
| <u>TEAMING REQUIRED? TO FILL WHAT NEEDS? TO IMPROVE PROBABILITY OF WIN? TO OFFSET COMPETITOR?</u> | <u>TEAMING CANDIDATES &amp; PROGRESS</u>  |

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|  |             |  |                       |                                   |
|--|-------------|--|-----------------------|-----------------------------------|
| <u>CAPTURE STRATEGY - CAPTURE SCENARIO</u> |             | <u>CUSTOMER UNIQUE SOLUTION</u>                    |                       |                                   |
| <u>OUR POSITION TODAY</u>                  |             | <u>SUGGESTED/PLANNED ACTIONS</u>                   |                       | <u>SUGGESTED/PLANNED CONTACTS</u> |
| Strengths                                  | <u>WHAT</u> | <u>WHEN</u>  | <u>WHO &amp; WHEN</u> | <u>MESSAGE/VALUE</u>              |
| Weaknesses & Red Flags                     |             |  |                       |                                   |
| <u>MAJOR THEMES – OUR STRENGTHS</u>        |             | <u>MAJOR THEMES – OFFSET COMPETITORS STRENGTHS</u> |                       |                                   |

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|   |   |                                  |
|---|---|----------------------------------|
| <u>KEY CAPTURE &amp; PROPOSAL MILESTONES - SCHEDULE</u><br><input type="checkbox"/> Opportunity analysis _____<br><input type="checkbox"/> Capture plan _____<br><input type="checkbox"/> Teaming agreements _____<br><input type="checkbox"/> Draft RFP/RFA _____<br><input type="checkbox"/> Pre-RFP/RFA proposal prep _____<br><input type="checkbox"/> RFP/RFA _____<br><input type="checkbox"/> Proposal _____<br><input type="checkbox"/> Award _____ | <u>CAPTURE RESOURCE REQUIREMENTS &amp; SHORTFALLS</u><br><br>   |                                  |
| <u>RESOURCE ASSIGNMENTS</u><br><u>Name &amp; Role</u><br><br>Name & Role  | <u>Name &amp; Role</u><br><br>Name & Role   |                                  |
| <b>OUTCOME</b>  |   |                                  |
| <u>POST OPPORTUNITY ANALYSIS</u><br><input type="checkbox"/> Won<br><input type="checkbox"/> Qualified, but not selected, no major deficiencies<br><input type="checkbox"/> Lost, major deficiencies  | <u>LOSS ANALYSIS - major factors</u><br><input type="checkbox"/> Product <input type="checkbox"/> Service <input type="checkbox"/> Demo<br><input type="checkbox"/> Proposed terms <input type="checkbox"/> Price <input type="checkbox"/> Technical proposal <input type="checkbox"/><br><input type="checkbox"/> Management proposal <input type="checkbox"/> Competitive value<br><input type="checkbox"/> User preference <input type="checkbox"/> Other (list) | <u>WIN/LOSS COMMENTS</u><br><br> |

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