

Capture Strategy: The Key to Winning Work



May 12, 2015

Agenda

- Introductions
- Why Plan?
- Planning Strategies
- Exercise





The more things change, the
more they stay the same.

~ Alphonse Karr

AZ QUOTES



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RFP Meeting #1

DEC

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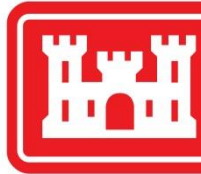
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RFP Due!

JUL

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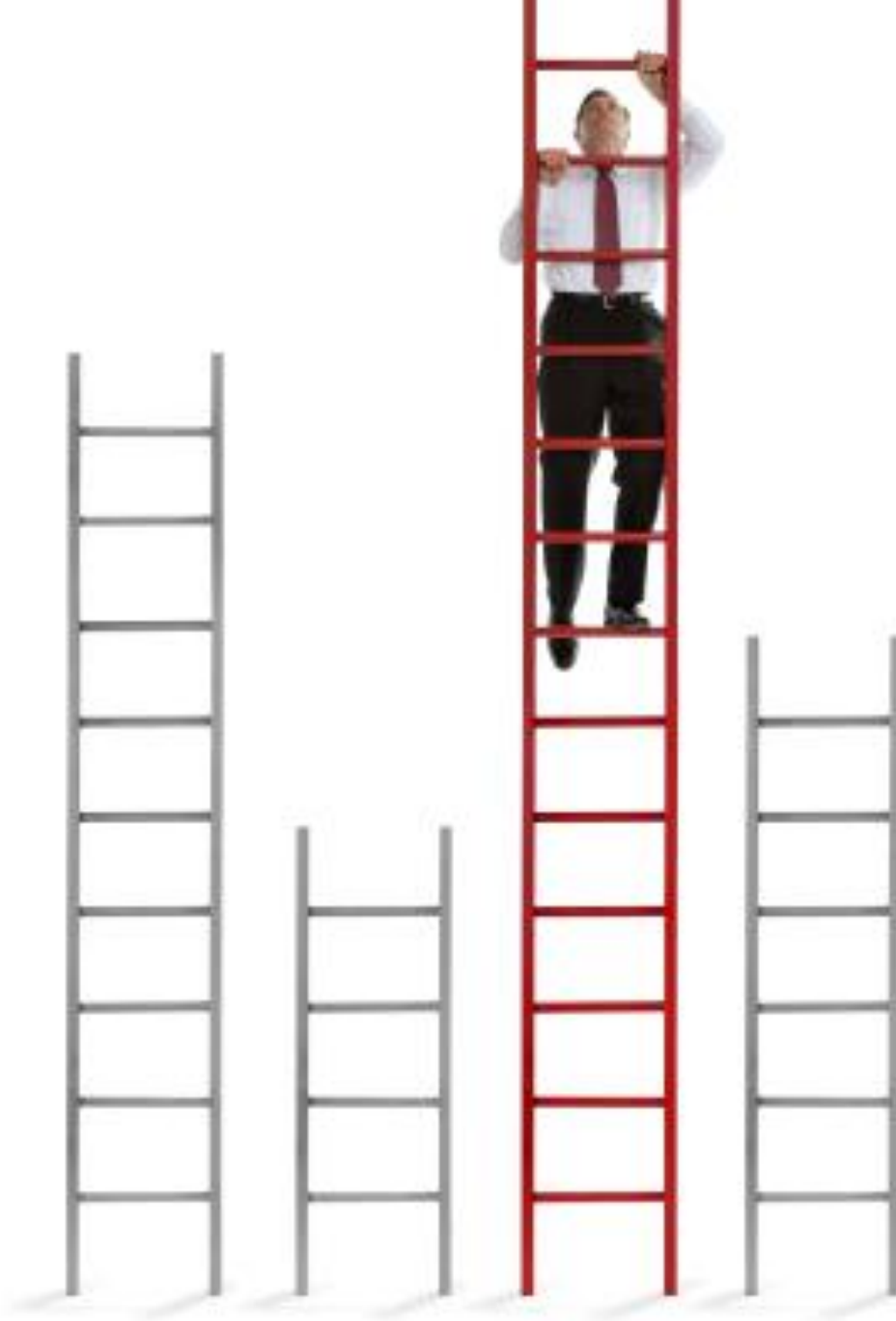
U.S. Department of Veterans Affairs



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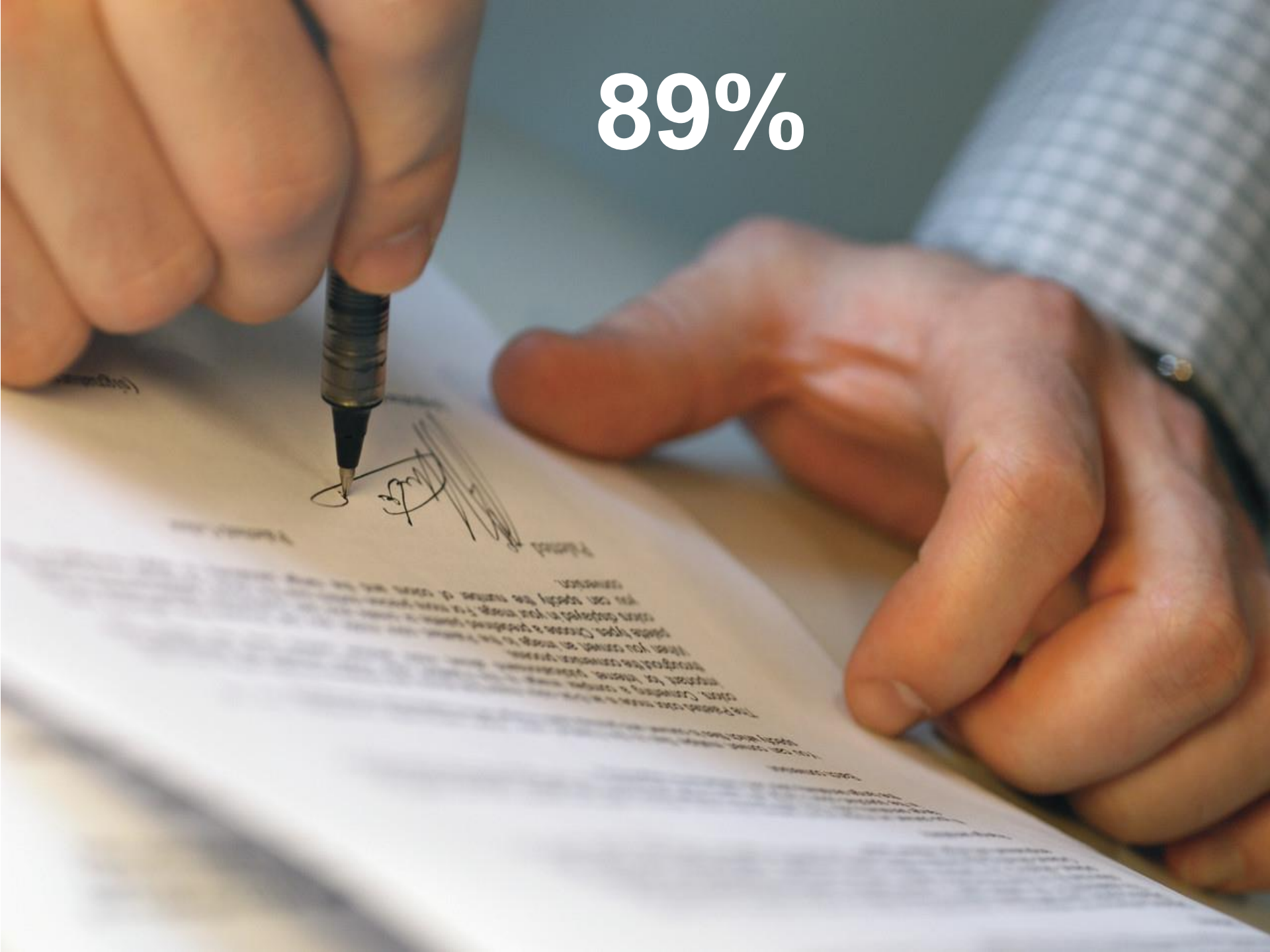
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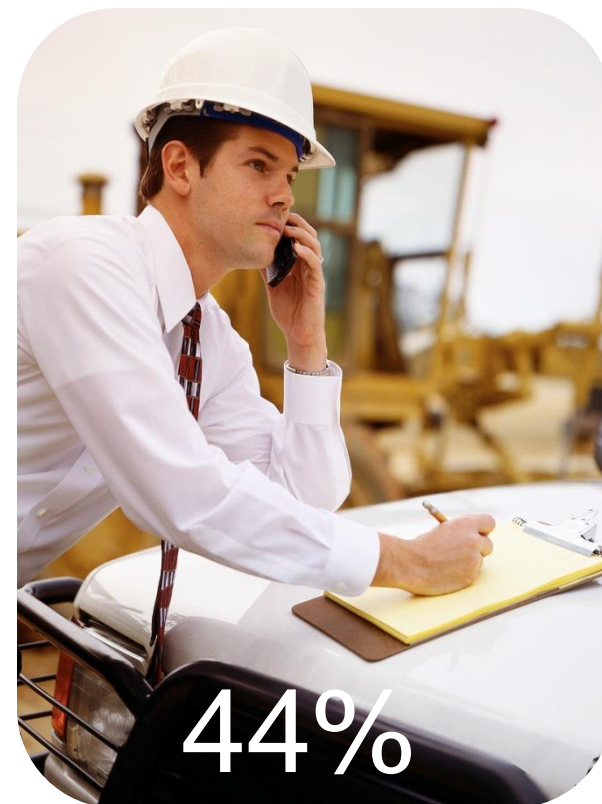
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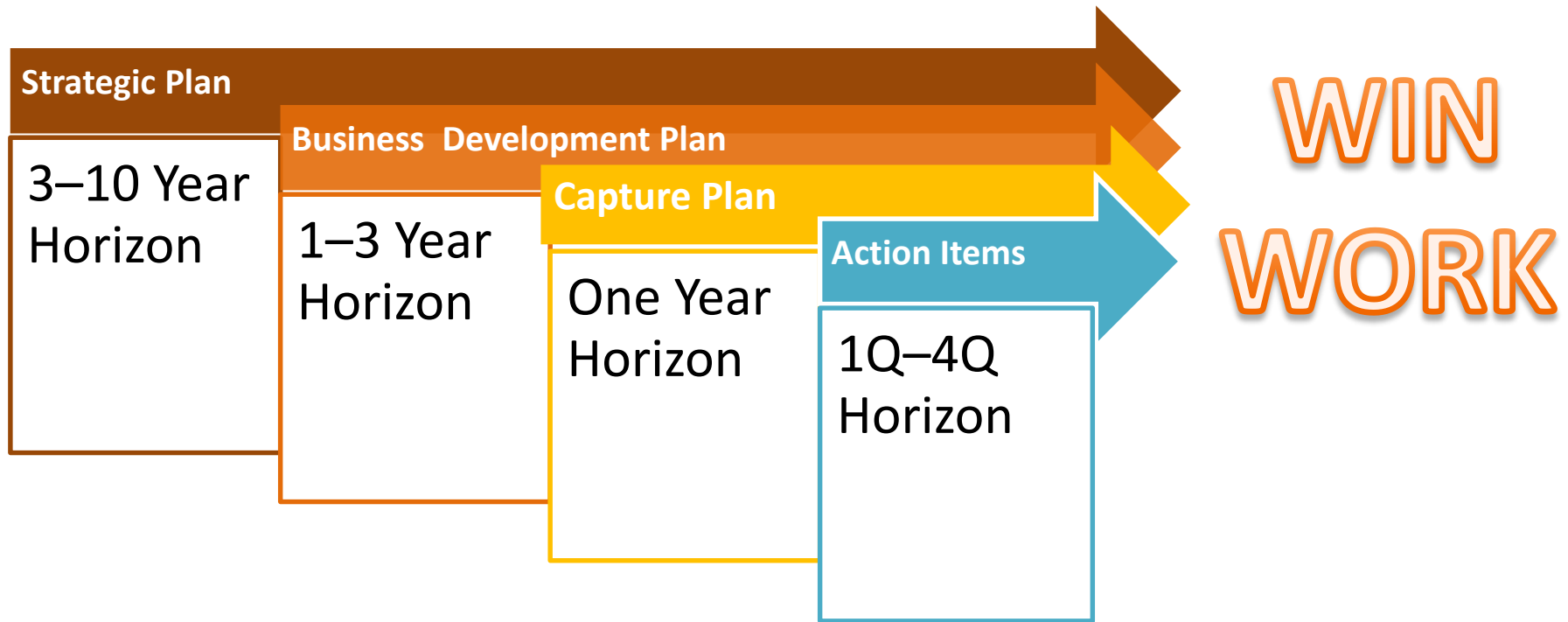


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The Plan



Strategic Planning



The Planning Hierarchy

STRATEGIC PLAN

Big picture

- Visionary
- Long Term
- Integrative
- Focused on all organizational areas

BUSINESS DEVELOPMENT PLAN

Overall approach to sales execution

- New revenue projections/backlog analysis
- Key prospects identified
- Must wins identified
- Individual market sales plans developed

CAPTURE PLAN

Specific actions needed to win

- Documents BD intelligence
- Tracks progress of pursuit effort
- Details sales strategy
- Team approach/contribution-based
- Keeps it real vs. “watching it”

Strategic Plan

Vision & Mission Statement
Values that guide behavior and culture
Goals to achieve vision and mission
Action plan for achieving goals



How the Strategic Plan Supports Business Development

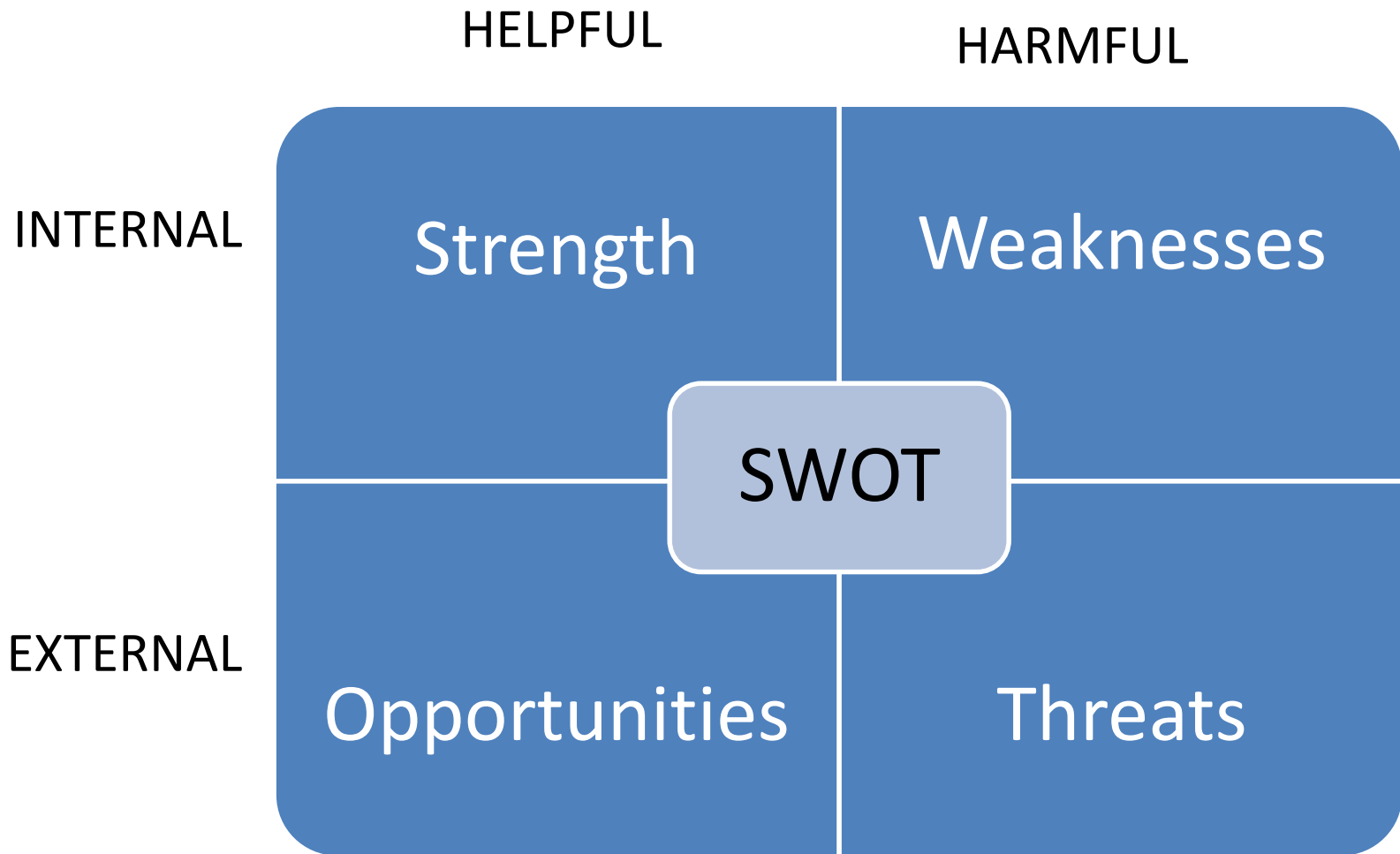
- Defines your target markets and clients (screening)
- Is different for different in-house services
- Allows efforts to be measured against the plan (metrics)
- Aligns the efforts of technical and non-technical staff
- Maintains focus in a multi-office firm



Business Development Plan Basics

- Client Focused
- Goals
- Strategies, tactics, and action plans
- Budget
- Schedule/timeline
- Champions
- Assign responsibilities
- Identify resources needed





SMART GOALS

Definition



SPECIFIC

What exactly do you want to achieve?



MEASURABLE

Establish clear definitions to help you measure if you're reaching your goal.



ATTAINABLE

What steps can you take to reach your goal?
Outline the exact steps to accomplish your goal.



RELEVANT

How will meeting this goal help you? Does your goal relate to your mission?



TIME-BOUND

How long will it take to reach your goal?

Sample BD Plan

Goals – Make them SMART

2013 Business Development Plan

I. Objective: Successfully leverage firm's public K-12 education work to gain work with Private Schools

| Goals | Tactics/Action Items | Cost | Due Date/Who |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------------------------------|
| <p>1. Develop three new private school clients (any range of K-12, day or boarding types) in 2013 to extend our reach in the education market and grow that sector by 10% (equals \$1M net fee growth.) This will mean three projects worth an average of \$3.5M each with a 10% fee.</p> <p>Strategy – Use email campaign to create awareness of firm's learning environments expertise first and follow up with targeted sales calls to top ten prospects based on research of need or potential.</p> <p>Strategy – Use speaking engagements to personally engage decision makers about design and learning environments and to make personal connections, plus build "expert" status in market place.</p> | Develop mailing list for e-mail campaign targeting headmasters, major donors, alumni, influencers and board members. Action Item: Buy list to review for names. | \$500 | 1Q/2013 – M. Mgr. |
| | Develop, design and produce a high quality and graphically captivating e-mail campaign that focuses on learning environments and the types of results they provide for students. Action Item: Ask K-12 team to quantify results. | \$2,000 | 2Q/2013 – M. Mgr. |
| | Develop, design and produce "learning" brochure about education design. | \$5,000 | 2Q/2013 – M. Mgr. |
| | Investigate appropriate client organizations and meetings so as to promote speaking about learning environments to these. Action Item: Call SMPS network for names of groups. | n/a - inhouse | 1Q/2013 – BD Director |
| | Develop top ten targeted private school clients based on research of upcoming capital project needs. Action Item: Purchase Am. School subscription for lists and facts. | n/a - inhouse | 1Q/2013 – BD Director |
| | Begin sales calls to top ten targets and make initial lunch or breakfast appointments to introduce the firm. | \$500 | 2Q/2013 – BD Director |
| | Hire new architect with private schooling background from one of the top ten targets who also has education experience. Consider headhunter help. Action Item: Call JRC for quote. | TBD – head-hunter | 3Q/2013 – Arch. Principal |
| | Do research on what target audience would like to see as info on learning environments. Action Item: Interview 10 Supts. | n/a - in house | 1Q/ 2013 -BD Director |
| | Distill our stories in public K-12 work to those applicable to private school market. Action Item: Hire writer. | \$2,000 | 1Q/2013 – Writer plus M. Mgr. to direct. |
| | Hire website design firm. Action Item: Get SMPS referrals. | n/a | 2Q/2013- BD Director |
| <p>2. Develop website by Sept. 2013 to reflect learning environments philosophy and benefits, rather than K-12 education project list that is on current website.</p> | Develop website, including social media tactics. Action Item: Clean up list beforehand | \$6,000 | 3Q/2013 – M. Mgr. |
| | | n/a - in house | 2Q/2013 – M. Mgr. |

Tactics/Activities – What needs to be done

Cost – Used to build budget

Strategies – Can be more than one

Due Date – By quarter or date

Who – Assign responsibility

Targeting Clients



Build Professional Relationships

- Find firms with experience related to your targeted clients
- Federal Resources: publicly available databases
 - www.sam.gov
 - www.fbo.gov
 - www.fpds.gov
- Network, network, network!

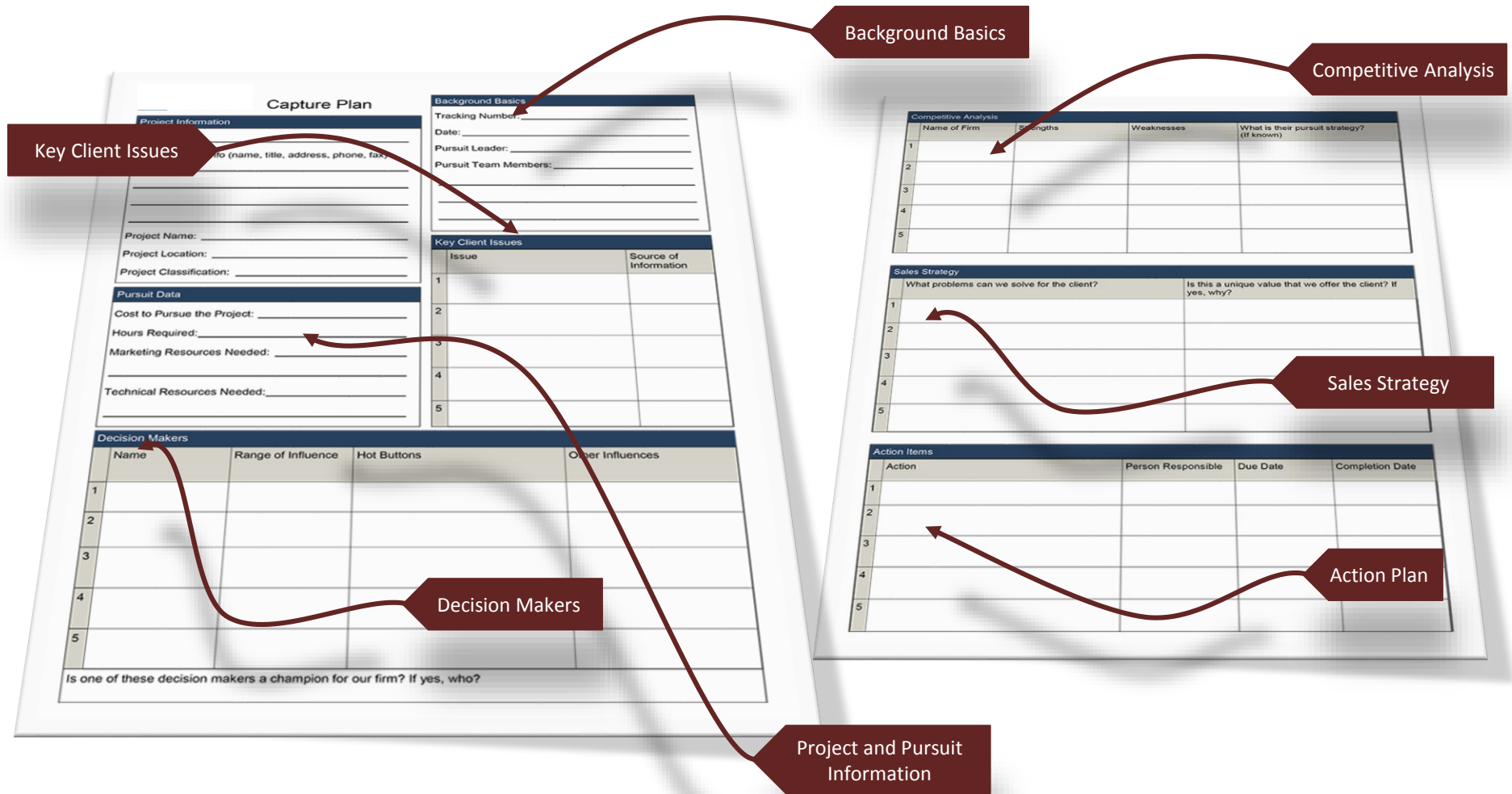


Capture Plan

- Project specific
- Details client intelligence
- Documents competitive insight
- Outlines a sales strategy
- Creates an action plan



Capture Plan Components



Capture Plan

| Project Information | | Background Basics | | | | | | | | | | | | | | | |
|-----------------------------------|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-------------------|--|-------|-----------------------|---|--|---|--|---|--|---|--|---|--|
| Project Name: _____ | | Tracking Number: _____ | | | | | | | | | | | | | | | |
| Project Location: _____ | | Date: _____ | | | | | | | | | | | | | | | |
| Project Classification: _____ | | Pursuit Leader: _____ | | | | | | | | | | | | | | | |
| Pursuit Data | | Pursuit Team Members: _____ | | | | | | | | | | | | | | | |
| Cost to Pursue the Project: _____ | | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #4a7ebb; color: white;">Key Client Issues</th> </tr> <tr> <th style="width: 50%;">Issue</th> <th style="width: 50%;">Source of Information</th> </tr> </thead> <tbody> <tr><td>1</td><td></td></tr> <tr><td>2</td><td></td></tr> <tr><td>3</td><td></td></tr> <tr><td>4</td><td></td></tr> <tr><td>5</td><td></td></tr> </tbody> </table> | | Key Client Issues | | Issue | Source of Information | 1 | | 2 | | 3 | | 4 | | 5 | |
| Key Client Issues | | | | | | | | | | | | | | | | | |
| Issue | Source of Information | | | | | | | | | | | | | | | | |
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| 4 | | | | | | | | | | | | | | | | | |
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| Hours Required: _____ | | | | | | | | | | | | | | | | | |
| Marketing Resources Needed: _____ | | | | | | | | | | | | | | | | | |
| Technical Resources Needed: _____ | | | | | | | | | | | | | | | | | |
| Decision Makers | | | | | | | | | | | | | | | | | |
| Name | Range of Influence | Hot Buttons | Other Influences | | | | | | | | | | | | | | |
| 1 | | | | | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | | | |
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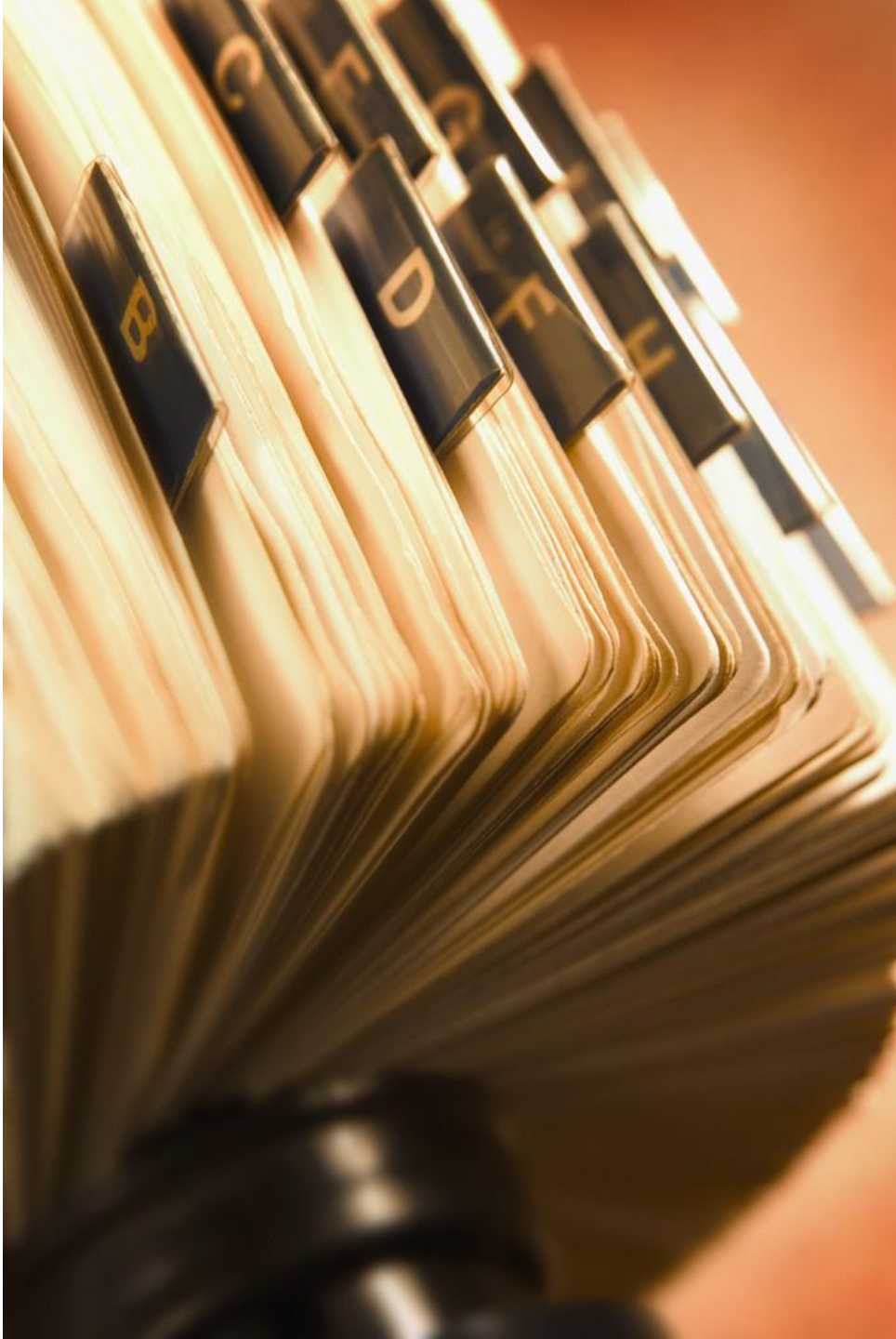
Is one of these decision makers a champion for our firm? If yes, who?

| Competitive Analysis | | | |
|----------------------|-----------|------------|--------------------------------------------|
| Name of Firm | Strengths | Weaknesses | What is their pursuit strategy? (if known) |
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| 2 | | | |
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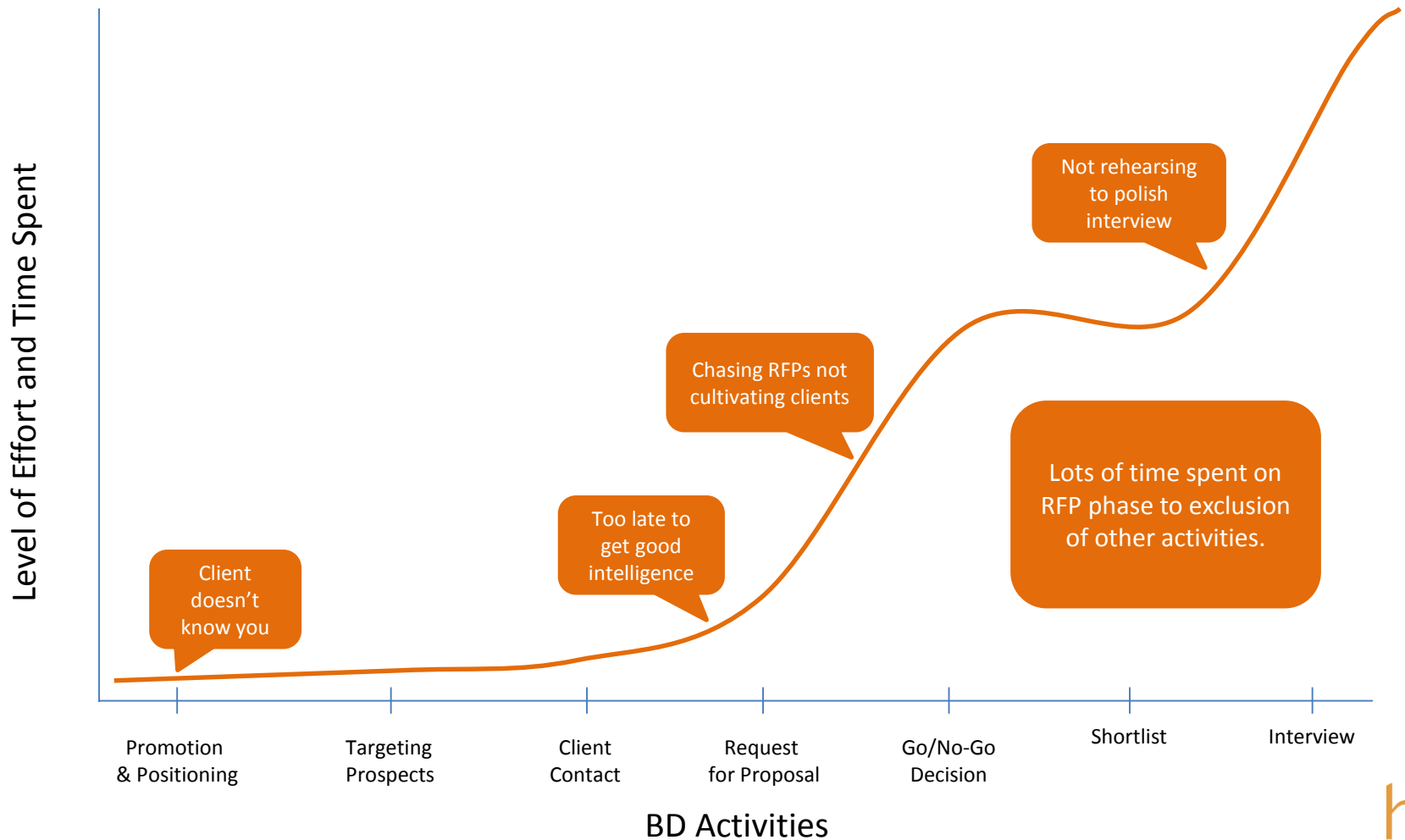
| Sales Strategy | |
|--------------------------------------------|---------------------------------------------------------------|
| What problems can we solve for the client? | Is this a unique value that we offer the client? If yes, why? |
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |

| Action Items | | | |
|--------------|--------------------|----------|-----------------|
| Action | Person Responsible | Due Date | Completion Date |
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |

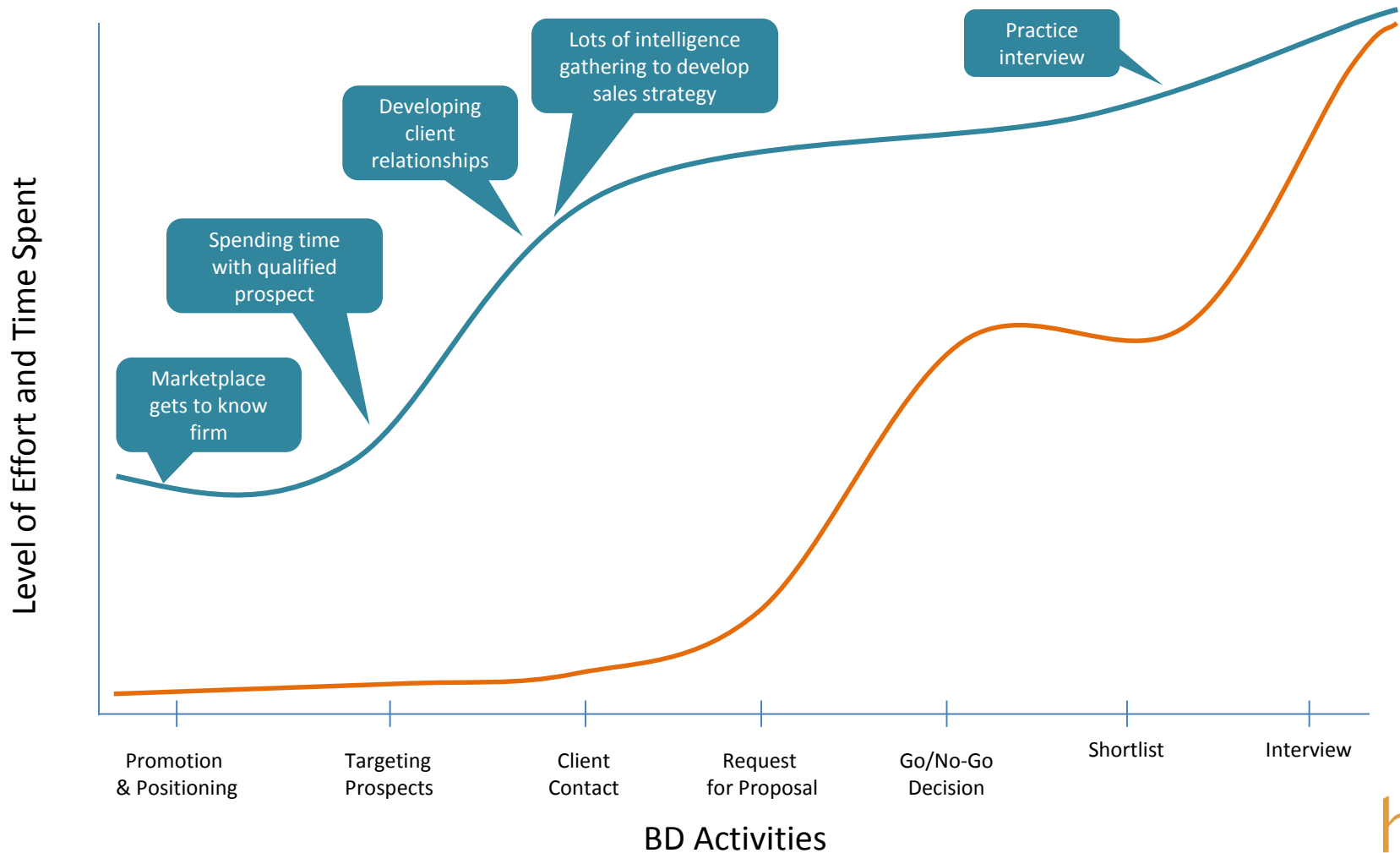
What are hot buttons – goals, fears and aspirations? Who is driving the project? Where is the money coming from? **Who will the decision makers be?** What kind of fees are they expecting to pay? What other firms have they worked with and what's gone well or poorly? In other words... what will win the job? What has the client built before? Who designed and built it? What were the results? **Who is the competition?** How do you compare to the competition? Have they worked with the client? Was it positive or negative? Have they worked with others involved in the project? Who wrote the RFQ/RFP? Was it you? Who else has received it? Is someone "wired"? How important is fee? Experience? What are project-specific issues? Do you truly understand them? **Is the project funded?** Where's the money coming from? Who are your references? Do they know the client/project? Have you visited the site? Have you visited abutters? Have you talked with local officials? What is the format of the proposal? What are client's key issues? What prior proposals has the client liked? How much boilerplate? Who will be reading it? **What is the fee structure?** Can you be profitable with this fee? What are competitors' typical fees? How important is fee to client? (They just might tell you it is not important – do not believe this for a moment!) How many people? Who makes the selection? Do you know the decision maker(s)? Who does? What about their background? What are their roles in the project? What does the "scoring sheet" look like? **Do you know the other players/stakeholders?** What about technical challenges? Can you address community concerns? Are there environmental issues? **Have you seen the space?** Can you choose where client sits? What about A/V? Web access? Do you need a screen? Can you control lighting? Sunlight? When will you present? **Do you have a choice?** When do you want to present? **First?** Just before or after lunch? Last? Is PowerPoint best? Boards? How long is the presentation? Is the timing strict or relaxed? Who does the client want to hear from? Who will ask questions of you? To whom will you ask questions? Is Q&A a two-way street? Who should contact whom? When do you follow up? **What can you ask?** Follow up whether or not you win! Who will tell you the results?



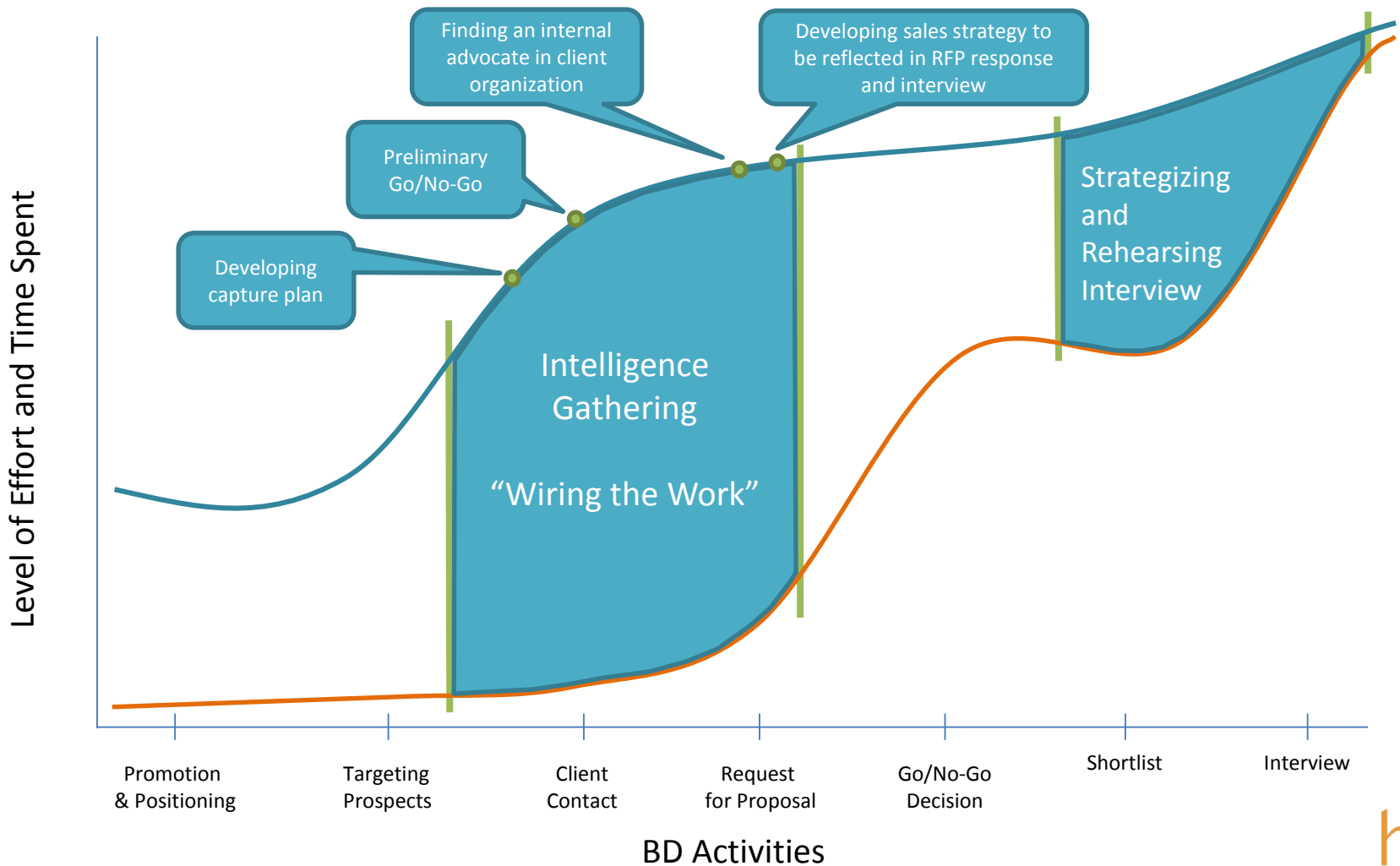
The Hunter



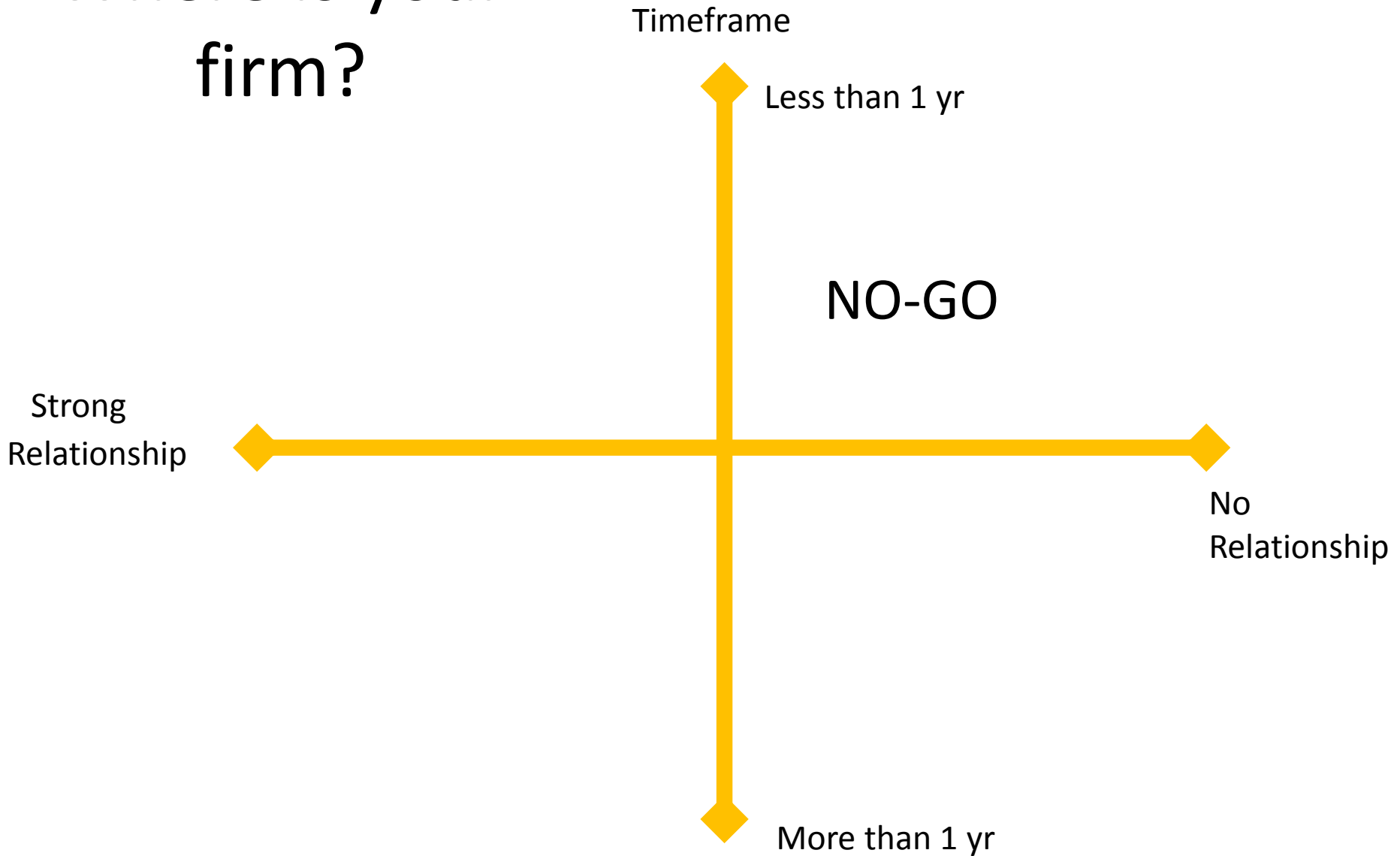
The Farmer



The Farmer's Advantage



Where is your firm?





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