



Federal Sales Strategies

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Back to Basics: Capture Planning Do's and Don'ts

By Peter Adler, *Seneca Creek Consulting*

The requirement to develop a capture plan should be limited to certain significant-sized acquisitions that warrant such in-depth understanding and market knowledge prior to making a bid decision. However, there are key components of this current process that can be streamlined and tailored to your business model.

The purpose of the capture plan is two-fold. First, it is the pre-request for management to make an unbiased and informed bid/no bid decision on prime contract bids. Secondly, once a bid decision is made, the capture plan becomes one of the key documents for the Proposal Manager and proposal team.

From the Proposal Manager's perspective, the capture plan contains several key elements necessary to ensure that a winning proposal is developed. These include:

- **Win Discriminators** – *What our solution has that nobody else has and why it is better than our competitor's solution?*
- **Evaluation Criteria** – *How will the selection process be made and to what extent does our company address each criteria?*
- **Evaluation Board** – *Who will make or influence the selection and what do they know about our company?*
- **Purpose of the Solicitation** – *Why is the customer interested in a new solution and why have they chosen to do it in the manner reflected in the RFP?*
- **Price** – *What is the "right" price range for this work? Is this "priced to win" or "priced to value"?*

The capture plan must be straightforward yet contain all the necessary ingredients to present management with a clear understanding of the opportunity and confidence that business development personnel have performed the required due diligence on the targeted acquisition. From the business developer's point of view, presenting a complete capture plan makes them a key stakeholder in the opportunity and contributing participant throughout the proposal process.

The Capture Plan, is in fact, the pyramid on which other step-by-step decisions are made regarding the opportunity that your enterprise is pursuing. Viewed in this light, it is apparent that a proper, not overly-complex, plan is in place at the earliest point possible.

The GSA Corner: MOBIS Refresh

By Deborah Wolland, *The JDS Marketing Group*

On July 1, 2009 GSA "refreshed" the MOBIS Solicitation with a merge between GSA Schedule 69 (Training Aids & Devices, Instructor-Led Training; Course Development;

Test Administration) and GSA Schedule 874 (MOBIS). One of the main reasons for this merger was the result of inquiries GSA was receiving from industry, government customers, and GSA's marketing network that services provided under the Training Schedule and the MOBIS schedule were required for a total solution. Training services and products are now included in revised MOBIS SINs 874-4 and 874-5 and new MOBIS SINs 874-8 and 874-9.

Contracting Officers for those companies who had a Training Schedule will not change as a result of the merger. Current Schedule 69 contract task orders will remain valid and the GSA contract number will remain the same. Those companies who had a Schedule 69 must take the following action: Amendment of approved GSA price list currently on GSA Advantage! to reflect the new SINs that apply to your products or services, delete any references to Schedule 69, and include reference to Schedule 874 MOBIS. A Mass Modification will be sent to current MOBIS contractors incorporating all Refresh 14 terms and conditions.

If, as a contractor you had a MOBIS contract and a Schedule 69 Training Contract you now have 2 (two) MOBIS contracts. There are a few avenues available so that you only have one MOBIS contract instead of the two. You can keep both contracts active and when one of the two contracts nears an option period you can then modify one contract and cancel (or let expire) the other contract. The other option is to request a modification to the contract you wish to continue. You will want to request the modification from the Region that administers the contract you wish to modify. Once the modification combining the services of both contracts has been completed you can request that the other Region cancel the applicable contract.

If you have any other questions regarding the Merger of Schedule 69 – Training and Schedule 874 – MOBIS please contact Debbie Wolland with the JDS Marketing Group at 703-502-1500 or dwolland@jdsmarketing.com.

Why Develop a Tactical Sales Plan?

By Tom Basile, *Seneca Creek Consulting*

If you have an existing business development team or plan to hire one, a tactical sales plan is an essential tool for BD professionals.

It is often said that up-front planning makes for more predictable results and favorable expectations. A well thought-out tactical sales plan will provide your BD personnel with a step-by-step roadmap, tailored to the specific solutions in your portfolio and in your business plan.

The place to start is to match your performance and services with 3 to 5 agencies that have budget and requirements compatible with your solutions portfolio. Determining how each agency buys will directly impact your strategies for bidding, partnering and contracting. For example, every agency is unique in that they have preferred ways of doing business. Some utilize agency or government wide contracting vehicles; others prefer single or multi-award competitive acquisitions; while others are amenable to GSA Schedule buys. Each agency targeted must have a sales strategy unique to the agency. How you sell to the Army Corps of Engineers is very different from the way you would sell to the General Services Administration.

We recommend that a tactical sales plan be concise and straightforward. Suggested areas the plan should address include:

- Where you are currently selling and at what levels
- Who you are going to target? E.g. agency heads, program management, major integrators, etc.
- What agencies, opportunities, and partners will you focus on (current agencies plus new agencies and partners)
- How management will achieve its objectives and measure success

Components of the plan may include:

1. Target agencies and existing and future acquisition programs (large and small business set-asides) where your solution and value statement have the best fit.
2. Target partners to work with including large, small, and SDVOSB companies.
3. Strategy for utilizing additional contracting vehicles in addition to the GSA Schedule.
4. Differentiators to position you with customers and partners.
5. Key sales objectives and milestones.
6. Management reporting requirements and formats.
7. BD support required to implement the plan.
8. Lead generation activities to support the sales effort.

It is often said that one cannot manage that which cannot be measured. The Tactical Sales Plan is one of the tools in your kit that help achieve the measurement portion of this goal.

Partner Corner

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