GovCons Save Time with Proposal Automation

Increase Productivity

Maintain Document Security

Reduce Errors

Provide Real-Time Status

ONEteam

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ONEteam

INTRODUCTION

OneTeam is specifically designed to support the federal government contractors (GovCons). OneTeam is not simply another CRM tool that CAN be used for Business Development. OneTeam was envisioned and created by a federal government contractor to dramatically improve proposing and winning contracts bids by providing an integrated, affordable, cloud-based software platform. OneTeam answers the question – 'What kind of tool do GovCons really need?'

1. **Logical** and easy to use for technical and non-technical people.

2. **Integrates** processes and people across the entire BD lifecycle

3. **Reduces** manual tasks.

4. Designed and built in the **cloud** to leverage the latest cloud technology.

5. **Scalable** and **expandable** based on client needs.

6. Provides **structure** to build BD processes and the **flexibility** to fit existing processes.

7. **Affordable** for first time prime contractors.

8. A **solution** that works both for small pieces of information and intelligence and for storing hundreds of related bid documents.

What evolved from these answers is a complete, secure, collaboration platform for the entire GovCon BD Team to use throughout the entire BD lifecycle.

OneTeam supports opportunity identification, qualification, and capture, including the tasks, activities, decisions, and reviews. OneTeam maintains all of the opportunity specific data WITH the assigned opportunity. OneTeam performs many functions during these pre-proposal phases of the BD Lifecycle, including supporting Pipeline Management and Capture Management.
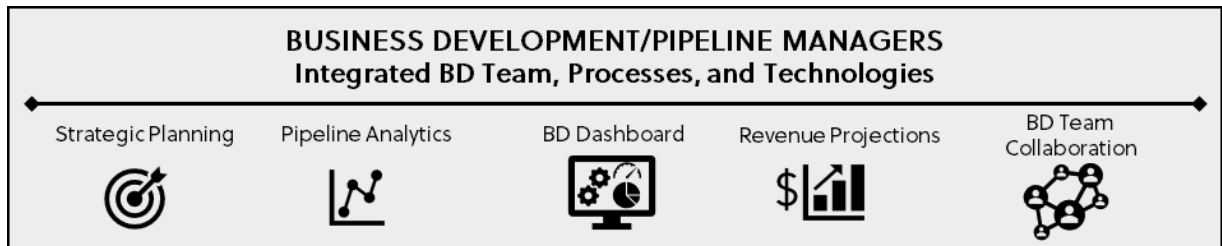
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Capture Management

OneTeam supports many of the functions of the BD Team during the Capture Phase.

Capture Managers turn their knowledge of contract opportunities into persuasive strategies to win contracts. They develop and execute capture plans that integrate people, processes, tools, and technologies.

OneTeam organizes opportunity data, in an opportunity-centric relational database, so Capture Managers can focus on developing and strengthening customer relationships, assessing and qualifying teaming partners, and developing winning strategies.

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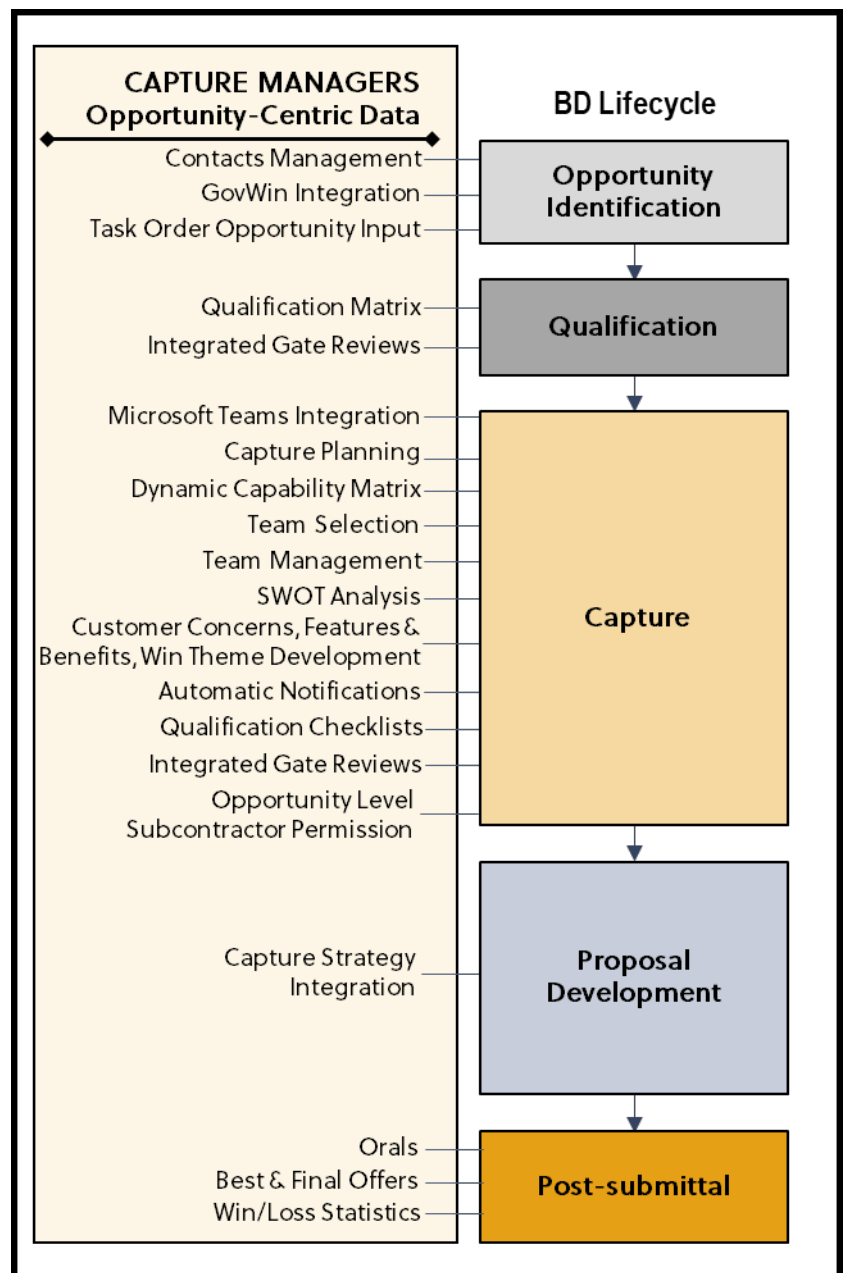
Proposal Planning and Development

Proposal Managers lead diverse teams to produce compliant and compelling RFP responses based on inputs from Capture Managers. They must successfully navigate numerous company processes, approvals, and reviews using multiple technology applications and systems, while adhering to a customer driven schedule.

Proposal management can be drastically improved with streamlined tools that support the team, are customized to company processes, and help maintain the customer's timeline. OneTeam allows Proposals Managers to:

- Automate manual proposal processes, workflows, and tasks to increase productivity, reduce errors, maintain document security, and provide real-time status.
- Use an integrated, cloud-based platform to support the entire BD lifecycle from identification, qualification, capture, proposal development, and award.
- Organize data in an opportunity-centric database to allow Proposal Managers to focus on developing compelling content for winning bids.
- Maintain the schedule and keep the entire team on track.
- Focus on developing and validating content, rather than performing manual administrative tasks.
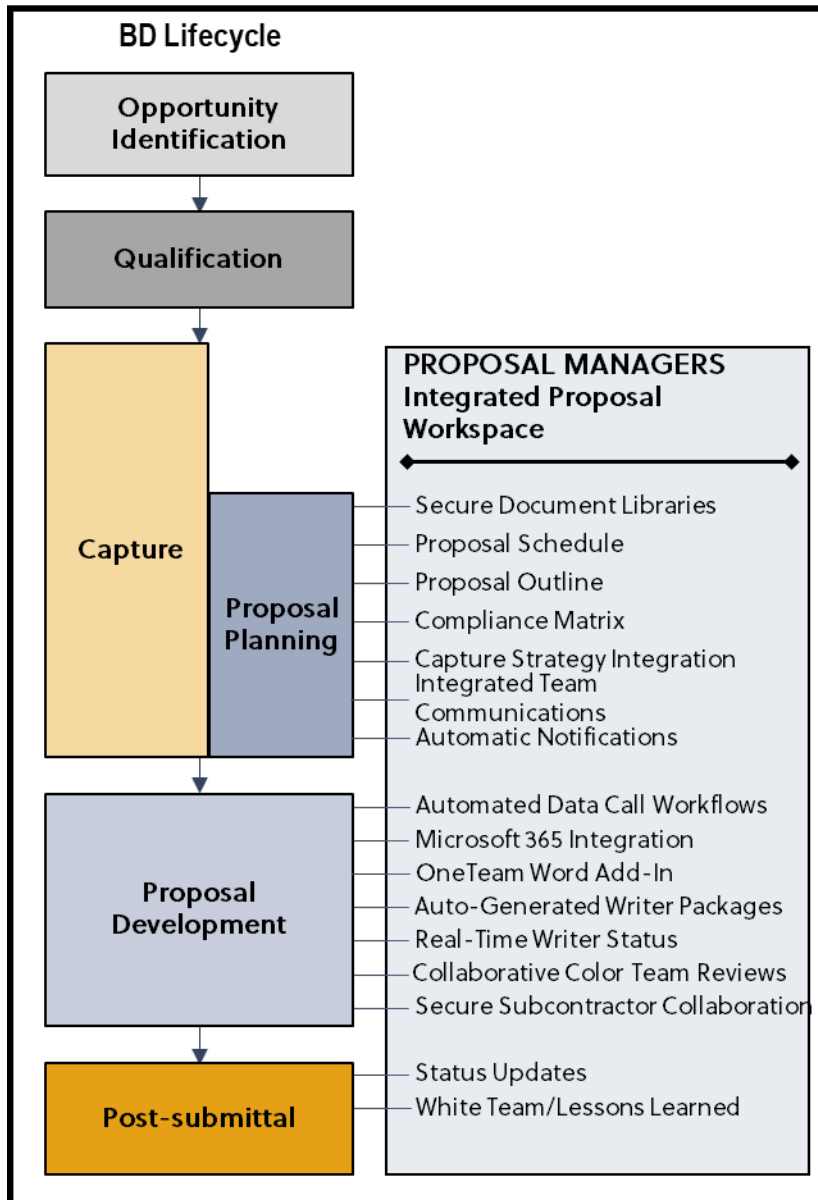- Easily access information, complete tasks, share data, and collaborate during writing and color team reviews.

> **OneTeam automates proposal tasks, so Proposal Managers can**
> - **Increase productivity**
> - **Reduce errors**
> - **Maintain document security**
> - **Provide real-time status.**

This eBook will focus on how OneTeam supports the Proposal activities during the proposal Planning and Proposal Development phases. Proposal Managers have many tasks to

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complete during the Proposal Phase and rely on shared drives, libraries, email, checklists, matrices, templates, and other tools to assist them in completing their tasks.

OneTeam applies automation and collaboration to existing proposal processes to streamline and reduces manual tasks. This is a partial list of Proposal Phase activities and top-level features of OneTeam that integrate with current BD processes.

BD Lifecycle

- Opportunity Identification
- Qualification
- Capture
- Proposal Planning
- Proposal Development
- Post-submittal

PROPOSAL MANAGERS
Integrated Proposal Workspace

- Secure Document Libraries
- Proposal Schedule
- Proposal Outline
- Compliance Matrix
- Capture Strategy Integration
- Integrated Team Communications
- Automatic Notifications

- Automated Data Call Workflows
- Microsoft 365 Integration
- OneTeam Word Add-In
- Auto-Generated Writer Packages
- Real-Time Writer Status
- Collaborative Color Team Reviews
- Secure Subcontractor Collaboration

- Status Updates
- White Team/Lessons Learned

Since OneTeam is cloud-based, it is easily accessible to the entire BD Team. OneTeam is continuously improving to better meet clients' needs and to automate more processes.

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This eBook will present 10 OneTeam features that support good Proposal Management processes.

1. Proposal Team Management

2. Secure Team Collaboration

3. Integrated Proposal Schedule

4. Automated Data Calls

5. Outline and Compliance Matrix

6. Auto-Generated Annotated Outlines

7. Auto-Generated Review Volumes

8. Collaborative Color Team Reviews

9. Capture Data Integration

10. Proposal Management Dashboard

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Proposal Team Management

Manage Internal and External Users

Traditional Best Practices

When responding to an RFP, Proposal Managers manage thousands of small details that must come together to submit a winning proposal. They may need input from many different people, including the Business Development (BD) team, teaming partners, Project Managers, and technical Subject Matter Experts (SMEs) who often support a contract full-time. A Proposal Manager faces several challenges as they manage the many milestones and inputs for a proposal. These include how to:

- Manage inputs from the internal company team, who are mainly company personnel who do not work for them.
- Manage subcontractors or teaming partners so they can participate in proposal development without having access to protected company sensitive information.
- Assign and manage team member roles, such as pricing, capture, artists, writers, reviewers, volume leads, data call manager, and editors.
- Assign writers and know the status of content development.
- Assign and manage Reviewers for the Color Team Reviews.
- Maintain frequent communication with the team.

- Proposal Managers must be organized and have easy access to all proposal relevant information and accomplish their tasks in a short turn-around time, usually 30 days or less. Also, Proposal Managers can several different tools to manage the Proposal Team, including:
- An Excel or Word POC list of all contacts for the Proposal Team, which is often sent through email
- A SharePoint site for proposal documents
- An Excel list of Teaming partners
- An Excel or Word assignment list for proposal Writers and Color Team Reviewers
- Outlook to email information to the team

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OneTeam's Best Practices and Solutions

OneTeam supports Proposal Team Management and permits the Proposal Manager to execute the proposal tasks in a collaborative workspace. In OneTeam, the Proposal Manager manages the team, communicates and tracks information, and makes sure that everyone performs their assigned proposa*l* duties *all in one location*, without maintaining a separate library of Excel or Word documents as shown in the graphic below.

Manages the Teaming Partner Companies, Contacts, Writers, and Reviewers

| OneTeam integrated Search on SAM & FPDS data | Manage Email Invitation Process to Securely allow Opportunity-Specific Access | Add Partner Contact Access to Specific Opportunity Only | Select Teaming Partners based on Capabilities and Value to Team | Quickly remove Teaming Partner Access when needed |
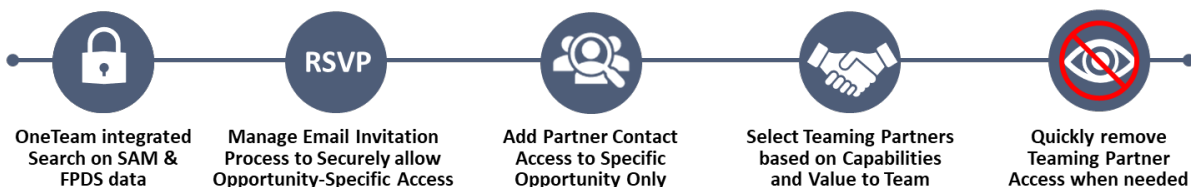
What is a OneTeam User?

Internal team members who use OneTeam have a license or subscription. Proposal Managers, Capture Managers, BD Managers and Consultants for the prime contractor require a OneTeam **Standard User** license. Internal company users can serve as Writers and Reviewers with a **Limited User** license. Subcontractors may serve as a Writer or Reviewer for specific proposal sections and are given a free Limited User license. A subcontractor cannot serve as the Proposal Manager in OneTeam, since their permission level and functions are much more limited than Standard Users.

1 Add Internal Team to Opportunity

Internal users are added to OneTeam at the company level, and then assigned to individual opportunities to support those specific bids. Internal users may support multiple bids simultaneously.

2 Select Teaming Partners

The Proposal Manager selects Teaming Partners by name when known, or may use OneTeam's Advanced Search with dozens of filters to select the right teaming partner for the bid. OneTeam incorporates SAM and FPDS data into an integrated easy to use Advanced Search Function.

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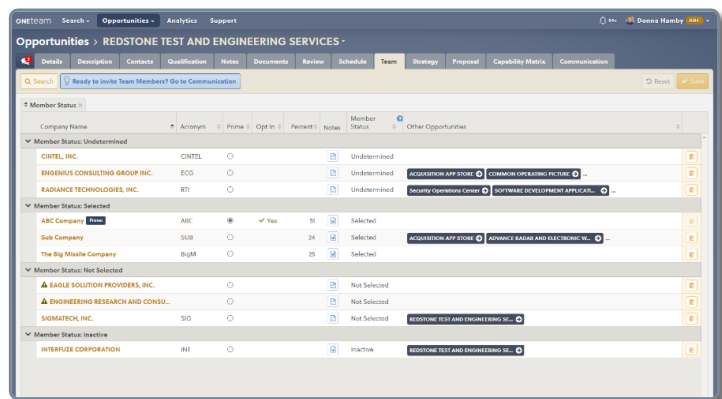
3   Assign Contacts and Roles

Team Management usually begins during the Capture Phase and is controlled by the Capture Manager. If this was not done during capture, then the Proposal Manager will complete these tasks.

- Designate a Primary Contact for the opportunity. This will most likely be either the Capture Manager if using OneTeam for the capture process or Proposal Manager if using OneTeam only for the Proposal process.

- Assign roles to the internal team members – Pricing Lead, Capture Manager, Graphic Artist, Data Call Manager, Past Performance Lead, Editor, etc.

- Add contact information and determine if anyone requires 'view only' access.

- Designate who can respond to a Capability Matrix and who may receive communications through OneTeam.
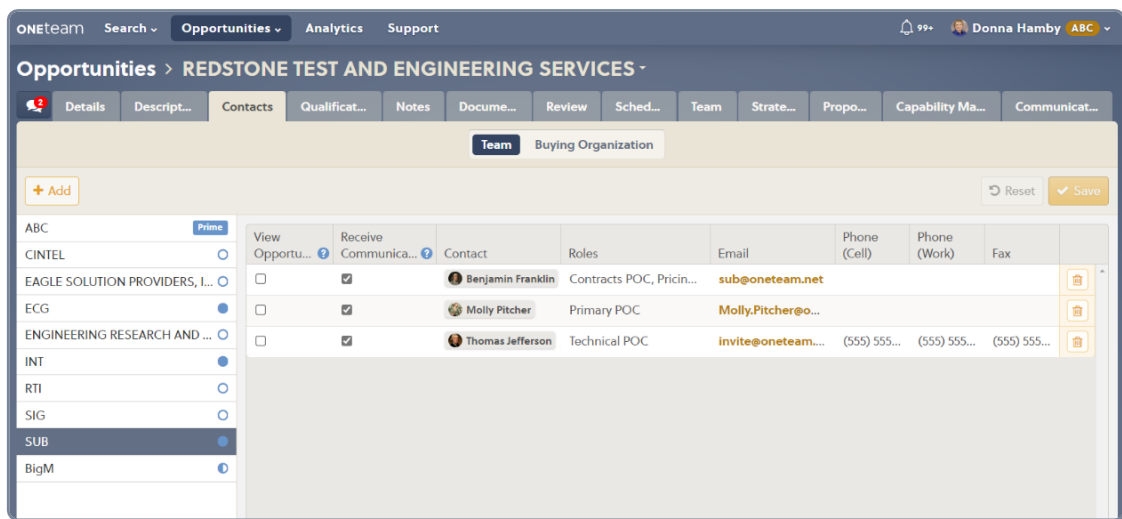
4   Assign Writers & Reviewers

The Proposal Manager ensures potential Writers and Reviewers are listed in the Contacts for the opportunity. Assign Writers and Reviewers from a pull-down menu of eligible contacts for the opportunity.

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5 Communicate with Team

Proposal Managers manage team opportunity-related emails in Communications to keep them associated to the opportunity. This expedites locating information, since it will be forever attached to the opportunity, which maintains the historical record for future contracts or a recompete of an existing contract.
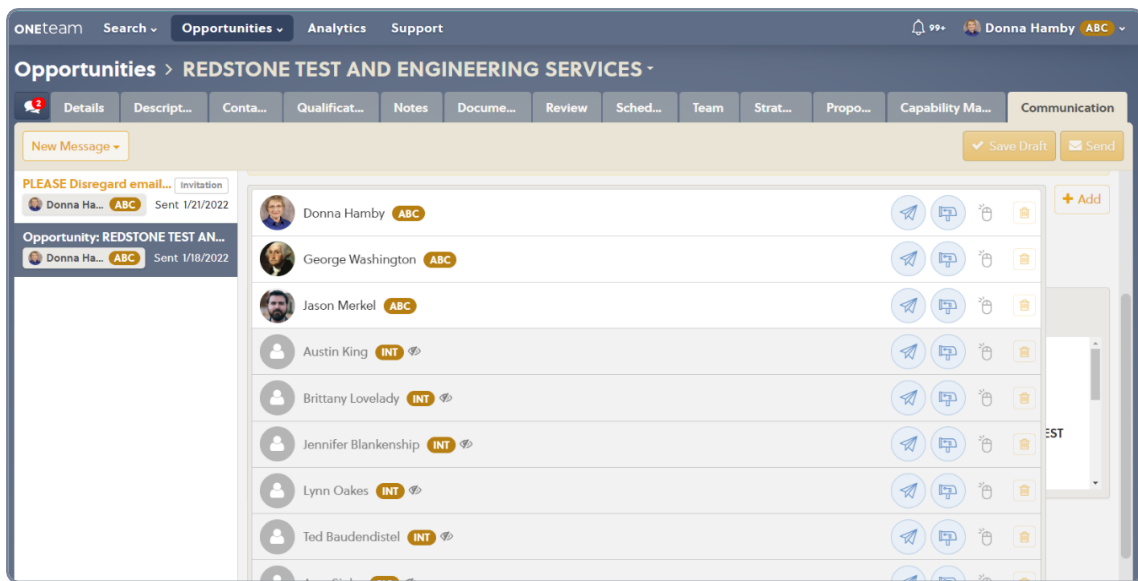
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OneTeam Benefits

- Manage the Proposal Team at the opportunity level.

- Quickly add internal team members from your list of company contacts.

- Integrate Subcontractor team members as Writers and Reviewers through an automated invitation process.

Implementing OneTeam Best Practices into the BD Process

The real-time status of the Contacts list and the Assignments eliminates the continuous updating and distribution of POC lists. OneTeam is the integrated single source of truth for your BD Team, and when any information is updated that is relevant to the team, everyone immediately has access to the data and may be notified of informational updates.

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Secure Team Collaboration

Control Access with Individual Permissions, Data Access, and Document Control at the Opportunity Level

Traditional Best Practices

Security has been a very important topic for GovCons since 2017, when the government issued requirements for compliance with NIST 800-171, a set of guidelines that outline the processes and procedures to safeguard Controlled Unclassified Information (CUI). This started a wave of conservation and questioning of the security of company data, tracking who has access to documents, and how and what data needs to be protected.

Proposal Managers must also abide by company cybersecurity standards presented in Cybersecurity Maturity Model Certification (CMMC). Balancing security requirements while juggling numerous tasks and producing a winning proposal is no small task for a Proposal Manager, it requires approved processes and a state-of-the art software solution.

OneTeam's Best Practices and Solutions

OneTeam was born and built in the cloud, specifically designed for Government contractors to ensure data confidentiality, integrity, and availability. OneTeam's collaborative cloud-based BD platform supports Proposal Team Management by the Proposal Manager as previously detailed in the previous section, *Proposal Team Management*.

A Proposal Manager controls access to the BD data in OneTeam thru multi-layered permissions and access, designated by the Capture or Proposal Manager. As an integrated BD platform, OneTeam ensures that secure collaboration starts in the capture phase and continues throughout the proposal development process. The Proposal Team is able to collaborate securely in OneTeam because of the following controls:
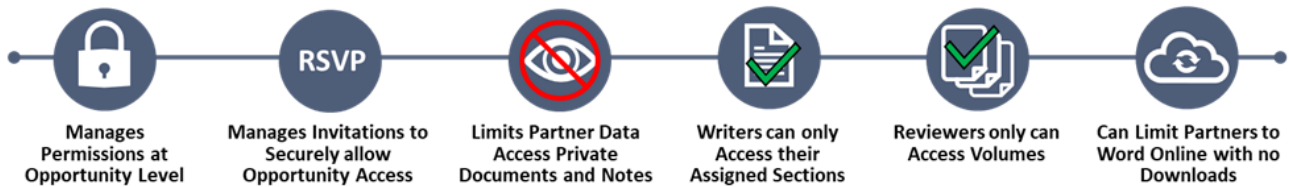
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- Internal proposal team members are determined by the Capture or Proposal Manager and assigned at the opportunity level. If internal personnel are not included in the list of Contacts for an opportunity, they do not have access to view the opportunity.

- Teaming Partners or Subcontractors must be invited to participate in a specific opportunity – which only provides access to specific data in that opportunity.

- Teaming partners must register for a free OneTeam account, which is available through the invitation process, and create their unique login.

- Teaming Partners can only be assigned as Reviewers or Writers for Proposal Content and only access their assigned content.

- Proposal Managers can designate specific documents, tasks, notes, or assignments as Private to limit viewing by subcontractors.

The graphic and narrative below present an overview of the five key features in OneTeam that permit Secure Team Collaboration.
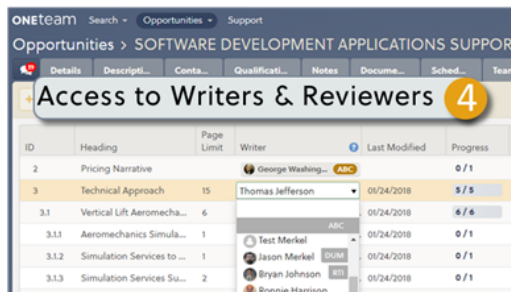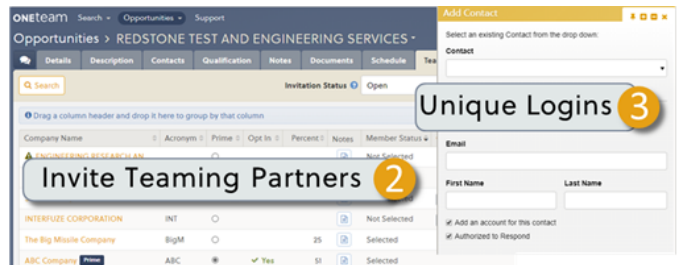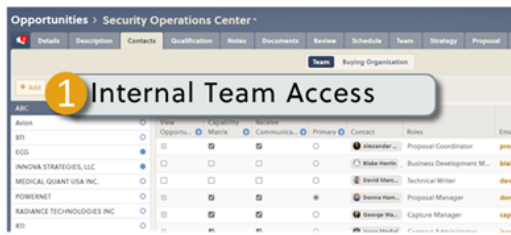
1 Internal Team Access

Each OneTeam User company has Company Administrators that control and assign users and their permission levels in OneTeam. These internal users are then available to be assigned to specific opportunities to support the capture or proposal process. If a user is not assigned to an opportunity, they will not have access to the opportunity data, and cannot participate as a Writer or Reviewer for that opportunity. The Capture and Proposal Manager also have easy access to remove a user as an opportunity. If a user needs to be permanently removed from OneTeam, a Company Administrator Inactivates the user to remove their access from OneTeam.

2 Invite Teaming Partners

During the Capture phase of the BD Lifecycle, the Capture Manager may have selected the Team by evaluating team members using the Team and Capability Matrix functions of OneTeam. Capture Managers invite Teaming Partners to discuss teaming with a secure Invitation sent through OneTeam Communication.

③ Unique Logins

Invited Teaming Partners or Subcontractors, are then prompted to set up a free OneTeam account. The Teaming invitation will contain a link to OneTeam with an automated account set-up process. Subcontractors have limited access to opportunity information, and never see any financial data, P-Win rates, B&P amount, profits, or revenue projections. They also cannot view notes, tasks, or documents that are marked as Private (see below) and do not see other Subcontractors, until they are all selected as Teaming Partners. If a teaming partner does not receive a Teaming Invitation Request, they cannot ever access that opportunity in OneTeam.
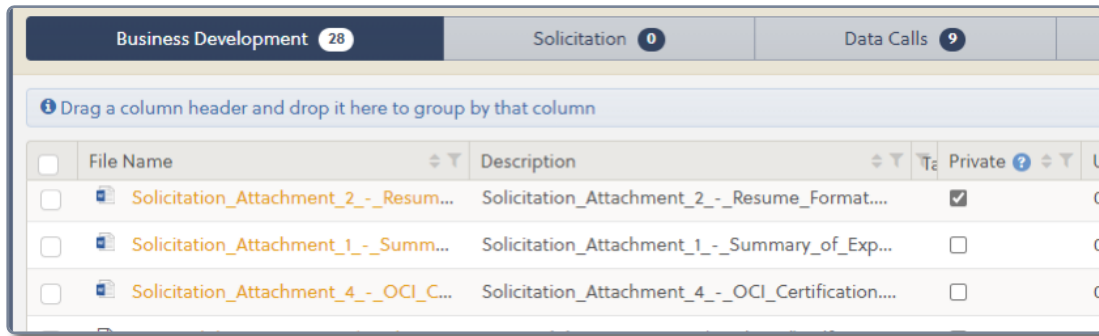
④ Assign Partners as Writers or Reviewers

Teaming Partners will be permitted to participate in the proposal process as Writers and Reviewers. They can also complete assigned Data Calls, complete a Capability Matrix (if designated to complete it), and add notes for the team. A contact from a Teaming Partner cannot view the opportunity in OneTeam until the Company has been invited to participate in that opportunity, and that contact has been added to the Teaming Partner contacts.

5   Restrict Access with Private

The Proposal Manager and Capture Manager can also maintain security and control access to opportunity documents and data using the 'Private' checkbox, to restrict access to those on the internal team only. Most files that are uploaded are by default marked as Private. The Proposal Manager can easily change this setting at the document or task level.

	Business Development 28	Solicitation 0	Data Calls 9	

ℹ Drag a column header and drop it here to group by that column

	File Name	Description	T₂	Private ❓	U
☐	📄 Solicitation_Attachment_2_-_Resum...	Solicitation_Attachment_2_-_Resume_Format....		☑	0
☐	📄 Solicitation_Attachment_1_-_Summ...	Solicitation_Attachment_1_-_Summary_of_Exp...		☐	0
☐	📄 Solicitation_Attachment_4_-_OCI_C...	Solicitation_Attachment_4_-_OCI_Certification....		☐	0

OneTeam Benefits

- Company permissions control level of access for internal team members.
- Subcontractors can only view limited non-financial related information.
- Remove access from Subcontractors quickly after proposal submission.
- Limit Subcontractor access to designated users.

Implementing OneTeam Best Practices into the BD Process

If team members change during a proposal, easily update permissions or contact information. The Team list is always up-to-date and accessible to the rest of the team. The permission process also permits the Proposal Manager to remove opportunity access to teaming partners immediately after a proposal is submitted.

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Integrated Proposal Schedule

Automatically generate a Proposal Schedule from Opportunity Data

Traditional Best Practices

Proposal Managers need to track and manage many milestones and events during the proposal development process. The RFI, DRFP, and RFP all have due dates, which may change multiple times. There will likely be customer events such as Industry Day or 1-on1 Sessions that GovCons need to track and attend. The Proposal Schedule is a complex listing of linked and often dependent deadlines.

There are also hundreds of action items and writing assignments relevant to the Proposal Manager and Proposal Team. Since BD departments often work multiple opportunities simultaneously, the number of events, dates, and tasks they manage is further multiplied.
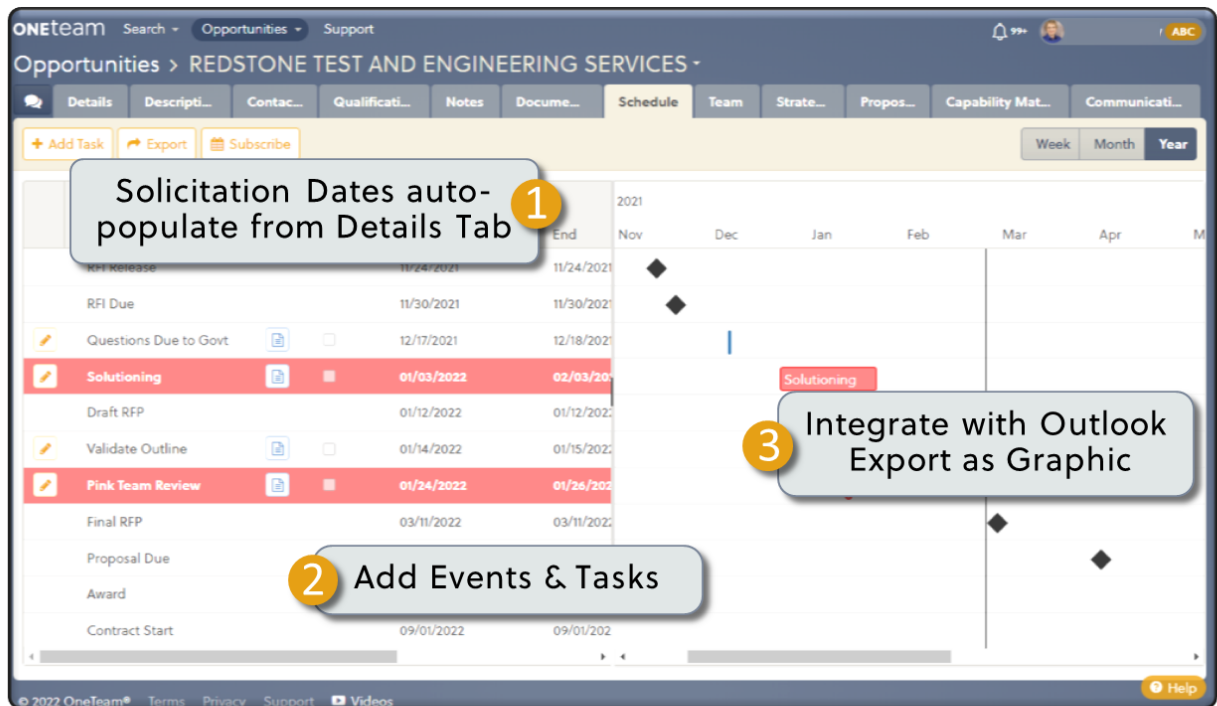
It is essential that the Proposal Manager create a schedule for each proposal and keep the schedule up-to-date with the ever-changing data from the government or from other internal drivers. Manually updating a schedule almost daily for multiple events and proposals can be tedious and may introduce errors.

OneTeam ProTip

Automatic updates of solicitation dates in accordance with data provided by the customer, is one of the ways OneTeam uses automation to reduce potential of errors. OneTeam provides an Integrated Proposal Schedule for each opportunity in a company's pipeline. When a company links OneTeam to their GovWin account, OneTeam is updated each time GovWIn updates opportunity data.
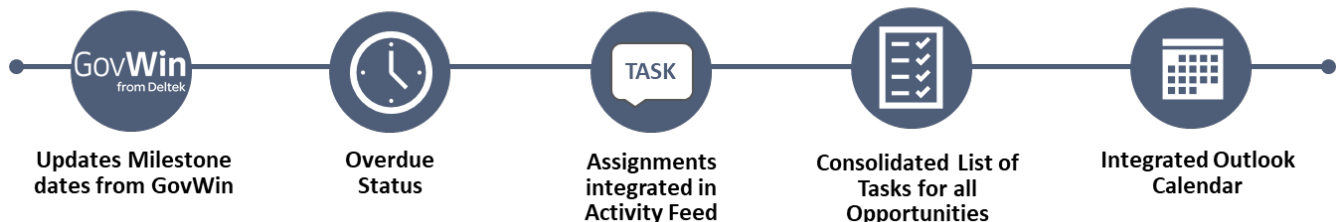
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Having a real-time online schedule reduces the need for a Proposal Manager to manually create a schedule and send to all proposal team members. Additional schedule capabilities are included in the consolidated list of milestones, events, and tasks for all opportunities in a company's pipeline. This allows the Proposal Manager to balance resources based on tasks assigned to team members. It also allows for consideration of other proposal's review schedule and events, when determining if Writers and Reviewers are available.

The graphic below and the following sections provide an overview of three key features in OneTeam that support the Integrated Proposal Schedule.

Automates Tasks & Events, Assignments, and Due Dates

| Updates Milestone dates from GovWin | Overdue Status | Assignments integrated in Activity Feed | Consolidated List of Tasks for all Opportunities | Integrated Outlook Calendar |

1 Solicitation Dates Auto Populate

OneTeam auto-populates dates from the opportunity details. The Proposal Manager may manually add the dates or they may be automatically created through an import from GovWin. Milestones from GovWin or those manually-added to opportunity details will automatically populate the schedule including: RFI Release, RFI Due, DRFP Release, RFP Release, Proposal Due, Award, and Contract Start. When these dates are updated, OneTeam will automatically update the Schedule.


2 Add Custom Events & Tasks

The Proposal Manager may add proposal custom events, milestones, and reviews, such as Pink Team, Red Team, Pens Down, Industry Day, Production days, directly in the schedule and then edit as needed.

The Proposal Manager can also assign tasks to internal or external contacts with a due date and time. OneTeam automatically notifies the assignee of their task via email. Tasks can also be quickly added from Activity Feed, either in the Pipeline view or from within the specific opportunity. Tasks show as an item in the Activity Feed and are included in automatic pop-up notifications.
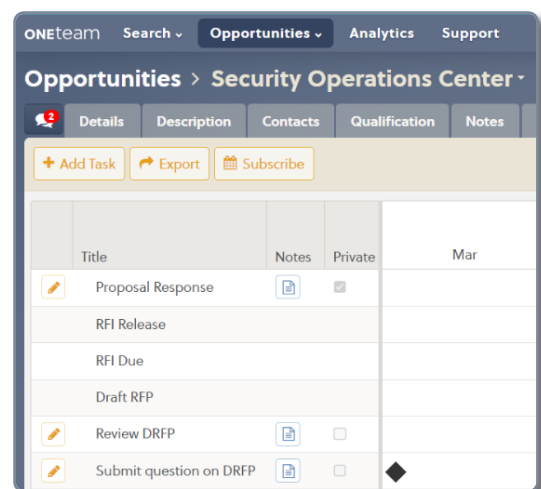
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③ Integrate with Outlook Export as Graphic

Events and milestones can be integrated with Microsoft Outlook - either as a separate calendar or into the user's primary calendar. OneTeam color codes the tasks and events in the Gantt chart and task list.

- Overdue tasks are shown in red in the Schedule.
- Completed tasks are shown in blue.
- A master list of all tasks across all opportunities is available at the pipeline level and may be searched, sorted, and filtered for review.

OneTeam Benefits

- Milestones from GovWin or manually added to opportunity details will automatically populate the Schedule including: RFI Release, RFI Due, DRFP Release, RFP Release, Proposal Due, Award, and Contract Start.
- Add custom events such as, Industry Day, Color Team Reviews, Questions due to Government, etc. to the Schedule.
- Integrate events and milestones with Microsoft Outlook – either as a separate calendar or into a user's primary calendar.
- Assign tasks and actions with due dates to teaming partners or internal team.
- Notify the assignee of task assignment via email automatically.
- Track tasks and check-off when completed.
- Quickly add task from Activity Feed in Pipeline view or from within an opportunity.
- Easily view overdue tasks in red.
- View and download a Gantt schedule.

Implementing OneTeam Best Practices into the BD Process

Create a master list of Proposal Events for a Prime bid, a Subcontractor bid, and for a Task Order Proposal. This document can be stored in the company's Default Documents, and then used in every opportunity for reference in creating the opportunity's custom events.

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Automated Data Calls

Securely Manage Data Calls in an Automated Workflow

Traditional Best Practices

A Data Call is a tool that a prime contractor uses to gather information about the team, including subcontractors or teaming partners for a specific opportunity. Data Calls asks for specific information and may include:
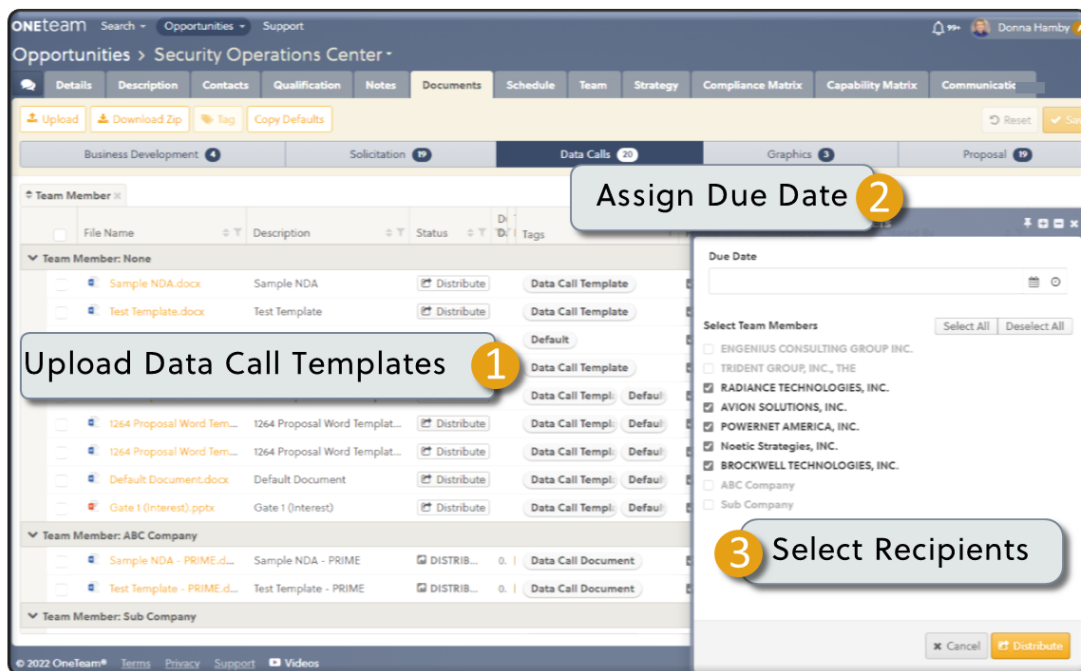
- Non-Disclosure Agreement (NDA) and Teaming Agreement (TA)
- Capability Matrix
- Company History
- Certifications – ISO, CMMC, CMMI
- Facility Security Clearance level
- Key Personnel qualifications
- Years of experience in technical areas
- Company size and locations
- Socio-economic status & certifications
- Specific customer and contract information
- Retention rate

A typical process is for a Proposal Manager to send one or more Data Call documents to a point of contact (POC) at each subcontractor and the prime contractor company. Usually, documents are emailed to POCs and then completed and returned via email. For only one or two teaming partners and a few Data Calls, the process is not overly difficult or complex. But when requesting multiple Data Calls from dozens of subcontractors for a large IDIQ contract vehicle bid, the process and organization of responses can be overwhelming and often requires a dedicated Data Call Manager.

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The Proposal Manager monitors email, retrieves the completed Data Calls and then files them in an appropriate location to be used for content development at a later time.

OneTeam's Best Practices and Solutions

OneTeam automates the Data Call process with a workflow for Word, Excel, PowerPoint, and pdf documents. Proposal Managers view the Data Call Dashboard to track all Data Calls, and see a real-time color-coded status of each Teaming Partner and Data Call. OneTeam does not email Data Calls, but rather provides the workspace where the Prime contractor and Teaming Partners securely manage and collaborate on Data Calls and other BD activities. The graphic below and following sections provide an overview of three key features in OneTeam that support the Automated Data Call process.

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Automates the rest of the Data Call Process

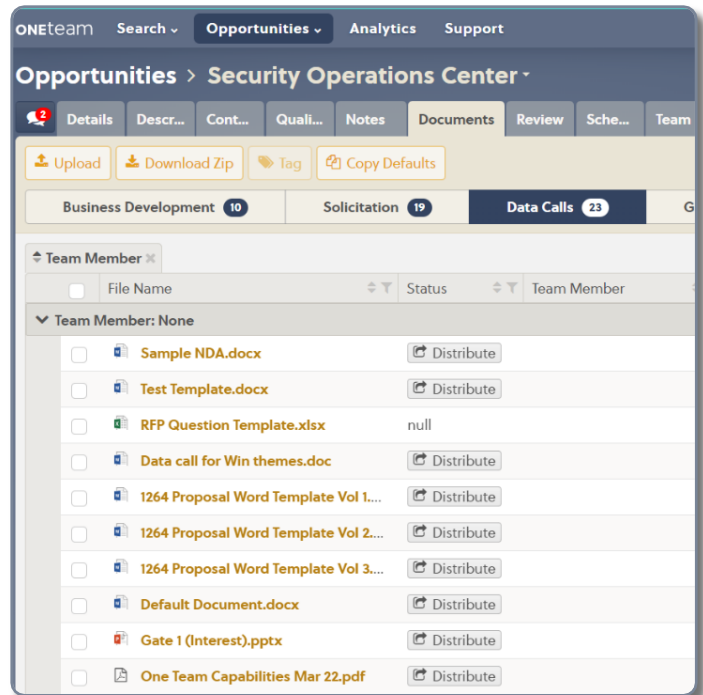| Notifies POC of Data Call Request | Tracks Data Call Status | Accepts or Rejects Data Call | Repeats Workflow until Data Calls Accepted | Data ready for Capture & Proposal Managers |

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① Upload Data Call Templates

The Proposal Manager uses the Data Call Dashboard of an opportunity to manage all related Data Calls. Data Call templates, including NDAs, Teaming Agreements, Pricing Inputs, and data requests can quickly be managed in the Dashboard.

OneTeam distributes a Data Call notification to the selected POC or all teaming partners, and for a POC for the internal company, who have been given permission to complete Data Calls. The Data Call documents are not emailed to POCs. Instead, an email is sent and includes a link to the Data Call, due date, person who assigned the data call, and their email address.

② Assign Due Date

The Proposal Manager assigns a due date and time for the Data Call In the 'Distribute to Team Members' window that opens. This due date is displayed in the email the recipient receives and in the Data Calls Dashboard.

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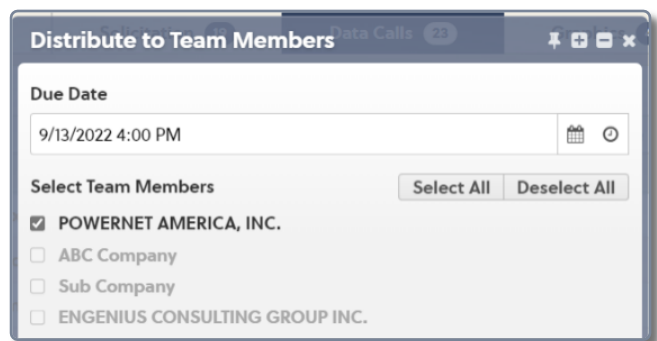
3 Select Recipients

The Proposal Manager selects the companies to receive the Data Call by selecting the company name.

The Proposal Manager cannot distribute a Data Call to the same company multiple times by accident – team members who have already received the selected data call are grayed out, and data calls can only be sent to the selected team member(s).
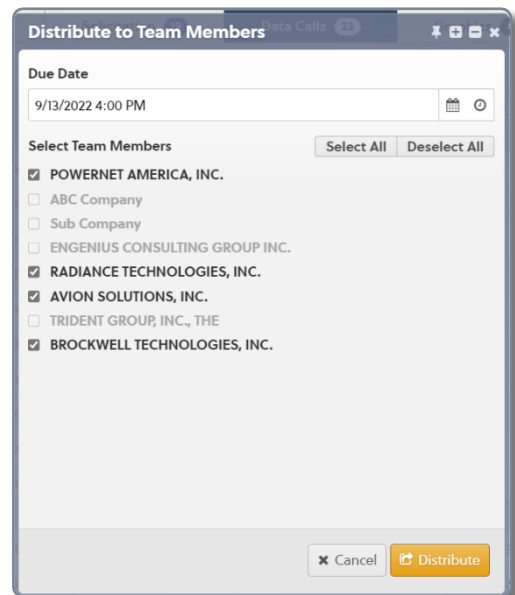
OneTeam Benefits

- Proposal Managers create opportunity-specific Data Calls and upload the Word, Excel, PowerPoint, or pdf documents to the opportunity record.

- OneTeam automatically distributes a Data Call notice via email to the Primary Contact for the potential or selected teaming partners.

- Data Calls are not emailed, but a link is sent to allow teaming partners to complete the Data Call in OneTeam. This keeps company sensitive information from going through the email system and protects a company's competitive advantage.

- Each Data Call document can only be sent once to a teaming partner.

- The Data Call dashboard shows a color-coded status for each data call – **Distributed**, **Submitted** (by teaming partner), **Accepted** (by sender), or **Rejected** (with reason provided by prime).

- Teaming partners will also receive email notices when Data Calls are accepted or rejected with the link to complete the Data Call if it was Rejected.

Implementing OneTeam Best Practices into the BD Process

Distribute NDAs and Teaming Agreements through the Data Calls Dashboard and easily track the status of all Data Calls. The Proposal Manager can be assured that all agreements are in place and fully executed BEFORE a Kick-Off Meeting is scheduled.

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Outline and Compliance Matrix

Create an Outline, Map Requirements and Automatically Create a Cross-Referenced Draft

Traditional Best Practices

Proposal development begins with an Outline detailing the bidding team's proposed response (Proposal) to the government customer. The Proposal Manager

- Creates the Outline in accordance with Section L, which may be also be called Instructions to Offer, Notice to Offerors, or something similar.
- Reviews Section M, Evaluation Criteria, and includes any additional outline elements that are found in Section M, but not included in Section L.
- Maps Section C, also called the PWS, SOW, or SOO, elements to the Outline.
- Includes the Sections L, M, and C reference numbers.
- Thoroughly reviews Sections G and H for requirements that did not make their way into Section L or M.
- Builds the Compliance Matrix based on the RFP mapping and Outline.

As technology progresses and Proposal Managers seek to automate more proposal tasks, the task of dissecting and interpreting an RFP in accordance with customer and industry terminology will likely remain the responsibility of an experienced Proposal Manager.

OneTeam's Best Practices and Solutions

In OneTeam, Proposal Managers build Outlines for all proposal volumes within the Opportunity record. It is not a separate Excel or Word document that must be updated and reloaded to a shared site. Edits to the Outline and Requirements can easily be made in real-time by the Proposal Manager, and the Outline and Compliance mappings are linked to the opportunity forever, even after the opportunity is archived from the active pipeline.

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The graphic and narrative below demonstrate three key features in OneTeam that allow the Proposal Manager to easily develop all volume Outlines and the Compliance Matrix.
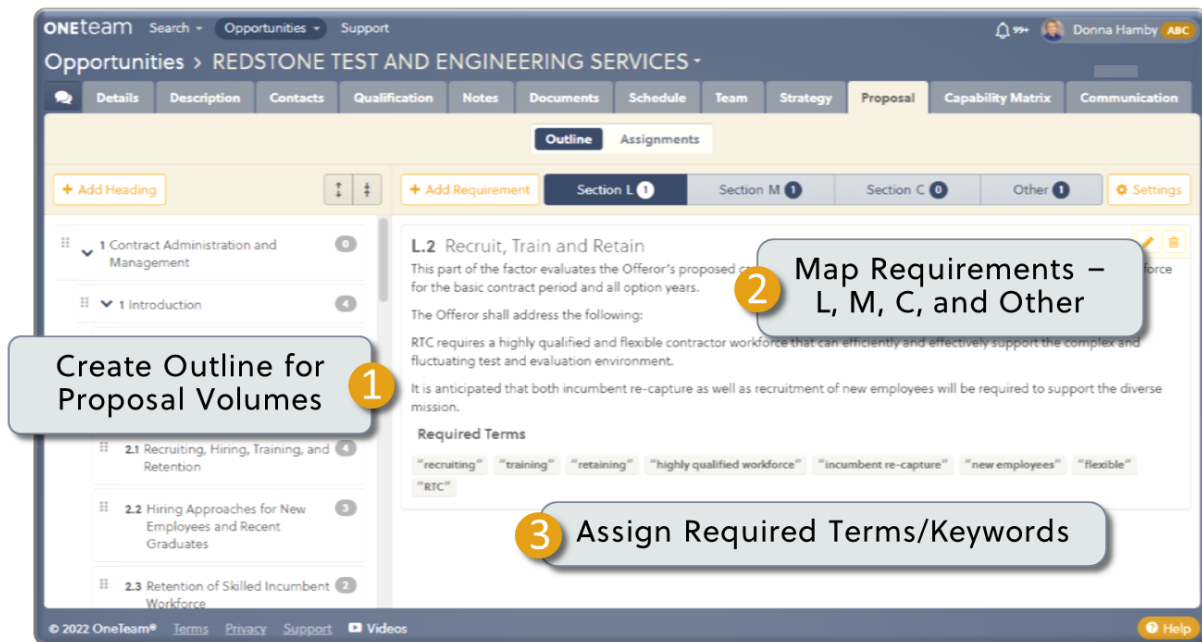
Create Outline for Proposal Volumes

It is as easy to build an Outline in OneTeam as it is to build it in Excel. OneTeam provides an intuitive way to visually map requirements to Outline headings

The Proposal Managers creates an Outline for each volume of the proposal, beginning with the major headings. They then add sub-headings to accurately reflect the RFP requirements, including as many levels of sub-headings as desired.

OneTeam allows the Proposal Manager to rearrange headings easily by dragging and dropping selected headings to another location. Headings can also be edited after being created or deleted if needed.

The Proposal Manager makes the Outline as detailed as required by the RFP Section L and to accommodate their intended Writers.

The difference in creating an Outline in OneTeam vs. creating it manually is the automation that is implemented when generating Word documents for the Writers to develop assigned content. After the Outline is created, the Proposal Manager does not have to copy or recreate the proposal headings in Word documents – OneTeam automates the entire process, as detailed in the section *Auto-Generated Writer Packages.*
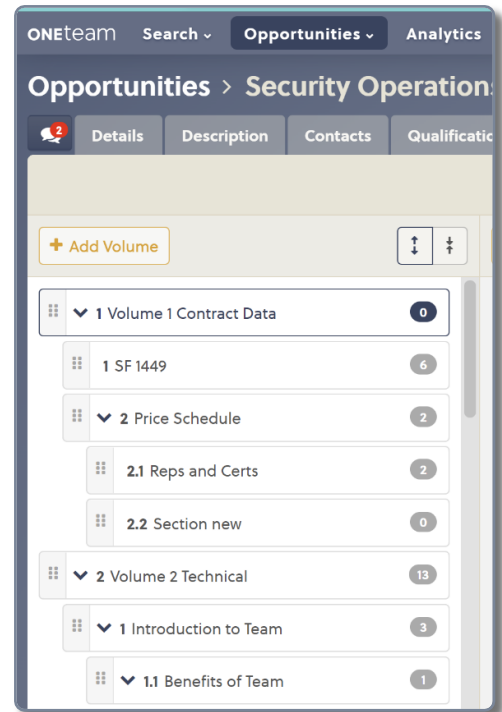
② Map Requirements – L, M, C, and Other

The Proposal Manager maps requirements from RFP Sections L, M, C, to the Outline Heading/Sections in OneTeam. Notice that the highlighted label at the top changes – L, M, etc. and the number shows how many requirements are currently mapped to that section of the outline in each RFP category. Add Section G or H requirements, or any win themes or capture strategies to the 'Other' category. This category can also be used for instructions to the Writers, such as parts of an approach, proof points, and other capture strategies.

ONEteam
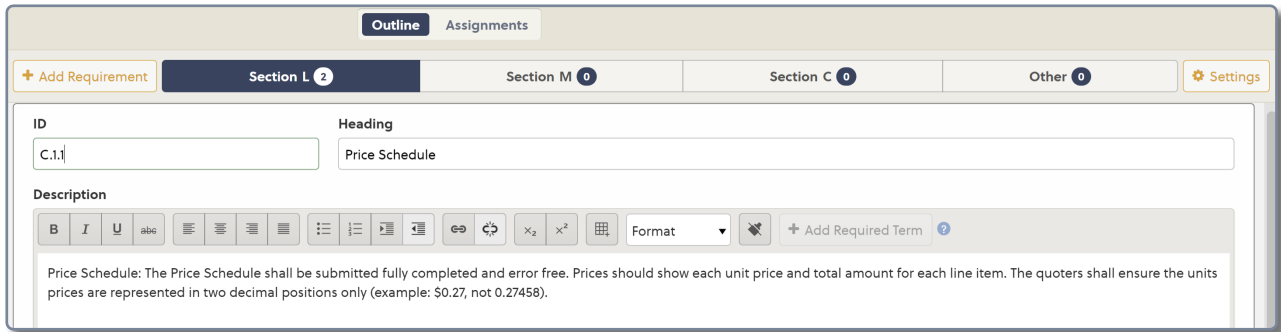
3 Assign Required Terms/Keywords

Lastly, the Proposal Manager adds Required Terms or keywords to be used in specific headings/sections. When Word Writer Packages are later created, these terms will display in red denoting they have not been used. The terms will then turn green after the Required Term has been used in the correct section. Here are some examples of using Required Terms to ensure keywords are used by the Writers in the correct proposal headings/sections:

- CDRLs.
- Certifications.
- Customer document number/name that must be followed.
- Customer Name or acronym.
- Customer-specific terminology, such as evolve, partner, etc.
- Names of organizational interfaces.
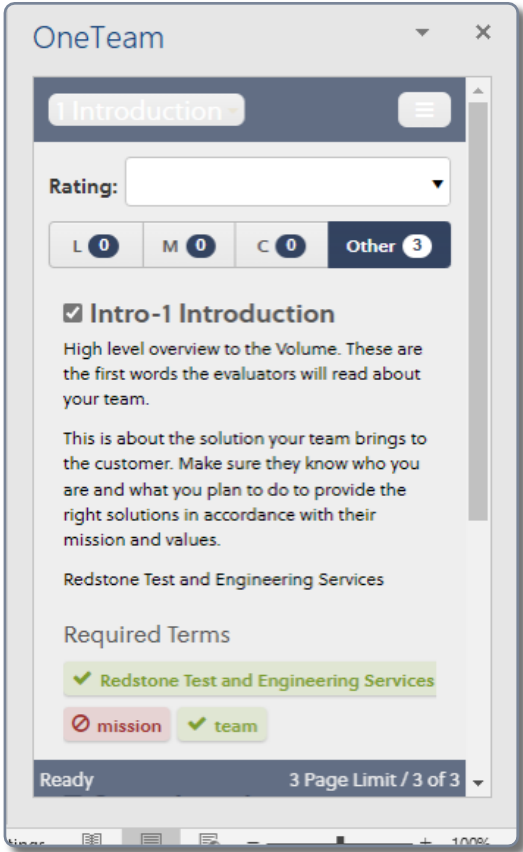
The Proposal Manager may input the requirements, headings, and reference numbers directly into the +Add Requirement window or may copy and paste from the RFP.

ONEteam

OneTeam Benefits

- Create proposal outlines for multiple volumes.

- Maintain outline integrity and compliance while compiling Writer inputs.

- Quickly map RFP requirements from Sections L, M, and C.

- Map Win Themes, Features & Benefits, and Proof Points to Other section.

- Automatically create cross-references, which appear at end of Outline headings.

- Customize heading numbering to company style guide.

- Update Outline and automatically flow Outline changes to the Writers' Packages.

Implementing OneTeam Best Practices into the BD Process

To create a better user experience for the Writers and Reviewers, map every Section L, M, C, and Other requirement to the appropriate volume and heading/section.

The Proposal Manager does not have to cut and paste RFP annotations to each Word document, and then remove them later. This saves a lot of time, reduces errors, and allows accurate page count.

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Auto-Generate Annotated Outlines

Create Word documents for Writers with their assigned sections

Traditional Best Practices

Historically, Proposal Managers create a proposal Outline and Compliance Matrix, as detailed previously in *Outline and Compliance Matrix*, in an Excel document. They often add Writer assignments to the Excel file to denote who has primary writing responsibility for each heading of a proposal volume.

Then to get the content from Writers, they must create a Word template based on RFP submission requirements for fonts and page layout, and in accordance with their own corporate style guidelines. The Outline from Excel must be transferred to Word where the Proposal Manager creates an annotated outline for Writers.

An annotated outline creates the master proposal template, where Writers enter content. The annotated outline has many components including:

- The Proposal Outline, which may be taken from the Excel document.
- RFP Reference numbers after each Outline heading and sub-heading for reference.
- Full text RFP references for
    - Section L – usually red font.
    - Section M – usually blue font.
    - Section C (PWS) often purple font.
- Page allocations or limits.
- Guidance or prompts for the Writers – in a different color from the RFP references, such as in green font.
- Win Themes, Discriminators, Proof Points, Innovations, and more capture strategies.
- Sample Table Format and instructions on graphics placement
- Writer Assignments – such as Writer names beside their assigned headings.
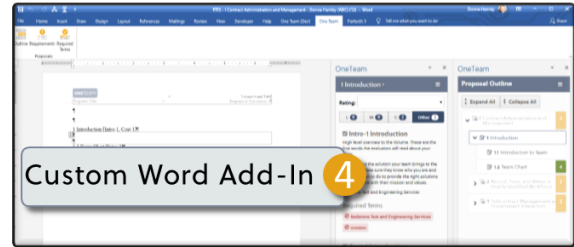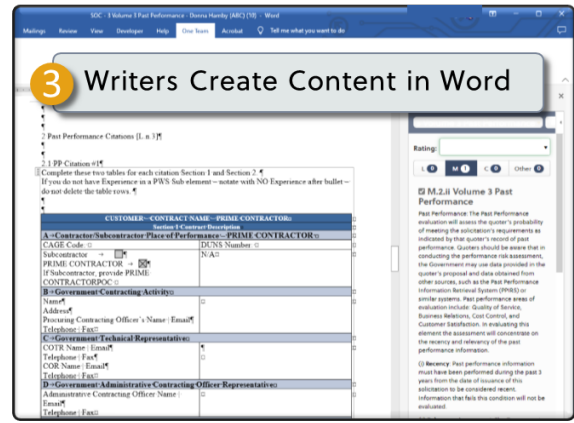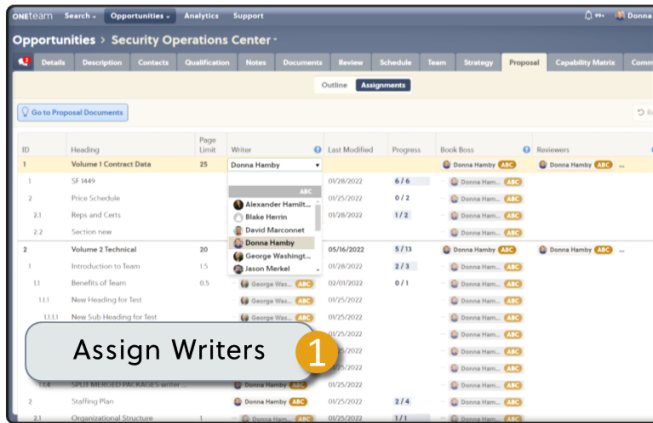
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A document can get very long quickly if it has three or more references for each heading of the proposal volume. This can make it difficult for Writers to assess accurate content length with so much other text included in the Word document. Creating the annotated outline is a very manual process, which takes several hours for the Proposal Manager to complete. Additionally, at some point of the review and edit process, all the annotations must be removed from the documents, and the annotative styles should be deleted from the proposal template style section.

OneTeam's Best Practices and Solutions

While some of the manual tasks cannot be avoided, some can be automated in OneTeam. Once the Proposal Manager has created the Outline for all proposal volumes and mapped all RFP requirements to the proposal headings, there is no need to create a separate annotated outline. OneTeam includes a custom Microsoft Word Add-In, which eliminates the need for an annotated outline by generating Writer Packages from the Outline, Mapped Requirements, and Assignments.
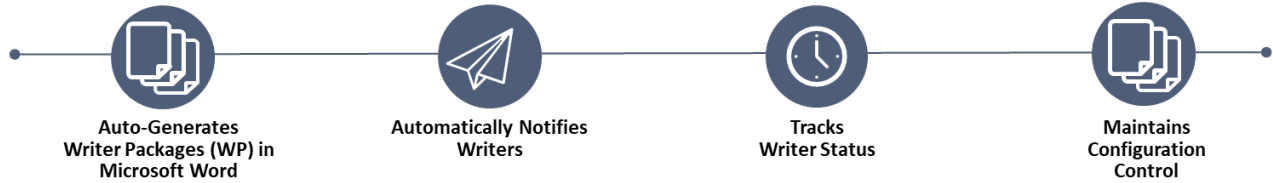
OneTeam auto-generates a separate Word document for each Writer of each proposal volume. A Writer that has assignments in two proposal volumes, will have one Writer Package for each Proposal Volume they are assigned. Each volume will be labeled with the volume number, volume name, and the Writers name. Each Writer Package includes all RFP requirements mapped to the Outline, in a separate window or panel beside the Word document, not in the space where Writers are adding content. Writers can easily view, Section L, M, C, and Other requirements, required Keywords, instructions from the Proposal Manager, and page allocations in the Word Add-in. Writers are also able to check off each requirement as they complete it.

The graphic and narrative below demonstrate four key features in OneTeam that allow the Proposal Manager to easily generate a Writer package for each Writer to save valuable time in the proposal process.

ONEteam

Assign Writers **1**

Generate Writer Packages **2**

Writers Create Content in Word **3**

Custom Word Add-In **4**

OneTeam's Custom Word Add-In Auto-Creates Writer Packages in Microsoft Word

| Auto-Generates Writer Packages (WP) in Microsoft Word | Automatically Notifies Writers | Tracks Writer Status | Maintains Configuration Control |

1 **Assign Writers**

After creating the Outline for each volume of the proposal and mapping the RFP Requirements from L, M, C, and Other sections to the Outline -the Writers are assigned. The Proposal Manager selects an individual Writer for each Outline heading. Only one Writer may be assigned per heading. Proposal Managers may assign page limits to each heading/section. Including page limits provides additional guidance to the Writers.
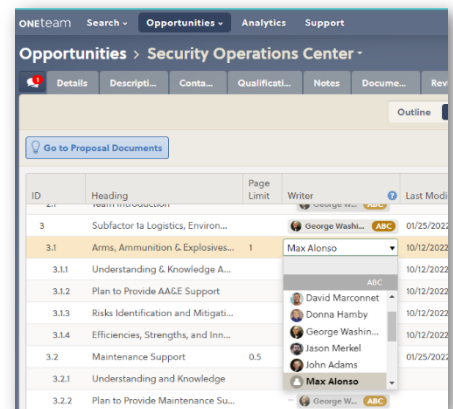
Proposal Managers can customize a proposal Word template to match RFP requirements and corporate style guide. This template can include a title page, match company style guide and/or RFP requirements, includes table of contents, list of figures, headers, footers, company logo, page numbers, and disclaimer statement.

② Generate Writer Packages

OneTeam will automatically generate Writer Packages and create a custom Word document for each Writer, based on the Writer assignments. Each Writer Package has that Writer's assigned heading/sections in the document with a content box for each heading/section. The document does not include sections not assigned to the Writer.
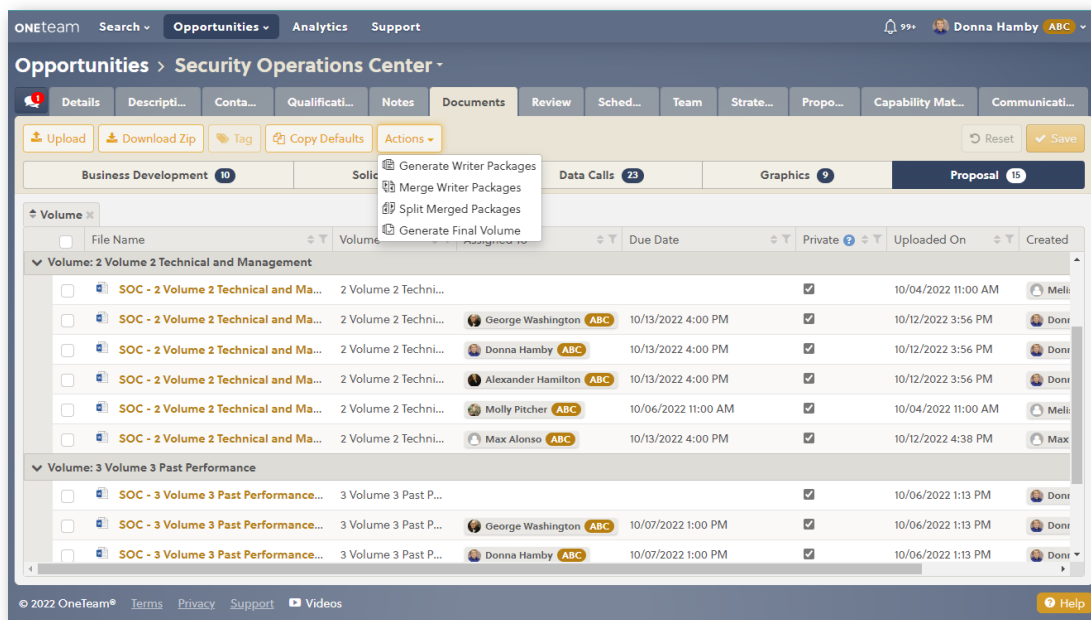
③ Writers Create Content in Word

Writers view their Volume Outline, RFP requirements, mapped capture/win strategies, and Required Terms in OneTeam's custom Word add-in (included with OneTeam subscription) – without the Proposal Manager copying and pasting all of those requirements into an annotated Word outline!

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Writers work in their Word document to input narrative, graphics, and tables in their assigned sections. Original content can be created in the Writer Package or Writers can copy and paste content from reference documents. Graphics, tables, Icons, and smart art can also be inserted or copied into the Writer Packages. Writers check off requirements as they are addressed in the Writer Package. The Proposal Manager views real-time status of Writers through the Proposal Management Dashboard.

OneTeam ensures that the Proposal Manager is in control of the Outline and Assignments, which ensures compliance with the RFP. Writers cannot change or move headings in the Word document, only a Proposal Manager can alter the proposal headings created by the Outline.
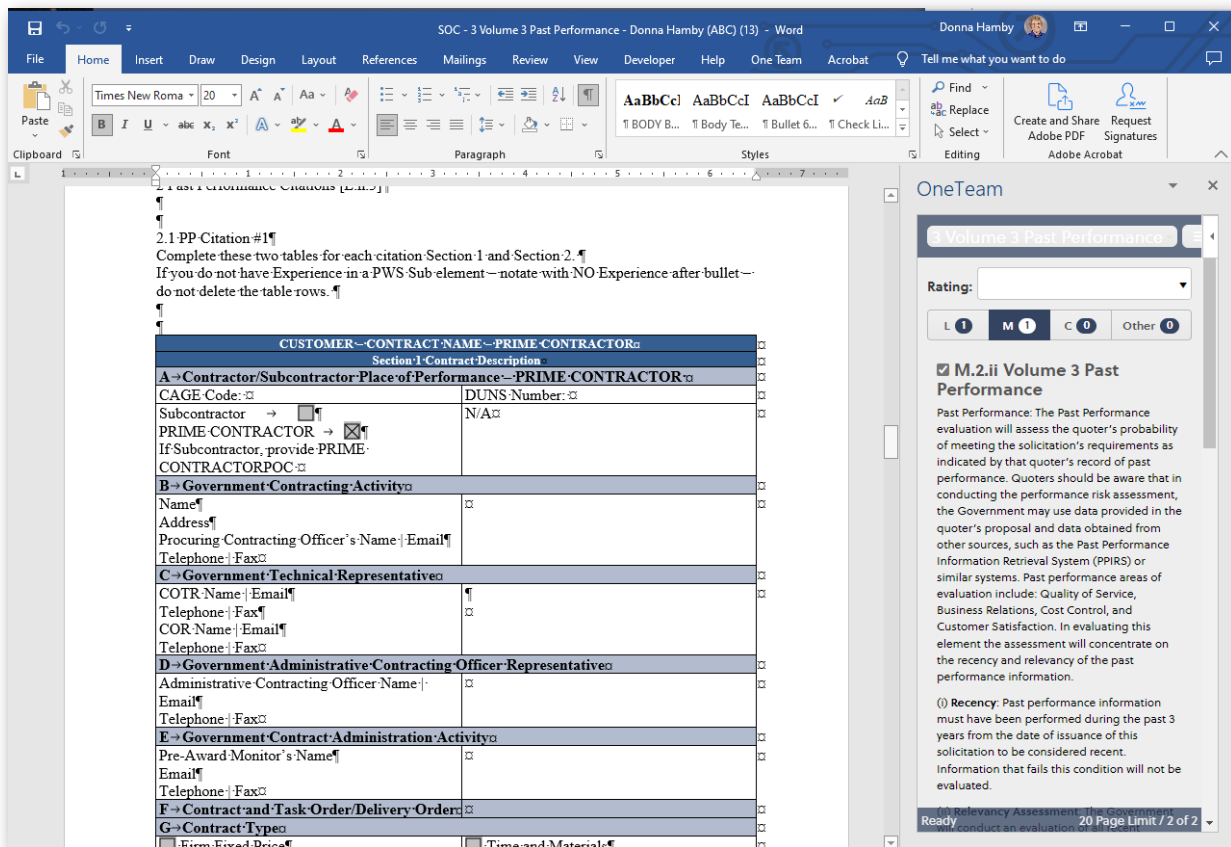
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4 Custom Word Add-In

The Requirements from the Compliance Matrix will appear in OneTeam's custom Word Add-in – NOT inside the Word document. Writers can easily view the requirements, but they do not interfere with content creation. OneTeam's custom add-in includes three panels/windows viewable from inside Word:

- **Volume Outline** – Writers view the entire volume outline with their assigned sections shown in black font, and other Writers' sections are in gray font.
- **Requirements** – Displays the mapped L, M, C, and Other requirements. Writers note their status by checking the box next to the requirement.
- **Required Terms** – Displays all Required Terms in color-coded status.

The graphic below shows an example Writer Package with Outline panel and Requirements panel. Writers can view Section L, M, C, and Other requirements and then check off assigned sections in the Requirements panel. Writers can view the entire volume Outline and where their assigned sections are located.
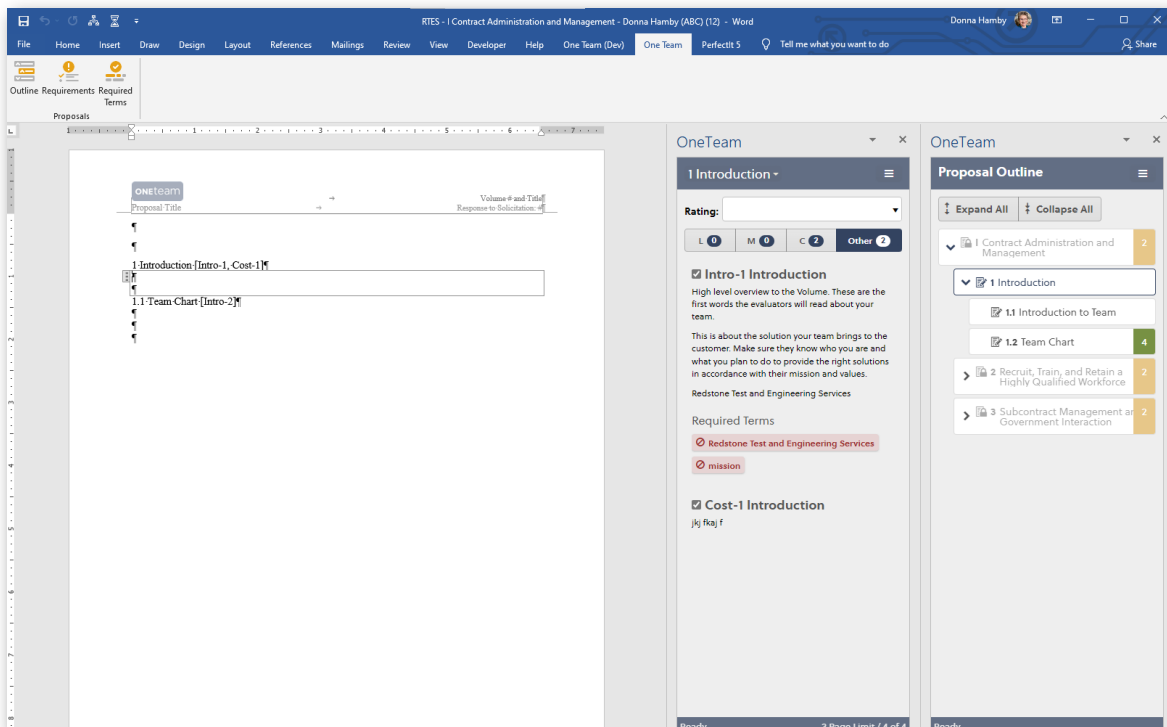
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OneTeam Benefits

- Reduces cutting and pasting of outlines for writers.

- Maintains configuration control and version history.

- Ensures writers only access their assigned sections.

- Maintains control of competition sensitive data.

- Writers designate sections as completed to provide real-time status to the Proposal Management Dashboard.

- To maintain the integrity of the Outline, Writers cannot change or rearrange headings, as those are determined by the Proposal Manager.

- RFP references are auto-generated by OneTeam at end of headings.

Implementing OneTeam Best Practices into the BD Process

Provide as much information as possible for the Writers – approved strategies, keywords, innovations, solutions, benefits, and win themes – these will help Writers provide better customer-focused specific content.

Capture Strategies can easily be developed in OneTeam, which also has validation for strategies that have been approved by management and finalized by the Capture Manager to be used in proposal content. This will help to get the information you need and avoid re-writes or starting over with content.

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Auto-Generated Review Volumes

Create Review documents in seconds, not hours

Traditional Best Practices

After Writers create content for a proposal volume, the content from all Writers of the volume must be combined into a Review document. The Proposal Manager compiles the Writers' inputs into the Review Volume and then prepares the volume for a review. This typically involves copying and pasting narrative and graphics from the Writer's Annotated Outlines into a master Review Volume.

Configuration control has historically been an issue since Word documents are often emailed to Writers. This results in several people having access to parts of the proposal, which may or may not be the most recent version of the information. Many times, Writers send an updated version of their inputs, after the Proposal Manager has incorporated their content into the Review Volume. But by this time, their inputs may have changed and the Proposal Manager must laboriously read and compare content to include the new revisions.

Keeping proposal documents in an online library, where users must always access the most recent version is critical for configuration control. It also reduces time wasted in redoing work and reduces some of the stress involved in developing proposals.
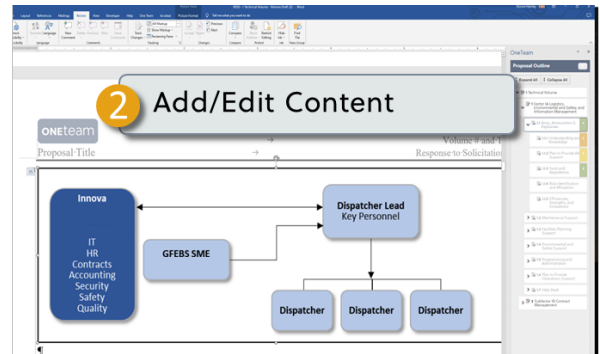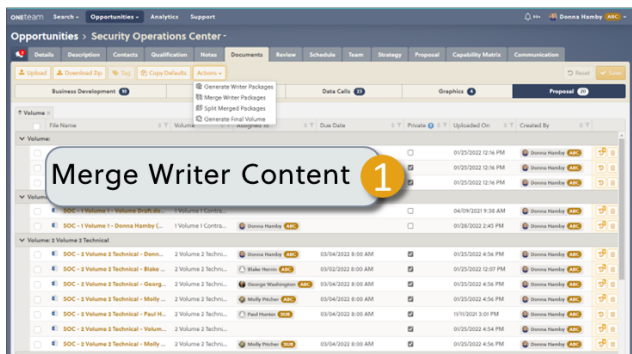
OneTeam's Best Practices and Solutions

OneTeam automates the entire process of moving Writer content into a full Review Volume. The Proposal Manager assigns a deadline for Writers to submit their content inputs, and then in a few seconds, can combine all the Writer Inputs into a Review Volume in OneTeam.

Additionally, the Proposal Manager can view each Writer's status of completing the RFP requirements, as Writers check off each requirement in the OneTeam Word Add-In. The
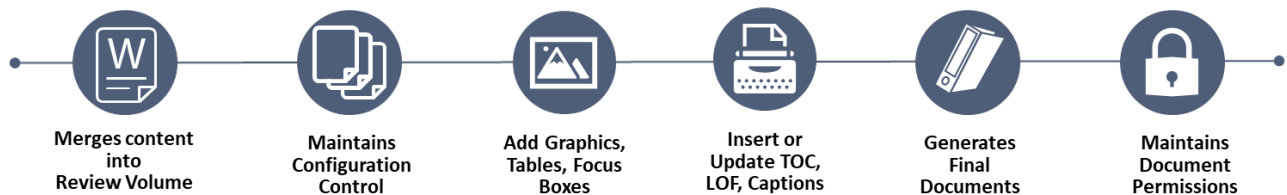
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status will display on the Proposal Management Dashboard so the Proposal Manager is informed when Writers are not working on their assignments. The Proposal Manager can also see the color-coded status of keywords that were assigned to proposal sections to determine if they were used as directed.

The graphic and narrative below illustrate three key features in OneTeam that allow the Proposal Manager to easily generate Writer packages for each Writer and save valuable time in the proposal process.
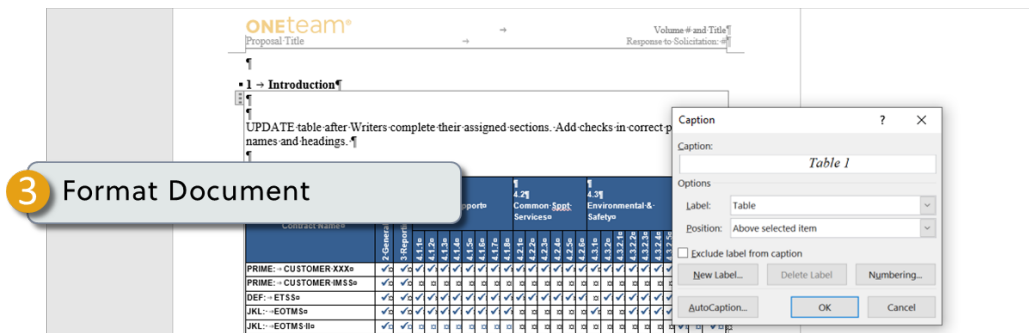

OneTeam's Auto-Generates Review Volumes in Word from Writer Inputs

| Merges content into Review Volume | Maintains Configuration Control | Add Graphics, Tables, Focus Boxes | Insert or Update TOC, LOF, Captions | Generates Final Documents | Maintains Document Permissions |

① Merge Writer Content

The OneTeam Word Add-in that allows the Proposal Manager to create Writer Packages, and also allows them to MERGE multiple writer packages into consolidated Review Volume documents in Word. After a review, the Review Volumes can be split back into individual Writer Packages. The process can be quickly repeated multiple times as needed in OneTeam.

OneTeam maintains the integrity of the Proposal Outline, the mapped RFP Requirements, and the content created by each Writer. OneTeam merges the Writer content into a Review Volume, where the Proposal Manager can view the entire volume. Each outline heading that was mapped to RFP requirements in the compliance matrix, will also have a reference in the heading.

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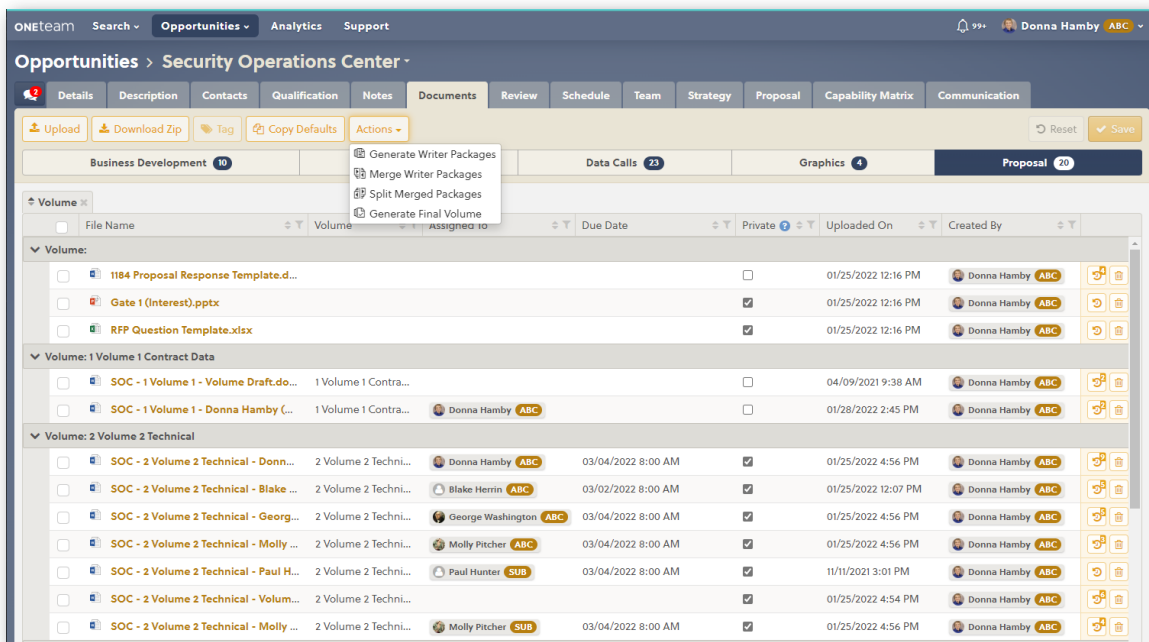
② Add/Edit Content

The Proposal Manager can determine if the Writers' content is sufficient for a review, ask for clarifications from Writers, or insert additional content. The Proposal Manager can

- Add or update graphics, tables, icons or SmartArt in Word.
- Edit or add more narrative content.
- Edit or add Captions to Graphics.
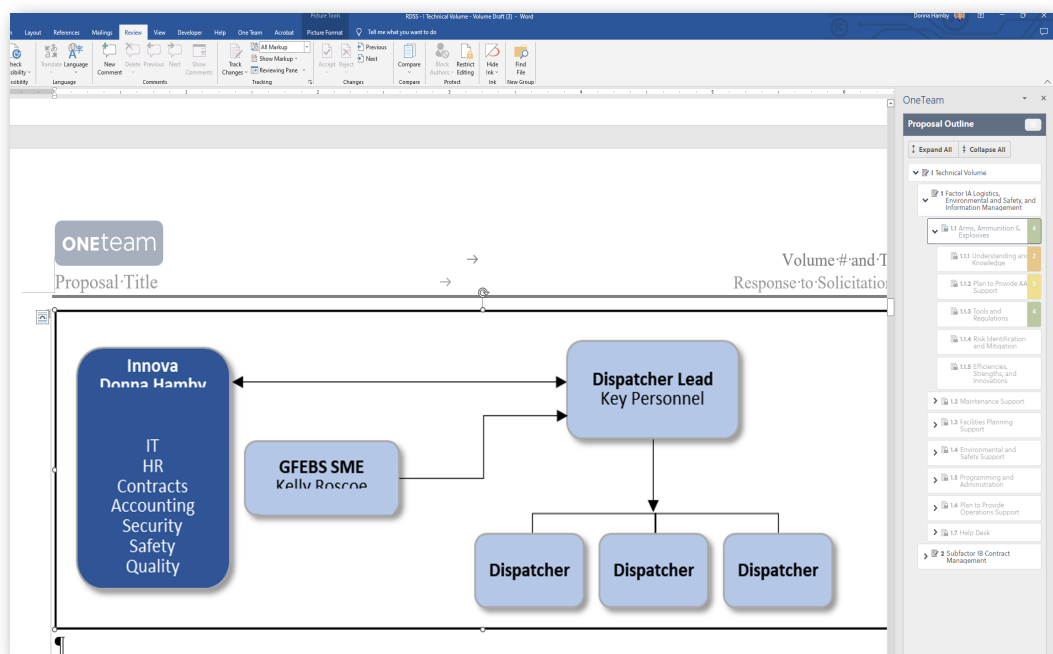
③ Format Document

The Proposal Manager or a Document Specialist can format documents for the Color Team Review. Since the Review Volume is created and edited in Microsoft Word, it is easy to

- Adjust page breaks and graphics layout.
- Update the Table of Contents and the List of Exhibits.
- Insert cross-references for exhibits.
- Update or edit styles or other formatting.

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- Update any formatting that has changed dur to a solicitation amendment.
- Insert or edit title page or header or footer information.
- Use a Word Add-Ins to create an acronym listing.
- Attach exhibits or appendices.
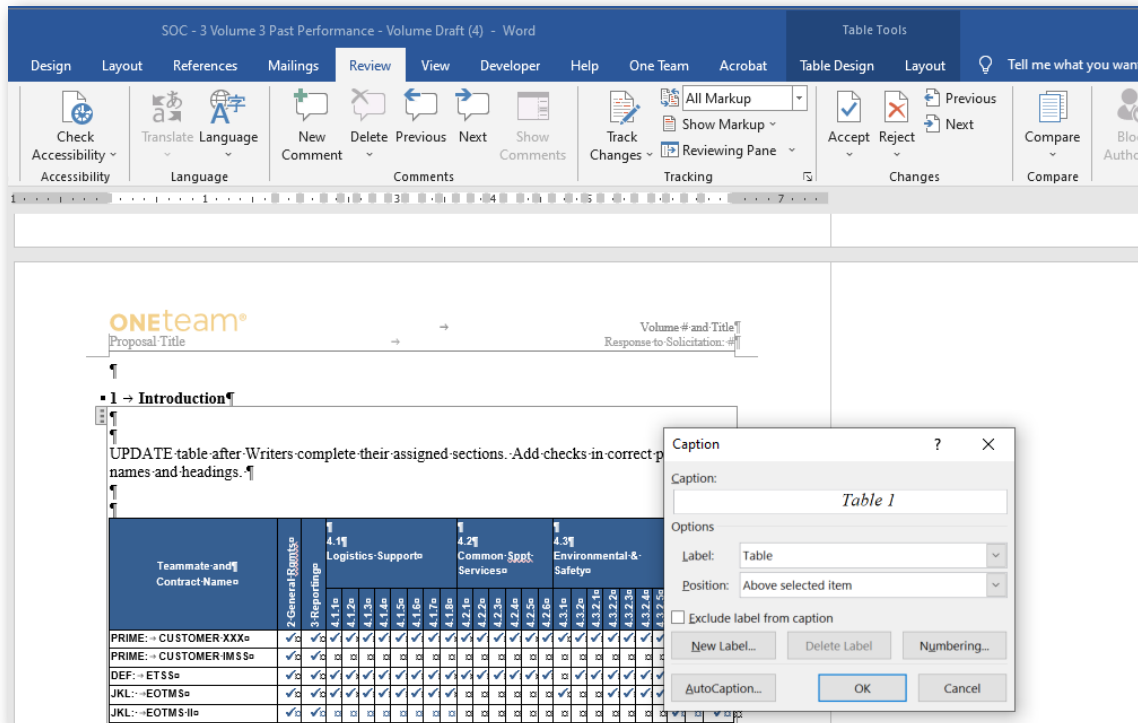
OneTeam Benefits

- Reduce cutting and pasting errors.
- Save time creating review drafts.
- Does not require annotated outline data to be inserted and later removed for review.

Implementing OneTeam Best Practices into the BD Process

Map every requirement during the outline/compliance matrix creation, to save work later in the proposal process. If win themes, proof points or experience examples were mapped in the Other category, they will have a reference visible in the heading reference, which can be deleted from the document after the review cycle is completed.

ONEteam

Collaborative Color Team Reviews

Conduct collaborative reviews with OneTeam and Streamline Reviews

Traditional Best Practices

Shipley Associates, Inc. defines a series of proposal reviews as Color Team Reviews, and many GovCons model their review cycle on the highly effective Shipley process including:

Blue Team approves the final capture solutions, strategy, and storyboards or annotated outlines. All features, benefits, differentiators, strengths, supporting evidence, and themes are reviewed, approved, and locked before Writers begin developing proposal content.

Pink Team evaluates the proposal outline in relation to RFP requirements, and validates the mapping of Blue Team-approved strategies to the outline. Pink Team may be conducted with an outline or storyboard, with RFP requirements and win strategies mapped. Pink Team focuses on compliance and messaging and locks the outline.

Red Team evaluates content against the evaluation criteria to determine how the team will score and how to increase score and probability of win. Reviewers evaluate customer focus, clearness, and cohesiveness. This review can resolve compliance, fill content gaps, and make content more clear or compelling.

Gold Team reviews for completeness and validates any suggestions and direction after Red Team. It is the finishing touches to ensure the proposal will receive the highest score possible and is the best product the team can submit.

Initially, proposal teams conducted Color Team Reviews on paper or hard copy documents and Proposal Managers had to translate hand-written notes from multiple reviewers into the electronic Word documents. But in recent years, Color Team Reviews are conducted

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virtually with electronic documents, which has simplified the Review process. But it has also introduced new challenges into the review process – primarily, maintaining tight control over company sensitive information and preventing its release to companies who may easily be a competitor on a different solicitation.

Electronic reviews still require the Proposal Managers to consolidate comments and edits from multiple Reviewers, using Word's Compare/Combine function to combine multiple authors' revisions into one document.

Many times, the connection to the Reviewers' names is lost in the combine function, and it is difficult to return to a Reviewer for clarification on instructions. It also creates a document with many, many tracked changes that must be dispositioned before turning the document back to the Writers to revise and update.

OneTeam's Best Practices and Solutions

OneTeam automates many parts of the Color Team Review and saves dozens of hours on the splitting and combining of Microsoft Word documents in the preparation for and completion of a review. In OneTeam, all Reviewers work simultaneously in the same online document using Microsoft 365. Reviewers can actually see the changes and comments made by fellow Reviewers. They can choose to 'ditto' a Reviewers comment instead of retyping the same information – this saves valuable review time and allows for a more thorough review of the document.

Since Reviewers are working in the same document, there is no combining different versions to create a master Review version – Microsoft and OneTeam easily automate this part of the review!

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The Proposal Manager can hold a Review Kick-Off Meeting and notify Reviewers WITHOUT emailing company sensitive content. The prime company who has the OneTeam license, can set restrictions on the review documents, so that Reviewers cannot download and save the document. This ensures that all comments will be in the same document and ensures company and competition sensitive information is not inadvertently or intentional saved by potential future competitors.

The graphic and narrative below show OneTeam key features that leverage Microsoft 365 collaborative/co-authoring abilities and OneTeam's custom Word Add-In features.
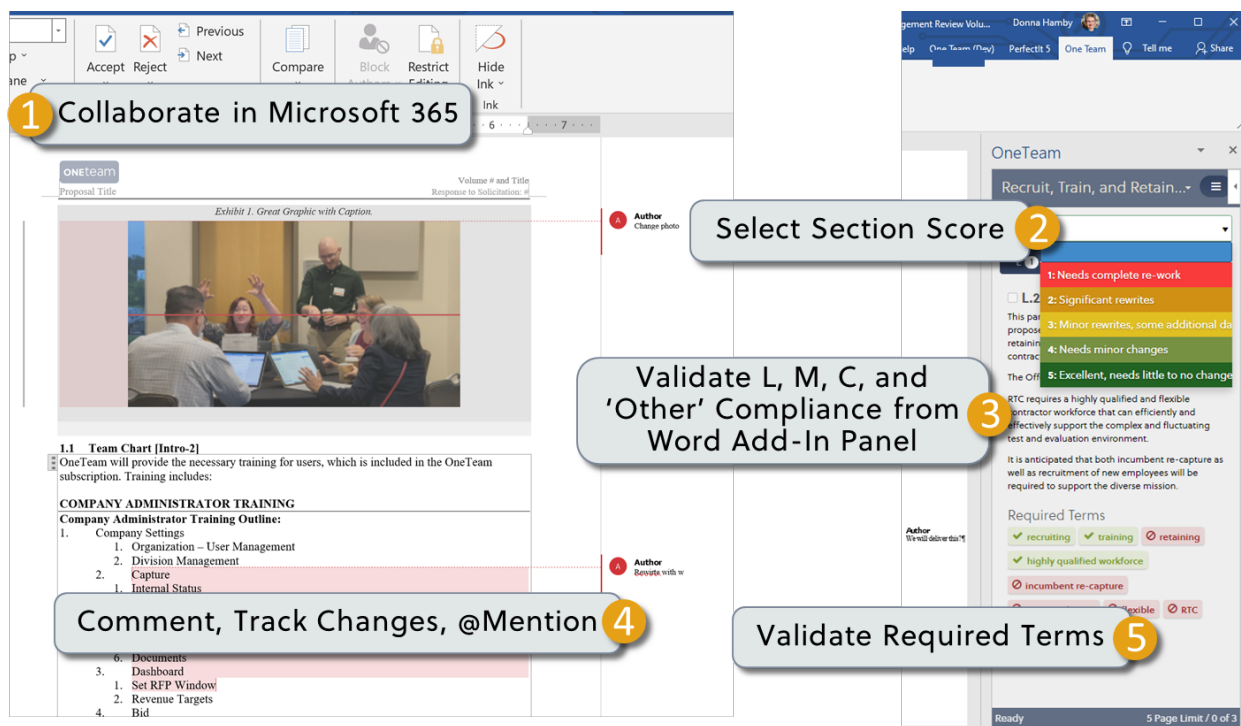
Leverage Microsoft 365 Collaborative Co-Authoring with OneTeam's Word Add-In

| Manages Permissions at Opportunity Level | Invitation Process to further Secure Data | Limits Teaming Partner Data Access Automatically | Writers Only Access their Assigned Sections | Can Require Working in Word Online – no Downloads |

1   Collaborate in Microsoft 365

Leverage Word's powerful co-authoring and collaboration capabilities built into Microsoft 365. All Reviewers will use Word 365, either in the Online version or they may open the documents in the Desktop application. Reviewers should NOT download the document. Reviewers can review the document simultaneously. The Proposal Manager does not email documents, so company sensitive information is secure.
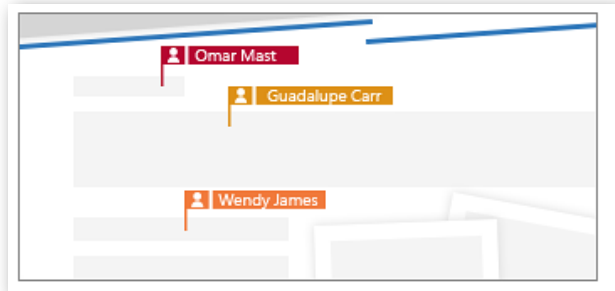
2   Select Section Score

Reviewers assign color ratings to each section of their assigned volume. Reviewers will see a RATING section with a pull-down list of rating or scoring options in the OneTeam Word Add-in Requirements window/panel.

Reviewers will select a rating for EACH proposal heading/section.

These ratings are customized and determined in the OneTeam company settings by a Company Administrator prior to the review. The customized ratings are then used for all proposals managed in OneTeam.
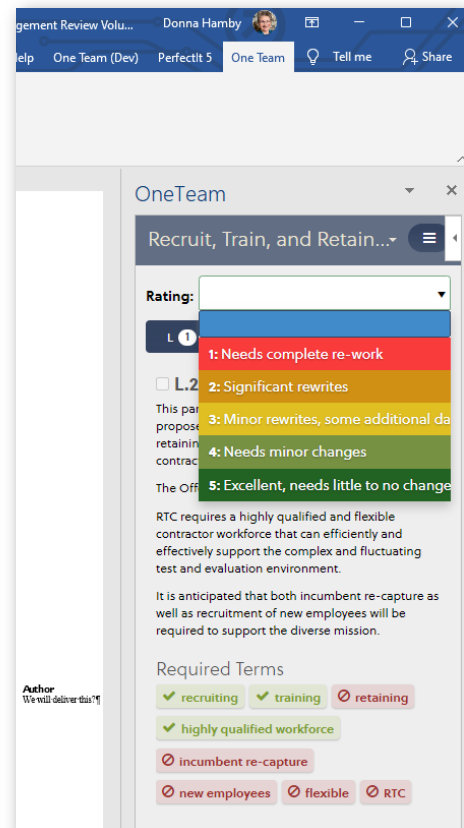
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The color ratings that Reviewers assign will display in two other locations in OneTeam:

- In the Word Add-in, Proposal Outline window/panel, Reviewers ratings will be displayed for each Outline Heading after these are selected by the Reviewer.

- The Proposal Management Dashboard (Proposal tab, Assignments sub-tab) will also show the Reviewer ratings in real-time.

3 Validate L, M, C, and Other Compliance

The OneTeam custom Add-In Requirements Panel contains a Reviewer Rating pull-down and RFP requirements previously mapped to proposal headings/sections.

The Reviewer selects the Section L, Section M, Section C, and Other Requirements buttons to view requirements and to determine if the heading/section content adequately addresses the requirements.
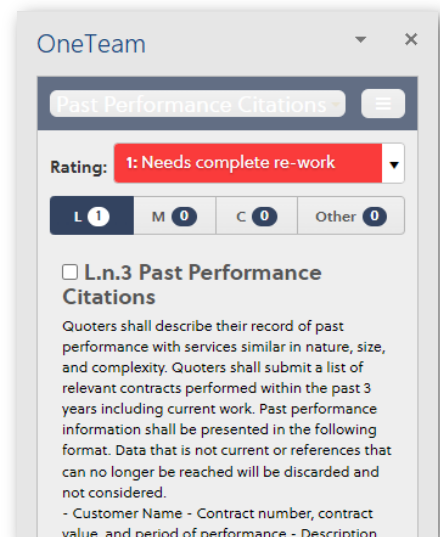
4   Comment, Track Changes, @ Mentions

Reviewers work in Microsoft 365 and use track changes, comments, and @mentions to communicate to Writers and with other Reviewers.

The Proposal Manager initiates Track Changes in the Review document or may use Word's Restrict Editing function to enforce Track Changes in all Review documents and to restrict the introduction of new styles in the documents.
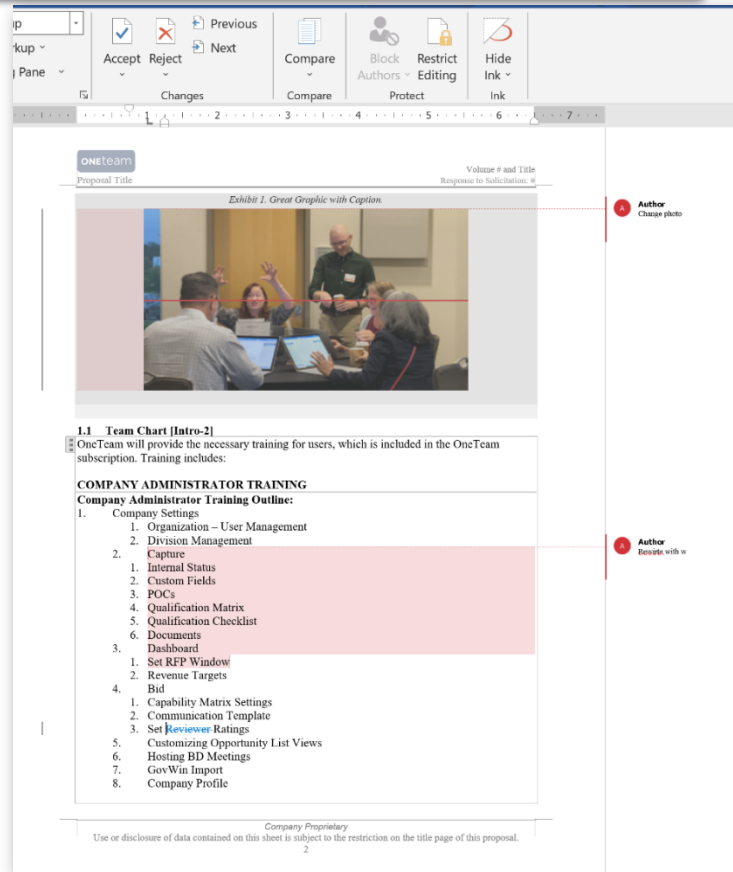
5   Validate Required Terms

Reviewers can view the Required Terms in the Requirements Panel to determine if they have been appropriately used for the heading/section. Terms that have been used are shown in green, while those that were not used are shown in red.

6   After the Review

It requires a lot of work and coordination to get proposal documents to a formal review. After the review is completed, it takes even more time to disposition Reviewer comments and get the correct proposal sections back to the Writers to update and edit. Historically this is a manual process, only minimally automated when using Word's Compare function.

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With OneTeam, Proposal Managers can disposition comments, and split the document(s) back into Writer Packages automatically. This process does not involve copying and pasting sections. OneTeam uses the Outline, Mapped RFP Requirements, and Assignments to re-create the Word Writer Packages. The Proposal Manager can assign a due date for the revised sections and automatically notify Writers via email. The Reviewers' ratings, comments, and tracked changes stay with document and are visible and accessible to the Writers when they receive their revised Writer Packages after the Color Team Review.

OneTeam Benefits

- Leverage Microsoft 365 capabilities to save valuable proposal time during the review process, with a real-time collaborative review.
- Reviewers save time by not repeating comments already made by other Reviewers.
- There is no need for the Proposal Manager to consolidate comments as they are in one document and managed through Microsoft Word 365 and OneTeam.
- Auto-generate Color Team document from multiple Writer Packages in seconds.
- View requirements with custom Word add-in (included with OneTeam subscription).
- No annotated outline or separate RFP documents are required.
- Reviewers score each section with color coded ratings, customized to the company's BD process.
- Use track changes, add comments, and integrate Reviewers and Writers using @mention.
- Word Document headings, organization, and styles cannot be changed by Reviewers.
- Monitor review status and scores in Proposal Management Dashboard.

Implementing OneTeam Best Practices into the BD Process

Since all Writers and Reviewers see the Proposal Outline, their mapped RFP requirements and other data mapped to the Outline, give as many details as possible when creating the initial Outline. More information and details help the Writers better understand their assignment, provide context, and result in fewer reworks overall.

ONEteam

Capture Data Integration

Create Capture Strategies and Integrate into Proposal Documents

Traditional Best Practices

Integrating Capture Strategies into a proposal volume may sometimes be difficult. Capture Managers use their technical skills and proposal knowledge to craft capture strategies. A Capture Manager may spend months or years developing Capture Strategies for a procurement, and then the Proposal Manager typically has 30-45 days to turn those strategies into a compelling, winning proposal.

The difficult part of capture is not collecting the data – it is analyzing the data, developing and executing the next steps based on the data, and then incorporating the vetted capture strategies and solutions into the winning proposal. A company invests a lot of time and money in the

The Capture Manager develops strategies, but the Proposal Manager is often the best communicator on the team. The Proposal Manager needs to understand what data is needed to identify solution gaps and to present the data as winning strategies.

Capture Manager and other team members to position their team to win a bid. That investment needs to be used wisely; the data collected is knowledge that needs to be evident in the submitted proposal documents. When a Capture Managers learns who competitors may be, and can identify a weakness of those competitors, they need to leverage that information to increase their own probability of win (P-Win).

OneTeam's Best Practices and Solutions

OneTeam is the single source of truth for the BD team and is used across the entire BD lifecycle, including opportunity identification, qualification, capture, pre-proposal planning,

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proposal development, and proposal submission. Capture Strategies are developed and kept up-to-date in OneTeam's integrated platform. OneTeam has a workspace for each contract opportunity and an organized schema to maintain all related solicitation data, including capture data that needs to be shared with the internal team, subcontractors, and the Proposal Manager.

The graphic and narrative below demonstrates four features of Capture Strategy Integration that will ensure the Capture Manager's hard work is directly translated into winning solution in the proposal documents.
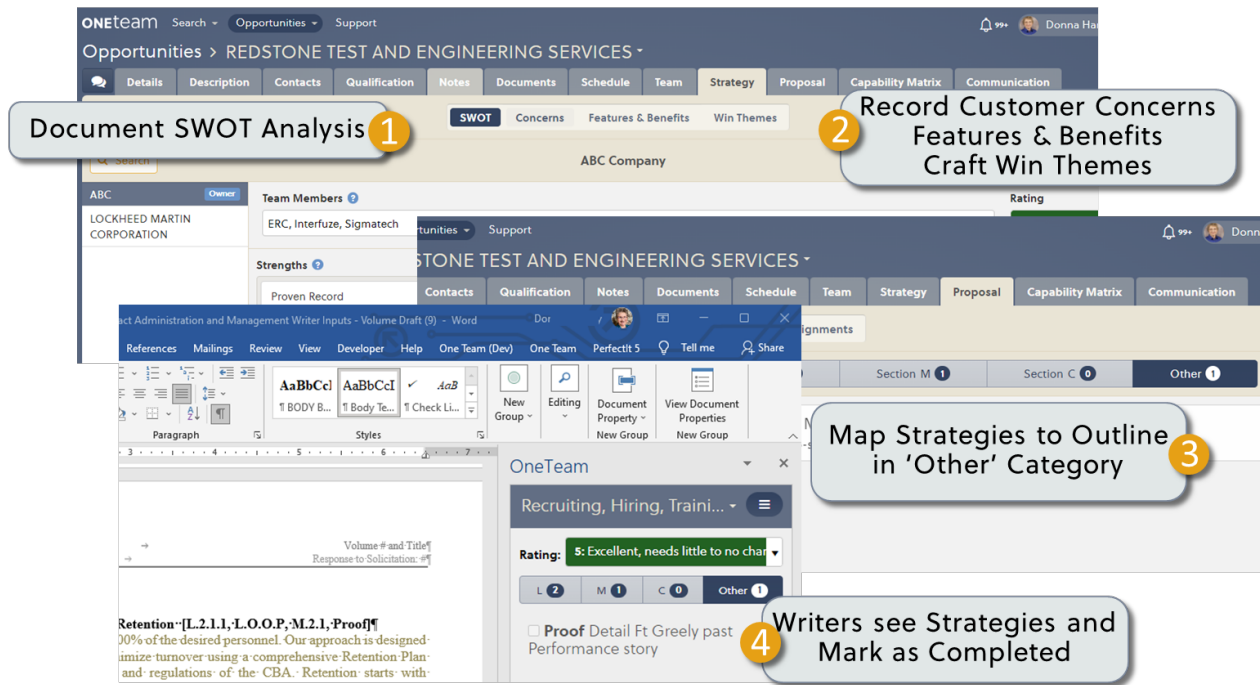
Ensures Features & Benefits, Proof Points, Strengths, and Win Themes are mapped to the Outline

VIP	**3 of 5**	(eye icon)	(no document icon)	(lightbulb icon)
Treats Strategies as a Important Requirement	Provides Real-Time Status on Completion	Easily Viewed by Writers and Reviewers without Manual Entry	Eliminates need for hard copies of strategy	Ensures that Strategies are NOT an afterthought

① **Document SWOT Analysis**

Review the SWOT Analysis on your team and proposed or likely competitors. Include teaming partner names and select a realistic rating for each team. This may be accomplished as part of a Black Hat Review, led by an experienced Proposal or Capture Manager. It is a good exercise to conduct this analysis with multiple teams of 3-5 people, with each team analyzing a competitor team and presents substantiation as to why they will be successful bidders. These teams research their assigned competitor, which greatly reduces research the Capture Manager must perform. Many companies dedicate one or two full days for a review and include team members who understand the competitors and the customer. There will be team members from the different companies on the proposed team, and they may be management, technical, proposal, and strategy personnel participating. A variety of skills and knowledge is needed for a successful Black Hat Review.
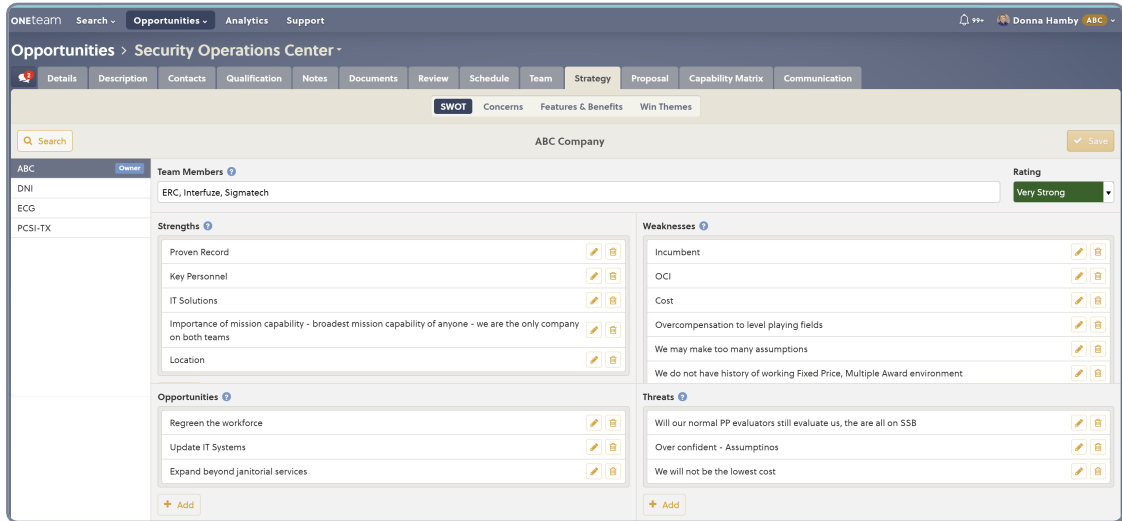
② **Customer Concerns, Features & Benefits and Win Themes**

The Proposal Manager may assist the Capture Manager with developing or refining a list of **Customer Concerns, Hot Buttons, Issues, and Problems.** This list can be updated and reviewed through the capture process, but must be finalized in time for the Proposal

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Manager to map the strategies for the proposal content creation phase. Follow industry best practices for capture and gather this information from multiple sources.
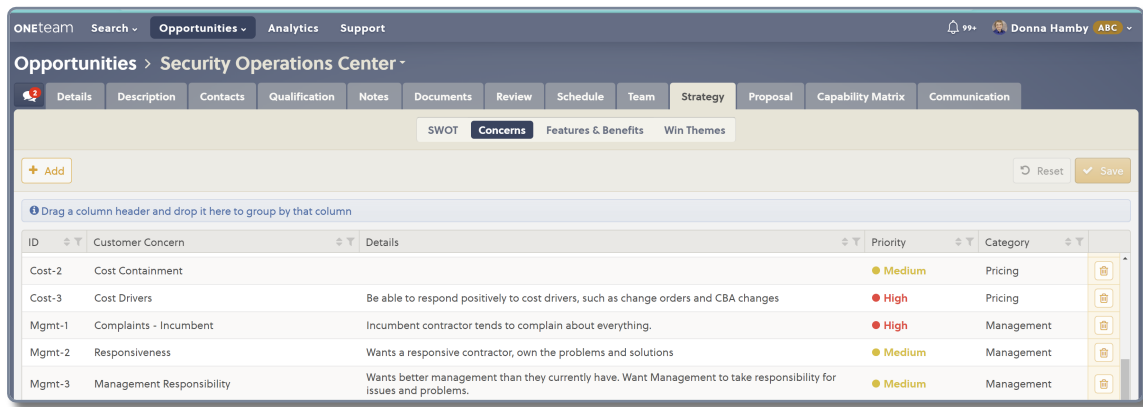
The Proposal Manager can assess the targeted customized **Solutions** for each customer concern, that were developed by the Capture Manager. They will incorporate these solutions as **Features** in the Proposal.

The Proposal Manager will also ensure that the Capture Manager has identified a real **Benefit** to the Customer for each Solution/Feature. They will assess if the benefit saves time, saves money, or provides a new capability to the customer. There may be multiple Solutions/Features for a Concern, included as separate entries in OneTeam Strategy.

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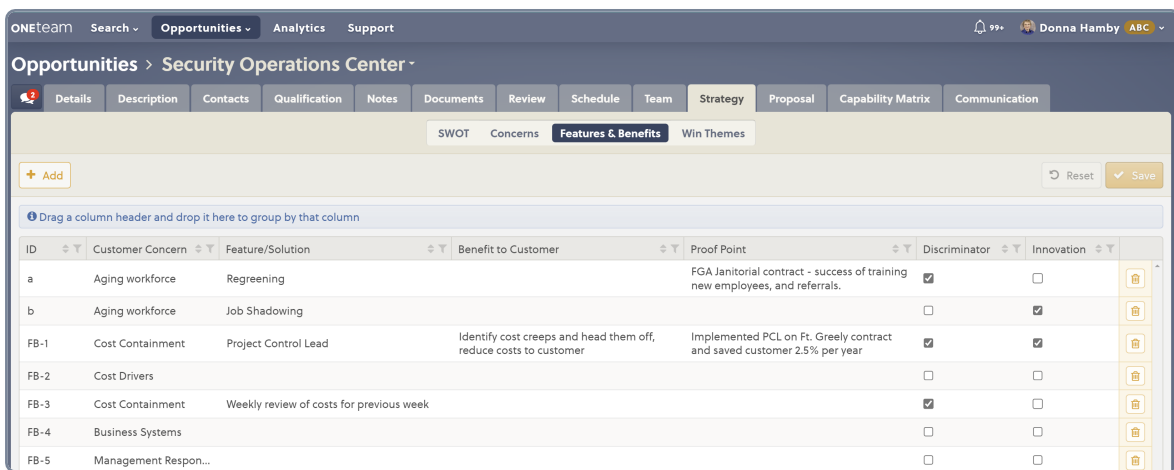
The Proposal Manager can work with the Capture Manager to create and refine Win Themes until they are compelling.

They will then be finalized by the Capture Manager and approved by the Management Team. This approval process signals the Proposal Manager that the Win Theme is ready to use in the proposal narrative. Win Themes may be mapped to multiple proposal sections, so the customer evaluators see a consistent proposal. If a Win Theme is updated, usually minor wordsmithing, after it has been mapped to headings, and Writers have used it in the narrative, the Proposal Manager can update the Win Theme as they are creating and preparing the Review Volumes for a Color Team Review.
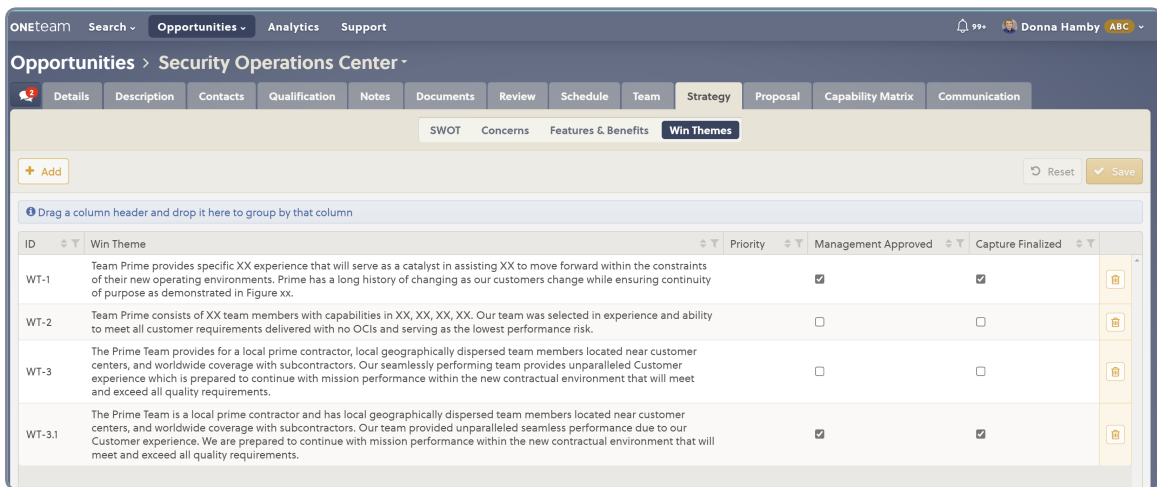
3 Map Capture Strategies to Outline in 'Other' Category

After the Proposal Manager creates an Outline in OneTeam, they map the RFP requirements (Section L, M, and C) to outline headings or sections. OneTeam allows the Proposal Manager to seamlessly map capture strategies into the proposal by incorporating them as a requirement in the Other category and mapping to the proposal section(s) or Heading(s) where they will score the most points. Use the 'Other Tab' on the Compliance Matrix to map other RFP requirements (Section G or H) and capture strategies, such as:

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- Win Themes.
- Features and Benefits.
- Innovations and Discriminators.
- Proof Points or Experience Examples.
- Other capture data that should be in the proposal.

For the non-L, M, C RFP data to map to the Outline, designate a numbering convention – either from the RFP section (G, H, etc.) or to designate Proof Point (Proof #1), Win Theme (Win A), and track the various strategies or use OneTeam's built-in auto numbering.

This ID Number will appear in the volume outlines at the end of the headings, just the Section L or M reference do. These 'Other' references can be removed as the Proposal Manager or Documentation Specialist finalizes the proposal documents after writing and Color Team Review cycle is completed.

After strategies, the Proposal Manager can easily identify gaps in the proposed solution and work with the Capture Manager to fill in those gaps before the proposal sections are given to Writers. A clear strategy for the entire proposal is essential to creating targeted, customer-focused content that will be compelling to and score well with evaluators.
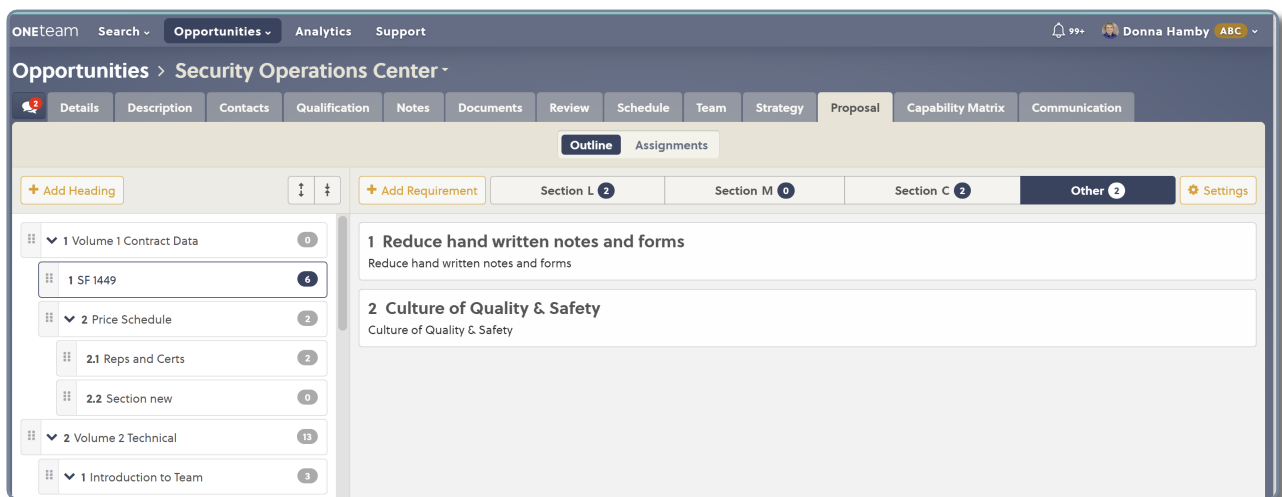
4 Writers View Strategies and Mark when Completed

Writers can view Capture Strategies that have been mapped to the Proposal Outline by the Proposal Manager.

The Writers check off each capture strategy as it is used appropriately in the assigned section.

When the proposal documents are finalized, the OneTeam Word Add-In and all OneTeam metadata are removed from the documents, in an automated process in OneTeam. The documents submitted to the government will never have the OneTeam Add-In visible.
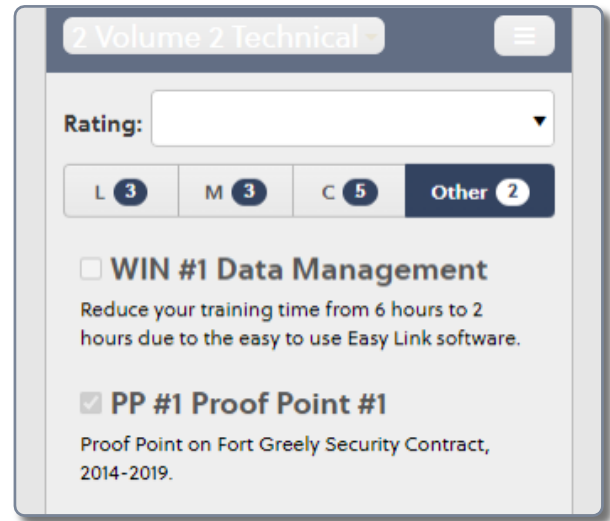
OneTeam Benefits

- Eliminate the need for annotated outlines.
- Writers and Reviewers do not have to print hard copies of RFP documents.
- Capture Strategies are validated by the Proposal Manager as they are integrated into the Proposal volume(s).
- Gather and categorize valuable Capture Data to optimize the proposal documents.

Implementing OneTeam Best Practices into the BD Process

Use the Other category to map Capture Strategies so they are treated as a requirement for that proposal section. The Capture Strategies will be incorporated into the correct proposal sections where they can help the proposal score higher and increase win probability. The Proposal Manager can include customer concerns, solutions, features and benefits, proof points, innovations, discriminators, and win themes in the mapping. They may also provide additional guidance or notes to assist the Writers in developing targeted content.

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Proposal Management Dashboard

Real-Time Status of Writers and Reviewers

Traditional Best Practices

Proposal Managers usually maintain a list of assignments for proposal sections or volumes. They must update the list when a Writer completes an assignment, their section or volume is usually routed or assigned to another person for graphics, editing, additional content, or review. Sometimes it can be difficult to track who has which volumes or section and which part of the process has been completed for every section.

If Writers provide late inputs or do not meet an assigned deadline, the Proposal Manager may quickly lose control of the schedule. To monitor Writer progress, a Proposal Manager typically communicates directly with the Writers via email to request an update or talk to them in person or the phone.

Many times, the Proposal Manager does not receive updates on progress from Writers and finds out very close or after the due date, that one or more Writers will not make their assigned deadline. One late input affects other people, their schedules, their work planning for the day, and it just snowballs. It should take an unforeseen event or emergency (a meeting is not an emergency) to force a schedule slip. Multiple late inputs may force a Color Team Review to be postponed.

OneTeam's Best Practices and Solutions

OneTeam's Proposal Management Dashboard provides an easy way to view all Writing and Review assignments and to view Writer Status. As Writers check off requirements they complete in their assigned sections, the statistics are updated on the Proposal Management Dashboard without requiring a check-in from the Proposal Manager or email

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from the Writer. Proposal Managers can be proactive and view Writer progress before the due date, and then contact Writers that are not completing their assignments. This will help to reduce late inputs.

The Proposal Management Dashboard also displays Reviewer Status and provides the Proposal Manager with data to make the best bid decisions. The graphic and narrative below illustrate three features of the OneTeam Proposal Management Dashboard that all the Proposal Manager to easily see who has specific sections or volumes, their status, and date of last update.

ONEteam®

Integrates Proposal Manager, Writers, and Reviewers

| Notifies Writers of Assignments | Workflows Outline updates to Writer Documents | Integrates Subcontractors as Writers and Reviewers | Monitors progress without emails | Updates Writer Progress and Reviewer Scores upon Save |

① Assign Writers, Volume Leads, and Reviewers

The Proposal Manager assigns Writers, Volume Leads (also called Book Bosses), and Reviewers from the contacts with permission to work on the selected opportunity. For easy reference, the contact's company is shown beside their name, so that specific teaming partners can be assigned to sections that have committed to write. Only one Writer may be assigned per heading or section of each proposal outline. If needed, a Proposal Manager can always update the Outline to accommodate multiple Writers for a specific heading, by breaking the heading down into smaller sections and assigning each to different Writers. Volume Leads and Reviewers are assigned at the Volume level. Multiple Reviewers can be assigned per volume, while only one Volume Lead may be assigned per volume.

One great feature is the real-time status of the Proposal Management Dashboard. If the Proposal Manager needs to make a change in the Writers assignments, they simply update the Writer's name for the section of the volume they wish to change.

The OneTeam Word Add-In will immediately notify Writers that writing assignments have changed and instruct them to sync the document. OneTeam will then remove headings no longer assigned to a Writer, and add that heading in the appropriate Writer Package.

② Monitor Writer Progress

The Proposal Management Dashboard also contains a real-time status of Writers' progress on completing assigned requirements. Each heading or section of each proposal volume has RFP and Other requirements mapped to it. Each heading or section is only assigned to one Writer, who will add content to their Writer Package, view the associated requirements, and then check-off each requirement as it is addressed. The Writer marks their requirements as completed, and the requirements progress automatically updates on the Proposal Management Dashboard. For example, if a heading or section has 6 mapped requirements, and the Writer checks off all 6, the Dashboard will show 6/6 requirements as completed. A colored bar is also shown and corresponds to percent completed.

The Proposal Management Dashboard keeps the Proposal Manager in sync with the Writers and Reviewers, without emailing or calling each to check on their progress.

3 View Reviewer Scores

As Reviewers are evaluating a Review Volume document, and assign their color-coded scores to each section or heading, those color-coded ratings also populate the Proposal Management Dashboard in real-time. OneTeam also includes a volume summary of Reviewer scores at the volume level of each proposal volume. The Proposal Manager hovers over the volume level score column to see the volume summary. This summary provides a listing of all section headings that are evaluated by the numeric and color codes.
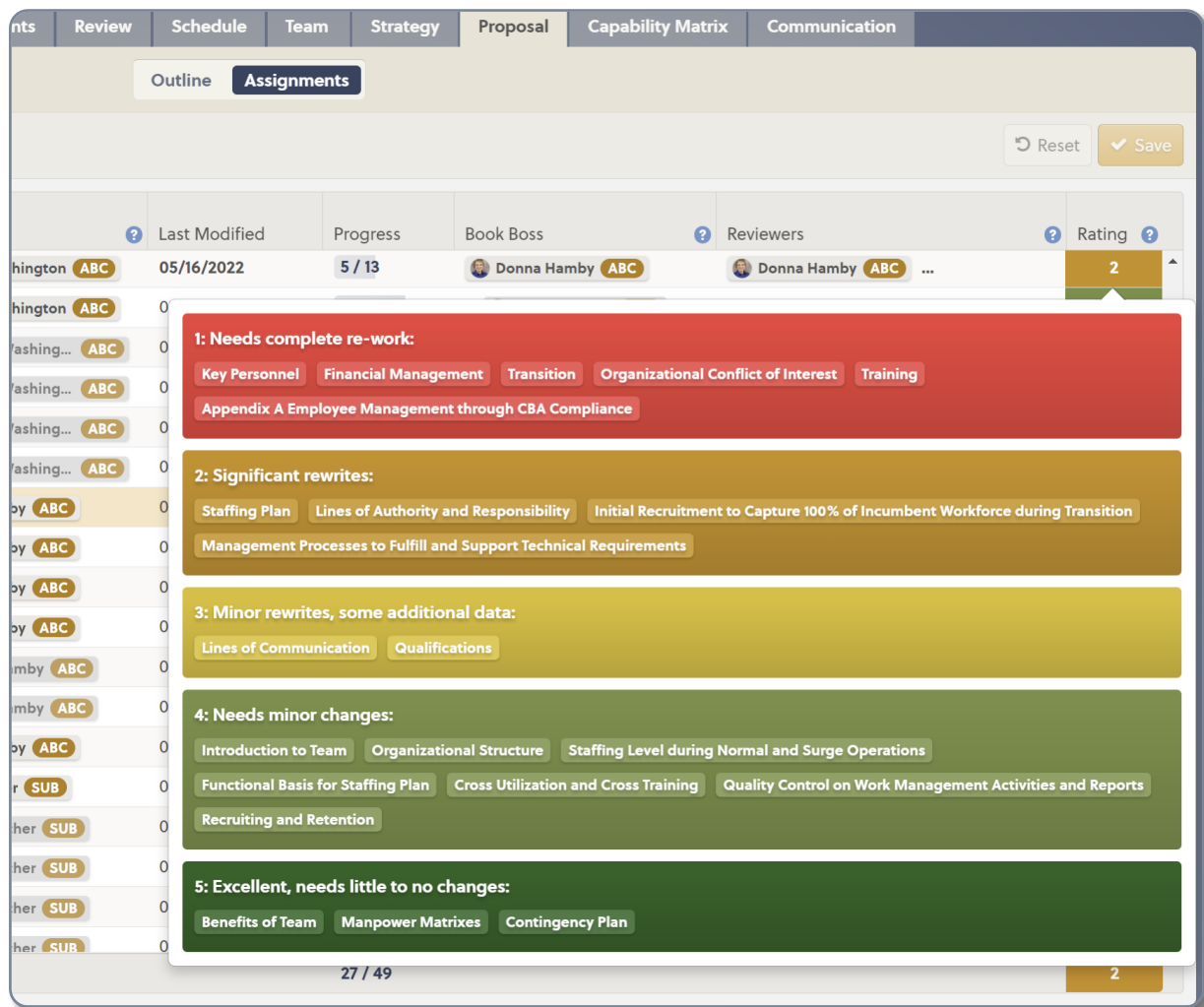
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OneTeam Benefits

- View validated Outline for volumes and assign page counts to sections and volumes.
- Assign Writers to each Outline section.
- Assign Book Boss or Volume Lead and Reviewers.
- View Writer progress of completed sections.
- View Reviewers' color-coded ratings for each section and overall volume ratings.
- Easily edit Writer and Reviewer assignments.

Implementing OneTeam Best Practices into the BD Process

Keep a close check on the Writers' status as the due date for their inputs approaches. Do not wait until hours or even the day before the due date to check in with Writers. Identify Writers that are experiencing difficulty with their assignment as early as possible and allow time for another Writer to step in to support.

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