The Capture Management Life-Cycle

By Gregory A. Garrett and Reginald J. Kipke
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This book is not another “how to” manual for sales, business development, and proposal professionals. It goes beyond being a tutorial on the basics of capture/proposal management and presents an approach that shows how an organization can win more business. The authors liken a vendor’s relationship with the customer to a dance, and present methods to implement a Capture Management Life-cycle model that will “illustrate the stages or dance steps required for a supplier to win more business, improve execution, and achieve high customer loyalty.”

Garrett and Kipke have surpassed the usual textbook style of a reference book and written a resource manual that is practical, thought-provoking, and useful. The chapters are arranged for ease of reference, and each one builds on the information presented in the previous one. Each chapter contains best practices, tools, and techniques in an easy-to-understand manner that any professional—whether novice or expert—will find useful and want to implement.

Chapter 1, “What it Takes to Win More Business,” provides an overview of the current business environment and the challenges facing suppliers. But Garrett and Kipke take this discussion one step farther and show a direct correlation between creating value for the customer and developing customer loyalty. They illustrate the value of customer loyalty as a connection to increased revenue and profits.

The Capture Management Life-Cycle is described in Chapter 2 as a process consisting of three phases and 10 stages that is “…all about winning new business by creating mutually beneficial offers which solve the customer’s business problems or objectives and meet your corporate requirements for profitability and risk.” The overview of the process provided in this chapter emphasizes its flexibility and shows how it can be applied to any business environment (federal vs. commercial, small start-up vs. large corporation, and local vs. global).

The three phases and 10 stages of the Capture Management Life-Cycle are:

1. Pre-Bid Phase
   • Opportunity Profile
   • Stakeholder Buy-in
   • Capture Project Plan
2. Bid Phase
   • Capture Team
   • Kickoff Bid Development
   • Bid Reviews
   • Stakeholder Approval
3. Post-Bid Phase
   • Negotiations and Contract Formation
   • Contract Fulfillment
   • Opportunity Growth
Chapters 3-8 break out the three phases and 10 stages of the Capture Management Life-Cycle and describe each in detail. These chapters provide an excellent discussion of all the key steps in each phase and describe how these steps contribute to the goals of winning new business and gaining customer loyalty. Case studies from companies such as Microsoft, Northrop Grumman, CACI International, Inc., and NCR Professional Services are included to demonstrate the real-world applications of the Capture Management Life-Cycle.

What makes this reference book especially useful is the “Questions to Consider” section included at the end of each chapter. How often does a professional have the time to evaluate how effectively his or her organization manages customer expectations or how well it documents and shares capture management lessons learned? These questions and the others in the book are designed to assess how effectively an organization uses the information contained in a specific chapter by helping to determine if that step in the model is currently implemented at the organization; if not, why not; and if so, is it being used effectively.

Each chapter also includes processes, inputs, tools, techniques, templates, and outputs to help the reader easily implement the Capture Management Life-Cycle. The inputs list what is needed to complete a specific stage (e.g., one input for the Bid Development stage is a well-documented proposal development plan), while the outputs list what final product should be achieved at the end of the stage, such as developing a winning proposal in the Bid Development stage. In between, the authors present tools and techniques that show the reader step-by-step how to attain the desired outputs. The tools and techniques are practical tools every business development or proposal professional would find useful. For example, sample forms, such as a capture team kickoff agenda, a negotiation planning summary, and a risk mitigation plan, are reproduced throughout the book. The authors also make extensive and practical use of graphics and diagrams to illustrate essential features of each phase or stage. Each graphic is easily understood, appropriate, and well-done.

After the detailed discussion of the Capture Management Life-Cycle, Chapter 9 provides a survey of the different types of commercially available information technology tools that are available to streamline the capture management process. The chapter includes sections that describe the various tools for meetings, sharing documents, proposal development and production, and integrated tools to manage the Capture Management Life-Cycle and ensure information security.

Chapter 10, “Going Global – Opportunities and Challenges,” covers the timely topic of tracking multinational business capture opportunities. Recent events such as the continued growth of the European Union have had a major impact on how countries do business with each other. The chapter provides an interesting and in-depth presentation of the subject, including an explanation of the various international trade organizations and agreements such as NAFTA, and defines the challenges and forces facing an organization pursuing business internationally. For example, two tables included in the chapter list the individual and core organizational competencies necessary to succeed in the global marketplace.

In addition to the “Questions to Consider,” there are two appendices that provide opportunities for organizational assessment. Appendix A contains a Capture Management Organizational Assessment Tool (CMOAT) that is comprised of a four-step process to determine an organization’s capacity to win business and evaluate past performance. The CMOAT is probably the best feature of the entire book because it offers a process to easily quantify the success of an organization’s capture management capabilities and to identify areas where changes can increase the win rate.

Appendix B is an adaptation of the article, “Proposal Automation Products,” by Greg Wilson from the Journal of the Association of Proposal Management Professionals, Spring 2001 (in fact, there are several references from either the Journal or other publications written by APMP members). This appendix contains a matrix of automation tools that includes the features/capabilities, training and support, and price of each tool. It can help determine if an organization can increase its ability to win business by using automation products.

What a treasure this handbook is! The authors have provided an approach to the entire capture management process that encompasses a variety of tools, techniques, and best practices, instead of just addressing a part of the process, i.e., proposal development. They have integrated this information into a reference manual that all business professionals can use to determine where their organization is now and where it needs to go to meet the current challenges of “the new supply environment.” Not only should these professionals have a copy of this book on their desks, but the pages should be well-worn.

These proposal professionals have a copy on their desks – do you?