

# Capture planning

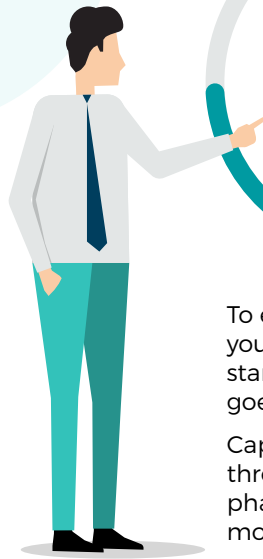
Gaining an early advantage



# Introduction

All proposal experts know that responding to an RFP that's landed out of the blue is a thankless task, with a low win probability.

As APMP launches its new Capture Planning certification, we thought it would be timely to see how great capture management and great proposal management go together.



75%  
of buyers

say that the best proposal usually wins the deal

To ensure that your sales effort is successful, at some point you will need to produce a compelling proposal. Winners start planning for this event long before their customer goes to market.

Capture provides a framework to help sellers navigate through this period. It helps them get to the proposal phase in pole position, ready and able to articulate the most compelling offer to the buyer.

## The procurement process



## Do many organisations really exploit the pre-RFP phase?

In the last five years, we've seen the number of pre-RFP and sales campaign client projects quadruple. Clearly some organisations are taking this seriously. Those who don't really embrace the potential benefit of this phase could find themselves behind the curve.

# Why the pre-RFP phase is so important...

## For renewals...

Research shows us that across all industry sectors, the **incumbent** retains business only 48% of the time when their customer goes to market. Having invested significantly in winning a contract and then implementing and delivering it, we don't like these odds!

For too many incumbents, waiting for the RFP to be released is clearly the main modus operandi. In a straw poll of heads of bids from major blue chip UK organisations, only 10% had a strategy for handling renewals. This is surprisingly low, demonstrating the lack of a clear capture process.



of deals end with the incumbent retaining the business\*

On average this phase happens at **57%** of the way through the buyer's timeline\*



Links to Business Lifecycle process on the following page



- Contract negotiated
- Business approval secured
- Contract signed



- Service implemented
- Supplier managed

## For new business

From a **new business** perspective, you probably have an incumbent to dislodge and other hungry organisations chasing the same prize as you. Sellers need to truly understand their buyer's business and industry. Once they have this knowledge, they can develop customised solutions and present them in compelling proposals. Good capture management gives sales team the structure to do this

# Great capture planning feeds winning proposals

For years capture management has been a discipline used predominantly in big value, long-term and prescriptive bid processes. It's about making sure bidders thoroughly understand each opportunity, and put the right team together to build the right proposition to win the deal.

However, too often proposal teams are on the back foot from the start because the capture process has been inadequate, or entirely lacking. The new capture practitioner certification from the APMP aims to address this by promoting the skills and processes needed to enable organisations to maximise their chances of winning.

The capture process starts once an opportunity has been identified and agreement to pursue has been approved. The initial business development phase aligns with the first stage of the buying cycle. The most proactive business development professionals influence the customer's needs at this point.

## The key capture roles within the business lifecycle

### Capture management



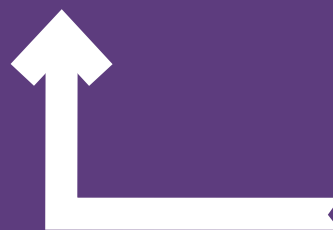
- Capture planning and management starts
- Engaging resources
- Stakeholder engagement
- Contact plan
- Requirements gathering
- Solution development
- Price-to-win starts
- Competitor analysis
- Win strategy
- Proactive proposals and pitches

- Bid go/no go
- Pre-proposal planning and management
- Finalise the solution and costing
- Refine the pricing
- Plan the proposal effort
- Develop the proposal strategy
- Create initial designs and templates
- Gather useful information and draft content
- Engage the wider team

- Kick off workshop
- Storyboarding
- Proposal design
- Content development
- Graphics development
- Reviews
- Approvals
- Production / submission

#### BID AND PROPOSAL ROLES

- Capture, opportunity or bid manager
- Proposal manager
- Programme manager / solution architect
- Client or account management



As the buyer gets closer to going to market, then the focus of the capture effort moves to focusing on planning for the proposal. This is when the information gathered is used to prepare for the creation of a winning proposal and pitch.

Either a permanent or temporary role, the capture manager leads the opportunity from concept through to contract award, supported by a small core team. The role may be filled by a capture specialist, salesperson, or bid manager.

The chart below maps the business lifecycle process, along with the activities and roles played by this core team.

Who performs these activities will vary across sectors, opportunities and bidding organisations. But as long as someone is performing them, and roles and responsibilities are well-defined, then the chances of success will be maximised.

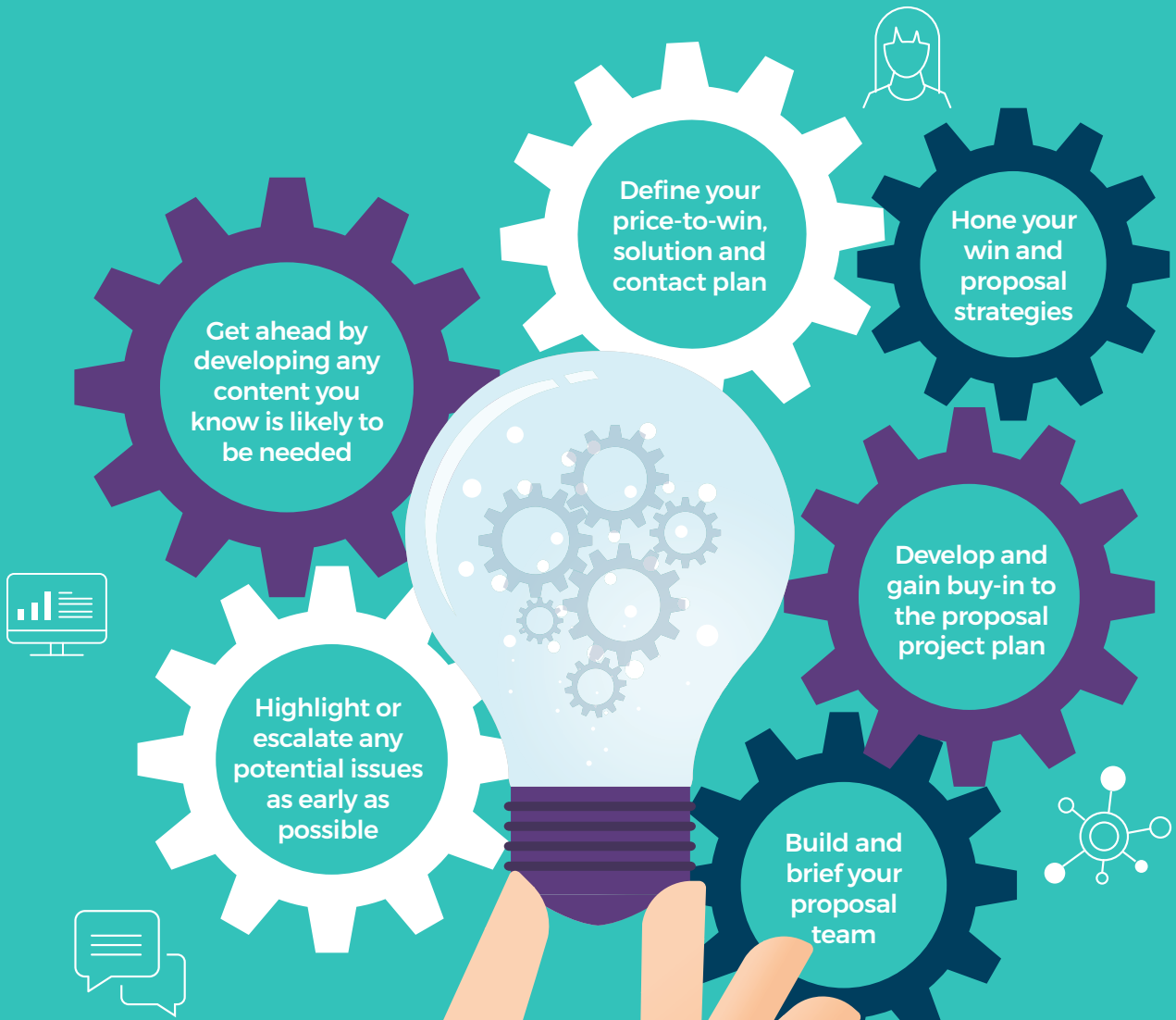
The capture manager stays engaged through the proposal development and post-proposal phases, but takes up more of a reviewing and advising role.

An effective business development effort with fully functioning capture management ensures organisations influence the customer and maximise their chances of success. And the influencing performed during the process has put you in pole position with the customer.



# Getting prepared: the basics

Capture planning has typically been championed in the bid world as a discipline that's only used in major bids. Historically, it's emerged from the world of defence bidding into other sectors such as construction and engineering. But its foundations are based on good solid business development that can be applied to any sector. So even if your timescales are short, the capture basics should still be happening. Before you get to writing your proposal, you need to do the following things:



# Capture: the skills required to be successful

The APMP has defined the following as the key skills for the capture manager.



APMP's new Capture Practitioner certification is designed for industry professionals who specialise in capture, business development, opportunity management and pursuit. If you're a bid or proposal specialist who gets involved in the early stages of the pursuit – or who gets frustrated by others' failure to plan the overall campaign effectively – then this is the qualification for you!

Our immersive two-day event will lead you through the sections of APMP's Body of Knowledge that form the syllabus for the Capture certification - focusing on the key points, methods and approaches required to operate your own capture process effectively.

For more information on our APMP Capture Practitioner training then please



Capture rate of **89%**



**Passionate**  
about winning



**Delivering**  
quality, improving  
win rates



Numerous  
industry  
awards

**#1**

Approved  
Training  
Organisation  
for the



**100% scores for quality**  
in many evaluation processes

Seasoned  
professionals



**serving**



clients  
globally



Proven  
processes  
and tools

