

Chapter 7 - Capture Managers

What is a Capture Manager and what role do they play in winning? Complex must-win bids require dedicated attention to winning.

A capture manager is a dedicated person assigned to winning a business pursuit, by providing the leadership, coordination, resource allocation, strategy, and management needed to prepare the winning bid. While a business development manager is responsible for a portfolio of leads, a capture manager is usually assigned to just one. Capture Managers are most often used for large complex sales, where closing the sale will take the business development manager's attention away from pursuing the other leads. **A Capture Manager plays a key role between business development and proposal writing** that can greatly improve your chances of closing the sale.

Hardest Job

Being a capture manager is the hardest job in the entire company. It also requires the qualifications and experience that cover a wider range than most people have.

Consider:

Being a capture manager is the hardest job in the entire company.

- A capture manager must know what to offer, how the offering should be designed, and how to make cost/value tradeoffs and still win.
- A capture manager must not only have the technical skills to know how to do the work, but also must know how to sell. A capture manager must not only know how to sell but also how to do it externally as well as internally. A big part of a capture manager's job is negotiating and persuading people within their own company.
- A capture manager must know pricing and contracts well enough to negotiate terms and win.
- A capture manager must know enough about proposals to anticipate the information required to write the winning proposal.
- A capture manager must have enough authority to make decisions and work through other people without being constantly second guessed.
- A capture manager must be able to take risks.

On top of all that, a capture manager has a high chance of getting fired if the bid loses.

Carl Dickson, the Founder and President of CapturePlanning.com and PropLIBRARY provides some excellent additional pointers:

- Marketing vs. Business Development vs. Sales vs. Capture Management
- What to focus on first when considering a capture process
- Are you missing the two most important ingredients for transitioning from sales, business development and capture to proposal writing?
- Business development vs. capture management vs. proposal management vs. winning
- Capture manager
- 8 pursuit and capture process goals to accomplish before your proposal starts
- What is a Capture Manager and what role do they play in winning?
- 37 problems to solve for successful pursuit and capture
- Staffing your pursuit effort
- Why is the job of capture manager impossible and how your fate is determined by what you do about it?
- What matters more: business development, capture management, or proposal management?
- The truth about customer intimacy
- How to steal contracts away from the current incumbent
- Find out how selling in writing is different than selling in person
- Whose job should it be to win?
- How to turn your customer, opportunity, and competitive intelligence into winning insights
- How implementing capture management can change your entire company
- Is it business development's job to win?

Assigning a capture manager who can't check all those boxes lowers your chances of winning. Companies that automatically assign the future project manager as the capture manager will usually be assigning someone with skill gaps. If it's a recompetes, the project manager may also have bias regarding the current state that prevents them from being sufficiently innovative.

The difficulty in finding a top-notch capture manager is one reason companies often turn to consultants. But this isn't a perfect solution either. A capture manager needs to know your company's history, resources, and capabilities. In some companies, that information can't be quickly learned in just a few meetings. But for some consultants, it's possible.

A capture manager also needs to know the client's preferences. Some companies

don't even know their own preferences. Generally, you will not get that by hiring a consultant, even one with some experience at the client's organization. You might get it, however, if the capture manager can spend enough time getting to know the customer. Unfortunately, consultants usually are not given the months that are needed for that.

Most companies go for what is cheap and convenient and then convince themselves it's an effective choice. Don't be that kind of company. Be the kind that understands win rate mathematics and how achieving a high win rate is about return on investment. Manage to get the highest return instead of the lowest investment.

But mostly, being a capture manager is about negotiations. He or she must collaborate with the internal company organizations to decide where to put the resources and efforts that are necessary to bring home the win. Oh, and then there is the customer.

The customer is easy. All you need to do there is to discover their preferences and give them what they need in a way that is better than their alternatives. It's your own company that will be hard. Who is going to discover the customer's preferences?

- How much effort will be required to do things and where will the resources come from?
- Who has the authority to decide every little thing?
- How do you get the price low enough to win? What is a price that is low enough to win?
- How do you get it all into your proposal, articulated effectively, and submitted on time?
- Oh, and if you think the customer is as easy as it says above, think twice.

All opportunity in your company comes from growth. This means all opportunity comes from capture. It's a hard job. And everybody depends on it. It's worth a quality approach. Don't skimp on the qualifications of your capture manager. Make the person you need available. But don't just assume that getting the right person is all it takes. Hiring the right people is not enough. Surround your capture manager with all the organization, process, and resource advantages that maximize your win rate. Put the amount into it that is necessary to be successful.

If you have the right leader with the right skill set, the capture manager needs to understand their primary responsibilities and be empowered to carry them out to fruition.

Responsibilities

The Primary Responsibilities of a Capture Manager:

- **Communication**
 - Establish and maintain contact with BD and the client where possible.
 - Keep management and team up to date (Good news and unwelcome news)
 - Ensure that conflicts are resolved.
 - Facilitate team meetings.
- Take on the role of surrogate customer and ensure that we satisfy the client's needs!
 - Understand the client's mission.
 - Understand the client's requirements.
 - Understand the client's constraints.
 - Understand underlying pain.
- Act as the proposal's solution architect (understand what it takes to win the job. One approach is to diagram the solution (Fishbone Diagram Attached).

The capture manager and the team need to look at the opportunity to ensure that it is qualified. It is not enough to say, well it is out there, we can bid. We must have the ability to win.

Resources are constrained, both financial and human capital. We need to discipline ourselves to limit pursuits to those that create value for our clients.

We need to look at opportunities from multiple viewpoints:

- Technical
- Organizational
- People
- Financial
- Past Performance

Can we provide value to our client? Are we able to win?

It is also helpful to use these same factors when determining how well our competitors stack up. We need to ask ourselves some tough questions and provide honest answers.

Technical

- Do we understand the customer's performance statement?
- Do we have the subject matter expertise to do the job and create value for the client?
- Do we have the existing core capabilities?
- Does this opportunity map to our organization strategic plan?
- Have we validated our approach with the client?

Organizational

- Is this a current client?
- Have we had successful engagements with the client?
- Do we understand the client's decision process?
- Are we a viable contractor to get the job done?

People

- Do our people know the client?
- Have we developed a level of trust with this client?
- Do we understand underlying client pain points?
- Have we been dealing with a decision maker?

Financial

- Is the opportunity funded?
- Is this a lowest cost technically acceptable bid?
- Can we meet our profitability goals?
- Are we able to meet investment constraints?

Past Performance

- Have you delivered to this contract?
- Have you done similar activities for others?
- Have you provided referenceable value to others?

Have we been honest? Can we respond in the affirmative to each of those questions?
(Probably not!)

Don't be dismayed. If the answers are not in the affirmative, can we do something about it? Do we need to conduct better client outreach campaigns? Do we need to add teammates to shore up the team?

It is ok to say no to bad opportunities. I cannot count the number of losing bids that were pursued because someone said, "I think we can win. What have we got to lose?"

Ok, you have made Up Your Mind, Craft the story.

Synthesize the big picture from the multiple team viewpoints.

Extract the major features and benefits that your team affords your client.

Ensure that the team understands a clearly defined set of themes/messages that we need to convey to the client.

- **Orchestrate resources.**

- Locate mission SMEs.
- Locate technology SMEs as required.
- Ensure that all gaps are filled with the best qualified resources including teaming where appropriate.
- Make sure that contracts and subcontracts are onboard early and kept informed.

- **Act as product manager for the proposal to ensure that a quality product is delivered.**

- Make sure that the proposal conveys the story, themes, and value. Value is best stated in clear value propositions. (see next section)

One tool that works well in visualizing a solution is a fishbone diagram. Kaoru Ishikawa was the originator of this technique, but the name fishbone replaced Ishikawa Diagram.

An example is provided on the next page.

I see the role of capture manager as one of facilitation, ensuring that all the above is completed and where appropriate, taking the action in hand and executing whatever work is required.

A major role of the capture manager is to ensure that the offering conveys a defensible Value Proposition.

Capture Manager

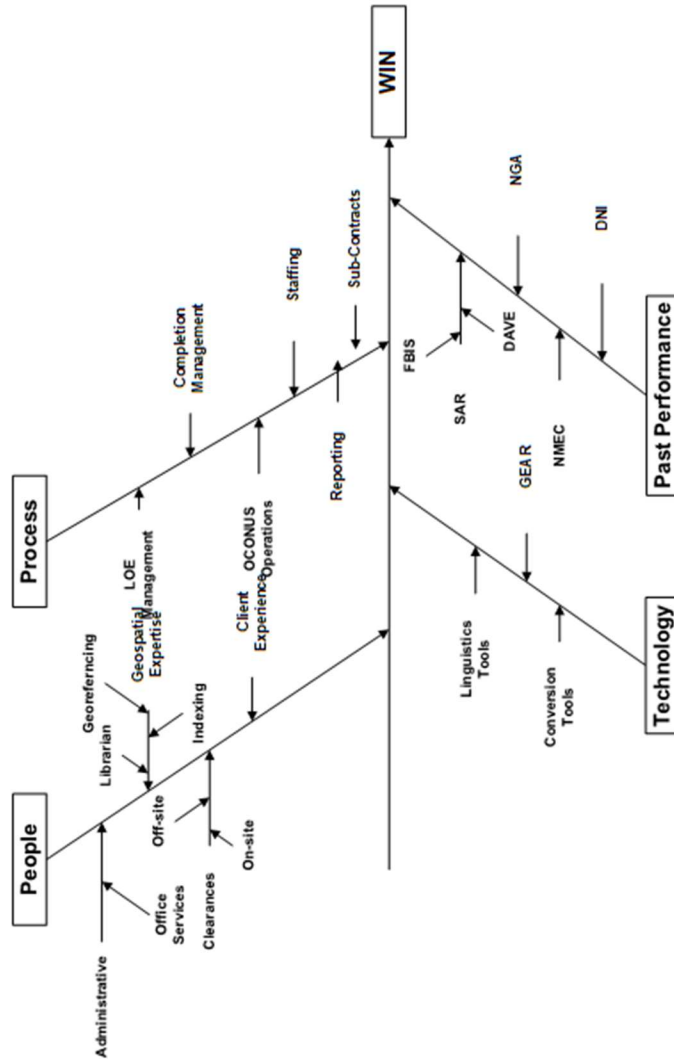
- **Opportunity Manager**
- **Cheer Leader**
- **Plumber**

I have used Ishikawa (fishbone) diagrams as an aid to pictorially display why my organization is well suited to do the work.

Try drawing diagonals that represent the critical areas. Then show branches and limbs off those diagonals that represent experience and proof that the team is ready to win.

Does This Opportunity Qualify?

Use the diagram to prove to yourself and others that you have the ability to WIN. You have the people, processes, technology, and past performance necessary to pursue this opportunity.



Sample Ishikawa (fishbone) Diagram

After proving that you have the capability to do the work and provide tangible value, you need to look at the value from the client’s perspective. You need to develop and understand your value proposition. Remember, value is from the client’s point of view, not the suppliers.

We often skip this step and go straight into “this is obviously the best solution”. At least it is obvious from our point of view.

I once had a student that wanted to understand how to work with a somewhat difficult client. She was sure that her solution would bring great value to the client. The client only needed to put her under contract and let her deliver. If he did so, he would eventually see the great value that she forecasted.

I tried to explain that clients usually must see the value before they buy.



Always do right. This will gratify some people and astonish the rest.

Mark Twain



Excerpt from “Manage Projects with Purpose” available on Amazon