MODULE 1 · PROJECT PURSUIT

THE PURSUIT, LEAD TO AWARD

Weston & Sampson

BUILDING CLIENT INTELLIGENCE

Client intelligence and prepositioning

Client intelligence is our firm's working knowledge of a client before a pursuit becomes formal: what the client values, how they decide, who influences those decisions, and what work may be coming next. **Prepositioning** is the deliberate use of that intelligence to strengthen our position before a solicitation is released. Once a pursuit becomes active, sort our client intelligence into what we know firsthand, what we assume, and what we must ask, then take the third column into a pre-proposal conversation. Listen for performance expectations, what the work must achieve, and experience expectations, how the client expects it managed and communicated. The combination of these data help our proposals speak to clients in unique ways that strengthen our firm's position.

	LEAD	OPPORTUNITY	GO / NO-GO	PROPOSAL	AWARD
WHAT HAPPENS	Our firm is developing business relationships, but no formal project exists.	A lead the client has validated as a project, with a revenue expectation, a win probability, and a schedule. Requests arrive as an RFQ, an RFP, or a direct appeal, in decreasing formality.	The formal decision to pursue or decline, required whenever a pursuit needs a formal submission from Marketing.	Our firm's submission that sets the scope, schedule, and financial terms for a project, either formal in response to an RFP or informal such as a letter proposal.	The official notice where the client selects Weston & Sampson and our firm opens the project with a chargeable project number.
WHAT IT PRODUCES	**Client intelligence.** Priorities, challenges, and upcoming work, recorded for Client Managers, Business Development staff, and future pursuit teams.	**The opportunity record.** Client, Projected Gross Revenue, ODC, Net Revenue, win probability, key dates, staff, Stage.	**The 2025 Go/No-Go form** and eight pursuit information fields, including a named Technical Champion.	**The Proposal Kickoff Form,** then the submitted proposal, formal or a letter proposal.	**A chargeable project number.** The project the pursuit assumed now exists.
WHO OWNS IT	Client Manager, business development, and the project manager delivering current work.	Lead Generator, who holds the pursuit history. Project manager, who opens the record.	No one person holds all the evidence. Lead Generator, Client Manager, Technical Champion, Discipline Leader, Regional Manager, Marketing Lead, and the project Principal, who signs.	Marketing Lead owns the package, Technical Lead the content, and both manage quality assurance. Quality control is performed by a technically experienced staff member outside the proposal team. A signer on the current Certificate of Vote signs.	The project manager, who takes the fee, schedule, and staffing the pursuit set.
DELTEK VANTAGEPOINT STAGE	**Lead** Not yet confirmed as real, funded, and open to our firm. Apply no win probability.	**Lead** Held at Lead until a Go is recorded. Every opportunity is entered, whether the work begins next month or a year from now.	**Proposal** Set once the form is complete and the record carries a Net Revenue and a win probability.	**Proposal** while the submission is prepared. **Short-Listed** once the client advances our firm past a first screening. Raise the win probability.	**Award** when the client selects our firm. **No-Go** when our firm declines the pursuit, another firm is selected, or the client cancels the work. Set it as soon as one occurs.
FORECAST DATA	None. No win probability applies at this Stage.	Estimated Net Revenue, the fee target less Other Direct Costs, and a win probability between 0 and 100 percent.	**Est. Net Revenue × win probability = weighted revenue.** Plus the estimated proposal hours, 35 on average in 2024.	Revise the revenue, the win probability, and the key dates monthly and at every stage change.	Future backlog becomes existing backlog on a contract our firm now holds.
PROJECT MANAGER INFLUENCE	**Greatest** Sets the relationship the pursuit starts from.	**Greatest** Shapes the scope, the fee, the schedule, and the staffing before any of them is fixed.	**High** Estimates the win probability and the hours committed.	**High** Develops the approach, the fee, and the schedule.	**Limited** Stress tests assumptions others have already made.

01 THE PROCESS: THE 2025 GO/NO-GO FORM, 15 QUESTIONS

SECTION A · TWO QUESTIONS AUTOMATICALLY STOP THE PURSUIT

Q1. We meet all the minimum and comparative evaluation criteria.

Q2. We can commit the time and attention to complete the proposal within the agreed upon schedule and be responsive throughout the process.

A No to either is an automatic No-Go. The evaluation ends and the reason is recorded in the Notes.

Read the RFP in its entirety before any other step and review it twice. Marketing cannot guarantee support below a two-week lead time.

FIRST REVIEW · WHAT WE MUST DELIVER

The evaluation factors the client will score. The minimum and comparative criteria, and state licensing. The submission requirements, forms, and portals. The dates, and how addenda are issued. Contract terms and insurance, to Risk Management. Any DBE goal or teaming requirement.

SECOND REVIEW · WHAT WE MUST LEARN

Why the work became necessary now. The risks to avoid, and where our experience has the most value. The other parties who influence the selection. The budget the client has established, stated or not.

TWELVE SCORED QUESTIONS	POINTS	WHAT IT TESTS
A Q3, licensure in the project state	**10**	A No lowers the score but does not stop the pursuit
B Strategic Fit and Positioning	**60**	Whether our firm can win. Capture plan, awareness, relationship, differentiation
C Profitability and Resources	**10**	Whether the fee supports profitable delivery. Scope, staffing, schedule, subconsultants, risk
D Operational Readiness	**20**	Whether our firm can mobilize. Regional experience, local staff, market position

70 or higher

The Go recommendation proceeds to final review.

Below 70

Answer Question 14 and record a written reason for any Yes.

RECORD THE BASIS OF EVERY ANSWER

In the Notes column, state whether the source of the pursuit stage intelligence is confirmed from a named source, inferred from experience or comparison, or unknown. Two teams can reach different totals on one opportunity, so the evidence is what makes a recommendation defensible.

Thirty of the 100 points measure strategic direction: a capture plan for the practice area or client (Q4), a targeted client (Q8), and a firm initiative (Q9), at 10 points each. The form evaluates both whether our firm can do the work and whether it should. Q15 records an emerging market for no points.

INSIDE THE PROPOSAL STAGE THE EXITS, THE ROLES, THE KICKOFF, THE CLOCK

Weston & Sampson

LEAD · OPPORTUNITY · GO / NO-GO · PROPOSAL · AWARD

02 EXITS AND UPKEEP

Three conditions produce a No-Go regularly

- Our firm needs a license in the project state and cannot obtain one in time.
- The solicitation requires experience our firm cannot demonstrate.
- The Technical Champion has multiple competing, higher priority opportunities or projects in the same response period.

Proposal hours are indirect labor, paid for whether or not our firm wins the work. Weston & Sampson pursues more opportunities than it can staff on purpose, and No-Go exists as an option on purpose. A No-Go concentrates proposal effort on the opportunities our firm can win and that support our strategic direction.

FOUR CONFIRMATIONS AFTER A GO

- The opportunity goes on the proposal calendar as a Confirmed Go.
- The bid registration goes to the client or portal where required.
- The solicitation goes to Risk Management wherever it carries contract language or insurance requirements.
- Someone confirms how the client issues addenda and who watches for them.

KEEP THE RECORD CURRENT

Update each record at least monthly and at every stage change: the Stage, the Projected Gross Revenue and Other Direct Costs, the win probability, the key dates, the assigned staff, and notes on the client's stated outcome and risks. An opportunity nobody updates stays in the revenue projection at its last recorded figures, and one that is over and still open overstates it.

03 THE ROLES AND WHAT A GO RECORDS

MARKETING LEAD

Owns the proposal package: completeness, qualifications, references, example projects, and the requirements of the solicitation.

Asks: does this comply, and does it present us well?

TECHNICAL LEAD

Owns the technical content: the project team, the approach, the fee, and the schedule. Named on every pursuit, with a backup.

Asks: can we perform this work, with this team, for this fee, on this schedule?

Both manage quality assurance jointly. Quality control is performed by a technically experienced reviewer off the proposal team.

SUPPORTING MARKETING ROLES

Proposal Writer, Marketing Coordinator, Graphics Designer, and the Proposal Manager, who marks the Go on the marketing calendar and manages every proposal in production.

SUPPORTING TECHNICAL ROLES

The project manager, the Technical Lead, the Risk Manager for contract language and insurance, the project Principal, who reviews, and the proposal signer.

EIGHT FIELDS A GO DECISION PRODUCES	WHAT IT RECORDS
Technical Champion	One person, named and committed
Manager support	Regional or Client Manager
Estimated Net Revenue	From the Deltek Vantagepoint OPP tab
Probability of winning	From the Deltek Vantagepoint OPP tab
Technical proposal hours	Estimated cost. The 2024 average was 35 hours
Technical lead capacity	Available before the deadline
Proposal format	Word or InDesign
Marketing hours	Estimated by Marketing

REMINDER

Two of the eight entries, the Estimated Net Revenue and the win probability, become forecast data. The other six identify the people and roles that support the pursuit. A Go decision ends when the pursuit information is recorded in the system of record. A proposal number, typically opened above eight hours, tracks the pursuit cost.

04 THE PROPOSAL KICKOFF MEETING

WHAT THE MEETING ESTABLISHES

The first formal meeting after a Go decision. It establishes the proposal focus, the internal schedule, the responsibilities, the delivery method, and the fee format. The Marketing Lead and the Technical Lead define and assign the work of the proposal.

Marketing schedules the meeting and attendance is mandatory. It establishes a uniform understanding of the RFP requirements, the complete team including subconsultants, the approach, the evaluation factors, the three win themes, and the content required to assemble the proposal. The Proposal Kickoff Form creates the agenda.

WHAT THE FORM COVERS

- The proposal focus and the win themes
- Roles for the Technical Lead, the Marketing Lead, and any second technical reviewer
- The complete team, the subconsultants, and disadvantaged business enterprise goals where appropriate
- The evaluation factors, and how our firm meets each
- The relevant projects and the monographs to write
- Who completes the fee proposal, and whether accessible deliverables are required
- The photography, graphics, and format needs
- The internal deadline for every handoff, agreed by the people who owe the work

THREE WIN THEMES

A win theme is a central proposal message that connects a client priority to a specific Weston & Sampson strength and explains the resulting client benefit. Marketing, technical staff, and operations each propose a different theme, and the project manager prepares one strategy that uses all three, so the client receives one message.

05 THE PROPOSAL CLOCK GO TO SUBMITTED

TIP

Build the proposal schedule backward from the due date, around the holidays and vacations of the people you depend on. A date that moves because the work was not ready moves the deadline of somebody else.

2 weeks before the response is due	Submit the Go/No-Go form in Deltek Vantagepoint. Marketing cannot guarantee support below a two-week lead time. The Technical Lead confirms the proposal schedule and deadlines before the form reaches Marketing.
48 hours after the kickoff	The Technical Lead confirms team composition with discipline and practice leaders, and introduces the Marketing Lead to any subconsultants within 24 hours.
24 hours before production	Technical components complete. Marketing then owns completion and quality.
24 hours before the deadline	Electronic submissions packaged, signed by an individual listed on the current Certificate of Vote.

Quality reviews are scheduled at the kickoff, at approximately 60 percent completion for general direction and again at approximately 95 percent as the final review. Marketing owns the schedule and depends on the team meeting the agreed deadlines and briefing it on client intelligence.

Color team reviews, on major proposals

More than $500,000 of Projected Gross Revenue, or a critical client, where enough time exists between the Go decision and the due date. Scheduled at the kickoff.

PINK

An outline of the response with a draft of projects and an organizational chart. Input at the earliest stage.

RED

The 90 percent submittal, with a limited group of people, not less than four days out.

GOLD

Federal only. Between Red and Green, at near 100 percent completion, not less than four days out.

GREEN

The final review. Costs, schedule, scope, and exclusions, not less than two days out, for final approval.