

Capture & Proposal

Standard Operating Procedure (SOP)

Establishing a Standardized Approach to Capture and Proposal Operations

Enabling Consistent, Data-Driven, and Scalable Capture Operation

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Purpose

This Standard Operating Procedure (SOP) defines a structured and standardized approach for managing capture and proposal activities across the organization. It ensures that all opportunities are evaluated, prioritized, and executed using a consistent, data-driven process rather than relying on individual judgment or informal practices.

By integrating key elements such as opportunity scoring, probability of win (PWIN), capture investment analysis, and return on investment (ROI), the SOP enables more informed and disciplined decision-making. It also establishes clear roles, governance checkpoints, and required tools to guide teams through each stage of the capture and proposal lifecycle.

Ultimately, this SOP is designed to institutionalize capture operations, improve consistency and efficiency, and ensure that resources are focused on opportunities that align with strategic priorities and offer the highest potential value.

Scope

This SOP applies to all personnel involved in the capture and proposal lifecycle, including Business Development, Capture Management, Proposal Teams, Technical Leads, and Finance/Pricing. It ensures that all stakeholders follow a common process, clearly understand their roles, and work in a coordinated and consistent manner across all pursuits.

It covers all stages of opportunity identification through proposal submission, negotiation, and closeout. This includes key activities such as opportunity intake, qualification and scoring, capture planning, proposal development, and final submission, as well as supporting governance processes, investment decision-making, and ongoing performance monitoring to ensure accountability and continuous improvement.

Operating Model Overview

The Capture & Proposal function operates through a structured, stage-gated lifecycle supported by governance, standardized scoring models, ROI-based investment evaluation, and competitive analysis. Each opportunity progresses through defined stages with clear entry and exits criteria, ensuring that decisions are made consistently and based on data rather than intuition.

This operating model integrates capabilities developed across multiple phases:

- Opportunity qualification and scoring (Sprint 1) to assess strategic fit and viability
- Pipeline governance and tracking (Sprint 2) to provide visibility, control, and consistent decision cadence
- Capture investment and ROI discipline (Sprint 3) to ensure financial accountability and efficient resource allocation
- Competitive strategy and positioning (Sprint 4) to strengthen win probability through informed differentiation.
- Pipeline forecasting and analytics to enable revenue forecasting, pipeline coverage assessment, and performance insights based on win rates, stage progression, and historical trends.

By combining these elements, the model enables a holistic and disciplined approach to opportunity management. It ensures that resources are focused on high-value pursuits, risks are identified early, and decisions are aligned with both strategic priorities and financial outcomes, ultimately improving win rates and overall capture efficiency.

End-to-End Lifecycle

The capture lifecycle follows a defined sequence of stages:

1. Opportunity Intake

- Capture initial opportunity details, including scope, value, and strategic relevance

2. Qualification & Scoring

- Evaluate the opportunity using scoring criteria to assess viability and alignment

3. Tier Assignment

- Assign priority level based on score, value, and strategic importance

4. Go / No-Go Decision (Gate 1)

- Determine whether to pursue the opportunity based on score, PWIN, and alignment

5. Capture Planning & Strategy Development

- Develop win strategy, customer engagement approach, and competitive positioning

6. Pipeline Forecasting & Analytics

- Analyze pipeline coverage, apply win rates, assess stage progression, and evaluate forecast confidence based on pipeline quality and historical performance

7. Proposal Authorization (Gate 3)

- Approve resources and authorize proposal development based on readiness and investment

8. Proposal Development

- Develop technical, management, and pricing content for submission

9. Red Team Review & Compliance Validation

- Validate compliance, quality, and win themes through structured review

10. Proposal Submission

- Submit finalized proposal to the client

11. Post-Submission / Closeout

- Record outcome, capture lessons learned, and update performance data

Opportunity Intake Procedure

All opportunities must begin with completion of the Opportunity Intake Form, which serves as the initial data collection and screening mechanism for entry into the pipeline. This ensures that all opportunities are evaluated consistently from the outset and that sufficient information is available for informed decision-making.

Required information includes:

- **Opportunity overview (client, scope, value)** – Defines the nature of the requirement, estimated contract value, and high-level scope
- **Strategic alignment** – Assesses how well the opportunity aligns with organizational priorities and growth areas
- **Customer mission and need** – Identifies the client’s objectives and the problem being addressed
- **Past performance and capabilities** – Evaluate relevant experience and ability to deliver
- **Competitive landscape** – Provides initial insight into competitors, including incumbents and potential challenges
- **Initial PWIN assessment** – Estimates the likelihood of winning based on current positioning and available information
- **Estimated capture investment** – Provides a preliminary estimate of effort and cost required to pursue the opportunity

The intake form serves as the foundation for qualification, scoring, and downstream decision-making. No opportunity may proceed to evaluation or enter the pipeline without a completed and validated intake form, ensuring consistency, transparency, and completeness of information.

Qualification & Scoring Procedure

All opportunities must be evaluated using the Quantitative Opportunity Scoring Model, which provides a structured and objective method for assessing opportunity viability. This ensures that decisions are based on consistent criteria rather than subjective judgment.

Scoring Criteria:

Strategic Alignment – Degree of alignment with organizational priorities and growth areas

Past Performance – Relevance and strength of prior experience related to the opportunity

Customer Relationship Strength – Level of access, engagement, and understanding of the client

Competitive Position – Relative positioning against competitors, including incumbent advantage

ROI (Revenue-to-Effort) – Expected financial return relative to capture investment

Probability of Win (PWIN) – Estimated likelihood of winning based on current positioning

Budget/Funding Clarity – Availability and certainty of funding for the opportunity

Delivery Readiness – Organizational capability to successfully deliver the requirement

The scoring model produces a total score (0–100), which is used to guide prioritization and decision-making.

Threshold: Minimum score to proceed: ≥ 50

Opportunities with a score below 50 are considered low viability and must not proceed unless there are a compelling strategic reason and formal approval from leadership. This ensures that resources are focused on opportunities with sufficient alignment, competitiveness, and likelihood of success.

Capture Investment & ROI Procedure Bottom of Form

Capture is managed as an investment decision, ensuring that resources are allocated to opportunities that provide the best balance of return, feasibility, and strategic value. This approach introduces financial discipline into the capture process and enables more objective Go / No-Go decisions.

Steps:

1. **Estimate capture cost (labor + overhead)**
 - Identify required effort across Business Development, Capture, and Proposal teams, including fully loaded labor rates and overhead components
2. **Calculate expected revenue (Contract Value × PWIN)**
 - Adjust contract value based on probability of win to reflect a realistic expected return
3. **Calculate ROI (Expected Profit ÷ Capture Cost)**
 - Evaluate financial return relative to total investment required
4. **Evaluate revenue-to-effort ratio**
 - Assess how much value is generated per unit of effort to identify high-efficiency opportunities

These metrics provide a comprehensive view of both financial return and investment efficiency.

Decision Considerations:

- ROI threshold (financial viability)
- PWIN threshold (likelihood of success)
- Strategic alignment (fit with organizational priorities)
- Competitive positioning and feasibility (ability to win and deliver)

Important:

A high ROI alone does not guarantee pursuit. Final decisions must consider a combination of financial return, probability of win, competitive positioning, and overall feasibility to ensure balanced and informed investment decisions.

Governance & Gate Review Process

All opportunities must pass through structured Gate Reviews, which serve as formal decision checkpoints to ensure that only qualified, high-value opportunities progress through the capture lifecycle. These reviews provide a consistent mechanism for evaluating readiness, validating assumptions, and aligning stakeholders before committing additional resources.

Gate Reviews include:

Gate 1 – Qualification (Go/No-Go): Confirms whether the opportunity meets minimum thresholds for score, PWIN, and strategic alignment

Gate 2 – Capture Strategy Approval: Validates the proposed win strategy, competitive positioning, and customer engagement approach

Gate 3 – Proposal Authorization: Approves resource allocation and confirms readiness to proceed with full proposal development

Gate 4 – Submission Readiness: Ensures the proposal is compliant, complete, and aligned with win strategy prior to submission

Each gate evaluates a consistent **set of criteria:**

Opportunity score

Probability of Win (PWIN)

ROI and capture investment

Competitive positioning

Strategic alignment

Decision Outcomes:

- **Go** – Proceed as planned
- **Conditional Go** – Proceed with required actions or mitigations
- **No-Go** – Do not pursue

All decisions, including rationale and any required follow-up actions, must be formally documented in the Decision Log to ensure transparency, accountability, and traceability across the capture process.

Capture Planning & Competitive Strategy

For approved opportunities, capture planning must include a structured and comprehensive approach to defining how the organization will position itself to win. This phase focuses on shaping the opportunity, strengthening competitive positioning, and aligning internal resources to maximize probability of success.

Key components of capture planning include:

Win strategy and win themes - clearly define the value proposition, key differentiators, and messaging that will resonate with the client

Customer engagement plan - Outline planned interactions, relationship-building activities, and insights into customer needs and priorities

Competitive analysis (including incumbent SWOT) - Assess competitors and incumbents to identify strengths, weaknesses, risks, and areas of opportunity

Differentiation strategy - Define how the organization will stand out, particularly in areas such as innovation, pricing, or technical capability

Partner strategy (if applicable) - Identify and engage partners that strengthen capabilities, past performance, or positioning

Capture planning is not limited to documentation—it is an active process of refining positioning, validating assumptions, and influencing the opportunity where possible.

The objective is to clearly define how the opportunity will be won by aligning strategy, customer understanding, and competitive positioning to increase overall probability of success.

Proposal Development Process

Proposal development follows a structured and coordinated process to ensure that all proposal components are complete, compliant, and aligned with the defined win strategy. This phase translates capture planning into a fully developed, high-quality proposal that clearly addresses requirements and differentiates the organization from competitors.

Key activities include:

Proposal kickoff

- Align all stakeholders on scope, timeline, roles, and win strategy

Section ownership assignment

- Assign clear responsibility for each proposal section to ensure accountability and timely completion

Technical and management solution development

- Develop a compelling and compliant solution that addresses client needs and reflects win themes

Pricing strategy development

- Define a competitive and realistic pricing approach aligned with cost, value proposition, and market positioning

Timeline and milestone tracking

- Monitor progress against key deadlines to ensure timely completion and readiness for review

All proposals must follow a structured schedule with defined ownership, clear milestones, and regular progress tracking. This ensures consistency, accountability, and alignment across all teams, resulting in a compliant, competitive, and high-quality submission.

Compliance & Red Team Review

All proposals must undergo formal compliance validation and Red Team review to ensure that submissions are complete, responsive, and competitive. This process serves as a critical quality assurance checkpoint to validate that the proposal meets all client requirements and aligns with the defined win strategy.

Compliance Matrix:

The compliance matrix is used to ensure full alignment with all RFP requirements and provides end-to-end traceability across the proposal.

- Maps each RFP requirement to corresponding proposal sections
- Assigns clear ownership for each requirement to ensure accountability
- Tracks compliance status (**e.g., Compliant, Partial, Non-Compliant**)
- Identifies gaps early and ensures all requirements are fully addressed prior to submission

Red Team Review

The Red Team review provides an independent and objective assessment of the proposal prior to submission.

- Evaluates compliance with solicitation requirements and instructions
- Assesses clarity, structure, and overall quality of the proposal content
- Validates alignment with win strategy, value proposition, and key themes
- Reviews competitiveness of the solution, including technical approach, pricing positioning, and differentiation against competitors

Feedback from the Red Team must be documented, prioritized, and incorporated prior to final submission.

No proposal may be submitted without completing both compliance validation and Red Team review, ensuring that all submissions meet quality standards, are fully compliant, and are positioned to maximize probability of win.

Pipeline Governance & Operating Rhythm

The organization follows a defined governance cadence to ensure consistent oversight, alignment, and disciplined execution across the capture and proposal lifecycle. These recurring meetings provide structured checkpoints to review opportunity status, validate decisions, and proactively address risks or gaps.

Key governance activities include:

Weekly Pipeline Review

- Reviews all active opportunities, including stage, score, PWIN, ROI, and next actions
- Identifies risks, gaps, and required follow-ups to keep opportunities progressing

Gate Review Meetings

- Conducts formal decision checkpoints (Go / Conditional Go / No-Go) at key stages
- Validates readiness, investment decisions, and alignment with strategy and priorities

Monthly Executive Reporting

- Provides leadership with a consolidated view of pipeline performance, key metrics, and strategic priorities
- Highlights high-value opportunities, risks, and required executive decisions

These meetings ensure:

- Pipeline visibility across all opportunities and stages
- Alignment across stakeholders on priorities, decisions, and resource allocation
- Timely decision-making to prevent delays and ensure efficient progression of opportunities

This governance cadence reinforces accountability, supports data-driven decisions, and ensures that capture activities are consistently aligned with organizational objectives.

Tools & Templates

The following tools must be used:

- **Master Pipeline Tracker** – Central tool for tracking all opportunities, stages, and key metrics across the pipeline
- **Opportunity Intake Form** – Standardized form for capturing initial opportunity details for evaluation
- **Scoring Model** – Framework for assessing opportunity viability based on defined criteria
- **Capture Investment & ROI Model** – Tool for estimating capture cost and evaluating financial return
- **Decision Log** – Record of all Gate Review decisions, including rationale and actions
- **Gate Review Deck** – Standard template for presenting opportunities during governance reviews
- **Compliance Matrix** – Tool for mapping and tracking RFP requirements to proposal responses
- **Pipeline Governance Template** – Structure for conducting and documenting pipeline review meetings
- **Pipeline forecasting and analytics** - to enable revenue forecasting, pipeline coverage assessment, and performance insights based on win rates, stage progression, and historical trends

Performance Monitoring & 90-Day Assessment

Performance must be tracked using standardized metrics to evaluate the effectiveness, efficiency, and overall health of capture and proposal activities, ensuring that decisions are grounded in measurable outcomes rather than assumptions.

- **Win rate** – Measures the percentage of pursued opportunities that result in awards, indicating overall capture effectiveness
- **Cost per pursuit** – Assesses the average investment required per opportunity, helping evaluate resource efficiency
- **Cost per win** – Evaluates total investment relative to successful outcomes, providing insight into return on effort
- **ROI trends** – Tracks financial return across opportunities over time, identifying patterns in high- and low-performing pursuits
- **Pipeline health** – Monitors pipeline value, stage distribution, and opportunity quality to ensure a balanced and viable pipeline

These metrics provide visibility into both performance outcomes and resource efficiency, enabling data-driven decision-making and more accurate prioritization of opportunities.

A formal **90-day performance assessment** must be conducted to review results against these metrics, analyze trends, identify gaps, and validate key assumptions (e.g., PWIN, cost, ROI). The assessment should also evaluate pipeline coverage, forecast accuracy, and stage progression to ensure alignment with expected revenue outcomes, and recommend targeted actions to improve capture effectiveness, forecasting reliability, and overall performance.

Continuous Improvement

Continuous improvement is achieved through structured feedback and analysis of capture and proposal outcomes to enhance future performance, decision-making, and overall effectiveness of the process.

Post-win and post-loss reviews – Evaluate outcomes to identify key factors that contributed to success or failure, including strategy, positioning, pricing, and execution

Lessons learned documentation – Capture critical insights, recurring issues, and best practices to ensure knowledge is retained and applied across future pursuits

Updates to scoring and ROI assumptions – Refine models based on actual results to improve accuracy of evaluations, forecasting, and investment decisions

Refinement of capture strategies – Adjust win strategies, customer engagement approaches, and competitive positioning based on validated insights

These activities ensure that learnings are systematically captured and applied, allowing the process to continuously evolve, improve efficiency, strengthen competitiveness, and enhance overall capture performance over time.

Policy Review

This SOP shall be reviewed periodically to ensure continued alignment with organizational strategy, market conditions, and evolving business priorities. Updates may be implemented as needed to incorporate process improvements, changes in governance, and lessons learned from performance assessments, ensuring the SOP remains relevant, effective, and aligned with operational needs. As part of this continuous evaluation, key performance and forecasting metrics must also be monitored to validate effectiveness and inform updates.

These include the pipeline coverage ratio, which measures pipeline value against targets (typically 3–4x) to identify potential gaps; forecast accuracy, which compares projected versus actual revenue outcomes to assess reliability; stage conversion rates, which track movement across pipeline stages to evaluate deal progression and efficiency; and forecast confidence level, which reflects the overall reliability of projections based on pipeline quality, stage mix, and historical consistency. Together, these metrics provide critical insight into performance and forecasting accuracy, supporting data-driven refinements to both the SOP and overall capture strategy.