

# Double Down

*How to create market and competitive analyses that are greater than the sum of their parts*



# Double Down

- What's the difference?
- When and Why do I need it?
- How does it fit into my BD process?
- What does the data show?



# What's the Difference?

## PRIMARY DATA



Data observed or collected directly from first-hand experience



# What's the Difference?

## PRIMARY DATA SOURCES

- Relationships (Customer, Partner, Industry)
- Communication Plans
- Discoveries in Delivery
- Quality Assurance Reviews



# What's the Difference?

## PRIMARY DATA SOURCES

- Relationships (Customer, Partner, Industry)

The screenshot displays a software interface for account management. The main window is titled "Account: Southwest Regional Maintenance Center" and has an "Information" tab selected. Below the title bar are several tabs: "General", "Details", "Account Plan", "Relationships", "Competitive Data", "SWOT Analysis", "Account Plan Report", and "Notes". The "Relationships" tab is active, showing a table with columns for "Party A", "Party B", "Current State", and "Future State". A dropdown menu is open over the "Current State" column, listing five relationship types: "1 - Strong Personal Relationship/Confidant", "2 - Personal Relationship", "3 - Professional Relationship", "4 - Reputation Only", and "5 - No Relationship".

Relationship: New  
Information

General Admin

Party A  
Contact [ ] Account [ ]

Party B  
LCE Contact [ ]  
Contact [ ] Account [ ]

Relationship  
Current State \* [ ] Future State \* [ ]  
Description [ ]

Party A	Party B	Current State	Future State
[ ]	[ ]	3 - Professional Relationship	3 - Professional I
[ ]	[ ]	3 - Professional Relationship	3 - Professional I
[ ]	[ ]	3 - Professional Relationship	3 - Professional I
[ ]	[ ]	3 - Professional Relationship	3 - Professional I
[ ]	[ ]	3 - Professional Relationship	2 - Personal Rele
[ ]	[ ]	2 - Personal Relationship	2 - Personal Rele
[ ]	[ ]	4 - Reputation Only	3 - Professional I

5 - No Relationship

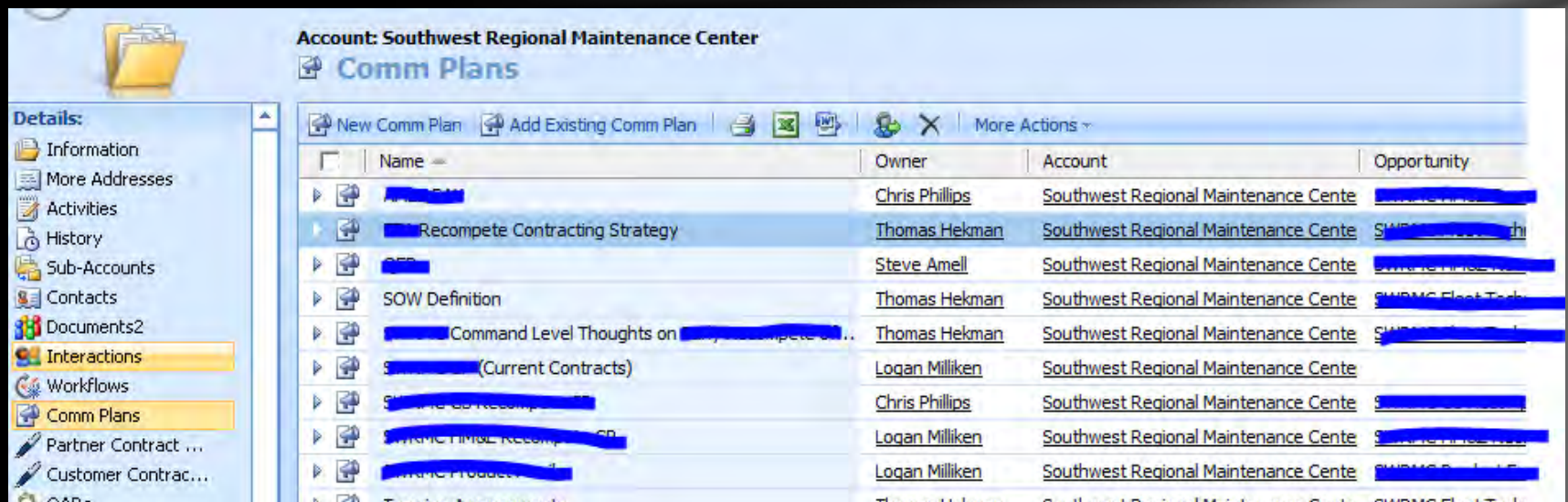
1 - Strong Personal Relationship/Confidant  
2 - Personal Relationship  
3 - Professional Relationship  
4 - Reputation Only  
5 - No Relationship



# What's the Difference?

## PRIMARY DATA SOURCES

- Communication Plans



The screenshot displays a software interface for managing communication plans. The account is identified as "Southwest Regional Maintenance Center". The main view is a table of communication plans, with a left-hand navigation pane and a top toolbar.

**Account: Southwest Regional Maintenance Center**  
**Comm Plans**

**Details:**

- Information
- More Addresses
- Activities
- History
- Sub-Accounts
- Contacts
- Documents2
- Interactions
- Workflows
- Comm Plans
- Partner Contract ...
- Customer Contract...
- QARs

**Toolbar:** New Comm Plan, Add Existing Comm Plan, [Print], [Export], [Import], [Refresh], [Close], More Actions

Name	Owner	Account	Opportunity
[Redacted]	Chris Phillips	Southwest Regional Maintenance Center	[Redacted]
[Redacted] Recompete Contracting Strategy	Thomas Hekman	Southwest Regional Maintenance Center	SWRMC [Redacted]
[Redacted]	Steve Amell	Southwest Regional Maintenance Center	[Redacted]
SOW Definition	Thomas Hekman	Southwest Regional Maintenance Center	SWRMC Fleet Tech [Redacted]
[Redacted] Command Level Thoughts on [Redacted]	Thomas Hekman	Southwest Regional Maintenance Center	SWRMC [Redacted]
[Redacted] (Current Contracts)	Logan Milliken	Southwest Regional Maintenance Center	[Redacted]
[Redacted]	Chris Phillips	Southwest Regional Maintenance Center	[Redacted]
[Redacted]	Logan Milliken	Southwest Regional Maintenance Center	[Redacted]
[Redacted]	Logan Milliken	Southwest Regional Maintenance Center	SWRMC [Redacted]
[Redacted]	Thomas Hekman	Southwest Regional Maintenance Center	SWRMC Fleet Tech [Redacted]



# What's the Difference?

## PRIMARY DATA SOURCES

- Communication Plans

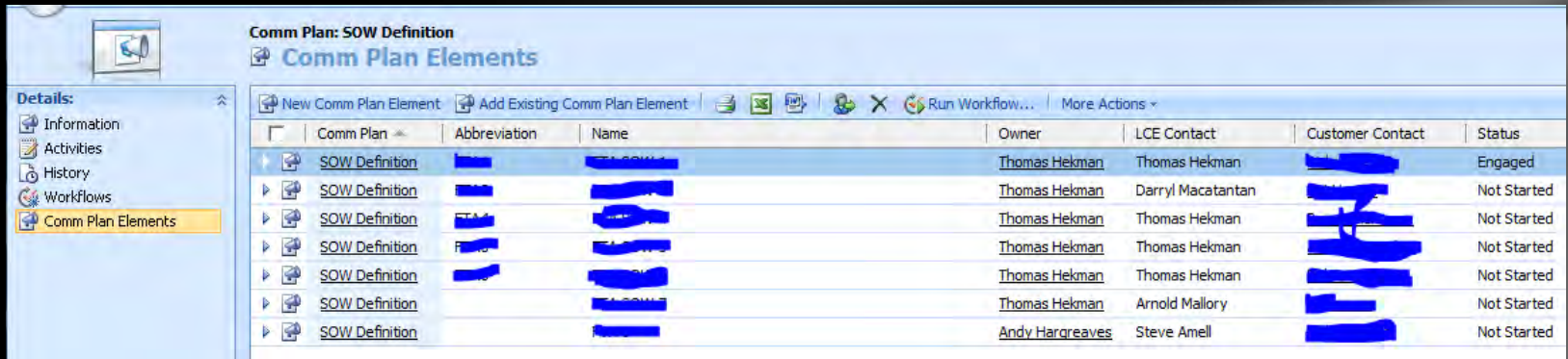
The screenshot displays a software interface for a 'Comm Plan: SOW Definition'. The interface is divided into a left-hand 'Details' pane and a main content area. The 'Details' pane includes a navigation menu with options: Information (selected), Activities, History, Workflows, and Comm Plan Elements. The main content area has a title bar 'Comm Plan: SOW Definition' and a sub-tab 'Information'. Below this, there are two tabs: 'General' (active) and 'Notes'. The 'General' tab contains several fields: 'Name \*' with the value 'SOW Definition'; 'Opportunity' and 'Account \*' fields, both containing redacted text; 'Owner \*' with the value 'Thomas Hekman'; and a 'Description' field with the text 'Determine what was lacking from the previous SOW and how we can influence the new SOW.'.



# What's the Difference?

## PRIMARY DATA SOURCES

- Communication Plans



The screenshot displays a software interface for managing Communication Plans. The main window is titled "Comm Plan: SOW Definition" and contains a table of "Comm Plan Elements". The table has the following columns: "Comm Plan", "Abbreviation", "Name", "Owner", "LCE Contact", "Customer Contact", and "Status". The data rows are as follows:

Comm Plan	Abbreviation	Name	Owner	LCE Contact	Customer Contact	Status
SOW Definition	[REDACTED]	[REDACTED]	Thomas Hekman	Thomas Hekman	[REDACTED]	Engaged
SOW Definition	[REDACTED]	[REDACTED]	Thomas Hekman	Darryl Macatantan	[REDACTED]	Not Started
SOW Definition	[REDACTED]	[REDACTED]	Thomas Hekman	Thomas Hekman	[REDACTED]	Not Started
SOW Definition	[REDACTED]	[REDACTED]	Thomas Hekman	Thomas Hekman	[REDACTED]	Not Started
SOW Definition	[REDACTED]	[REDACTED]	Thomas Hekman	Thomas Hekman	[REDACTED]	Not Started
SOW Definition	[REDACTED]	[REDACTED]	Thomas Hekman	Arnold Mallory	[REDACTED]	Not Started
SOW Definition	[REDACTED]	[REDACTED]	Andy Hargreaves	Steve Amell	[REDACTED]	Not Started





# What's the Difference?

## PRIMARY DATA SOURCES

- Discoveries in Delivery

### BD Intelligence Sharing – What Counts

#### Important customer comments:

‘Man, I am really having trouble with...’

‘I am not getting what I need from [contractor, program, etc.]’

‘We are really overloaded in...’

‘We have a lot of work coming up over the next...’



# What's the Difference?

## PRIMARY DATA SOURCES

- Discoveries in Delivery



# What's the Difference?

## PRIMARY DATA SOURCES

- Quality Assurance Reviews

**QAR: Brian Finley**  
**Information**

General Document Notes

**General**

Name *	<input type="text"/>	Year *	2014
Customer *	<input type="text"/>	Contact *	<input type="text"/>
LCE Advocate *	<input type="text" value="Terri Ciprich"/>	LCE Region *	ESG - Northeast
Document URL +	<input type="text"/>	Owner *	<input type="text" value="Russell Griffith"/>

**Status**

Requested Date	<input type="text" value="1/3/2014"/>	Scheduled	<input type="radio"/> No <input checked="" type="radio"/> Yes
Conducted Date	<input type="text" value="8/28/2014"/>	Client Debriefed	<input type="radio"/> No <input checked="" type="radio"/> Yes
Reviewed Date	<input type="text" value="10/1/2014"/>	Manager Debriefed	<input type="radio"/> No <input checked="" type="radio"/> Yes
Customer Rating	<input type="text" value="5"/>		

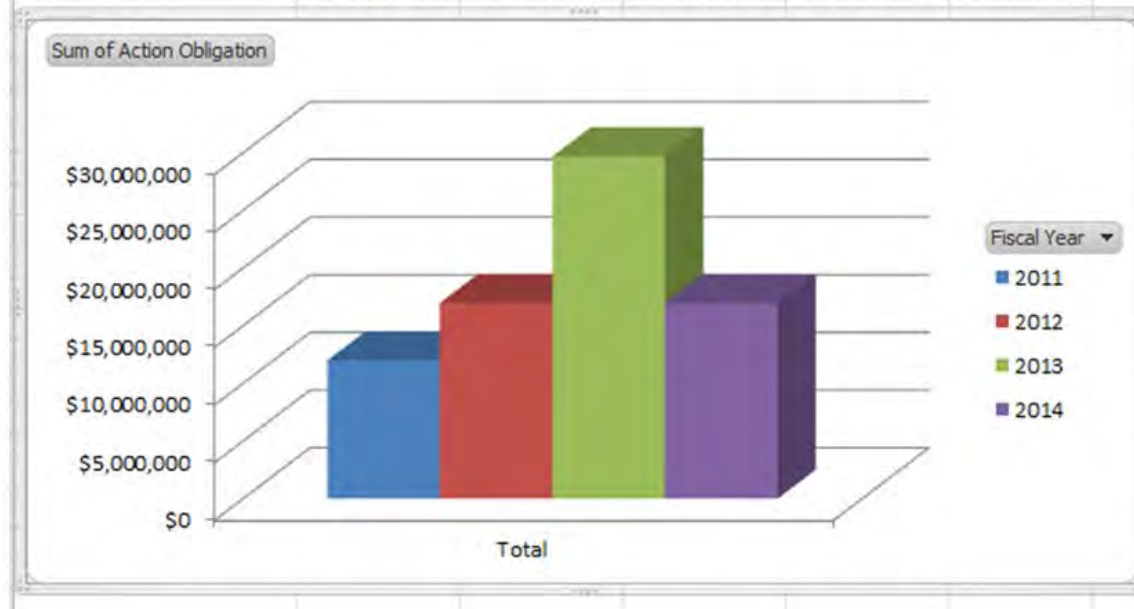


# What's the Difference?

## SECONDARY DATA

### Total Command Spending Trend

Sum of Action Obligation	Fiscal Year				Grand Total
	2011	2012	2013	2014	
Total	\$12,004,832	\$16,989,074	\$29,699,200	\$16,966,911	\$75,660,017



Data collected by someone other than the user (Public Domain)



# What's the Difference?

## SECONDARY DATA SOURCES

- **Publicly Available**
  - Federal Procurement Data Systems (FPDS)
  - FedBizz Ops
  - World Wide Web
    - Company Websites
    - Customer/Command Sites
    - Press Releases





# What's the Difference?

## SECONDARY DATA SOURCES

- **Available through Subscriptions**
  - Bloomberg
  - Washington Technology
  - GovWin IQ
  - Isell
  - D&B and/or Credit Safe Reports



# What's the Difference?

## SECONDARY DATA SOURCES

1 SERCO vendor profile July 2013

2 Table of contents

- Company Facts
- Capabilities
- Clients
- Leadership
- Additional POCs
- Locations
- Contracts
- FPDS reports

3 Company Facts

- Incorporated in North America in 1988
- \$1.4 billion division of a \$6.8 billion international services leader
- Approximately 9,000 employees across North America; 100,000 employees world wide
- Headquartered in Reston, VA (Washington D.C. metropolitan area) with more than 100 locations across North America in 45 states and 5 Canadian provinces and 14 countries around the world.

4 Capabilities

- Serco has access to over 200 contracts with capabilities in the areas of IT & Professional Services and Managed Services

5 Clients

- U.S. Department of Homeland Security
- U.S. Department of State
- U.S. Army
- U.S. Air Force
- U.S. Navy
- U.S. Marine Corps
- U.S. Federal Aviation Administration
- U.S. Patent & Trademark Office
- Ministry of Transportation of Ontario
- Intelligence Community

6 Leadership

7 Leadership

8 Additional POCs

9 Locations

Serco is headquartered in Reston, VA (Washington, DC metro area) with locations in 45 states, four Canadian provinces and 14 countries around the world.

Serco Inc, Headquarters  
 North America  
 1818 Liberty Street  
 Suite 1000  
 Reston, VA 20190  
 703-939-6000 tel  
 703-939-6001 fax  
 info@serco-na.com

10 Contracts

11 Top NAICS codes – FPDS prime awards

NAICS Code	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
541310	1,234,567	1,345,678	1,456,789	1,567,890	1,678,901	1,789,012	1,890,123	1,901,234	2,012,345	2,123,456	2,234,567	2,345,678	2,456,789	2,567,890	2,678,901	2,789,012
541511	987,654	876,543	765,432	654,321	543,210	432,109	321,098	210,987	109,876	98,765	87,654	76,543	65,432	54,321	43,210	32,109

12 Top customers – Prime FPDS awards

Customer Name	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
U.S. Department of Homeland Security	1,234,567	1,345,678	1,456,789	1,567,890	1,678,901	1,789,012	1,890,123	1,901,234	2,012,345	2,123,456	2,234,567	2,345,678	2,456,789	2,567,890	2,678,901	2,789,012
U.S. Department of State	987,654	876,543	765,432	654,321	543,210	432,109	321,098	210,987	109,876	98,765	87,654	76,543	65,432	54,321	43,210	32,109



# Combining the two

- Real time capture of primary data
- Management of communication plans
- Quarterly refresh of secondary data
- **Ownership** will drive updates and analyses

The screenshot displays a 3x4 grid of presentation slides for Golder Associates, Inc. The slides are numbered 1 through 12. Slide 1 is the title slide. Slide 2 is the Table of Contents. Slide 3 is Company Facts. Slide 4 is Capabilities. Slide 5 is Clients. Slide 6 is Leadership. Slide 7 is Leadership. Slide 8 is Additional POCs. Slide 9 is Locations. Slide 10 is Contracts. Slide 11 is Top NAIC 5 codes - FPDS prime awards. Slide 12 is Top customers - Prime FPDS awards.



# When and Why Do I Need It?

- Market Analyses
- Customer Profiles
- Market Segmentation
- Account Management
- Competitor Intelligence
- Opportunity Positioning





# How Does it Fit into My BD Process?

## Life Cycle Engineering Business Development (BD) Process Map



Phase	1. Long-Term Positioning	2. Opportunity Assessment	3. Capture Planning	4. Proposal Planning	5. Proposal Development	6. Closing
<b>Customer Milestones</b>	• Needs Assessment	• Funds Requested • RFI/Budget Estimate • Funds Approved	• Require Developments	• Site Survey/Capability Assessment • Pre-Bid Instructions • Draft RFP/RFQ • Pre-Bid Discussions • Final RFP/RFQ Release	• Bidders Conference • RFP Q&A • RFP Amendments	• Proposal Receipt • Orals • BAFO Requests • Award Decision • Award Debrief • Program Kickoff
<b>Goals</b>	Targeted Opportunities	Qualified Opportunity	Winning Strategy	Validated Solution	Winning Proposal	Contract Award
<b>Decision Gate</b>	Gate 1: Quality Decision	Gate 2: Pursuit Decision	Gate 3: Preliminary Bid Decision	Gate 4: Validate Bid Decision	Gate 5: Submit Proposal Decision	
<b>Gate Reviewer</b>	Group Lead	President	President	President	President	

### Corporate & Business Groups Planning

- Strategic Plan
- Business Plans
- Product Plans



Deliver Awarded Services





# How Does it Fit into My BD Process?

## Corporate & Business Groups Planning

- Strategic Plan
- Business Plans
- Product Plans

Create/Update Account Plans

**BTR1**



Phase 1: Long-Term Positioning

**BHR**



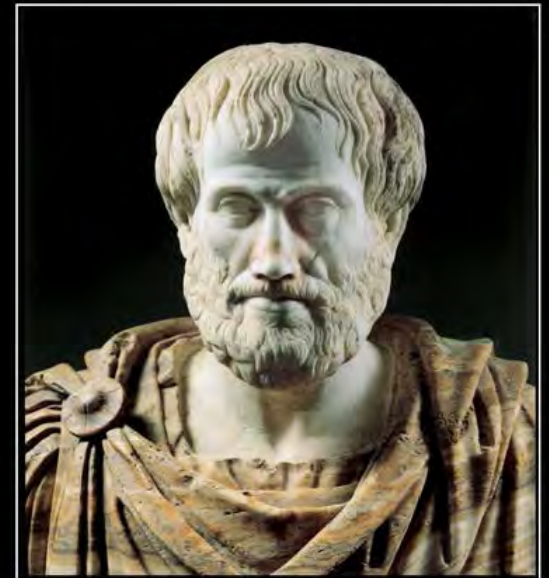
Decision Gate Briefing Package



# What Does the Data Show?

- Two Accounts Example:
  - - research + capture intelligence
- GovWin IQ Data Dump
- Gossip Guys

“The whole is  
greater than the  
sum of its  
parts.”



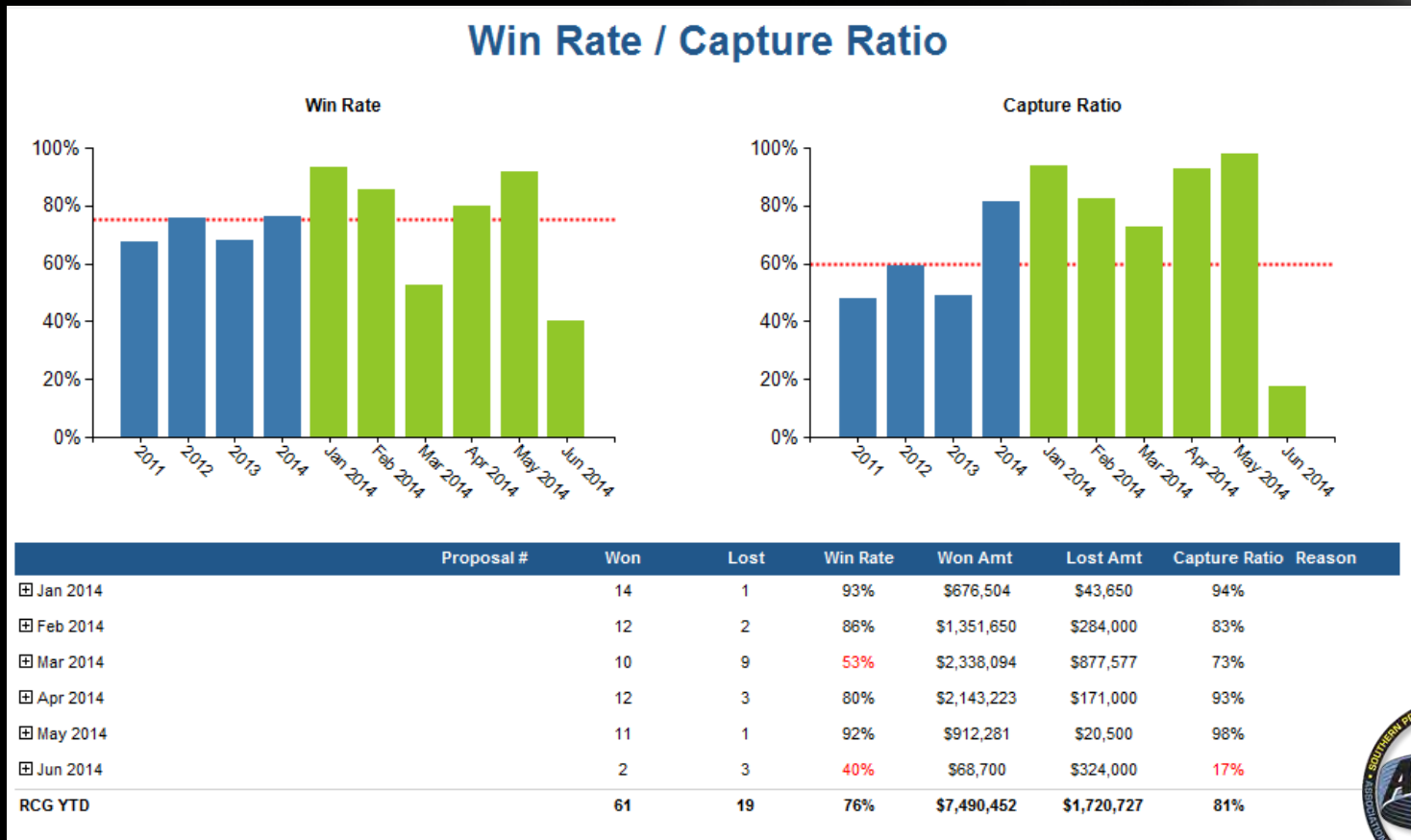
ARISTOTLE

Father of Logic



# What *Will* the Data Show?

## ○ Win Rate and Capture Ratio Impact



# What *Will* the Data Show?

- Account Management Impact
  - - Revenue to Target Comparison
  - - Quality Assurance Review Scores



# Conclusions and Take-Aways

- **Plan, Document and Share** primary data
- Update secondary data **routinely**
- Select high profile accounts and opportunities as **focus areas**
- **Ownership** will drive updates and analyses
- Determine **metrics** to monitor effectiveness





# Q & A

