ONEteam[®]

Company Settings for Company OneTeam Administrator

- Designate company users
- Designate teammate users
- Assign permissions levels to users
- Assign company divisions
- Determine company Internal Status terms
- Create custom fields
- Add document templates

- Modify Qualification Matrix criteria, response, and weighting
- Designate color team reviewer ratings
- Develop custom Capability Matrix/responses
- Create custom communication templates
- Set custom ranges for RFP Window
- Set revenue, win rate, and profit target

Opportunities

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ONEteam		pportunities -	Contacts 🗸	Search 🗸	Analytics	Supp	oort								tît əəə 🕷	Donna Hamby	
Oppor	ti °	pportunities	Compai	ny -													
	D	ashboard		0		_											
TAda	Ľπ	meline	Search	9				Propingr	BD Meeting Pipelin	e Capture Mgr Op	Sortunities by STAGE	weekly BD Meeting		:=	Columns wew: C	pportunities by S	TAGE
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	In	vitations 🗿					Qualification	Contract	Company				Proposal		Contract	Contract	P
ا ۲۹	A	rchived		¢ 1	Stage	() † T	Score ≎ T	Value 0 1	Revenue 🔶	Division 🗘 🤉	Final RFP 🔅 🕇	Buying Organization 0 1	Due ≎⊤	NAICS	¢ τ Award ¢ τ	Start ≎ T	C
1	104	SERVICES FOR EN/	ABLING AGILI	E DELIVERY	1 Qualify		57% (1977/348)	\$200,000,000	\$75,000,000	Research & Development	E 07/01/2022		E 08/06/2022	541512	E 11/01/2022	E 03/01/2023	- î
1	006	APPLICATION DEVI	ELOPMENT S	UPPORT FOR J	. 1 Qualify		76% 265/348	\$4,500,000	\$2,750,000		E 09/01/2022	DEPT OF THE ARMY	E 10/01/2022	541511			<
I 💽 1	021	TACTICAL AIR DEFE	ENSE RADAR	SYSTEMS SUP.	. 1 Qualify		72% 252//348	\$5,500,000	\$3,200,000	Missile & Aviation	E 01/01/2022	air combat command	E 02/01/2022	811219	E 05/01/2022	E 11/01/2022	•
1	073	SECURITY REPORT	ING SYSTEM		1 Qualify		51 % (178/348)	\$14,415,000			E 08/01/2022	EPERAL ACQUISITION SERVICE	E 09/05/2022	541511			< .
1	66	KENNEDY INFRAST	RUCTURE AP	PLICATIONS A.	. 1 Qualify		60% (210/348)	\$318,457,000	\$200,000,000	Hardware Support	E 01/01/2022	INFORMATION TECHNOLOGY A	E 03/01/2022	541512	E 09/01/2022	E 01/01/2023	2
	75	SYSTEM ADMINIST	TRATION TECH	HNICAL SUPPO	1 Qualify		63% 220/348	\$500,000,000	\$200,000,000	Software Solutions	E 12/01/2021	DEFENSE INFORMATION SYSTE	E 01/15/2022	541519	E 03/01/2022	E 06/01/2022	
1	90	Sub ADVANCED	TECHNICAL E	XPLOITATION .	1 Qualify		23 % (81/348)	\$960,000,000	\$12,500,000	Engineering Services	E 11/01/2021	and space intel	E 12/01/2021	541715	E 10/01/2022	E 01/01/2023	¢
1	96	ENGINEERING LOO	GISTICS TECH	NICAL PROGR.	. 1 Qualify			\$26,645,000			E 08/01/2023	1 INDIAN HEAD EXPLOSIVE ORDN		541330	E 03/01/2024		<
1	200	Sub JOINT NAVIG	GATIONAL WA	ARFARE CENTER	1 Qualify		75% 261/348	\$99,200,000	\$10,000,000	ABC JV	E 07/01/2022	E CHIEF INFORMATION OFFICER (E 08/01/2022	541715	E 03/01/2023	E 09/01/2023	¢
1	205	RANGE SUSTAINM	IENT PLANNIN	NG TECHNICAL	1 Qualify		75% 261/348	\$4,659,000		Cyber Security	E 02/01/2023	1 96TH TEST WING		541330	E 05/01/2023		¢
1	208	Sub SPECIAL OPI	ERATIONS FO	RCES SYSTEM	1 Qualify		70% 243/348	\$100,000,000	\$7,500,000		E 04/01/2023	1 NAVAL AIR SYSTEMS COMMAND	E 05/01/2023	541330	E 09/01/2023	E 04/01/2024	< .
1	228	Sub MH60RS CO	NCURRENCY	AND TECH REF	1 Qualify		38 % 133 / 348	\$60,000,000	\$5,000,000	Missile & Aviation	E 07/01/2022	a NAVAL AIR SYSTEMS COMMAND	E 08/01/2022	333318	E 03/01/2023	E 10/01/2023	<
	44	RISK MANAGEMEN	NT SERVICES	IDIQ	1 Qualify		49 % 170 / 348	\$90,000,000			E 01/01/2023	a BUREAU OF RECLAMATION		541519	E 06/01/2023		E
1	242-2	child OASIS TO 0	001		1 Qualify		78% 270/348	\$18,500,000	\$18,500,000	Engineering Services	E 07/01/2022		E 08/01/2022		E 01/15/2023	E 09/01/2023	t
1	48	OPERATION AND M	MAINTENANC	E OF BULK FUE	1 Qualify			\$6,531,000			E 09/01/2026	1 DLA ENERGY		493190	E 03/01/2027		¢
N	253	353RD SECURITY F	ORCES TRAIN		1 Qualify		29 % 102/348	\$24,502,000	\$12,500,000	Cyber Security	E 10/01/2021	DINT READINESS TRAINING CE		611519	E 01/01/2022	E 09/01/2022	E
	254	AEC FY19 P3005 DE	SIGN BUILD	CONSTRUCT C.	. 1 Qualify		89 % 3117/348	\$25,000,000			E 11/01/2021	E NAVFAC WASHINGTON	12/08/2020	236220	E 03/01/2022		t
	255	CLOUD HOSTED EN	NTERPRISE SE	RVICES FOR S.	1 Qualify		88 % 3057/343	\$0			E 10/01/2021	air force network integrati		541511	E 05/01/2022		t i
	256	Sub COMBAT AIR	R FORCES DIS	TRIBUTED MIS.	. 1 Qualify		87 % 302//348	\$490,000,000			E 07/18/2022	agile combat support direc	E 08/29/2022	541511	E 06/01/2023		ſ.
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Goal: Maintain centralized pipeline of all company opportunities.

OneTeam: Opportunities imported and automatically updated with GovWin or Salesforce subscription. Opportunities may be manually added by BD personnel without subscription service or for IDIQ task orders opportunities not published in GovWin.

Location: Main Menu, left side Opportunities.

Actions: Import Opportunities with your GovWin or Salesforce subscription, and auto import updates.

Manually add OTAs and Task Orders opportunities under IDIQ Contract Vehicles as 'Child'.

Create opportunity with data required by your BD process. The Opportunity Name is always required.

Resolve discrepancies between manually added data and imported data. Discrepancies are noted in Details Tab fields with user entered data taking priority.

NEW FEATURE: Company Administrators can designate required fields for creating opportunity to advance opportunity through BD Stages. Required fields can be different for each Stage.

Best Practice: When creating opportunity, determine what information is needed – opportunity title from government if possible, customer name, set-aside or contract type. Complete what you know, and fill out more information as you gather it. Only fill-out information that is relevant to your company and is needed for your BD process.

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Views

ONEteam O	oportunities - Contacts - Search - Analytics	Support									Û »•	🚯 Donna Hamby 👫 🗸 🗸
Opportun	ties > ABC Company -											
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O Drag a colun	in header and drop it here to group by that column										+ Save View As 🗸	Save View C Reset View
			Qualification								II 🔶 PropMgr	/ 8
🙊 T ID 🔅	Copportunity Name OT	Stage [] ≑ ▼	Score © T	Contract Value © T	Company Revenue	Division 0 T	Final RFP 0 T	Buying Organization 0 1	Proposal Due 9 T	NAICS OT C	ion ii 🚖 🛛 BD Meeting	1
140432	SERVICES FOR ENABLING AGILE DELIVERY	1 Qualify	57% (07/533)	\$200,000,000	\$75,000,000	Research & Development	E 07/01/2022		08/06/2022	541512	E II 🖈 Pipeline	/ 1
1006	APPLICATION DEVELOPMENT SUPPORT FOR JOHNSON.	1 Qualify	76% 2557/548	\$4,500,000	\$2,750,000		E 09/01/2022	DEPT OF THE ARMY	E 10/01/2022	541511	II 🔶 Capture Mgr	/ =
1021	TACTICAL AIR DEFENSE RADAR SYSTEMS SUPPORT	1 Qualify	72% 252/545	\$5,500,000	\$3,200,000	Missile & Aviation	01/01/2022	air combat command	02/01/2022	811219	II 12 REP WINDOW	
1073	SECURITY REPORTING SYSTEM	1 Qualify	51% (787548)	\$14,415,000			(E) 08/01/2022	E FEDERAL ACQUISITION SERVICE	09/05/2022	541511	비 ☆ Group by Int Status	/ 8
1166	KENNEDY INFRASTRUCTURE APPLICATIONS AND COM	. 1 Qualify	60 % (207/54B)	\$318,457,000	\$200,000,000	Hardwore Support	E 01/01/2022	E INFORMATION TECHNOLOGY AND CO	E 03/01/2022	541512 (E II 🏠 Last Modified	1
1175	SYSTEM ADMINISTRATION TECHNICAL SUPPORT	1 Qualify	63% (20)/348	\$500,000,000	\$200,000,000	Software Solutions	(E) 12/01/2021	DEFENSE INFORMATION SYSTEMS ADE	E 01/15/2022	541519	E 目台 RFP 90 Day Outlook	1
1190	Sub ADVANCED TECHNICAL EXPLOITATION PROGRAM	1 Qualify	23 % (81/548)	\$960,000,000	\$12,500,000	Engineering Services	E 11/01/2021	A NATIONAL AIR AND SPACE INTELLIGENC	(E) 12/01/2021	541715	画 II 合 Tagup	1 8
1196	ENGINEERING LOGISTICS TECHNICAL PROGRAM MAN.	1 Qualify		\$26,645,000			E 08/01/2023	INDIAN HEAD EXPLOSIVE ORDNANCE D		541330 (All Opportunities	/ 8
1200	Sub JOINT NAVIGATIONAL WARFARE CENTER	1 Qualify	75% 261/343	\$99,200,000	\$10,000,000	ABCIV	(E) 07/01/2022	CHIEF INFORMATION OFFICER (DOD CIO)	(E) 08/01/2022	541715	E RFP Windows	/ 3
1205	RANGE SUSTAINMENT PLANNING TECHNICAL SUPPO_	1 Qualify	75 % 2817548	\$4,659,000		Cyber Security	E 02/01/2023	a 96TH TEST WING		541330 (E II 🔄 Assigned to Me	/ 8
1208	Sub SPECIAL OPERATIONS FORCES SYSTEM ENGINE	1 Qualify	70% 2457/548	\$100,000,000	\$7,500,000		E 04/01/2023	a NAVAL AIR SYSTEMS COMMAND	E 05/01/2023	541330 (n Division	/ 8
1228	Sub MH60RS CONCURRENCY AND TECH REFRESH	1 Qualify	38 % (157/545)	\$60,000,000	\$5,000,000	Missile & Aviation	07/01/2022	a NAVAL AIR SYSTEMS COMMAND	08/01/2022	333318	日☆ Acquisition Status	1 1
1244	RISK MANAGEMENT SERVICES IDIQ	1 Qualify	49% 175/548	\$90,000,000			E 01/01/2023	EUREAU OF RECLAMATION		541519	Division by Fiscal Yes	s / 8
1242-2	Child OASIS TO 001	1 Qualify	78% (202252)	\$18,500,000	\$18,500,000	Engineering Services	07/01/2022		08/01/2022	(Dipeline Review Mer	AGE III
1248	OPERATION AND MAINTENANCE OF BULK FUEL FACILI.	1 Qualify		\$6,531,000			(E) 09/01/2026	DLA ENEROY		493190 (副会 MGM Demo	/ 8
1253	353RD SECURITY FORCES TRAINING SUPPORT SERVICES	5 1 Qualify	29% (102/948)	\$24,502,000	\$12,500,000	Cyber Security	(E) 10/01/2021	DINT READINESS TRAINING CENTER		611519	🐑 🗄 🚖 Weekly BD Meeting	1
1254	AEC FY19 P3005 DESIGN BUILD CONSTRUCT CHILD DEV.	1 Qualify	89% 617515	\$25,000,000			E 11/01/2021	I NAVFAC WASHINGTON	12/08/2020	236220 (E C TEST	/ 8
1255	CLOUD HOSTED ENTERPRISE SERVICES FOR STACK SE	1 Qualify	88% (037/513)	SO			E 10/01/2021	AIR FORCE NETWORK INTEGRATION CE.		541511	目台 MGM View 2	18
1256	Sub COMBAT AIR FORCES DISTRIBUTED MISSIONS O.	1 Qualify	87% (007/048)	\$490,000,000			E 07/18/2022	AGILE COMBAT SUPPORT DIRECTORATE	E 08/29/2022	541511	E 06/01/2023	Donna (AB
1257	COMMAND AND CONTROL SOFTWARE ENGINEERING	1 Qualify	72% 251/345	\$40,000,000	\$26,000,000		E 10/01/2021	DIGITAL DIRECTORATE		541511	E) 04/01/2022	Donna (AB
197103	DISA CYBER VULNERABILITY	1 Qualify	16% 54/348	\$50,000,000			(E) 05/01/2022	DEFENSE INFORMATION SYSTEMS AGE		541511	c) 09/01/2022	Donna (AB
1260	INTEGRATED SCIENTIFIC AND TECHNOLOGY OPERATI	1 Qualify	26% (90/548)	\$8,387,000			(E) 11/01/2022	ain force research Laboratory		541512	E) 03/01/2023	Donna (AB
1261	MULTI DOMAIN ELECTRONIC WARFARE CAPABILITIES	1 Qualify		SO			(E) 06/01/2024	CCDC CSISR CENTER		(E) 12/01/2024	Donna (AB
1262	NAVAL AVIATION WEAPONS SYSTEMS INTEGRATION	1 Qualify	93% 623/545	\$100,000,000	\$43,000,000		E 09/01/2021	maval air warfare center aircraft		541330 (E) 06/01/2022	Donna (AB
1263	OBSCURA MISSION INTEGRATION NETWORK SUPPOR.	1 Qualify	90% (19/63)	\$20,747,000			E 02/01/2022	E PETERSON-SCHRIEVER OARRISON		541330 (E) 11/01/2022	Donna (All
1265	REMOTELY PILOTED AIRCRAFT	1 Qualify		\$961,000,000			E 03/01/2024	air combat command		488190	E) 03/01/2025	Donna An
1266	SAFETY HEALTH AND MISSION ASSURANCE 3	1 Qualify		\$35,237,000			(E) 09/01/2023	afety and Mission Assurance DR.		541620	E) 04/01/2024	Donna (AR
1267	SECRET INTERNET PROTOCOL ROUTER NETWORK VIRT	1 Qualify	77% (2527/558)	50	\$27.000.000		(E) 11/01/2021	air combat command		541512	E) 02/01/2022	Donna (AR
2 1268	SPACE SERVICE ACQUISITION EXECUTIVE TECHNICAL	1 Qualify	70% (12/948)	\$167,019,000	\$30,000,000		(E) 08/01/2021	assistant secretary of the Air For		541611 (E) 09/01/2021	Donna (AB
1249	SPECIAL WARFARE PROGRAM OFFICE SYSTEMS FING	1 Qualify	25% (27/5/3)	50			(E) 10/01/2021	a ISR/SOF DIRECTORATE		541512	E) 03/01/2022	Donna 👧
1270	TECHNICAL AND SCIENTIFIC SERVICES	1 Qualify	8% (29/548)	\$20,000,000			(E) 09/01/2021	CENTERS FOR DISEASE CONTROL AND P.		541990	E) 11/01/2021	Donna (AB
1271	USACE AEC FY25 SECRET AUDITORIUM AND FACULTY	1 Qualify	and the second	\$69,000,000			(E) 04/01/2025	avannah district		236220	E) 08/01/2025	Donna 👧
1001	INFORMATION TECHNOLOGY INNOVATIVE PROCURE	1 Qualify	88% 000000				(E) 12/01/2021	E FEDERAL AVIATION ADMINISTRATION		541519	E) 09/01/2022	Donna 👧
1092	Sub TECHNICAL INFORMATION ADMINISTRATIVE AN.	2 Capture	45% (155/540)	\$175,600,000	\$25,000,000	Software Solutions	(E) 10/01/2021	I OLENN RESEARCH CENTER	(11/01/2021	561210	E) 09/01/2022	31/2023 Georg.
	Count: 54			\$5,799,961,000	\$1,042,450,000		-					

- Create custom VIEWS of Pipeline set up VIEWS for BD Manager, Capture, Proposal, etc.
- Set favorite VIEWS to add a shortcut to your Pipeline.
- Share custom VIEWS with internal team.
- View active and non-active (won, loss, no-bid, bid next cycle) opportunities.
- Filter, sort, and group pipeline by over 60 data fields and your custom data fields.
- Export opportunities pipeline to Excel.
- Integrate custom VIEW for BD meeting to quickly review opportunities.
- Maintain accountability using 'days since modified' column in custom view.

Create Custom VIEW

- 1. Select or deselect the columns you wish to see using the COLUMN button
- 2. Drag and drop columns to reorder
- 3. Filter and sort according to your preferences
- 4. Select '+Save View As' button in the VIEW BOX
- 5. Name the view (required) and add a description (optional)
- 6. Select 'Share with Company' to share view with internal team
- 7. Select \star to select as favorite and create shortcut at the top center of your pipeline

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Dashboard



Goal: Graphs and charts for reporting on pipeline by acquisition status, internal status, RFP window, won/lost, expected revenue.

OneTeam: Create graphics that can be customized and has links to original data sets.

Location: Opportunities pull-down list, select Dashboard.

Actions: View opportunity pie chart by Acquisition Status.

View sales funnel of pipeline by Internal Status.

View bar chart of opportunities by RFP Window and select graphic to see opportunities in data set.

View won/lost ratio with the date option allows you to select 1, 3, or 5 years or custom date range.

View expected revenue by list or chart – based on revenue of opportunities in won status, and revenue of in-process opportunities based on P-Win.

Export DASHBOARD graphics for reports and presentations.

oneteam®

Timeline

ONEteam Opportunities - Contacts - Se	arch - Analy	ytics Support												Û	Donna Hamby	ABC ~
imeline > ABC Company ·																
Export 🛍 07/06/2022 to 07/06/2023 Type S	Stage Qualific	ation Score Prime	Priority											[Week Month	Year
						2022						20	23			
Opportunity Name	Туре	Stage	L Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	
Sub JOINT NAVIGATIONAL WARFARE CENTER	RFP	1 Qualify	6	JOINT NAVIGA												
SERVICES FOR ENABLING AGILE DELIVERY	RFP	1 Qualify	-	SERVICES FOR EI												- 11
Sub MH60RS CONCURRENCY AND TECH REFRESH	RFP	1 Qualify	6	MH60RS CON												- 11
Sub COMBAT AIR FORCES DISTRIBUTED MISSIO	RFP	1 Qualify		COMBAT	AIR FORCE											- 11
SECURITY REPORTING SYSTEM	RFP	1 Qualify	1	SE	ECURITY REPO											- 11
APPLICATION DEVELOPMENT SUPPORT FOR JOH	RFP	1 Qualify	-		A	PPLICATION I										- 11
Security Operations Center	RFP	5 Submitted	¢			Security O	perations Cent	er								- 11
NEXT GENERATION SERVICES MULTI AGENCY IDI	RFP	2 Capture	-				NEXT GENE									- 11
INTEGRATED SCIENTIFIC AND TECHNOLOGY OPE	RFP	1 Qualify	6				•	•								- 11
RISK MANAGEMENT SERVICES IDIQ	RFP	1 Qualify	-													- 11
BANGE SUSTAINMENT DI ANNING TECHNICAL SU	DED	1 Ouslify	1								2					

Goal:

View opportunity pipeline in Gantt-style chart to support long-term planning.

OneTeam: Autogenerate chart based on opportunity solicitation milestones and dates. Color coded to qualification score.

Location: Opportunities pull-down list, select Timeline.

Actions: View Gantt-style chart of opportunities.

View opportunities for short-term and long-term strategic planning.

Identify workload fluctuations to determine proposal and bid resources.

Tasks Image: I

Location: Opportunities pull-down list, select Tasks.

Actions: View tasks across all opportunities.

Filter and sort by Opportunity, Date, or Assignee.

View Late Tasks, Due Within 7 Days, Due After 7 Days.

Assign tasks with due dates

NEW FEATURE PLANNED: Ability to filter by division.

Invitations

Goal: View Teaming Invitations.

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OneTeam: The Teaming Invitations that you accept show up in Opportunities List (your pipeline view).

Location: Opportunities pull-down list, select Invitations.

Actions:

View and Accept or Reject Teaming Invitations.

NEteam Opportur	nities - Contacts - Search	 Analytics 	Support					û 994 - 🍓 D	onna Hamby 🔼 🗸
Contacts > Aar	Contacts Organizations D Reset Save	Opportunities	Notes						
First Name*	Last Name *	Search	Q						
Aaron	Ford	O Drag a column	header and drop it her	e to group by that column					
Phone (Cell)		Name	÷τ	Organization 🗘 🛪	Relationship @ T	Roles \$ 7	Stage 🗢 🕇	Team Member Status ‡ T	Final RFP 💠 T
Organizations (2)		DETER TESTBED	CYBER SECURITY S	SCIENCE AND TECHNOLO	Customer		No-Bid		A 02/01/2019 [*]
SCIENCE AND TECHN E-MAIL: Aaron.Ford PHONE: (202) 254-6	IOLOGY DIRECTORA Current ahq.dhs.gov 302								

Contacts	
Goal:	Organize all individual, company, and customer contacts.
OneTeam:	Full function Customer Relationship Management (CRM) database. Maintain all internal company contacts; teaming partners and customer contacts.
Location:	Main Menu, between Opportunities and Search .
Actions:	View Master list of all contacts. Automatically add individuals to the master contacts list as they are added to individual opportunities in your pipeline. Automatically associate opportunities to individual people and companies or agencies. Associate individual contacts to multiple organizations. Associate individual contacts to multiple opportunities. Manage Notes about individual contacts, which flow from opportunities to their contact record.
Best Practice:	Manage and update contacts to organizations (companies or customer agencies) as you receive new contact information. When contacts move to new company, update new company information, while retaining your relationship history.
Organizations	
Goal:	Organize all company and customer agency organization contacts.
OneTeam:	Full function Customer Relationship Management (CRM) database. Maintain all internal company contacts; teaming partners, competitors, and customer organization information.
Location:	Main Menu, select Organization between Opportunities and Search .
Actions:	View a Master list of all organizations. Add organizations in the Contacts>Organizations tab. Automatically associate opportunities to companies or agencies. Associate individual contacts to multiple organizations. Associate organizations to multiple opportunities. Manage Notes about organizations, which flow from opportunities to their contact record.
Best Practice:	Manage and update contacts to organizations (companies or customer agencies) as you receive new contact information. When contacts move to new company, update new company information, while retaining your relationship history.

Search																	
ONEteam	Opportunities v	Contacts •	Search V Support Search Favorite Searches Favorite Companies	rt									<u>ل</u> ۶۶۰	A Donn	a Hamby	AHS	~
© 2023 OneTa	aam ^e T <u>erms Priv</u>	sear acy Support 1	 Company Name, DUXS Company Name, DUXS 	IS, Cage Co	ode, of POC				L Search	≠ Advance	d 🕅	vorites				C Help	
Goal:	R	esearch	companies, c	contr	ract aw	vards, t	teamir	ng arr	anger	nents,	and co	mpe	titor	5.			
OneTea	am: R a	lesearch ward dat	companies u a.	using	g the S	Search	functi	ion us	sing ir	ntegrat	ed SA	M.go	v an	d FPD	S coi	ntra	ct
Locatio	on: N	/lain Mer	iu, left side S	Searc	:h.												
Actions	s: R	esearch	and add pote	entia	al teami	ing pa	rtners	and o	compe	etitors.							
	F c	ilter sear ertificatio	ch results by ons, core con	relev mpet	vant cri tencies,	riteria - 5, locati	- comp ion, ar	pany s nd mo	size, so pre.	ocio-ec	onomi	ic stat	tus, N	NAICS,	PSC	Cod	e,
	C	Create fav	orite searche	es ar	nd favo	orite co	ompan	nies to	o strea	mline	esear	ch.					
	R	leview SA	M and user o	defir	ned cor	mpany	, profil	les.									
	C	Create Pri	vate Notes o	on sea	arch pr	rofiles.											
	R	lesearch	competitors	in co	ompany	y searc	ch.										

Best Practice: Use the search feature to find niche capabilities.

Opportunity Capture Reference Guide



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Guides

Reference Guides, how-to, step-by-step descriptions of functions of OneTeam.

Company Administrator Quick Reference Guide

See all articles \rightarrow

Capture and Pipeline

Grow your business with effective opportunity tracking and qualification Custom Views on the Opportunities List

GovWin Import Fields Opportunity Reporting Fields

See all articles \rightarrow

INI I

Teaming and Data Calls Simplify team communication and improve teaming decisions Setup a Capability Matrix Invite Companies to an Opportunity Send, Receive, and Review Data Call Documents

See all articles \rightarrow

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Proposal Management

Streamline proposal writing and color team reviews Contribute to a Proposal through a Writer Package Evaluate Proposal Content in a Color Team Review

See all articles →

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Search

Find new teaming partners or gather intelligence on the competition Basic Search Advanced Search

See all articles \rightarrow

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Company Settings

Configure options for your company Manage User Permissions Automate Opportunity Imports from GovWin Store Documents in SharePoint Online (Microsoft 365)

See all articles \rightarrow

2

Account Settings

Release Notes

Location:Main Menu, left side Support.Actions:Knowledge Base for common actions divided into major categories.Link to OneTeam Support chat.

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Opportunity Capture Reference Guide

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Notifications

Goal:	Keep users informed of updates.
OneTeam:	Consolidates notifications for ALL opportunities you have access to.
Location:	Pipeline view, notification bell icon is in upper right beside your user profile, includes amount of new notifications. Select bell icon and gray window opens on right side.
Actions:	Review notifications, categorized as Opportunity Modified, Team (company opts in or selected), new note, new task, new writer package, new template.
	Clear notifications individually or as a group.
	Expand notification in the activity by Selecting individual notification.
Best Practice:	Review notifications every day and determine if they require action.
	Select 'Clear All' at top of notifications window to clear notification history. Close a notification individually if it is an FYI type notification, or no action is required. To go to opportunity, select notifiation, the activity feed for that opportunity will open on the left side and the notification will be removed from the right notification window. Select \bigcirc to the right of opportunity name to go to the details tab of the opportunity. Make required note, review or update task, or other needed action.
Note:	You will also receive an email notification of task assignments, writing assignments, and other communication email sent from OneTeam.



oneteam®

Opportunity Capture Management

Activity Feed



Goal: Maintain a record of all activities for an opportunity.

OneTeam: Record and designate new opportunity, modified opportunity, teaming actions (opted-in company, or selected team member), notes and tasks (with title).

- **Location:** Inside an opportunity (on far left) or from pipeline view, blue window opens on left and includes red number for unread activities.
- Actions: Create, edit, and comment on Notes and Tasks.

Filter by type – Update, Note, Task, or Team.

Search posts and comments by keywords.

Mark all items as read and archived, if desired.

Best Practice: Use Activity Feed to quickly review opportunities in pipeline. Review and update: Notes, Tasks and more.

Details

ONEteam Opportunities -	Contacts - Search - Analy	ytics Support					🗘 🚥 🛛 🥰 Donna Hamby 🗚 🗸 🗸				
Opportunities > Secu	urity Operations Cent	ter ·									
Details Description	Contacts Qualification No	tes Documents Review	Schedule Team Strate	egy Proposal Capability M	atrix Communication						
+ Add Child + Copy Arc	hive Users						✓ Save Details				
Opportunity Name * 😢			Acquisition Status * 😢 S	itage 😧 Contract	Type 😢 Qualificat	ion Score 😮	Pink Team Review 😉				
Security Operations Center			Post-RFP 🗸	5 Submitted CPAF - C	MM/DD/YYYY						
ID 😧 Acrony	m () Division ()	Priority 😢	Award Type 😮		P-Award 😧	Red Team Review 😧					
1184 SOC	Engineering S	iervices • 5	Single Award		~	65 % 100 %	MM/DD/YYYY				
Contract Value 😨	Contract Vehicle 🚱		Buying Organization 🚱			Buying Office 🚱	Gold Team Review 😮				
\$ 17,000,000	ARMY > AMCOM EXPRESS - P		 SECURITIES AND EXCHAN 	GE COMMISSION > OFFICE OF INF	ORMATION TECHNOLOGY	•	MM/DD/YYYY				
Company Revenue * 😮	Contract Role * 🕑	Primary Contact 😢	Incumbent(s) 🚱				Opportunity Manager 😮				
S 10,500,000 Å	Prime	Donna Hamby	ACCENTURE PLC				Donna Hamby				
Factored Company Revenue 😮	Estimated FTE 🚱	Facility Clearance 😗				li	Solicitation Number 🚱				
S 6,825,000	23	To Be Determined	Incumbent Contract Numb	ier 😧	Incumbent Award Date	Incumbent Expire Date	RFISOC				
Probable Profit 😧	Expected Contract Length * 🕑		GS35F580AA		02/11/2015	02/10/2020	Solicitation Sources 😧				
6 % \$630,000	4.5	Yea	IS NAICS (2)		Source ID Name						
B&P Cost 👔	Contract Duration 😮		541512: Computer Systems	Design Services		•	182642 GovWin				
S 275,000							+ Add				
ROI 🚱							Competition Types ()				
229 %											
RFI Release 🖗	RFI Due 🚱	Draft RFP 🚱	Final RFP * 🖗	Proposal Due * 🚱	Contract Award	Contract Start * 🚱	BD - Undetermined				
Expected 03/02/2022	(Expected) 03/25/2022	Expected 07/01/2022	Expected) 11/01/2022	Expected 12/21/2022	Expected) 03/31/2023	Expected 05/01/2023	III Add / Remove				
							Linked Opportunities 🚱				
Actual 03/11/2022	Actual 03/25/2022	Actual 08/19/2022	Actual 09/12/2022	Actual MM/DD/YYYY	Actual MM/DD/YYYY	Actual MM/DD/YYYY	Security Operations Center TEST CO				
							Select an Opportunity Add				
							Places of Performance ()				
							City State Country Pct				
							Nashville Te United States				
							+ Add				

Goal: Maintain all opportunity-relevant data fields – solicitation dates, customer name, incumbent, competition type,

OneTeam: Consolidate opportunity data with most fields populated from GovWin integration.

Location: Select opportunity name from pipeline view and the DETAILS tab automatically opens.

Actions: Assign a company division, primary POC, and set internal status.

Link to Parent or Child opportunities, or another opportunity (previous contract).

Assign company revenue, factored company revenue, probably profit, B&P, and ROI.

Set P-Win and P-Award percentages.

Validate acronym.

Review RFI, DRFP, RFP estimated and actual dates.

Best Practice: Validate opportunity title and acroynm, changing opportunity title from all caps to make it more readable in timeline view.

Description

DNE10877 Opportunities, Contacts, Search, Analytics Support	🕽 30 – 🛞 Donna Hamby 🔼 🗸 🗸
Opportunities > Security Operations Center	
2 Details Description Contacts Qualification Notes Documents Review Schedule Team Strategy Proposal Capability Matrix Communication	
	 Save Description
B I U sse ≡ ≡ ≡ ≡ ≡ fill iii iii format	
Redstone Test and Engineering Services Contract (RTES)	
Vision Statement	
The Department of Defense (DOD) premier Test Center, providing safe, timely and cost effective test services in support of the Warfighter.	
1. Introduction	
Redstore Text Center (RTC) is one of the DODs premier text facilities supporting both military and commercial material developers by testing a broad spectrum of equipment throughout the life cycle, from concept through deployment. RTC is designated as a DOD lead agency to advance, mainteel and encore testing. The starting are any encoded to ensure the through by testing a broad spectrum of equipment throughout the life cycle, from concept through deployment. RTC is designated as a DOD lead agency to advance, and reliability of multiary hardware and embedies of tware in the roperational environment. RTC starts to provide to ensure the house how concept and environment. RTC starts through the starts and most effective weapons spectre possible to the solders in the field. RTC supports the Nation's Wardflyter by responsive, monowave and diverses of test capabilities, substynes and or devaluation.	or W91CRB21R0030 Page 11 of 203 ns are optimized with the best providing the most flexible,
RTC is a subordinate of the United States Army Test and Evaluation Command (ATEC) and a tenant activity on Redstone Arsenal, Alabama (RSA), RTC encompasses over 14,000 acres, or about one-third of the land area of Redstone Arsenal with an extensive inventory of test range laboratories. RTC is organized by Directorate competencies with over 1,300 personnel that consist of Government Civilian, Military, and Contractors. Over 70% of the personnel that make up RTC are support contractors.	es, specialized facilities and
1.1 Mission	
The primary mission of the RTC is to provide superior technical expertise and state-of-the-art facilities and capabilities to plan, conduct, analyze and report the results of tests on aviation, missile, sensors, systems, subsystems and components. Many of the systems under test are Executive Offices, the US Army Aviation and Missile Life cycle Management Command (AMCOM) and the CCDC Aviation and Missile Center. RTC provides technical support to the local aviation, missile and weapon systems acquisition community, the U.S. Army, and other custor Services, and foreign governments) for weapon system research, development, production, and post-deployment testing activities. Test tems associated with these mission areas consist of aircraft; aviation systems, missiles, rockets, and explosives; instrumentation, computers, other electronics; small calibe to large caliber veapons; solder and support equipment; and developmental technologies.	a developed by the local Program mers (DOD, private industry, Joint software, communications, and
1.2 Scope	
RC requires contract support personnel for engineering and rest services and controls and divisions. These services will perform a wide variety of tasks related to the first and Evaluation program at RIC. Relatione Test and Evaluation program at RIC and the performant primarity at RSA. In Hunstville, Alabama, Temporary duty support may be required at other locations in the Continental United States (CONUS) and Outside CONUS). The capacity in will support functions will operate are circulal and essentiates that the RTS mission to support the Wardighter. The Contractor shall posses the proper training, certifications, and experience commensurate with the work they will perform, and level is esponability they are projuded. Second	to procure specialized personnel, hich these test and engineering is effort shall be consistent across s and specifications in the
This RTES IDIQ contract is intended to maximize efficiency and to provide the flexibility to allocate resources across RTC based on workload requirements. As discussed above, efficiency in test execution and flexibility of the highly trained workforce are critical for RTC's completion year. All test programs utility joint Government and Contractor test team. Though the types of test programs and test capabilities varies greatly at RTC, engineering and services used to support this workload can be organized into large flexible pools of highly trained and skiller programs to program or mission areas are needed.	n of over 800 test programs per d labor that can be moved from
The contract allows the prime Contractor to staff to the overall workload at RTC, not to the specific mission area which may fluctuate considerably during the year.	
2. General Requirements	
The Contractor shall perform all functions and tasks described within the contents of this Performance Work Statement (PWS). In accordance with (JAW) all applicable range control, security, safety, and health procedures and other applicable regulations and standing/internal og with a specific type of testing. The Contractor shall provide all personnel labor, equipment, materials, transportation, management, and incidental support personnel required to support all Directorates and Divisions of RTC and the functions that are briefly defined below and fu	perating procedures associated rther defined within this PWS.
1. Major Mission Areas of Aviation, Missile and Sensors, and Environmental and Component Test and Evaluation.	
2. Engineering, Scientific, and Technical Direct Test Support.	
3. Test Operations Support.	
© 2023 Cheleam® terms trivacy support 🖬 videos	10 Help

- **Goal:** Capture customized information about the opportunity.
- **OneTeam:** Page to add additional information on solicitation.
- **Location:** Currently separate tab, in the future this will be incorporated into the DETAILS tab.
- Actions: Add information about the opportunity not imported from GovWin or Salesforce such as intelligence or links to relevant information.

Contacts (Tab)

oneteam o	pportunities -	Contacts -	Search 🗸	Analytics Su	pport											Ô 30	🦚 Donna Hami	by ABC ~
Opportun	ities > Sec	curity Op	erations	Center ·														
🧶 Details	Description	Contacts	Qualification	Notes Doo				Strategy	Proposal	Capability Matrix								
							_											
ARC	Prime																	
AHS	0	+ Add Se	arch	Q 0						ABC Co	ompany						'D Reset	 Save
Avion	0	O Drag a colu	umn header and	drop it here to gro	up by that co	olumn												
BTI	0		Unders															
EGS	0	View	Capabi	Receive	Deal													
ECG		€ ¢ T		 Communit € T 	0 ÷T	Contact	¢Τ	Roles		T Email	÷ T	Phone (Cell)	¢ т	Phone (Work)	¢ 1	Fax	\$ 1	e.
FV	0	8	0		0	Abigail Adams				abigail.adamsg	oneteam.net							8
ISL	0	13			0	Alexander Hamilton		Proposal Coordi	inator	proposals@one	team.net							8
ITCDEFEN	0	0			0	Blake Herrin		Business Develo	opment Mana	blake.herringo	neteam.net	(256) 289-9635		(202) 929-0194				1
MOUL	0	0			0	David Marconnet		Technical Writer		david.marconn	et@tgi-us.com	(256) 658-5179						1
OASYS	0	12			۲	Donna Hamby		Proposal Manag	ger	donna.hamby@	oneteam.net	(256) 797-8866						
POWERNET	0	5			0	George Washington		Capture Manag	er	capture@onete	am.net	(555) 555-5555		(555) 555-5555		(555) 555-555	i5	
RSSG	0				0	Jason Merkel		Contract Admin	istrator	jason.merkel@t	gi-us.com	(256) 679-7910						8
RT	0	8	0	2	0	John Adams		Technical POC,	Volume Mana	primegonetear	n.net							
RTI	0	-			0	Max Alonso		Technical Writer		max.alonsoeor	eteam.net							8
RE	0	10	0	12	0	Meliera Gabor-Miche				melissa gabore	oneteam net							
ST	0	0	0		0	Menssa Gabor - Micye	a.	Desisten Dublisk	nor Bronocol F	Melly Disebases	-onetean.net							
SGS	0				0	Molly Pitcher		Desktop Publisi	iei, rioposai c	Mony.Pricherge	meteammet							
SUB	•	U	U	U	0	Paul Hunter				paul.hunter@or	neteam.net	(256) 783-8492						
TGI	0																	
UNI	0																	
VEG	0																	
OIT	Buying Org																	

Goal:	Identify contacts for THIS opportunity, including internal users, teaming partner users, customer contacts, or other users.
OneTeam:	Maintain list of contacts with permissions for capability matrix, ability to receive communication emails, designate primary contact, role, email, phone numbers, and other information related to individial opportunity.
Location:	Separate tab inside Opportunity. Includes buttons for Team and Buying Organization.
Actions:	Assign internal company contacts to opportunity and designate permissions.
	Add teaming partner contacts and their roles, required for writers and reviewers.
	Contacts of buying organizations automatically populated and updated from GovWin.
	View contacts by company, update information as needed.
	Add customer contacts to the Buying Organization workspace.
Best Practice:	Update company contacts (users) as they are hired or begin supporting BD functions.

Qualification

Qualification Matrix

ONEteam Opportunities Contac	cts 🗸 Search 🗸 Analytics	Support									🚇 Donna H	amby ABC -			
Opportunities > Security	oportunities > Security Operations Center														
👰 Details Description Contac	ts Qualification Notes		dule Team Strategy I	Proposal Capability Matrix											
		Matrix Gate	1 (Interest) Gate 2 (Pursue)	Gate 3 (Plan) Test Pursuit Dec	ision Production Checklist										
Chaie Snapshot 🏕 Export 🗆 Edit 🔭 Add															
Description	0	1	2	3	4	Notes	Rating V	/eight S	Gate Review 3 Core	5 May	Demo Snapshot	Gate 2			
Input to Solicitation	No Contact with Customer	Very Little Contact with Customer	Some contact with Customer	Customer expressed interest in our Suggestions	Suggestions reflected in RFP		4	1	4 4	4	4	4			
Competitors Strategies	Competitors not known	Competitive Strategy Workshop completed	Some competitor strategies in place	Most Competitive Strategies in place	Fully developed competitor strategies in place		2	3	6 6	6	12	6			
Program Manager	PM not yet identified	PM Identified, barely qualified but unknown to the customer	PM identified, well qualified but unknown by the customer	PM identified, extremely well qualified, unknown or little known by the customer	PM Identified, extremely well qualified and known to be very well liked and trusted by the customer		4	2			8	10			
Do We Understand the Problem?	No Staff Available that can understand the problem	Few on staff that can understand the problem and adequately write to it	Adequate Staff Available that can understand the problem	Many on staff that can adequately understand the problem and write to it	Excellent Staffing Available that can understand the problem and write to it	e	2	3	6 6	3	3	9			
Opportunity Real?	No funding yet identified, acquisition strategy not yet identified	Funding is questionable	Funding is pending	Funding is most likely	Funded, acquisition strategy approved, has a champion		3	3		12	6	9			
Customer Relationship? We have no incumbency with the customer, we have no relationships		We have very limited incumbency or customer relationships	We have subcontractor incumbency, we have limited customer relationships	We have strong incumbency, but our relationship is equaled by at least one competitor	We are the incumbent, the customer likes us, we understand the customer, we can influence the RFP		3	2		4	4	6			
	Prime and/or partners have no	Prime and/or partners have	We and/or partners have some	We have teaming partners who	We have significant experience										

Goal: Move your company or team into a 'Favored' position' in the evaluation process.

OneTeam: Analyze opportunity by assigning scores to criteria so data supports bid decisions. Use companyspecific qualification criteria to evaluate opportunity or create custom opportunity-specific criteria.

Location: Inside Opportunity, Qualification tab, Matrix Pill.

Actions: Qualify opportunity with customizable weighted criteria for gate reviews to determine strategic fit, customer relationship, past performance, competitive landscape, etc.

Customize a matrix for your specific opportunity. You can delete/edit criteria, edit the response templates, and edit the weight. It only changes for this opportunity.

Take **Snapshot** for comparison to other dates or gate reviews. You can customize the heading for snapshot with Gate Review # or name or date. Later when you hover over name, it automatically shows the date.

Export pdf of completed matrix for presentation or report.

Best Practice: Add notes to explain selection. Each entry of the Qualification Matrix has a separate note icon. Select note icon and window opens with box for note. Record notes associated with qualification criteria for each criteria and response entry.

Sample note for Program Manager:

05.06.21 Brent has signed LOI. Customer loves him.

04.03.21 Began with 3 names for PM, down-selected to Brent Houser, former NASA Branch Chief. He is 2 years out from NASA retirement date, eligible to work for contractor.

Review and Update Qualification regularly. Let your BD process guide this – if you have formal gate reviews, always update the qualification matrix before a review. Update before a weekly or monthly capture review or standard BD Meeting.

Any rows that are evaluated in the red or orange column, should be assigned to a **task** or **action item** for the Capture Manager. Example, if you select 'No PM identified' for Program Manager, set a task with a deadline to identify a qualified PM.

Qualification Checklist

ONELGAM Opportunities Contacts Search Analytics Support	🗘 30 - 🦓 Donna Hamby 🗚 🗸
Opportunities > Security Operations Center -	
2 Details Description Contacts Qualification Notes Documents Review Schedule Team Strategy Pri	oposal Capability Matrix Communication
Matrix Gate 1 (Interest) Gate 2 (Pursue) Gi	ate 3 (Plan) Test Pursuit Decision Production Checklist
	✓ Save
1 Opportunity Overview/Status	
Do we have a clear understanding of the opportunity title, description, & scope?	• Yes • Add a note
Do you know the customer?	• Yes • fdsdf
2 Opportunity Data	
23 Do we have a clear understanding of the projected value?	• Yes • Add a note
22 Do we have a clear understanding of the DRFP, RFP, Proposal Due, & Award dates? Are they adhering to the expected schedule? If not, why not, and what does that tell us about the opportunity?	No No Need to get more info from KO
23 Do we have a clear understanding of the Competition type? Contract vehicle?	No Talking to KO about this
20 Do we have a clear understanding of the deliverables and schedule?	• Yes • Add a note
3 Customer Assessment	

Goal: Create list of actions to be completed for Gate Review. **OneTeam:** Customize a list of actions, that can be followed by new or experienced personnel to guide them thru the items which must be completed to participate in Gate Review. Location: Inside Opportunity, Qualification tab, each company created default checklist will appear in the pills beside Matrix. Actions: Create, edit, and manage unlimited checklists for use in all Opportunities. Best Practice: Use this as a training tool for new BD personnel. They can easily see the actions they need to perform, select Yes when complete, and add notes or references in the Notes section. Set up specific Lists for Capture, Proposal, and Production to streamline processes that must be completed for a specific event – gate reviews, color team reviews, BD Meeting presentations, or other events.

NOTE: See Qualification Quick Reference Guide for detailed explanation of Checklist Process

Notes

ONEteam Opportunities - Contacts -	Search	 Analytics 	Support												¢ 30	🔹 🚇 Donn	a Hamb	y <mark>ABC</mark> ~
Opportunities > Security Op	eration	ns Center ·																
Q Details Description Contacts	Qualificati	ion Notes			chedule T		gy Proposal	Capabilit										
+ Add															a C	Reset 🔒 D	elete	 Save
New Contract Discussion	4/12/2023	Title													Occi	urred On		Private 😮
Teaming Conversation		New Contract D	iscussion												04/	12/2023		
Discussed teaming options	2/28/2023	Associations																
Teams Kick-Off Meeting	1/31/2023	George Washing	ton Contact 🔒 .	ARMY TRAINING N	MODELS MANAG	GEMENT SUPPORT	Opp 🔒 Security	Operations Cer	enter Opp (🗎 (10TH A	AIR BASE WIN	NG 💽 🗎						+ Add
Customer phone call Called customer, asked for meeting	5/13/2022	Format	B I U			i≡ ≡ ⊡	₫ @ Ø											
Teaming Discussion Radiance Technologies Updated industry day list, add ed k kl;	2/16/2022	Discussed upc	oming ITSS proc	urement with Co	ontracting offic	cer												
Teaming Discussion Teaming Discussion with Obsidian.	10/04/2021																	- 1
This is a note added from a mobile device. This is a note added from a monile device.	9/28/2021																	- 1
Weekly Brief Last Update	5/10/2021																	- 1
STATUS UPDATE 04.07.21 Last Update (from last status update entry): March	4/06/2021																	- 1
																		- 1
																		- 1
																		- 1

Goal:	Capture and organize small bits of information.											
OneTeam:	Create Notes that are attached to opportunity a	nd can be keyword searched in the Activity Feed.										
Location:	Separate tab inside Opportunity.											
Actions:	Add Note (+Add) to document customer meetin	ngs, phone calls, emails, and visits.										
	Document meetings, phone calls, and emails wi	ith potential teaming partners.										
	Document other items that your team needs to know.											
Best Practice:	Create 'Status Update' note. Capture managers opportunity day prior to BD Meeting. Example r	can create status update note for EACH assigned note includes:										
	 Last Update Changes since last BD meeting Schedule Summary Customer contacts Teaming Uncoming events (site visit, gate review) 	Date Narrative Narrative, updates from GovWin Detail meetings, phone calls, emails Status of team, TAs, etc. Date and attendees										
	- opcoming events (site visit, gate review)	Date and attenuees										

Next steps and actions
 Actions for CM to assign in opportunity

Schedule (Tasks)

ONEtea	M Opportunities - Co	ontacts 🗸	Search	- Analytics Supp	ort												۵۵ ل	🛞 Donna H	amby (ABC) ~
Oppo	ortunities > Securi	ity Op	eration	s Center -															
	Details Description Co	ontacts	Qualificati		ents Review Sc	hedule		rategy Pro		Capability									
+ 44	LTask 🛃 Export 🗎 Subsc	ribe											_					Week N	onth Year
																			202
	Title	Notes	Private 🕜	Start	End	Assign	ments			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
	Proposal Response		12	10/16/2021	02/16/2022														
	Review DRFP			02/17/2022	02/18/2022	George	Washington 🥑	ABC Donna Ha	ml										
	Submit question on DRFP	B		02/23/2022	02/23/2022														
	RFI Release			03/11/2022	03/11/2022														
	RFI Due			03/25/2022	03/25/2022														
	Task from Activity Feed			03/28/2022 8:00 AM	03/29/2022 10:00 AM														
	Kick-Off Meeting			03/31/2022 10:00 AM	04/01/2022 11:00 AM														
	Volume 2 Writing Assign			04/16/2022	04/18/2022														
	Red Team Pens Down	e		05/26/2022 2:00 PM	07/22/2022 2:00 PM														
	Red Team Review			05/30/2022	06/02/2022														
	Draft RFP			08/19/2022	08/19/2022														
	Final RFP			09/12/2022	09/12/2022					•									
	Red Team Edits	e		09/14/2022	01/19/2023					Red Team E	dits								
	Update Capability Briefing			09/16/2022	09/19/2022					0									
	Proposal Due			12/21/2022	12/21/2022								•						
	Test Teams Kick-Off Mee			01/31/2023	02/01/2023									1					
	Strategy Workshop															Stra			
	Contract Award			03/31/2023	03/31/2023											•			
	Contract Start			05/01/2023	05/01/2023												•		
	Gold Team	B		06/09/2023	06/12/2023				1										
	Activity Feed Added Task	2		06/15/2023															Act
	White Glove Review			08/23/2023	08/23/2023														_
	Production			10/20/2023	10/27/2023														
	Activity Feed Added Task	B		12/21/2023	12/21/2023														

- **Goal:** Stay informed on individual opportunity schedule and action items.
- **OneTeam:** Create List view and Gantt-style chart of milestones and events.
- **Location:** Separate tab inside Opportunity.
- Actions: Assign tasks to users with due dates. Add notes and designate task as private.
 Created Tasks by updating RFI, DRFP, RFP, Proposal Due, Award, and Contract Start dates in Details Tab.
 View Timeline of events with milestones by week, month, or year.
 Export schedule to pdf.
- **Best Practice:** Create capture schedule items and assign to team.

Documents

Opportunities > REDSTONE TEST AND ENGINEERING SERVICES -														
	Details	Description	Contacts	Qualification	Notes	Documents	Schedule	Team	Strategy	Compliance Matrix	Capability Matrix	Communication		
Lupload Lownload Zip Stag Copy Defaults Actions -													/ Save	
	Bu	siness Developme	ent 2 8		Solicita	tion 🚺		Data C	Calls 🚺	Gr	aphics 3	Propo	sal 5	

Goal:	Securely organize documents related to opportunity.
OneTeam:	Organize documents, tag and revise. Integrate with Microsoft 365, where documents can be housed on company's GCC High tenant.
Location:	Separate tab inside Opportunity. There are 5 separate document folders, each with number indicator of documents inside folder.
Actions:	Upload templates or reference documents for team to review or use.
	Sort and filter by various criteria based on which folder document is housed.
Business De	velopment
Actions:	Upload documents with win themes, innovations, hot buttons, key words, required terms. These can be used later in proposal process to map to the proposal outline.
	Categorize and organize preliminary solutions.
	Upload Industry Day documents or other customer provided documents.
	Add documents with intel on solicitation, customer, competitors, etc.
	Maintain previous RFP, RFI, or completed proposal.
Best Practice:	Set up a labeling convention, use tags to quickly search documents.
Solicitation	
Actions:	View Solicitation documents auto-downloaded from GovWin.
	Upload documents not added from GovWin.
Best Practice:	Rename documents using a naming convention that is easy to read and to quickly find the right document. Split documents to have separate files for L, M and other sections if needed.

Data Calls

Actions:	Upload default Data Call Documents.
	Auto-distribute Data Calls to teammates with checklist of recipients. Receipients receive an email notification when they are assigned a data call, and when the sender accepts or rejects their submitted data call.
	Auto-receive Data Calls from teammates – submitted status.
	Mark Data Calls as accepted or rejected.
Best Practice:	Upload templates for every data request from subcontractors. Also include your company, the prime, on data call requests. Incorporate contracts department if required, for NDAs and Teaming Agreement data calls.
Graphics	

OneTeam – Integrated Pipeline Capture, and Proposal Management Platform Designed for government contractors by government contractors!

Opportunity Capture Reference Guide

oneteam[®]

Actions:	Populate Graphics folder with sample graphics.
	Add Tags to documents.
	Find and reuse of content from previous proposals.
Best Practice:	Assign control number to graphics for easy identification.
Proposal	
Actions:	Add default documents to use as templates.
	Proposal Manager uses Proposal tab for proposal drafts and review volumes.
Best Practice:	Upload all relevant information so that others on the team have access to it.
	Determine where each type of document is filed.

Гeam							
DNETEAM Opportunities - Contacts - Search -	Analytics Support					🛆 🕫 🌸 Donna Hamb	by ABC -
Opportunities > Security Operations	Center -						
Details Description Contacts Qualification		Review Sched	luic Team	Strate	v Proposal	Capability Matrix Communication	
Q Search or Select • + Add Q Ready	to assign Team Member Ro	oles? Go to Contacts				© Reset	🖌 Save
Name	Acronym	≎ Prime ≎ Opt	In © Percent©	Notes	Member Status	Other Opportunities	
✓ Member Status: Undetermined							*
ALLIANT HEALTH SOLUTIONS, INC. Profile	AHS	0		•	Undetermined		8
FULL VISIBILITY LLC Profile	FV	0			Undetermined		8
POWERNET AMERICA, INC. Profile	POWERNET	0			Undetermined		8
R3 STRATEGIC SUPPORT GROUP, INC. Profile	RSSG	0		2	Undetermined		8
RADIANCE TECHNOLOGIES INC Profile	RT	0			Undetermined		8
RBT ELECTRIC, INC. Profile	RE	0			Undetermined		8
TORCH TECHNOLOGIES, INC. Profile	TTI	0			Undetermined		8
UNISSANT, INC. Profile	UNI	0		•	Undetermined		8
V Member Status: Selected							
ABC Company Profile Prime	ABC	• ۲	Yes 59	•	Selected		
AVION SOLUTIONS, INC. Profile	Avion	0			Selected	SOFTWARE DEVELOPMENT APPLICATIONS	8
EGS INC. Profile	EGS	0		8	Selected		8
ENGENIUS CONSULTING GROUP INC. Profile	ECG	0	5		Selected	ACQUISITI COMMON CYBER SE CYBERSEC MAINTEN OASIS Poo REDSTON RF MACHI RSA INFO (TETHERED USA	AK 👔
INNOVA STRATEGIES, LLC Profile	ISL	0	15		Selected	REDSTONE TEST AND ENGINEERING SERVI	8
ITC DEFENSE CORP Profile	ITCDEFEN	0			Selected		8
OASYS, INC. Profile	OASYS	0			Selected		(8)
RADIANCE TECHNOLOGIES, INC. Profile	RTI	0			Selected	SOFTWARE DEVELOPMENT APPLICATIONS SYSTEMS ENGINEERING AND ADVANCED	8
SPECTRA TECH. INC. Profile	ST	0		(B)	Selected		A

Goal:	Determine teaming partners for specific opportunity.
OneTeam:	Build team in designated workspace to assess companies' capabilities and performance.
Location:	Separate tab inside Opportunity.
Actions:	Research and add potential teaming partners.
	Analyze past teaming arrangements.
	Invite companies to join your team, which includes an automated invitation proces.
	Manage workshare percentages.
	Designate favorite companies and search criteria.
Best Practice:	Integrate teaming partners into writing and reviewing process. This does not require they have OneTeam subscription.

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Strategy

ONEteam Opportunities Contacts Search	Analytics Support 🗘 🕫 Donna Hami	by <mark>ABC</mark> v
Opportunities > Security Operation	s Center ·	
Qualification Contacts Qualification	on Notes Documents Review Schedule Team Strategy Proposal Capability Matrix Communication	
	SWOT Concerns Features & Benefits Win Themes	
Q Search or Select	ABC Company	✓ Save
ABC Owner Team Members 3	Rating	
CSL ERC, Interfuze, Sigmatech	Very Strong	<u> </u>
DNI B Strengths @	Weaknesses 😧	
PCSI-TX Record	Incumbent	/ 8
Key Personnel	OCI de la constante de la cons	
IT Solutions	Cost de la	2 🖻
Importance of mission ca both teams	spability - broadest mission capability of anyone - we are the only company on	20
Location	We may make too many assumptions	2 💼 📗
	We do not have history of working Fixed Price, Multiple Award environment	
+ Add	There are many companies that can fulfill PWS, we have to show them why we are the best. We will not play the "ME TOO" strategy.	20
Opportunities 🚱	Threats 😡	
Regreen the workforce	Will our normal PP evaluators still evaluate us, the are all on SSB	20
Update IT Systems	Ver confident - Assumptinos	2 🖻
Expand beyond janitoria	I services Ve will not be the lowest cost	
+ Add	+ Add	
© 2023 OneTeam [®] Terms Privacy Support Dideos		Help

Goal: Document information on opportunity competition and develop capture strategies.

OneTeam: Relational database gives you more data for other opportunities.

Location: Separate tab inside Opportunity, to the right of Team.

Actions: Perform SWOT Analysis on your team and add teammembers names. Select rating – very weak to very strong with numberic color coded system.

Perform separate SWOT analyses for each potential competitors. Add prime and subcontractor competitors using the Search function and assess competition's strengths, weaknesses, etc. and rate competitors – very weak to very strong with numberic color coded system.

Create list of Customer Concerns, issues, problems, and hot buttons to be used in developing solutions.

Map Customer Concerns to Features/Solutions, Benefits to Customer, and detail a proof point or experience example to validate the solution and benefit. Designate which Features/Solutions are discriminators and innovations.

Develop Win Themes based on Customer Concerns, Features, Benefits, and Proof Points. Refine Win Themes in work space and indicate when they are approved by management and are finalized by the Capture Manager. This allows Proposal Manager to use them in the proposal.

Best Practice: If you did not include competitors here before proposal submission, add them after award. This tags their company with that opportunity, and it will show up when they are added as competitors or teammates for other opportunities.

Proposal

The Proposal Tab contains the Proposal Outline, RFP reference mapping, and Assignment tabs for use in the Proposal Management process. Its use is covered in the Proposal Reference Guide and Training materials.



Capability Matrix

ONEteam Opportu	nities 🗸	Contacts	Search	 Analytics 	Support																30 I	🚇 Donna H	lamby	ABC -
Opportunities	> Sec	urity O	peration	ns Center																				
👰 Details Desc	ription		Qualificat						Strategy	Proposal	Capabil	ity Matri	x Commu											
+ Add Requirement	I≣ Selec	t Categories	r Export]																		D Re:	set 🗸	Save
Overview		The bes	t response is	shown for each	requirement (al	ong with a c	ount for that n	esponse). H	lover over an	y summary ce	II for more													
M ABC	Prime							-																
Alexander Hamilton	a o	Ref	ference	Requirement							N	otes	Capability Leve	el internet and a second s	Past Performan	ce	Customer E	kperience	Recency		CPAR:	s		
Donna Hamby	D	1		OCONUS Exp	erience						Į	3	7 Full ABC	ECG	6 Prime AB	C ECG	3 Simila	Work AB	2 2 year	s ECG IS	2	Exceptional	ECG	
- George		PW	/S 3.1	The contractor	shall support the	Missile Defe	nse Agency (N	1DA) in the	development	of logistics pol	licy t		3 Full ECG	ISL S	2 Prime EC	G ISL	3 Simila	Work ISL	3 2 year	s ECG IS	. 2	Exceptional	OAS'	
Washington	•0	PW	/S 3.2	GENERAL: This	is a non-person	al services co	ntract to provid	de Work Re	ception and N	lanagement fo	or th	2	3 Full ECG	ISL O	4 Prime AB	C ECG	2 Simila	Work EC	1 2 year	s ISL	7	/ery Good	ABC	
🖾 🕒 Jason Merkel	€ 0	PW	/S 3.3	Description of	Services/Introdu	tion: The Co	ntractor shall p	rovide all p	ersonnel, equ	ipment, suppl	ies, f		4 Full ECG	ITCDEF	2 Prime AB	C SUB	2 Simila	Work EC	2 2 year	s ISL SU	B 3 \	/ery Good	ABC 1	1
AHS	O	PW	/S 3.4	Background: T	his service is curr	ently being p	erformed unde	er Fort Stew	art's Base Op	erations and N	faint	3		ITCDEFI	2 Prime AB	C ECG	2 Simila	Work AB		s SUB	0	Exceptional	ECG	1
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ECG	0	PW	/S 3.5.3	Provide daily, v	veekly, and mont	nly reports as	needed.						4 Full ABC	ISL S	4 Prime AB	C Avior	3 Simila	Work AB	🤇 🚺 2 year	s Avion		Exceptional	RI	<u>1</u>
E FV	0	PW	/S 3.5.4	Provide courte	ous, friendly cust	omer service	to all DPW cus	tomers.			[1	4 Full ABC	ISL IT	4 Prime AB	C Avior	3 Simila	Work AB	🕻 🚺 2 year	s Avion	2	Exceptional	ECG	1
	0	PW	/S 3.6	Scope: Service	s includes: Estab	ishing and tr	acking all requ	ests for rep	airs and main	tenance issues	s at F		2 Full ISL	RTI	1 Prime RT		4 Simila	Work Av	c 🚺 2 year	s RTI	1	Exceptional	RTI	
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- **Goal:** Develop dynamic customizable Capability Matrix of all potential team capabilities.
- **OneTeam:** Develop dynamic customizable Capability Matrix. Includes workflow to send and receive between teaming partners. Automatically consolidates answers from all companies into an overall response view.

Location: Separate tab inside Opportunity.

Actions: Conduct 'what-if' scenarios to see impact of various companies on team capabilities and gaps, by adding or removing potential teaming partners and their responses.

Analyze experience level and performance of teaming partners individually and as a team.

Communication

ONEteam Opportunities - Contacts - Sea	ch- Analytics Support	🗘 30 🕘 Donna Hamby (ABC) 🗸
Opportunities > Security Operations Center		
📢 Details Description Contacts Qualif	cation Notes Documents Review Schedule Team Strategy Proposal Capability Matrix Communication	
New Message -		🖹 Delete 🗹 Save Draft 🔤 Send
Review Team Kick-Off Meeting Informati	M Subject	
Draft 12/20/2022	Review Team Kick-Off Meeting	
Opportunity: Security Operations Center Invitati Draft 10/24/2022	Recipients	
Writer's Kick-Off Meeting Informati	M A One or more selected Contacts are currently unable to view this opportunity	×
Opportunity: Security Operations Center Invitati	M Blake Herrin 😢 Donna Hamby 📖	✓ + Add
Contract Information for Quad Chart Informati	Message	
Opportunity: SECURITY OPERATIONS CENTER Invitati	an B I L was E = = = = E = E E E E F F F F F F F F F	
36h 0102020	Red Team Review - Technical and Past Performance Volumes	
	Security Operations Center, SOC	
	SECURITIES AND EXCHANGE COMMISSION > OFFICE OF INFORMATION TECHNOLOGY	
	Review Date(s):	
	Time:	
	Location:	
	Completed review documents due by:	
	Please join my meeting from your computer, tablet or smartphone.	
	https://dobal.octomestina.com/ori/1/8/4855001	
	You can also dial in using your phone. United States: +1 (872) 240-3412	
	Access Code: 824-855-901	
	New to GoToMeeting?	
	Get the app now and be ready when your first meeting starts: https://global.gotomeeting.com/install/82485901	
	Virtual or in-person in Huntsville, AL?: Virtual	
I	Donna Hambu	

Goal: Securely communicate with team using pre-populated templates to streamline communications.

OneTeam: Streamline email communications and auto-populate information into emails.

Location: Separate tab inside Opportunity.

Actions: Send teaming invitation or other emails to internal and external team.

Best Practice: Create templates for various emails and save as default documents. OneTeam will autopopulate opportunity fields, such as opportunity name, due dates, and customers.

Set up templates for Teaming Invitations, Kick-Off Meeting, Color Team Review In-Brief and Out-Brief, B&P request, or Contracts request for NDAs or TAs.