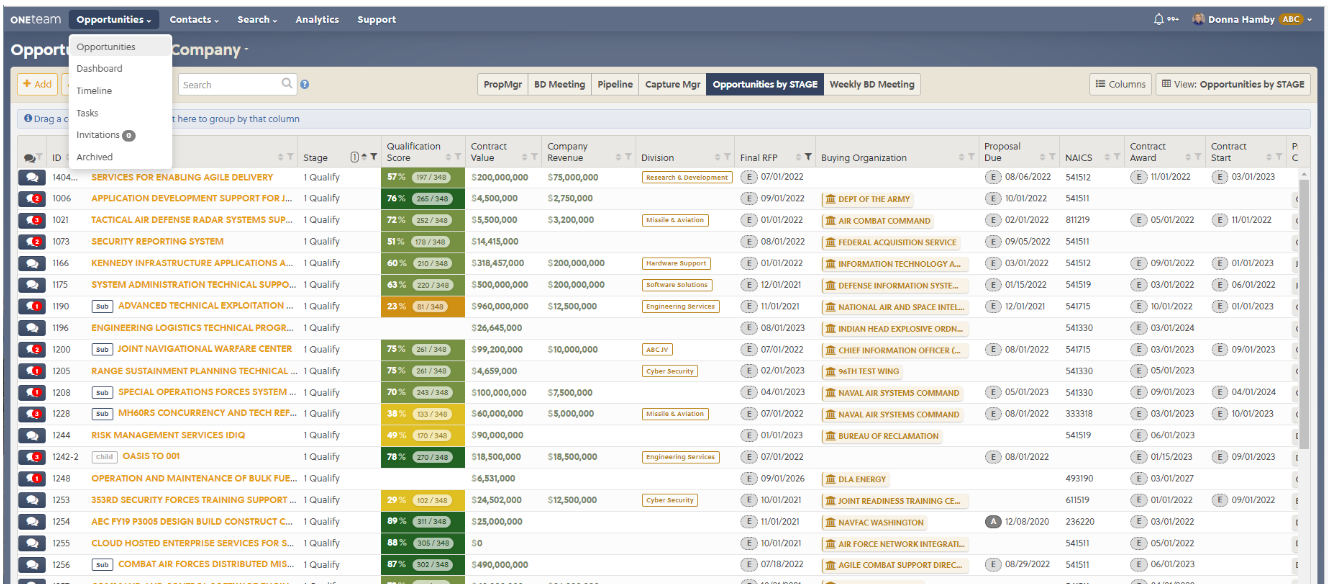
Company Settings for Company OneTeam Administrator

- 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



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'.

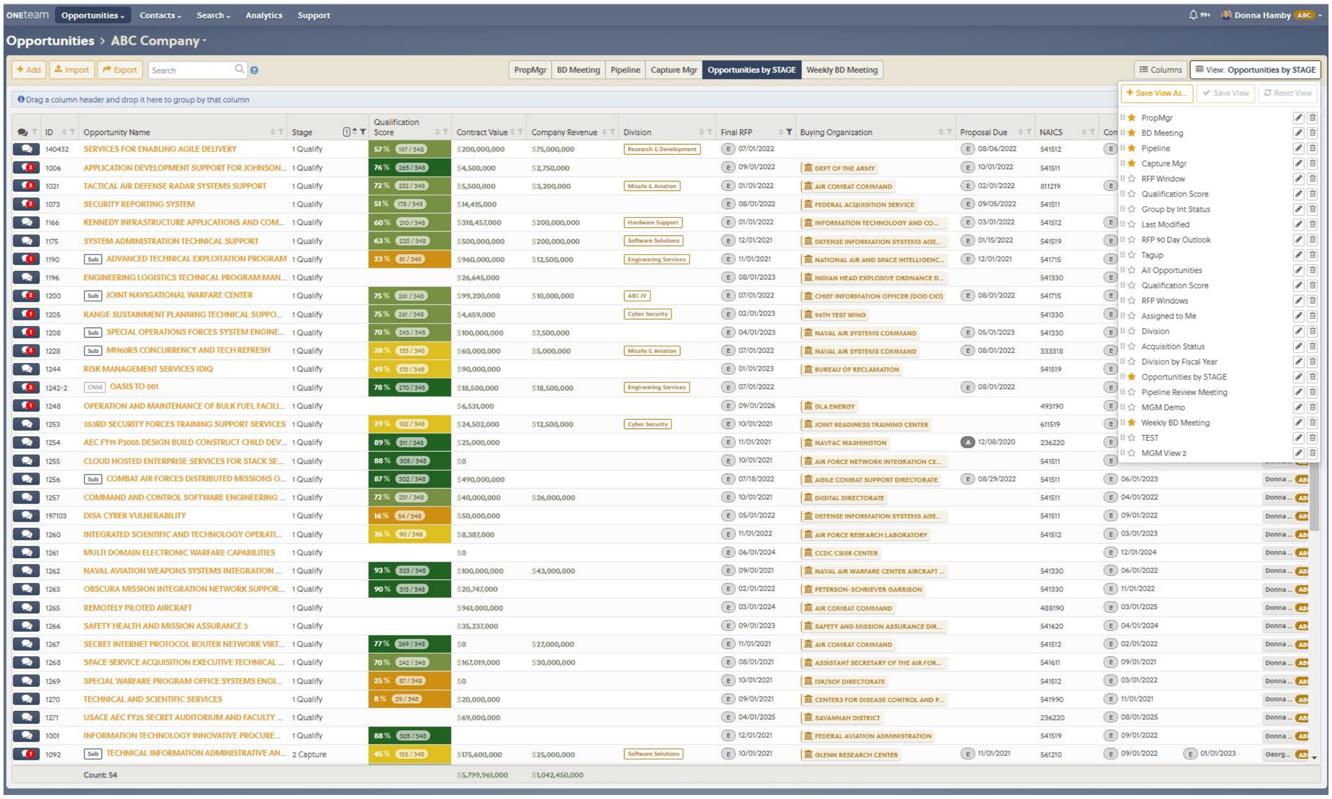
Create opportunity with data required by your BD process. The Opportunity Name is always required.

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.

Views

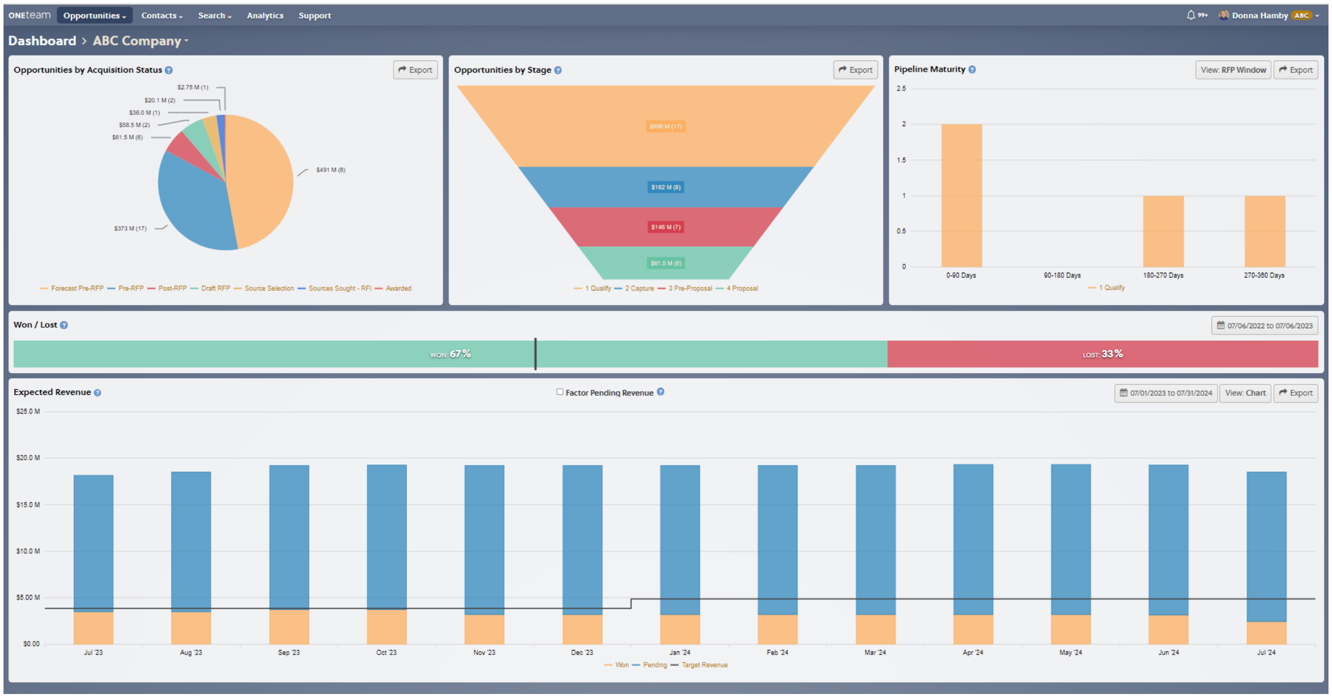


- Create custom VIEWS of Pipeline – set up VIEWS for BD Manager, Capture, Proposal, etc.
- Set favorite VIEWS to add a shortcut to your Pipeline.
- Share custom VIEWS with internal team.
- View active and non-active (won, loss, no-bid, bid next cycle) opportunities.
- Filter, sort, and group pipeline 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 ★ to select as favorite and create shortcut at the top center of your pipeline

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.

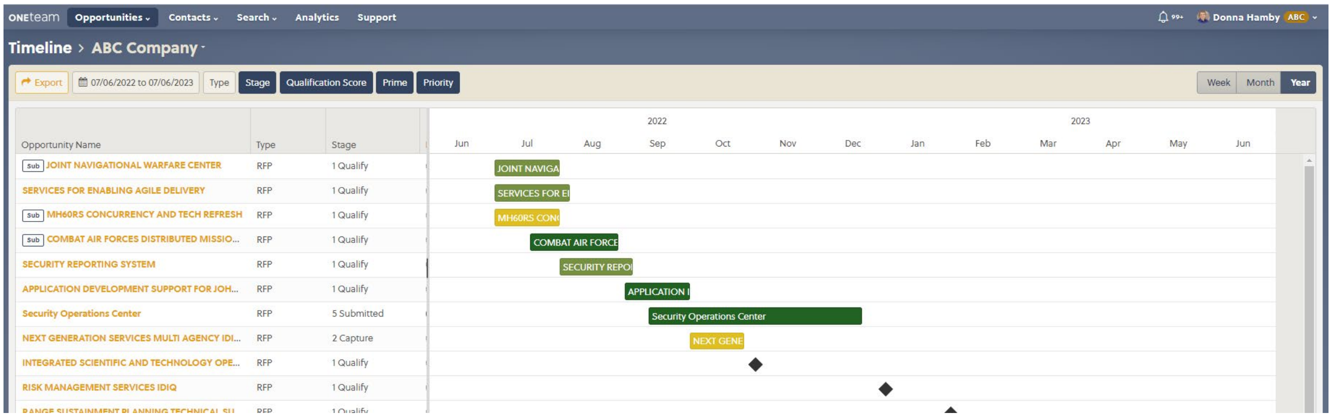
View bar chart of opportunities by RFP Window and select graphic to see opportunities in data set.

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.

Timeline



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.

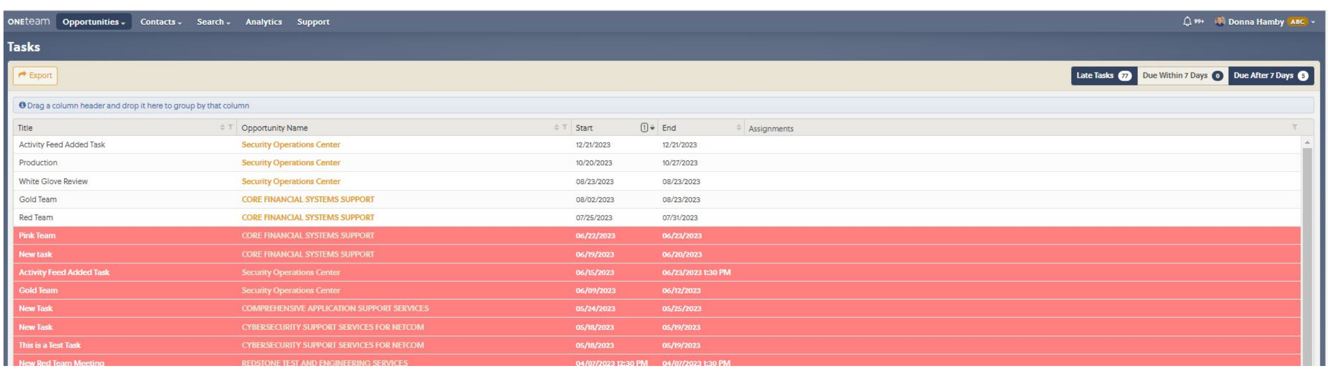
Location: **Opportunities** pull-down list, select Timeline.

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



Goal: View and maintain task assignments for all personnel together.

OneTeam: Maintain consolidated Tasks lists from all opportunities.

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.

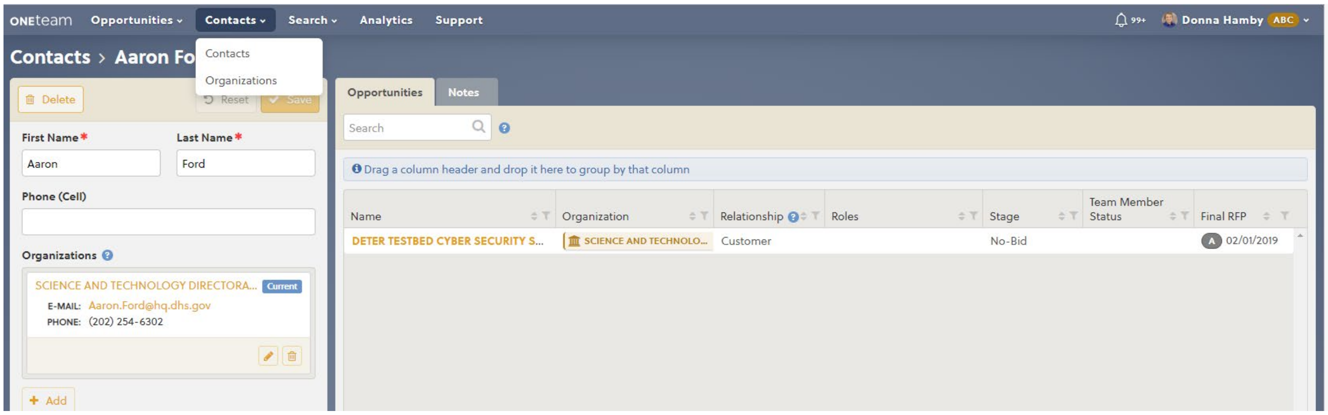
OneTeam: The Teaming Invitations that you accept show up in Opportunities List (your pipeline view).

Location: **Opportunities** pull-down list, select Invitations.

Actions:

View and Accept or Reject Teaming Invitations.

Contacts



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.

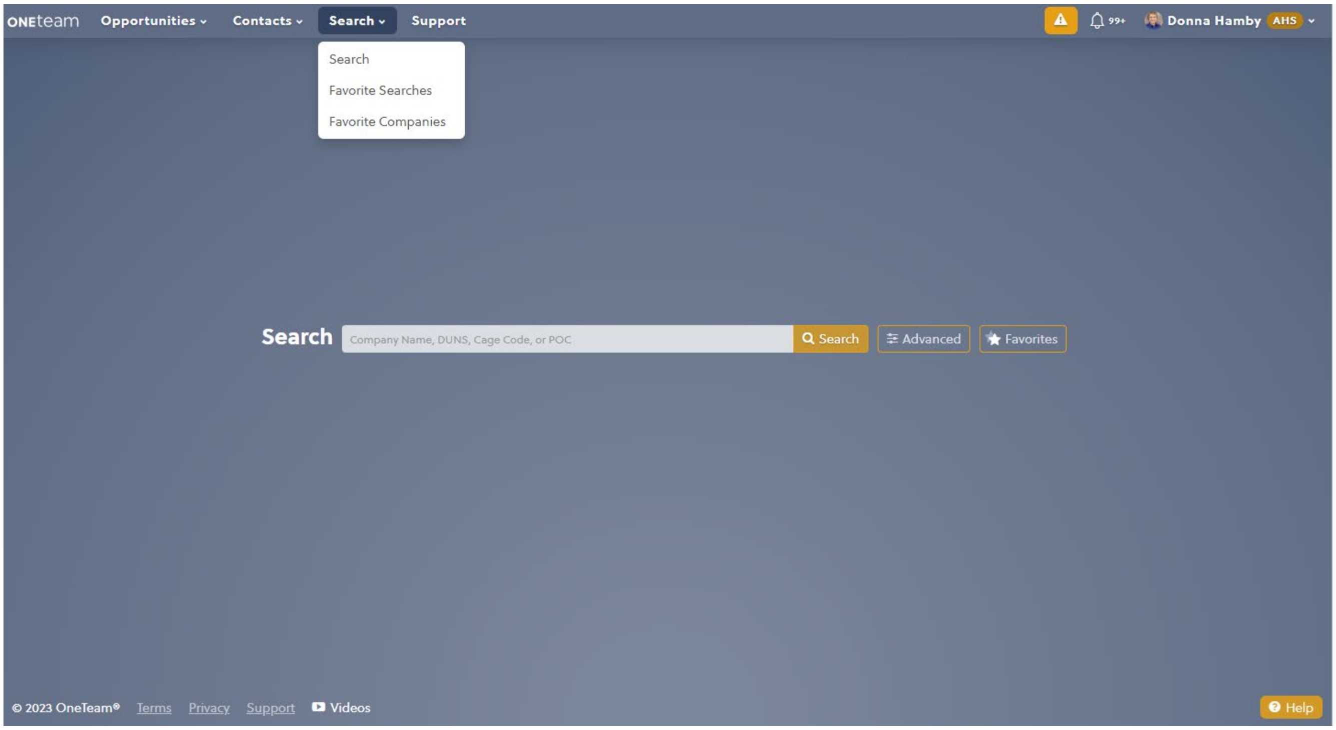
OneTeam: Full function Customer Relationship Management (CRM) database. Maintain all internal company contacts; teaming partners, competitors, and customer organization information.

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



Goal: Research companies, contract awards, teaming arrangements, and competitors.

OneTeam: Research companies using the Search function using integrated SAM.gov and FPDS contract award data.

Location: Main Menu, left side **Search**.

Actions: Research and add potential teaming partners and competitors.

Filter search results by relevant criteria – company size, socio-economic status, NAICS, PSC Code, certifications, core competencies, location, and more.

Create favorite searches and favorite companies to streamline research.

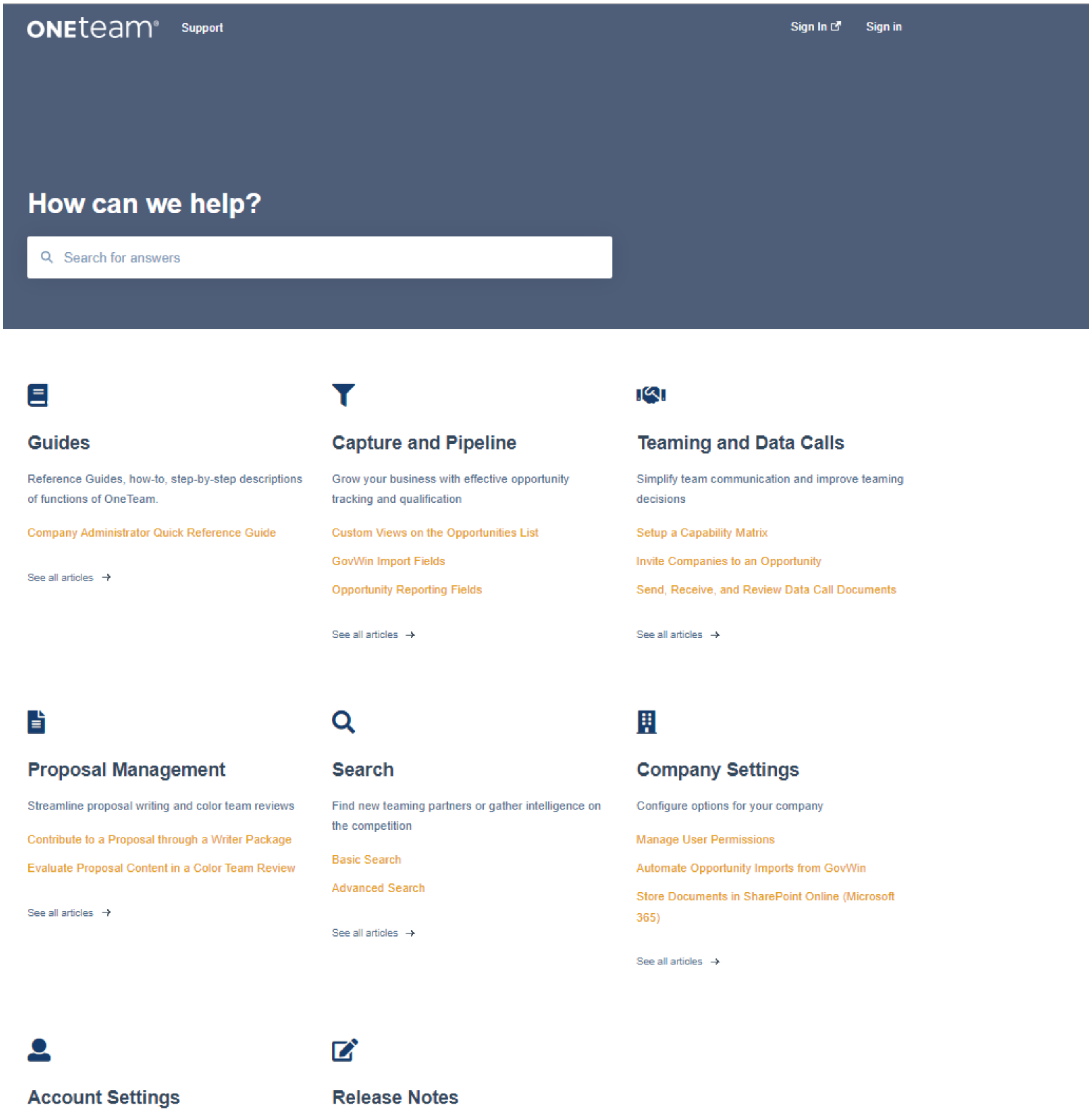
Review SAM and user defined company profiles.

Create Private Notes on search profiles.

Research competitors in company search.

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

Support



Location: Main Menu, left side **Support**.

Actions: Knowledge Base for common actions divided into major categories.

Link to OneTeam Support chat.

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.

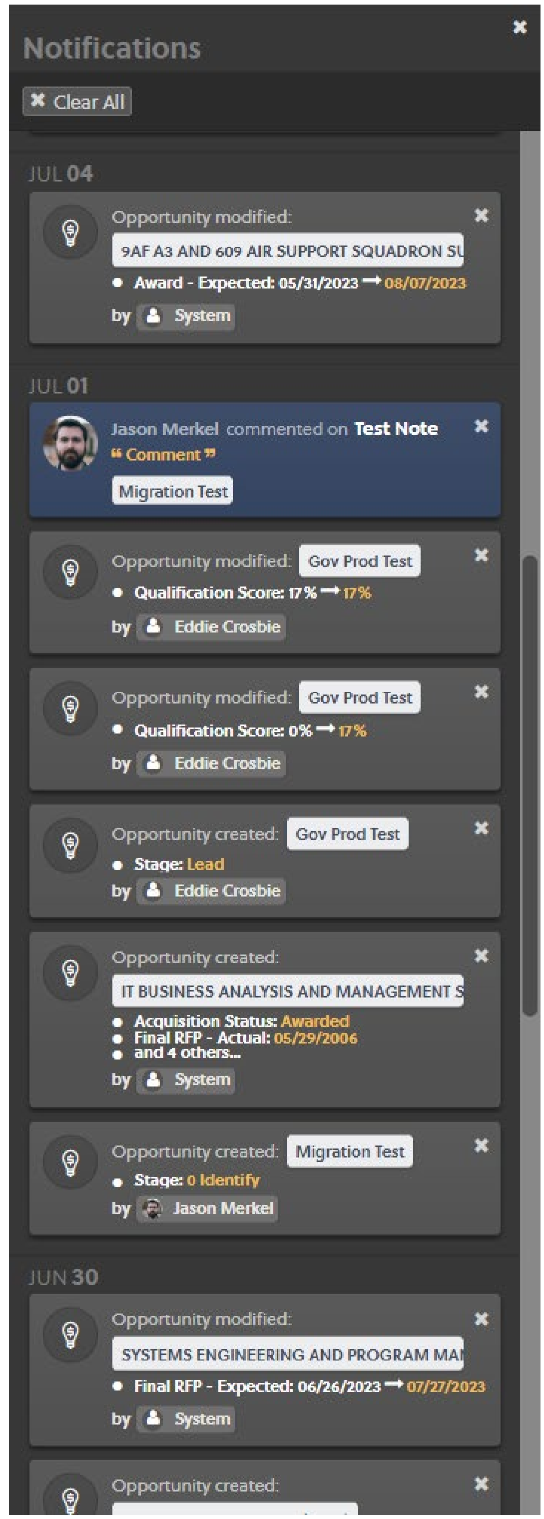
Clear notifications individually or as a group.

Expand notification in the activity by Selecting individual notification.

Best Practice: Review notifications every day and determine if they require action.

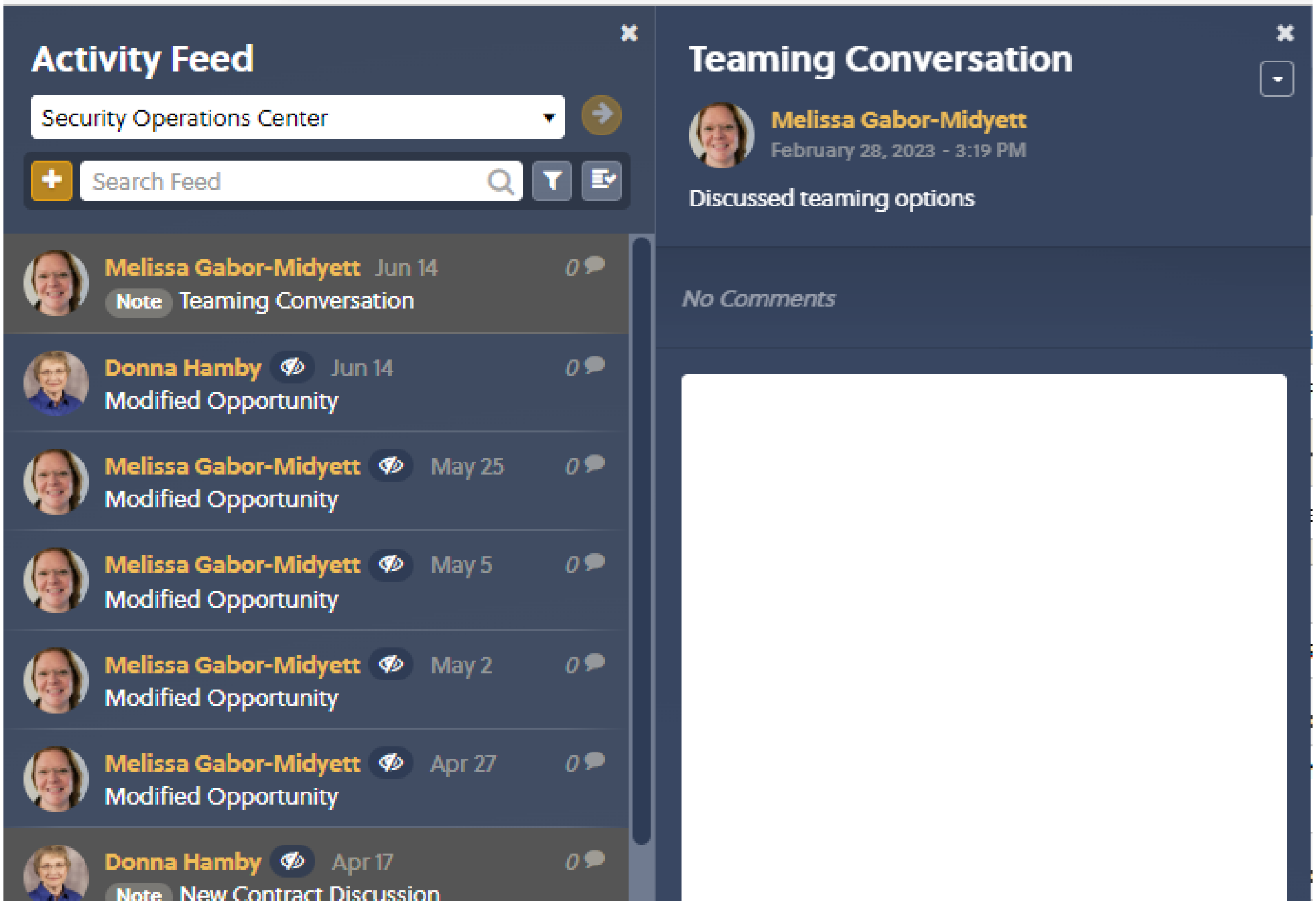
Select 'Clear All' at top of notifications window to clear notification history.
Close a notification individually if it is an FYI type notification, or no action is required.
To go to opportunity, select notifiation, the activity feed for that opportunity will open on the left side and the notification will be removed from the right notification window.
Select ➲ 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.



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.

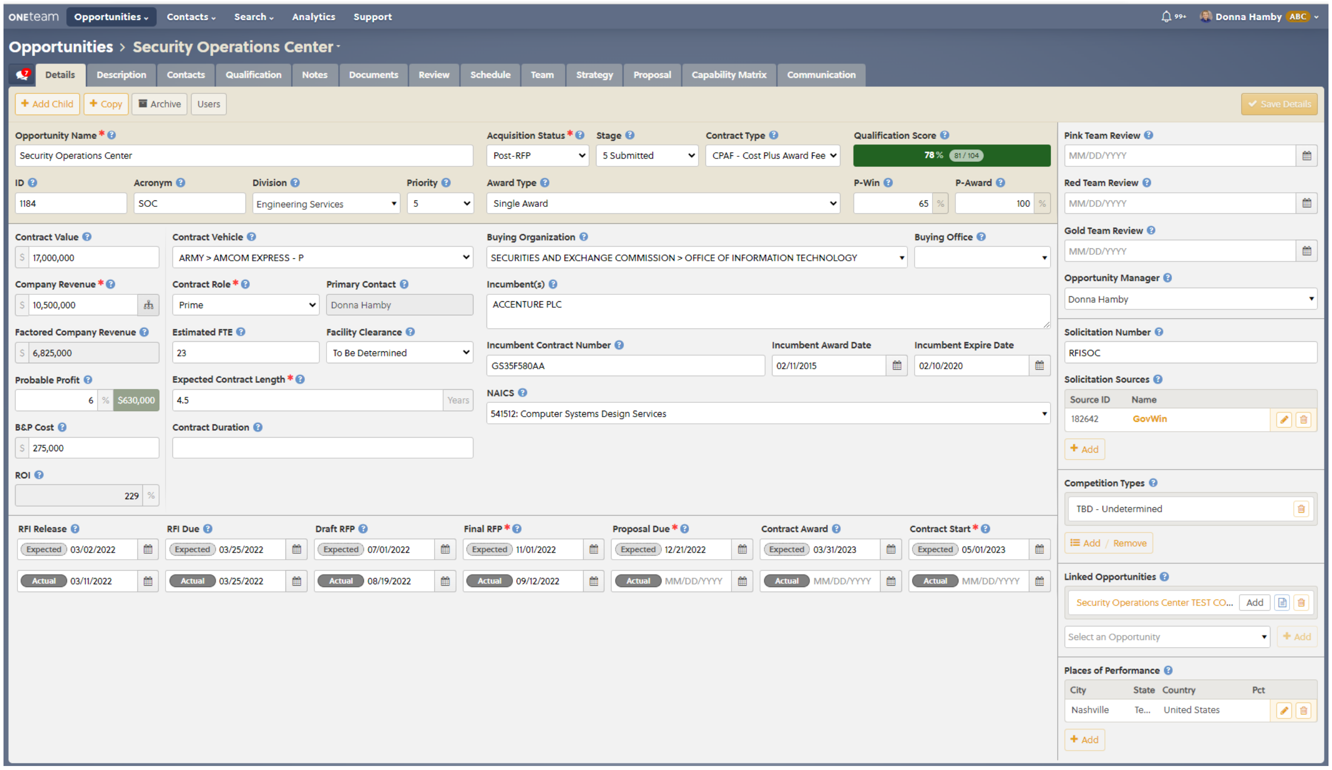
Search posts and comments by keywords.

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



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.

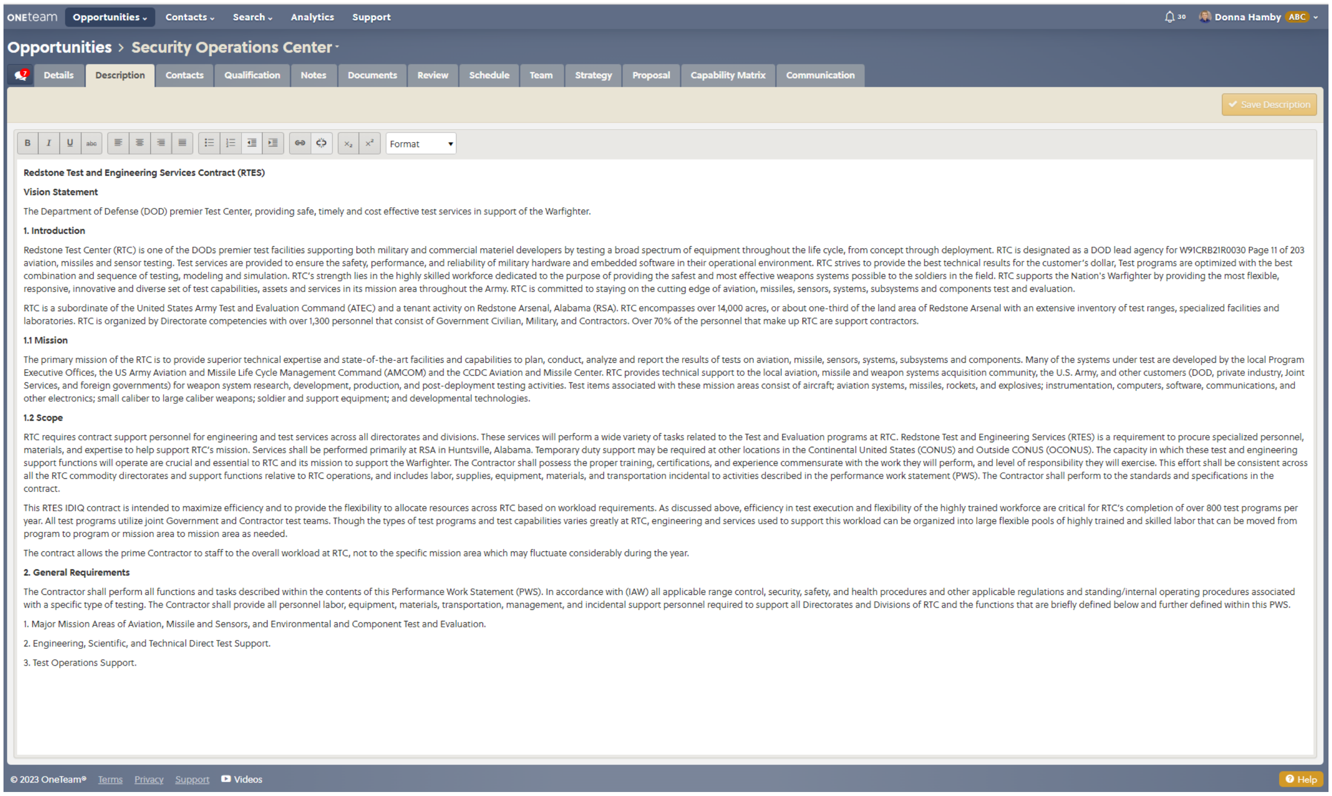
Set P-Win and P-Award percentages.

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



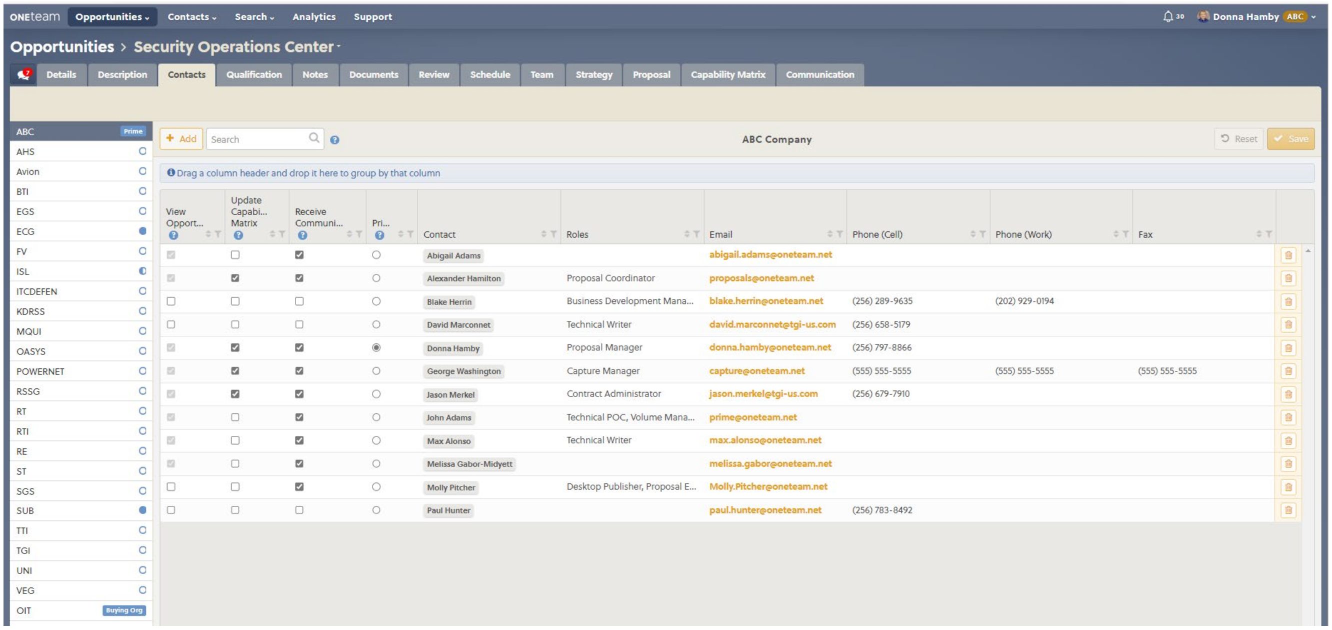
Goal: Capture customized information about the opportunity.

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)



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.

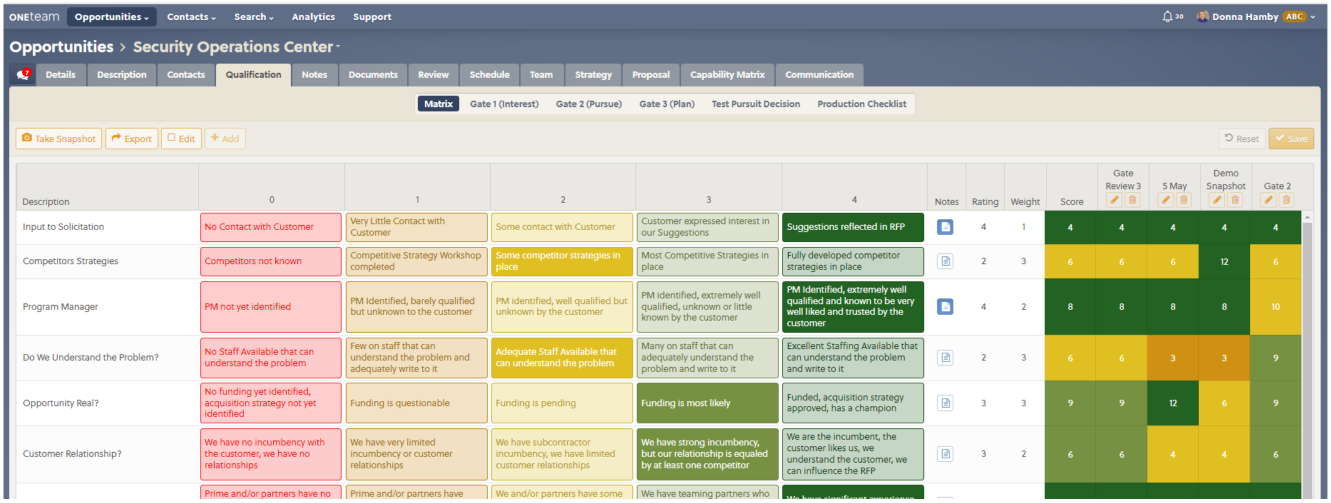
View contacts by company, update information as needed.

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



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 company-specific 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:

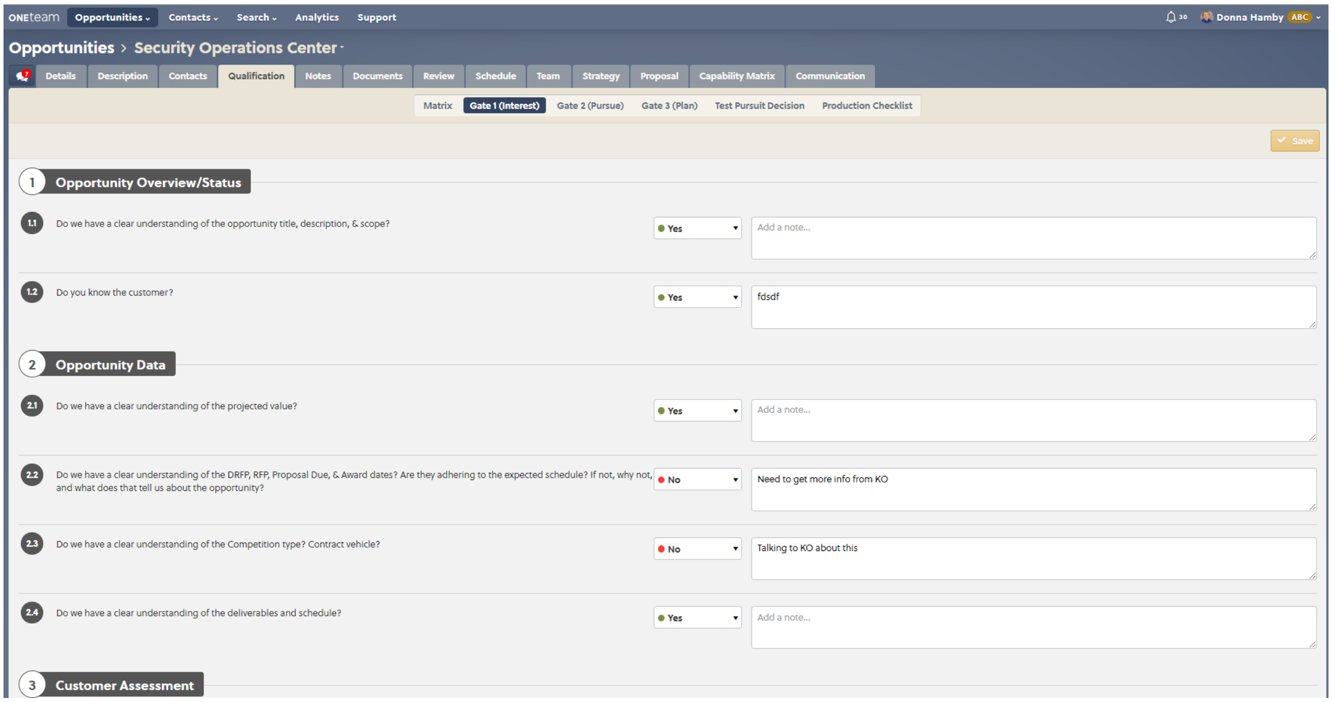
05.06.21 Brent has signed LOI. Customer loves him.

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



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**.

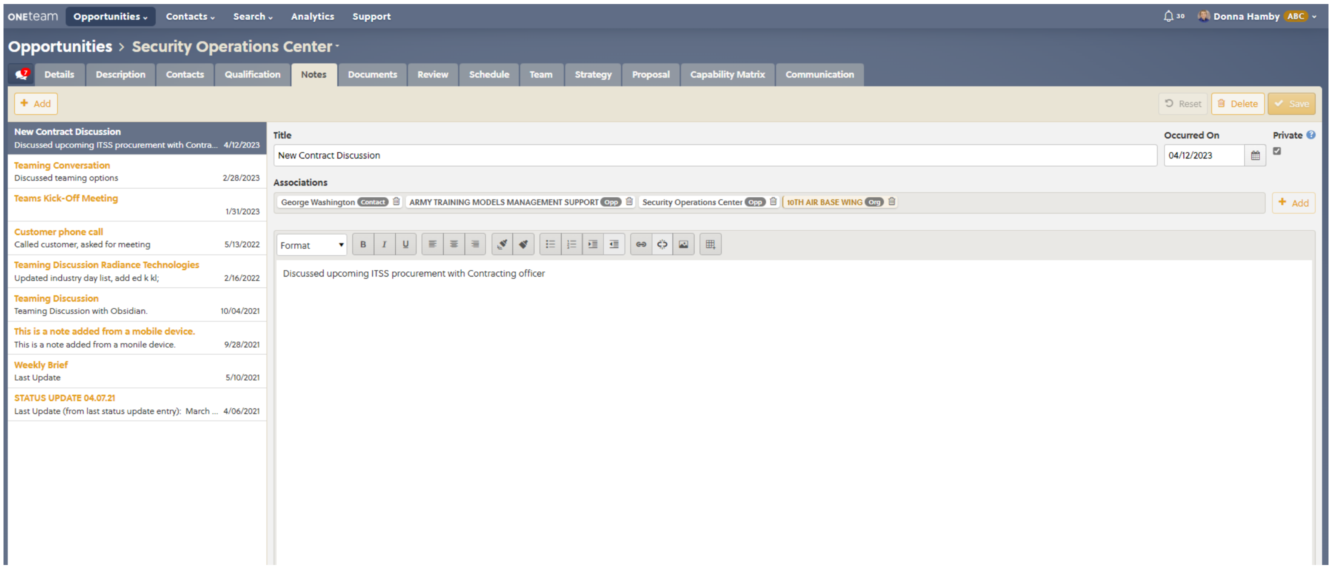
Actions: Create, edit, and manage unlimited checklists for use in all Opportunities.

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



Goal: Capture and organize small bits of information.

OneTeam: Create Notes that are attached to opportunity and can be keyword searched in the Activity Feed.

Location: Separate tab inside Opportunity.

Actions: Add Note **(+Add)** to document customer meetings, phone calls, emails, and visits.

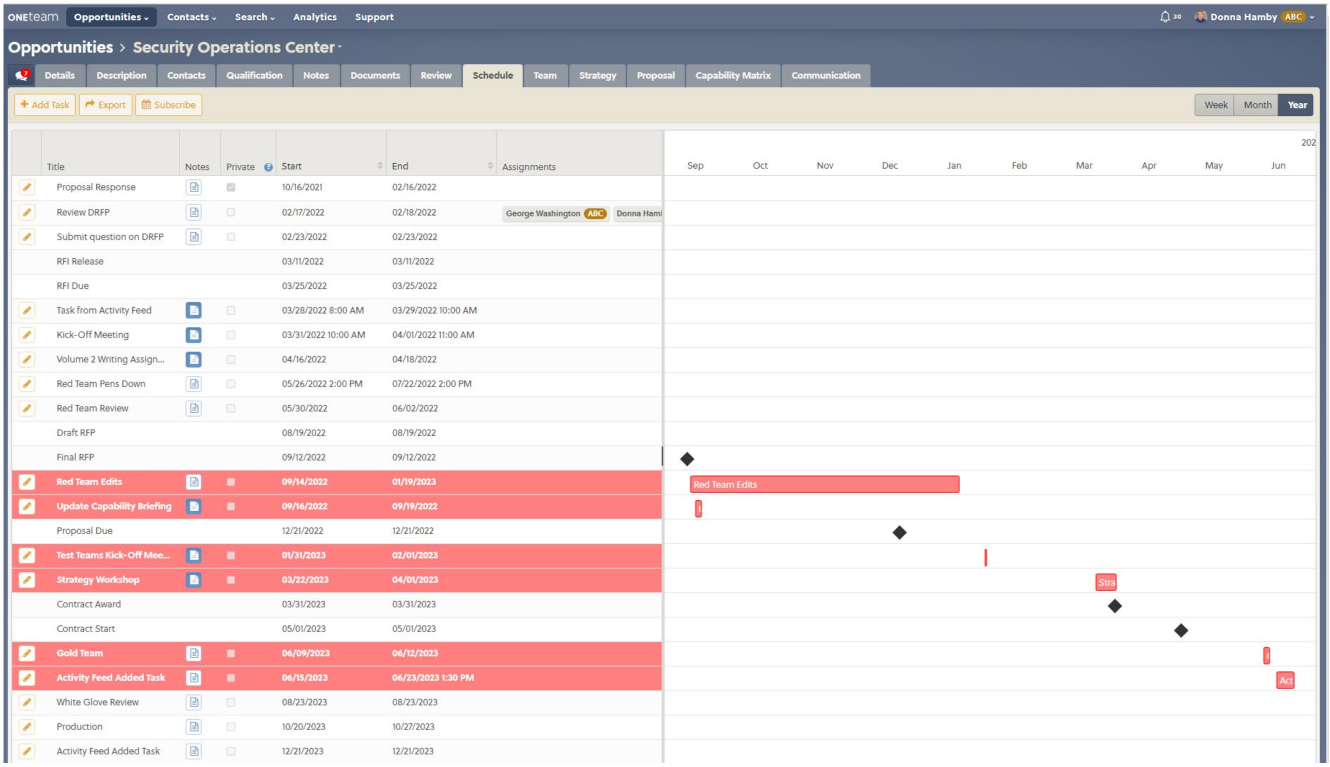
Document meetings, phone calls, and emails with potential teaming partners.

Document other items that your team needs to know.

Best Practice: Create **'Status Update'** note. Capture managers can create status update note for EACH assigned opportunity day prior to BD Meeting. Example note includes:

▪ Last Update	Date
▪ Changes since last BD meeting	Narrative
▪ Schedule Summary	Narrative, updates from GovWin
▪ Customer contacts	Detail meetings, phone calls, emails
▪ Teaming	Status of team, TAs, etc.
▪ Upcoming events (site visit, gate review)	Date and attendees
▪ Next steps and actions	Actions for CM to assign in opportunity

Schedule (Tasks)



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.

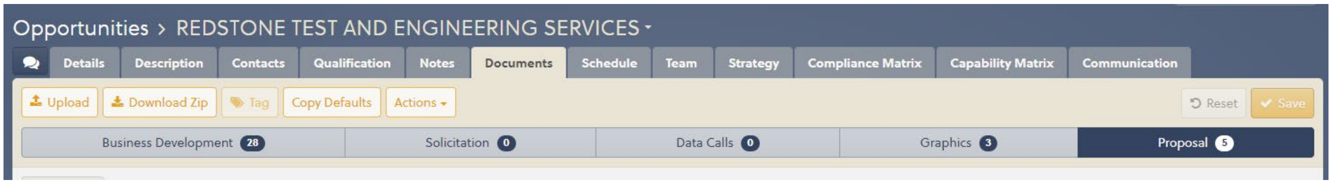
Created Tasks by updating RFI, DRFP, RFP, Proposal Due, Award, and Contract Start dates in Details Tab.

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



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 Development

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

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

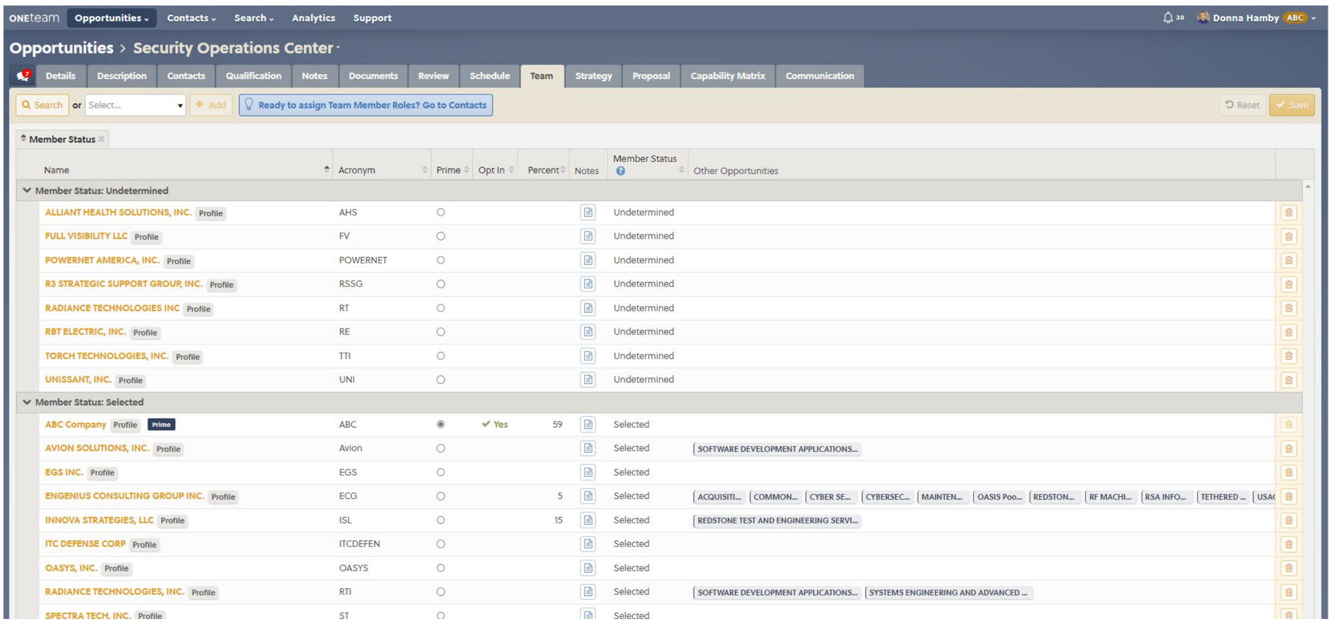
Actions: Add default documents to use as templates.

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.

Team



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.

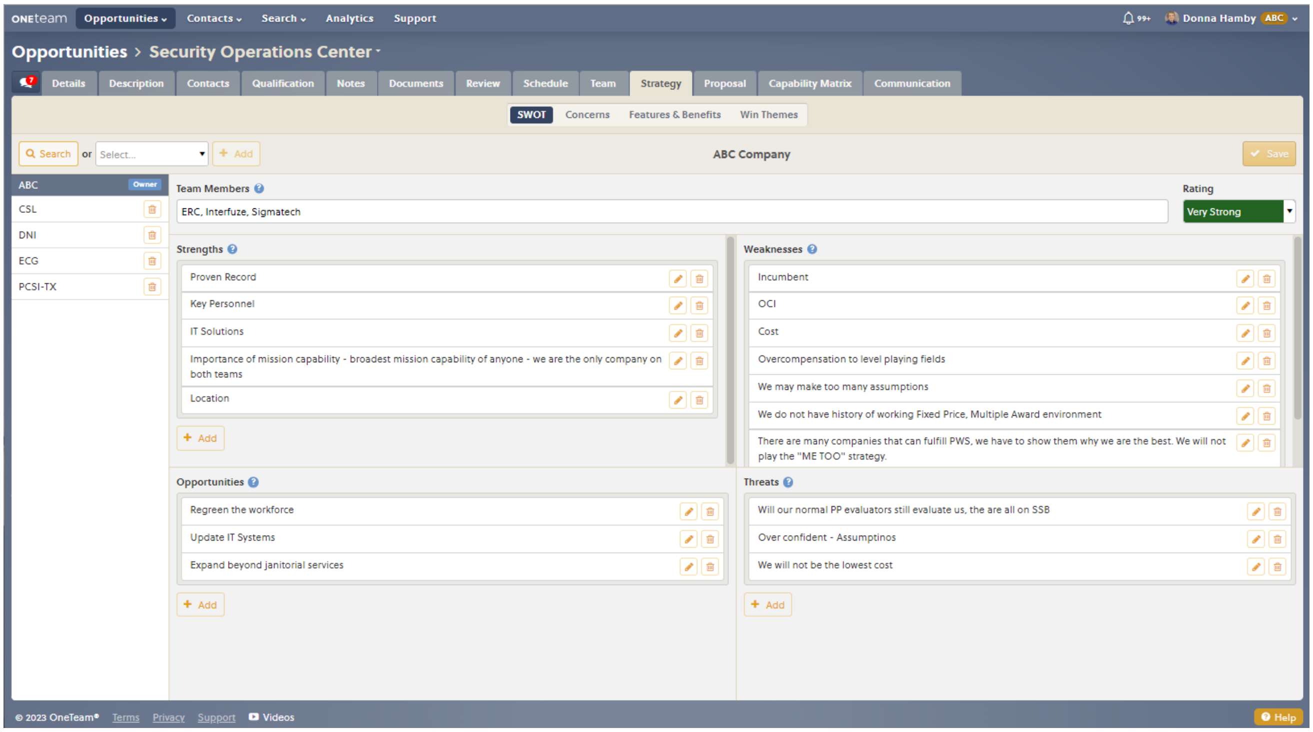
Manage workshare percentages.

Designate favorite companies and search criteria.

Best Practice: Integrate teaming partners into writing and reviewing process. This does not require they have OneTeam subscription.

is

Strategy



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.

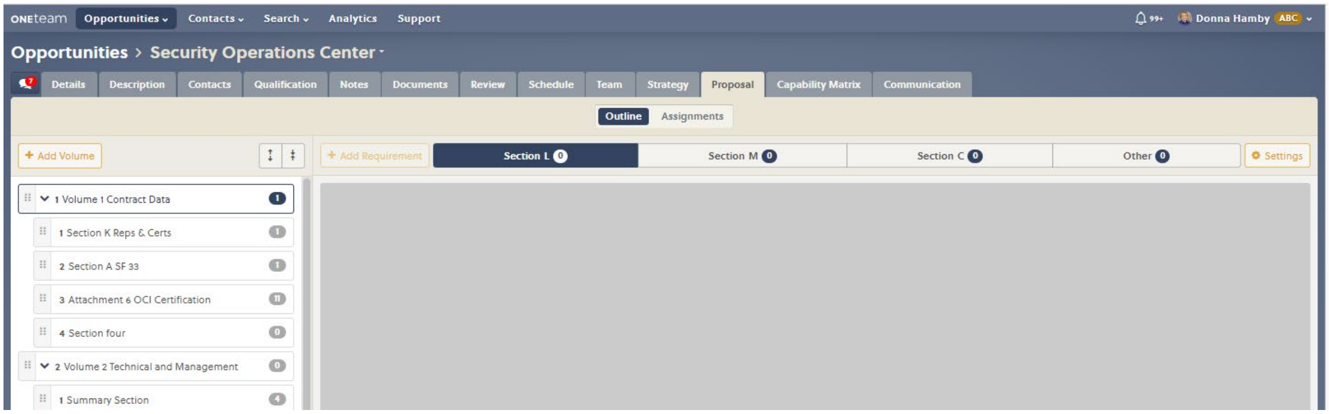
Map Customer Concerns to Features/Solutions, Benefits to Customer, and detail a proof point or experience example to validate the solution and benefit. Designate which Features/Solutions are discriminators and innovations.

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.

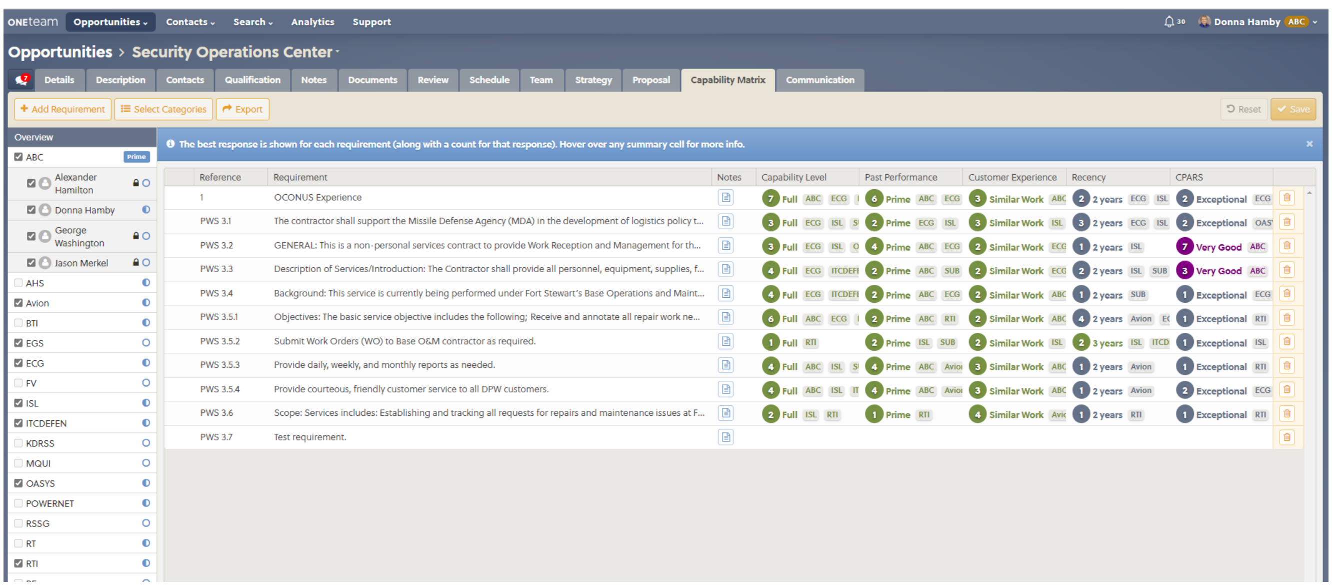
Best Practice: If you did not include competitors here before proposal submission, add them after award. This tags their company with that opportunity, and it will show up when they are added as competitors or teammates for other opportunities.

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



Goal: Develop dynamic customizable Capability Matrix of all potential team capabilities.

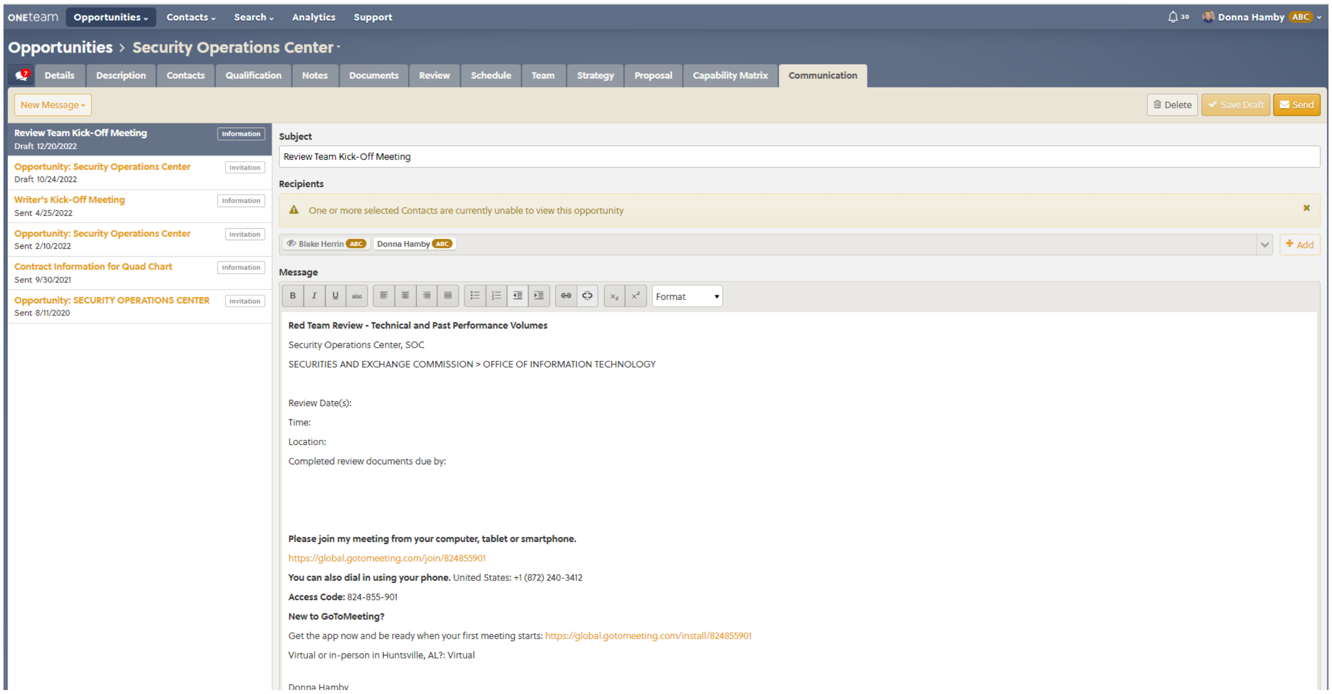
OneTeam: Develop dynamic customizable Capability Matrix. Includes workflow to send and receive between teaming partners. Automatically consolidates answers from all companies into an overall response view.

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



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.