

# CAPTURE PLANNING WORKSHEET

*A Guide for Government & Industry Professionals*

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## Executive Summary

Capture planning is the structured process of preparing to win a competitive federal or defense contract. Effective capture begins well before the Request for Proposal (RFP) is released and ensures that a company fully understands the customer, requirement, competition, solution, and pricing strategy.

This guide presents a clear, accessible worksheet format to help government and industry professionals organize and execute capture activities in alignment with DoD acquisition processes.

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## Understanding Capture Planning

Capture activities bridge the gap between business development (BD) and proposal development. They ensure your team is positioned, informed, and ready when the government releases a solicitation.

### Core Capture Goals

- Understand the customer and mission need
- Shape requirements ethically where appropriate
- Build technical and operational credibility
- Develop competitive insight
- Form the right team
- Prepare a compliant, compelling proposal

Capture is a disciplined, proactive effort—not a last-minute scramble once the RFP drops.

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# Capture Planning Process Overview

A practical and widely used sequence for capture is:

## Capture Workflow

1. **Opportunity Identification**  
Initial discovery through market intelligence or customer engagement
  2. **Customer Engagement**  
Meetings, RFIs, TIMs, and industry forums
  3. **Requirements Insight**  
Understanding capability gaps, budgets, acquisition pathways
  4. **Solution Development**  
Technical approach, operational value, differentiators
  5. **Teaming Strategy**  
Identify capability gaps and fill them with subcontractors
  6. **Competitive Analysis**  
Assess incumbents and likely bidders
  7. **Win Strategy Development**  
Align strengths with customer's mission needs
  8. **Proposal Preparation**  
Build compliance matrix, draft content, finalize pricing
  9. **Submission and Debrief**  
Learn from each competition
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## Core Elements of a Capture Plan

### 1. Customer Understanding

Capture planning begins with a strong understanding of the buyer.

- Identify key decision makers (PM, KO, technical leads)
- Understand mission needs and operational objectives
- Track acquisition pathway and timeline
- Review budget materials for funding status

## 2. Competitive Assessment

Evaluating competitors helps shape your strategy.

Competitor	Strengths	Weaknesses	Likely Strategy
Incumbent	Established relationship, proven performance	Higher cost structure	Maintain advantage
New Entrant	Innovative technology	Limited past performance	Aggressive pricing

## 3. Win Themes

Win themes must clearly communicate:

- What the customer needs
- Why your solution is superior
- How your approach reduces risk or improves performance

Example:

*“Improves readiness through predictive maintenance analytics that reduce downtime by 18%.”*

## 4. Teaming Overview

A strong team can fill capability gaps and increase competitiveness.

- Identify complementary partners
- Define roles and integration points
- Avoid organizational conflicts of interest (OCI)
- Ensure all team members meet compliance requirements

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## Capture Readiness Checklist

### Customer

- We have identified the customer’s mission drivers
- We have engaged decision makers early
- We understand funding, schedule, and acquisition pathway

## **Solution**

- Technical approach aligns with requirements
- Risks are mitigated or manageable
- Innovation opportunities clearly defined

## **Team**

- Partners identified and committed
- Subcontractor capabilities documented
- No OCI risks present

## **Proposal Preparedness**

- Compliance matrix drafted
  - Price-to-win established
  - Proposal team prepared and resourced
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# **Capture Planning Worksheet**

Use the following worksheet fields to build a structured capture plan:

**Customer Need:**

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**Key Decision Makers:**

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**Competitive Landscape:**

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**Win Themes:**

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**Risks & Mitigations:**

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**Solution Summary:**

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**Teaming Partners:**

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**Next Actions:**

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## **Appendix A — Acronyms & References**

### **Acronyms**

- BD – Business Development
- PM – Program Manager
- KO – Contracting Officer
- OCI – Organizational Conflict of Interest
- Pwin – Probability of Win
- RFP/RFI – Request for Proposal / Information

### **References**

- DoD’s AAF Portal – <https://aaf.dau.edu>
- SAM.gov Contract Opportunities – <https://sam.gov>
- GAO Acquisition Reports – <https://gao.gov>