April 2022
Volume 1, Issue 1

OneTeam InSights

OneTeam Newsletter Launch!

Welcome to OneTeam Insights! This is your guide to all things OneTeam—software release notes, new features, pro tips and tricks, upcoming events, Q&A, and much more. We hope you will take a look around and learn more about how OneTeam can save you time and money by streamlining and automating Business Development processes including Pipeline Management, Capture Management, and Proposal Management and Development.

Software Releases & New Features

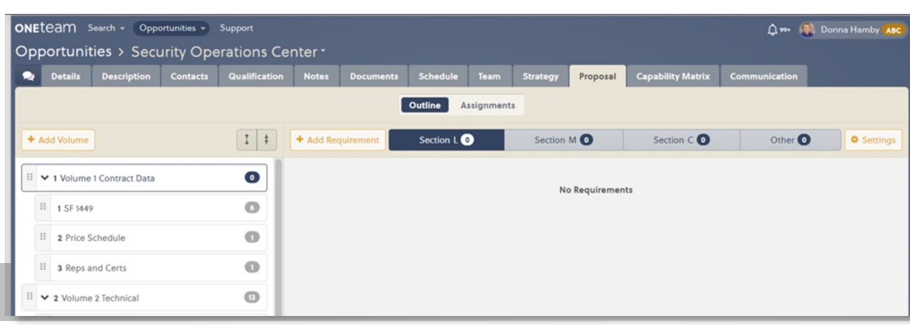
OneTeam users noticed a few new changes beginning March 1st and even more updates on March 31st. Our team has released updates and new features to give clients additional capabilities for capture and proposal functions, while improving user interfaces and the overall user experience.

Updated Feature

Compliance Matrix tab is now Proposal

If you have been using proposal functions in OneTeam, you will notice that the Compliance Matrix Tab that has been renamed Proposal. It has been reorganized to better reflect the proposal process. Select the Proposal Tab, and you will still see the Proposal Outline development tool on the left, and the RFP Compliance Matrix development panel on the right. The process of developing the Outline and mapping RFP requirements has not changed.

You will notice that the "Details" button has had a makeover and is now called "Assignments". Select the Assignments button and be ready to assign writers, volume leads, reviewers, and page limits. The Assignments page will still serve as the Proposal Manager's Dashboard, giving you access to the writers' progress and reviewers' ratings, as they become available.



Inside this issue

Qualification Matrix 2
Due Dates for Writer Packages 2
Upcoming Webinars............................ 2
Menu Buttons/Quick Navigation........... 3
Document Tags 3
Automated Emails................................ 3
Communication Templates 4
Q&A 4
Automated Writer Packages 5
Proposal Features 5

We all Need a Little Help!

- Does your team need training on implement new features? Email Donna Hamby
- Did you run into a problem working in OneTeam?

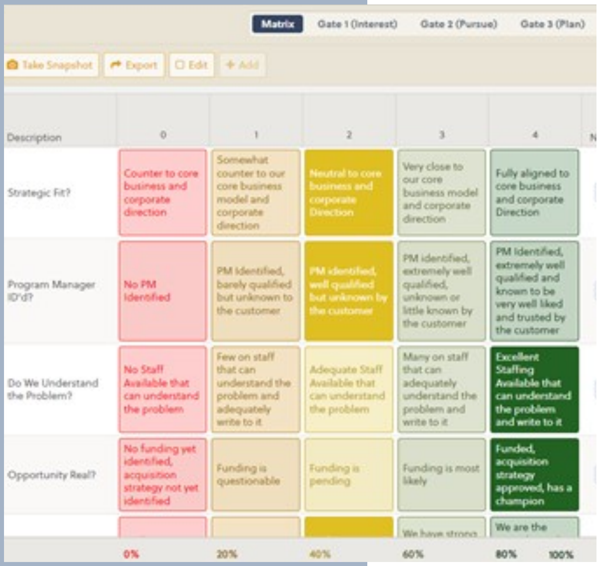
Support

- First try the **Support** button, search for your issue and see if there is a tutorial or answer to your issue.

Next try the **Support Chat** button. If chat does not find a solution, OneTeam will open and ticket and notify our service team.

- Are you a GovCon and need a demo to see if OneTeam is right for your company?

Request a Demo



Updated Feature

Qualification Matrix Scoring

Many of our clients have requested an update to the scoring scale on the Qualification Matrix – it is currently 1 to 5.

Our OneTeam developers implemented a new 0 to 4 scoring range, which will be the default for all new OneTeam clients.

If you are a current Company Administrator and you want to change your Qualification Matrix Scoring Range, contact us and we will update your settings.

Changing your settings WILL update any qualification scores that you have already completed - so expect to see scores and percentages change.

What can you Expect from OneTeam in Q2 2022?

- ***Automated Gate Review Templates***
- ***Analytics Module with Power BI embedded in OneTeam***
- ***A few surprise Features!***

Upcoming Webinars

Do you have questions about OneTeam? Try a free Webinar with all the right answers! Click to register!

Pipeline

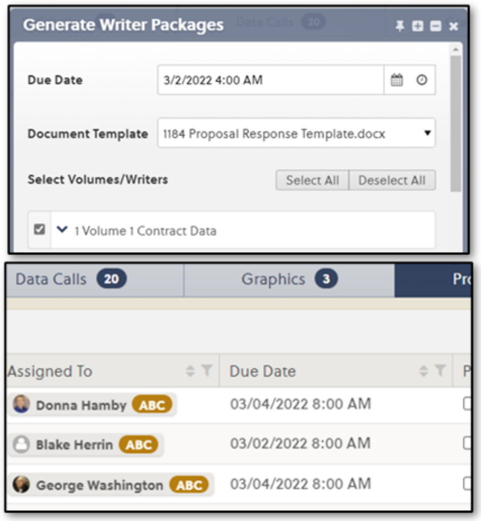
Capture

Proposal

New Feature

Due Dates for Writer Packages

You asked and we listened! You will now include a Due Date and Time field as options when generating writer packages in OneTeam. It is NOT a required field, but it is an option that is especially helpful for virtual teams.



The due date will be included in the email that writers receive about their assignment, and it is also in shown in the Proposal Document library, in the column 'Due Date'.

Proposal Managers can easily update a due date by changing the date and time in the Due Date Column in Proposal Documents. When a due date is changed, writers will automatically receive an email notifying them of the updated due date.

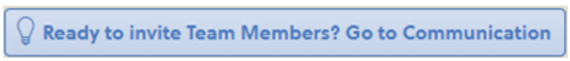
This feature will eliminate the need for emails on changes to document due dates and streamline the process for Proposal Managers.

Updated Feature

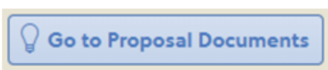
Menu Buttons & Quick Navigation Links

Our Menus have a new look! No big changes here – but you may notice the change in the Opportunities Menu. Select the pull-down arrow, then select Opportunities to go to your Pipeline or Opportunity View.

We added a quick navigation button to the Team tab to make it easier to invite Team Members.



We also added a quick navigation button to the Proposal tab to make it easier to generate Proposal Documents after writer assignments are made.



Updated Feature

Automated Emails

We updated the emails from OneTeam that go to writers and data call recipients. These emails are more consistent, provide the recipient with a clear message of the task, the requestor's name, the document title, due date, and a link to the document. Writers receive automated emails when they are assigned an initial writer package and when the due date is changed by the Proposal Manager. Data Call recipients receive automated emails when they are assigned a data call, and when a data call has been accepted or rejected by the requestor.

Automating the workflow for acceptance and rejection means there is one less thing for the Proposal Manager to think about during the busy proposal process.

The Data Calls process also provides the perfect opportunity to integrate company Contracts personnel into the BD process – allowing them to upload, send and manage NDAs and Teaming Agreements in OneTeam!

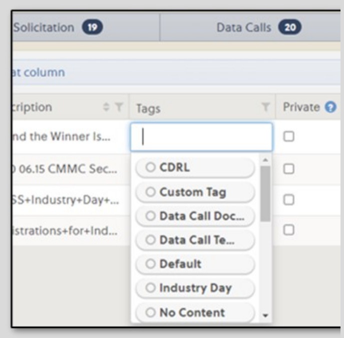
Updated Feature

Document Tags

OneTeam includes document tags in the libraries to assist with identifying document content. Now we have added document tag management in the Company Settings.

Company Administrators manage tags in this location:

Company Settings>Capture>Tags



Company Administrators can add, edit, and delete tags, and to see how many time the tags are used in their documents.

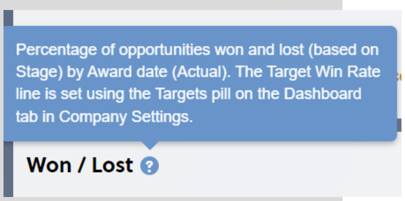
Your company's list of tags is available to use in document libraries - data call, proposal, etc. - in a pull-down list in alphabetical order, so they are super easy to use!

Q & A

Real questions from real clients with only minor edits for clarification.

Q: We recently updated the stages of our Win/Lost opportunity, but it seems our new update doesn't reflect the ratio calculation on our Dashboard. Would you please advise how the calculation works?

A: Beside the Won/Lost Graphic on the Dashboard, you see it is based on Stage and Award Date (Actual). Two opportunities in your Won/Lost list do not have Actual Award dates—they have Estimated Award dates—so they won't be used in the Won/Lost Dashboard graphic.
NOTE:
OneTeam developers included lots of Help Tips throughout the site. Hover on the symbol and you will see very helpful info!



New Templates

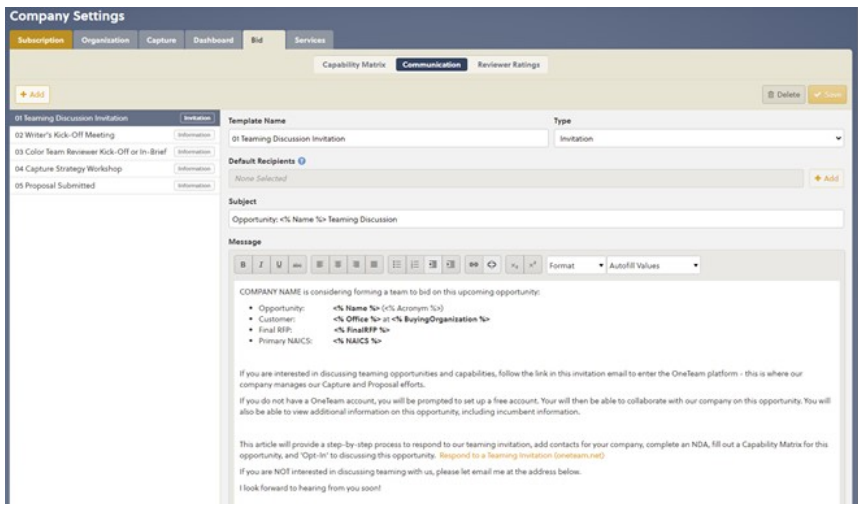
Communication Templates

We added several new Communication Templates to default templates. Company Admins edit or add templates here:

Company Settings > Bid > Communication

We updated the Demo Invitation Template to Teaming Discussion Invitation and added templates for Writer's Kick-Off, Color Team Review, Capture Strategy Workshop, and Proposal Submitted.

Access Communication templates under the Communication Tab, then select New Message, and choose template from the pull-down list. We plan to add more templates and Auto-Fill values in the future!



Send all questions to Donna Hamby and we will email you an answer—and maybe include it here for other users!

Proposal Managers, have you Tried OneTeam's Automated Writer Packages?
Getting Started is as Easy as 1 - 2 - 3!

ONEteam

Auto-Creates Writer Packages with Outline and Requirements Panels

- Auto-Generates Writer Packages (WP) in Microsoft Word
- Automatically Notifies Writers
- Tracks Writer Status
- Merges WPs into Review Draft
- Facilitates Collaborative Reviews
- Splits Draft into WPs with comments
- Repeats Writing/Review Process
- Generates Final Documents

Check out OneTeam Proposal Management and Development Features on our Website!

- Data Call Workflow
- Collaborative Color Teams
- Capture Data Integration
- Proposal Outline
- Team Management
- Proposal Schedule
- Proposal Manager Dashboard
- Notifications
- Secure Collaboration