

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

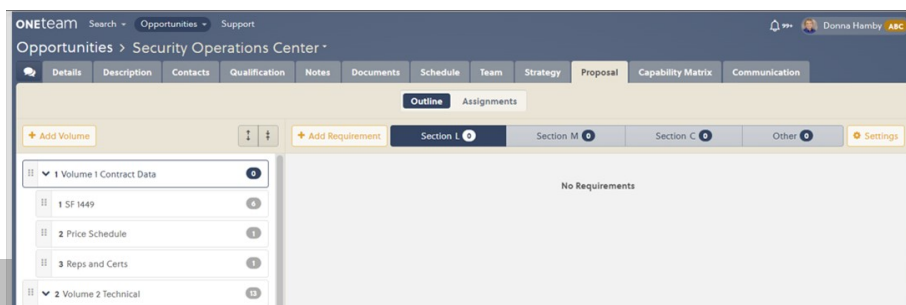
OneTeam users noticed a few new changes beginning March 1st and even more updates on March 31st. Our team has released updates and new features to give clients additional capabilities for capture and proposal functions, while improving user interfaces and the overall user experience.

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.



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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

	0	1	2	3	4
Description					
Strategic Fit?	Counter to core business and corporate direction	Somewhat counter to our core business model and corporate direction	Neutral to core business and corporate direction	Very close to our core business model and corporate direction	Fully aligned to core business and corporate direction
Program Manager ID/OT	No PM identified	PM identified, barely qualified but unknown to the customer	PM identified, well qualified, unknown or little known by the customer	PM identified, extremely well qualified, known to be very well liked and trusted by the customer	PM identified, extremely well qualified and known to be very well liked and trusted by the customer
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 and write to it	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
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
	0%	20%	40%	60%	80% 100%

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.

Upcoming Webinars

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

Pipeline



Capture



Proposal



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!

New Feature

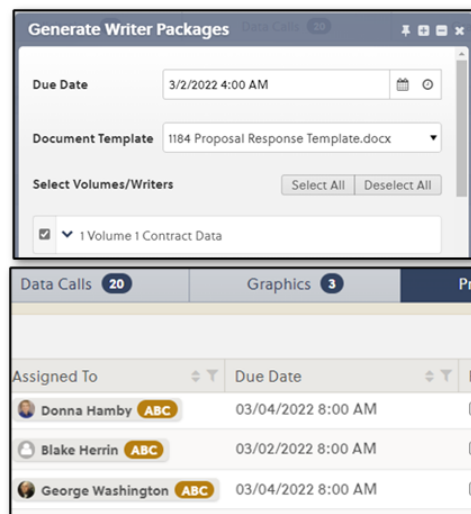
Due Dates for Writer Packages

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 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.



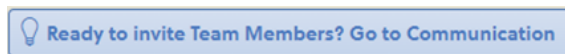
Updated Feature

Menu Buttons & Quick Navigation Links

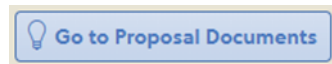


Our Menus have a new look! No big changes here – but you may notice the change in the Opportunities Menu. Select the pull-down arrow, then select Opportunities to go to your Pipeline or Opportunity View.

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!



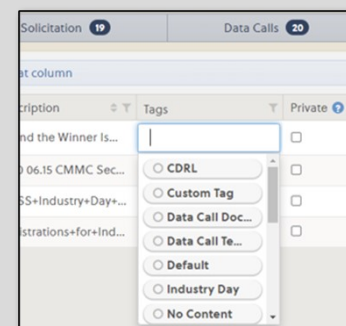
Updated Feature

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!

Percentage of opportunities won and lost (based on Stage) by Award date (Actual). The Target Win Rate line is set using the Targets pill on the Dashboard tab in Company Settings.

Won / Lost 

New Templates

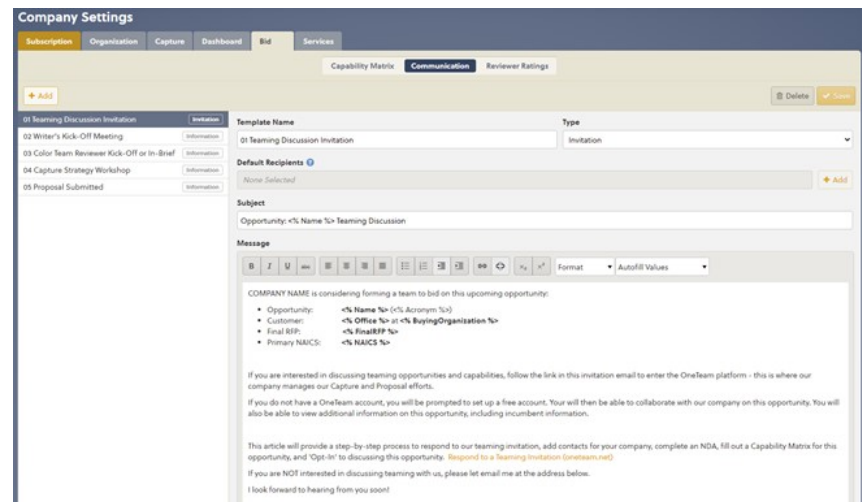
Communication Templates

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!



The screenshot shows the 'Company Settings' interface with the 'Communication' tab selected. On the left, a list of templates includes '01 Teaming Discussion Invitation', '02 Writer's Kick-Off Meeting', '03 Color Team Review Kick-Off or In-Brief', '04 Capture Strategy Workshop', and '05 Proposal Submitted'. The main area displays the '01 Teaming Discussion Invitation' template editor. It includes fields for 'Template Name' (set to '01 Teaming Discussion Invitation'), 'Type' (set to 'Invitation'), and 'Default Recipients' (set to 'None Selected'). The 'Subject' field is populated with 'Opportunity: <% Name %> Teaming Discussion'. The 'Message' field contains a rich text editor with a toolbar and a pre-formatted email body. The email body includes a greeting, a list of bullet points with placeholders for Opportunity, Customer, Final RFP, and Primary NAICS, and a closing statement. The email body text is as follows: 'COMPANY NAME is considering forming a team to bid on this upcoming opportunity: Opportunity: <% Name %> (<% Acronym %>)Customer: <% Office %> at <% BuyingOrganization %>Final RFP: <% FinalRFP %>Primary NAICS: <% NAICS %> If you are interested in discussing teaming opportunities and capabilities, follow the link in this invitation email to enter the OneTeam platform - this is where our company manages our Capture and Proposal efforts. If you do not have a OneTeam account, you will be prompted to set up a free account. You will then be able to collaborate with our company on this opportunity. You will also be able to view additional information on this opportunity, including incumbent information. This article will provide a step-by-step process to respond to our teaming invitation, add contacts for your company, complete an NDA, fill out a Capability Matrix for this opportunity, and 'Opt-In' to discussing this opportunity. [Respond to a Teaming Invitation \(oneteam.net\)](#). If you are NOT interested in discussing teaming with us, please let email me at the address below. I look forward to hearing from you soon!'

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



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](#)