### **Free Trial Reference and Training Guide**

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### Free Trial Reference and Training Guide

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#### Welcome to your OneTeam Free Trial!

Congratulations on starting your 30-day free trial of OneTeam – this is the first step in streamlining and automating your company's BD process! OneTeam fully integrates the entire Business Development Lifecycle including Pipeline Management, Capture Management, and Proposal Development. Are you ready to get started?

Our BD experts at OneTeam created this guide to lead you through your trial period and help you master the power of OneTeam. You do not need to complete every task shown here, but this guide provides a roadmap for a few high-level BD functions that OneTeam supports. This document is meant to lead you through your free trial – not to provide an exhaustive reference for all OneTeam features. If at any point during your trial you need more resources or support, please do not hesitate to reach out to us.

You have most likely had one or two demos, but now you are ready to see firsthand how to use OneTeam. If you want a quick refresher on OneTeam Navigation and Features – feel free to set up a meeting with a member of our Customer Satisfaction Team – <u>Free Trial Overview Meeting</u>. We want this to be a successful exercise for you and your team and are always happy to assist you!

Your Company's Trial Site has been loaded with 20 Demo opportunities. Feel free to practice on these opportunities or add an opportunity that is of interest to you! This guide is full of practice opportunities, but you do not have to complete them all in one day.

You will learn more in the free Training that OneTeam provides for your Team when you purchase a subscription – including Company Administrator Training, Capture and Pipeline Training, and Proposal Training. Additional training is always available as an add-on. Free Training is provided per the following schedule:

Essentials Plan	5 hours of personalized training
Pro Plan	10 hours of personalized training
Premium Plan	15 hours of personalized training

OneTeam is here to help you every step of the way. If you have questions, just reach out to OneTeam at <u>Free</u> <u>Trial Assistance</u>! We look forward to talking with you again soon!

Donna T. Hamby, OneTeam Product Manager

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#### Sample Exercises

Take a look through these sample exercises to perform in OneTeam. When you have completed one – check it off the list! Remember to check the support site to help with questions, talk with your team members if you are unsure of exercise, or <u>email</u> us if you need assistance before our Q&A session.

NOTE: If a task contains either Company Administrator, Proposal Manager, Capture Manager, Writer, or Reviewer at the end of the sentence in (), it indicates which role would typically perform that action.

DEFINITIONS	
Pipeline:	A listing of Opportunities that are evaluated and moved through a process to various stages until award (Select Opportunities Menu, then Opportunities in the drop-down list). Also called Opportunities List or Opportunities View. This is the home page when logging into the OneTeam application.
Opportunity:	One specific bid or contract that your company is tracking in the Pipeline.
Tab:	The structure of information in OneTeam is organized in tabs. All Opportunities have the same tabs – Detail, Description, Contacts, Qualification, Notes, Documents, Review, Schedule, Team, Strategy, Proposal, Capability Matrix, and Communication.
	In the example below, the Opportunity name is Security Operation Center. The Tabs listed above are shown and ONLY APPLY TO THIS OPPORTUNITY.
Sub-Tab:	A sub-section of a Tab. For example, the Proposal tab has an Outline sub-tab and an Assignments sub-tab. This example shows the Proposal tab selected, and the Outline sub-tab selected (dark blue).
ONEteam Search - Opportunitie	s v Analytics Support 🗘 🕫 - 🧌 Donna Hamby 🗚 C v

Орр	ortuni	ties > Sec	urity Op	perations C	Center									
	Details	Description	Contacts	Qualification	Notes					Strategy	Proposal	Capability Matrix		
	Outline Assignments													

Inside Opportunity:Select an Opportunity from the pipeline and complete tasks and functions for that specific opportunity. All 'lof a Proposal Managers tasks are performed 'Inside an Opportunity' and most Capture Manager tasks are also performed 'Inside an Opportunity'. General Pipeline assessment and management is accomplished in the Opportunity Pipeline (not inside an Opportunity).

Button: These are selections in many tabs within OneTeam, usually shown in Gold. For example +Add Volume, +Add Requirement, and Settings are buttons in this graphic.

oneteam	Search ~	Oppor	tunities 🗸	Analytics	Support											🗘 👐 🚷 Donna	Hamby (ABC) -
Opport	unities	> Seci	urity Op	perations (	Center												
🧐 Deta	ails Desc	ription	Contacts	Qualification	Notes	Documents	Review	Schedule	Team	Strategy	Proposal	Capability Matrix	Communication				
	Outline Assignments																
+ Add Vol	lume			I	‡ <b>+</b> /	Add Requirement		Sectio	n L 💿			Section M 🗿		Section C 🧿	Oth	ner 💿	• Settings

User: A person, identified by unique email address, who has access to OneTeam. Company Users require either a Standard or Limited User License. Subcontractors are given a free Limited User license by OneTeam.

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View: Term in OneTeam for data to be displayed in a Pipeline list. Over 60 data fields are available to be displayed for opportunties, and custom fields may also be added. A view is the arrangement of this data, including how the data is grouped (such as by Primary Contact), how the data is filtered (such as by Stage), and how the data is sorted (such as by ascending date).

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#### **1.0** Add an Opportunity to the Pipeline

Completed

- Go to the Opportunities drop-down menu and select Opportunities. 1 Select the +Add button. 2 ONELEAM Search - Opportunities - Analytics Support 🗘 ୨୨+ 🕘 Donna Hamby (ABC) -Opportunities > ABC Company -+ Add 🛓 import 🕹 earch Q O PropMgr BD Meeting Pipeline Capture Mgr RFP Window Top 10 2022 Hamby 2 🖽 Columns 🖩 View Days Modifi... ① \* T ID \* T Opportunity Name \* T Company Qualification \* T Revenue \* T Score \* T Stage \* T Final RFP \* T Due \* T Start . Y Primary Contact: Donna Hamby E 06/15/2022 E 0 68% 797116 4 Proposal 1184 Security Operations Center \$10,500,000 E 04/15/2022 9 1264 REDSTONE TEST AND ENGINEERING SERVICES \$9,500,000 4 Proposal E 03/11/2022 E 04/13/2022 E 0 83 1000 OASIS Pool 3 \$22,000,000 5 Submitted E 12/01/2022 E 02/28/2023 E 
   2
   93
   1241
   **A** NEXT GENERATION SERVICES MULTI AGENCY I...
   \$27,000,000
   2 Capture (E 10/01/2022 (E 10/27/2022 (E 1 1 Qualify E 07/18/2022 E 08/29/2022 4 Proposal E 12/15/2021 E 01/15/2022 E : 125 1256 Sub COMBAT AIR FORCES DISTRIBUTED MISSIO... 
   125
   1256
   Sub
   COMBAT AIX FORCES DISTRIBUTED MISSIO...

   131
   1264-1
   REDSTONE TEST AND ENGINEERING SERVICES SD...
   \$6,500,000
   135 1268 SPACE SERVICE ACQUISITION EXECUTIVE TECHNI... E 08/01/2021 1 Qualify E 09/01/2021 
   135
   1270
   TECHNICAL AND SCIENTIFIC SERVICES
   1 Qualify 135 1267 SECRET INTERNET PROTOCOL ROUTER NETWORK ... 77% 🧲 1 Qualify E 11/01/2021 E 11/01/2021 A 12/08/2020 135 1254 AEC FY19 P3005 DESIGN BUILD CONSTRUCT CHILD... 1 Qualify 135 E 10/01/2021 1269 SPECIAL WARFARE PROGRAM OFFICE SYSTEMS E... 1 Qualify 135 1257 COMMAND AND CONTROL SOFTWARE ENGINEER... 1 Qualify E 10/01/2021 135 1255 CLOUD HOSTED ENTERPRISE SERVICES FOR STAC... 1 Qualify E 10/01/2021 13 1262 NAVAL AVIATION WEAPONS SYSTEMS INTEGRATI... 1 Qualify (E) 09/01/2021 \$1,068,677,000 Count: 73
- **3** Add Opportunity Name and other information hover over the blue circle ? for more info about the various fields. Add dates for RFI, DRFP, RFP, Proposal Due, Contract Award and Contract Start.

+ Add Child + Cop	y Archive U	sers							🛩 Save Do
Opportunity Name * 🕢	ID 📀	Acronym 📀	Acquisition Status 📀	Stage 🕢		Qualification Sci	ore 📀	Opportunity Manager 🗿	i,
	1318			~ 0 Identify	~				
Division 😧	Pric	ority 😡	Contract Type 📀	Award Type	0	P-Win 😡	P-Award 🕤	Top 10 🚱	
	•	v		*	v	3	6		
Contract Value 📀	Company Revenue	. 0	Contract Vehicle 😡					Solicitation Number 🕢	
\$	\$	đ					~		
Factored Company Reve	nue 😡		Contract Role 😧		Prime	Company 📀		Source ID Name	
\$					•				
Probable Profit 📀			Primary Contact 📀		Estima	ated FTE 🚷		140 301	citation sources
		% \$0	Donna Hamby					+ Add	
B&P Cost 😡	ROI 😡		Facility Clearance 😡		Expec	ted Contract Lengt	th 😡	Competition Types Q	
\$		%			~		Years	None Selected	
			Contract Duration @					III Add / Remove	
Buying Organization 📀						Buying Office 📀		None Selected	
					•		v	Select as Opportunity	
Incumbent(s) 😨								Select an Opportunity	•
								Places of Performance	
Incumbent Contract Nur	mber 😡		Incum	ent Award Date		Incumbent Expire	e Date	City State Co	ountry Pct
			MM/D	D/YYYY	8	MM/DD/YYYY		No Place	es of Performance
NAICS O								+ Add	

**5** Go back to Opportunities List to see the opportunity has now been added to the pipeline.

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#### 2.0 Add Internal Contacts – Company Admin Only

**1** Go to the OneTeam drop-down menu under your name on the upper right.

#### Select Company Settings.

- **2** OneTeam automatically opens the Company Settings to the **Organization** tab, **Users** sub-tab. (Company Administrator)
- 3 Select +Add to add a new user. (Company Administrator)

scription Organizatio	on Capture Dashboard	Bid Services				
		User	Divisions			
dd 🏲 Export		Add		700×		
atus 🗙		Add User				
Name (1 = T	Email	Email *			¢ ▼ Status	\$ T
Status: Standard 🔟						
Abigail Adams	abigail.adams@oneteam.net	First Name *	Last Name *		Standard	
Alexander Hamilton	proposals@oneteam.net			y Manager	Standard	1
Donna Hamby	donna.hamby@oneteam.net	Permissions 📀		y Manager, Report N	Manager Standard	1
Eddie Crosbie	eddie.crosbie@tgi-us.com	Company Administrator			Standard	
George Washington	capture@oneteam.net	Company Profile Manage     Opportunity Manager	er	y Manager, Report N	Manager Standard	
Glenn Meyer	glenn.meyer@tgi-us.com	Opportunity Viewer		lager, Opportunity N	Nanager Standard	1
Jason Merkel	jason.merkel@tgi-us.com	Report Manager		r, Company Profile M	Aanager Standard	
John Adams	prime@oneteam.net			y Manager	Standard	
Melissa Gabor-Midy	melissa.gabor@oneteam.net			wer, Report Manage	er Standard	
Molly Pitcher	Molly.Pitcher@oneteam.net		× Cancel	Save	Standard	
Status: Inactive 💿						
Austin Boyd	austin.boyd@whitespaceinnovat	tions			Inactive	
Dista Lisada	latetas la contra e constances e et	Common Administration	Comment Des Cla Mana	O In . Maria D M	Annan Innahun	-

- Add user email, first name, last name and select Opportunity Manager permission.
  - Note: The blue ? displays permission descriptions. (Company Administrator)
- 5 Select Save. (Company Administrator)

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#### 3.0 **Customize Stages For Your Company – Company Admin Only** Completed Go to OneTeam drop-down menu under your name on upper 🗘 99+ 🛛 🧠 Donna Hamby 🔼 🗸 1 right. ABC Company Settings Company Profile Select Company Settings. (This can only be completed by a Account Settings 2 **OneTeam Company Administrator**) Admin ger 🕜 Sign out Select Capture Tab and then select the Stages sub-tab. (Company Administrator) 3 Select +Add button to add new stage. Provide Description (name of stage), Type, and select checkbox if this is an active phase for an 4 opportunity, such as pre-capture, capture, or proposal. Do not check this box for closed opportunities, won, lost phases. (Company Administrator) ONEteam Search - Opportunities - Analytics Support 🗘 ୨୨+ ( Donna Hamby 🔠 🗸 **Company Settings** Subscription Organization Capture Dashboard Bid Servi Stages Required Fields Custom Fields Revenue Contact Roles Buying Organization Contacts Qualification Matrix Qualification Checklist Documents Tags Review + Add 'D Reset Default Active Opportunity 0 Description O Type II 0 Identify ۲ 1 II 1 Qualify 2 Capture Opportunities In Capture V Û ۵ II 3 Pre-Proposal **Opportunities In Capture** Proposals In Work V II 4 Proposal ŵ II 5 Submitted Proposals Submitted Wor II Win ŵ II Loss Loss 1 II Bid Next Cycle ŵ II No-Bid Û 5 Select Save. (Company Administrator) To edit an existing Stage, click in the Description column to edit. (Company Administrator) 6 Select Save. (Company Administrator) 7

1

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#### 4.0 Create A Custom Pipeline View

Completed

Start on the home page, which is the Pipeline view. By default all demo opportunities will be shown. (Opportunity Managers)

Select the Columns button in the upperright of the Opportunities List. (Opportunity Managers)

A window will open with a listing of all 63 default columns available, and any custom columns that have be added by the Company Administrators.

3 If you are having difficulty seeing all of the columns, check the zoom on the browser window. Once the zoom is over 100%, the column names may be too large to fit within the pop-up window. Reduce the zoom to easily see all column headings. (Opportunity Managers)

I View: Pipeline I Columns ☑ Acquisition Status Division Owner C Acronym Owner Percen Division Code Active Tasks Draft RFP □ P-Award Award Type Estimated FTE C P-Win Expected Contract Length B&P Cost Places of Performance Buying Office Facility Clearance Primary Contact Buying Organization Factored Company Revenue Prime Buying Organization Contacts 🗹 Feed Prime Percent Company Revenue C Final RFP Priority 🗹 ID Competition Types Probable Profit Contract Award Import Conflicts Proposal Due Contract Duration Incumbent Award Date ☑ Qualification Score Contract End Incumbent Contract Number C RFI Due Contract Role C RFI Release Incumbent Expire Date Contract Start Incumbent(s) RFP Window Contract Type Late Tasks C ROI Contract Value Linked Opportunities Solicitation Number Missing Required Fields Solicitation Sources Contract Vehicle Days Since Created NAICS 🗹 Stage Davs Since Modified Next Milestone Team Contacts Copportunity Name Davs Until Next Milesto Team Members

Columns that are shown in the current view, will have a check mark in the box beside the name, as shown in Solicitation Number., Stage, and Top 10.

Columns that are filtered will show a filter icon, as shown **4** here with Stage.

Sorted columns will show a sort icon, as shown in Stage and Top 10. (Opportunity Managers)

If you want to uncheck a column that is sorted or filtered, first remove the sort and/or filter from those column headings. Then deselect the column heading in the Columns window.

Notice in this example that the Stage column has a filter

- **5** applied, but the column is not visible. The filter will still be applied to the resulting data in the Opportunity List. If you simply remove the column from the view, the sort and filter selections remain active.
- Solicitation Number
   Solicitation Sources
   Stage
   Team Contacts
   Team Members
   Top 10

T

.

- Solicitation Number
- Solicitation Sources
- Stage
- Team Contacts
- Team Members
- Top 10

Select or deselect the column checkboxes to add or remove columns from the new custom view you are creating. (Opportunity Managers)

www.oneteam.net



To rearrange columns, select a column heading to move, then drag and drop it to the desired position.

+ Add	1 Import		• Export Search		Q	Prop	Mgr Group by	nt Statu	us Opportunities by S	ragi	Weekly BD Meetin	g Top 10 List	All Fields	Final Pipeline Download	1	≡ G	olumns	TView:	PropMo
0 Drag	a column he	ader	and drop it here to grou	p by that	column														
Fe \$ T	ID	¢τ	Opportunity Name	II So	licitation Number	÷	Solicitation	÷T.	Acquisition Status	s	tage ③ ♦ ¥	Draft RFP	÷ T	Final RFP \$	Proposal Due	¢1	Contra	act Start	÷
2	1264		REDSTONE TEST AND	NGINEER	ING SERVICES		W91CRB21R00	10 I	Post-RFP	4	Proposal	E 01/13/2022		E 03/12/2022	E 04/14/202	2	E 09/	03/2022	
	1158		CYBERSECURITY SUPP	ORT SERV	ICES FOR NETCON	1	292401		Post-RFP	4	Proposal			A 08/01/2021	E 09/01/202		E 06/	01/2022	
	1264-1		REDSTONE TEST AND	NGINEER	ING SERVICES SD	/0			Post-RFP	4	Proposal			E 12/15/2021	E 01/15/2022		E 10/	01/2022	
	142906		SOFTWARE DEVELOP	IENT APP	LICATIONS SUPPO	RT SERVICES F.	DOLOPS16R00	028	Post-RFP	4	Proposal	A 09/01/2021		A 10/15/2021	A 12/30/202		E 06/	01/2023	
	1064		JSC ENGINEERING TEC	HNOLOG	Y AND SCIENCE CO	ONTRACT			Pre-RFP	3	Pre-Proposal	A 06/15/2023		E 09/01/2023	E 10/01/2023		E 09/	01/2024	
2	1249		SCADA SYSTEM MOD	RNIZATIO	N AND CE DASHB	DARD DESIGN	FA520520CU00	000	Post-RFP	4	Proposal	E 02/16/2024		E 03/01/2024	E 03/15/202		E 04/	01/2025	
	194777		Security Management	and Sup	port Services		RFQ1469265		Source Selection	3	Pre-Proposal			E 12/07/2020	A 01/13/2021		E 05/	01/2021	
	1154		CYBER OPERATIONS N	ETWORK	ENGINEERING SUI	PORT			Pre-RFP	3	Pre-Proposal			E 09/01/2021	E 10/31/2022		E 05/	01/2022	

Resize the columns widths as desired by selecting the right edge of a column heading to adjust column width. (Opportunity Managers)

7 Select filter and sort options to your preferences. (Opportunity Managers)

Select the View button and then select +Save View As button in the VIEW BOX.

**ONE**team<sup>®</sup>

- 8 Note the Save View button will update changes to an exiting view. The Save View As button creates a new custom view with all the selections you have made. (Opportunity Managers)
- **9** Give the newly created view a name, which is required, and a description, which is optional. (Opportunity Managers)

Select the Share with Company checkbox to share this new
custom View with your company's OneTeam users.
(Opportunity Managers)

Check the Favorite box to create a shortcut for this view at the top of your pipeline.

11 This does not designate this View as a Favorite for everyone on your team. Each person selects and manages their own favorites. (Opportunity Managers)

	E Columns	
+ Save View As	✓ Save View	2 Reset View
II 🛨 Pipeline		1
▼ Stage 1 🕈 ▼ Typ	e ≑⊤ RFP	Window 🗢 👅

Save view /	As				
Weekly BD Meeting	)				
Description					
List of Opportuniti	es for W	eekly BD	Meetin	g with Rob	1.
Share with Com	pany	🗹 Fa	avorite		
			Cance	el 🗸 Sav	/e
	_				

3

4

5

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#### 5.0 Complete Qualification Matrix

Completed

**1** Select an Opportunity Name from the Pipeline or Opportunities list to open it. (Capture Manager)

#### 2 Select Qualification Tab. (Capture Manager)

9 Details Description Contac	ts Qualification Notes	Documents Review S	chedule Team Strategy	Proposal Capability Matri	r Communication						
		Matrix Gate 1 (Interes	t) Gate 2 (Pursue) Gate 3 (	Plan) Test Pursuit Decision	Capture Checklist						
Select Template: ABC Prime Bid	Take Snapshot 🖉 🕐 Export 🕅 🕻	D Edit + Add								'D Res	et 🗸
Criteria	0	1	2	3	4	Notes	Rating	Weight	Score	Final RFP	Gate Review
oes the opportunity fit with Strategic lan?	Have not assessed	No Strategic Plan Swim Lanes Match	1-2 Strategic Plan Swim Lanes Match	3-4 Strategic Plan Swim Lanes Match	5+ Strategic Plan Swim Lanes Match	B	3	4	12		
trategic 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		4	7	28		
re there negative impacts on current ommitments, Financial Goals, and/or Iperational Ability?	Significant Negative Impacts Critical Condition	Moderate Negative Impacts Slow Recovery	Recoverable Negative Impacts	Mitigatable Negative Impacts	No Negative Impacts		4	4	16		16
rogram Manager ID'd?	No PM 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	10	40		40
/hat is the impact on Expansion Goals?	None	Low	Moderate	High	Very High		4	4	16	12	
o 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		4	8	32		32
/hat is the contribution to Future srowth Potential?	None	Low	Moderate	High	Very High	H	4	4	16		16
pportunity Real?	No funding yet identified, acquisition strategy not yet	Funding is questionable	Funding is pending	Funding is most likely	Funded, acquisition strategy		4	10	40		40
	0%	1%	26%	51%	76% 100%				416 / 616	412 / 616	262 /

Select the Select Template button on the upper left side of the matrix to determine which Qualification Matrix Template to use for this opportunity.

I Select Template: ABC Prime Bid

Change Qualification Template

Click to choose a different

∓⊕∎×

The 'Change Qualification Template' will open. If a Qualification Score has been given to an opportunity, the company's default template will be displayed.

If a Qualification Score has been given, changing the Qualification Matrix will lose all score on the matrix being removed.

Select the Qualification Matrix template to use. Then select the  $\checkmark$  Change button to remove the current matrix and replace it with the one selected.



If minor changes need to be made to the Qualification Matrix FOR THIS OPPORTUNITY MATRIX ONLY – select the Edit button, which is located under the Matrix sub-tab and next to the Export button. (Capture Manager)

Opp	Opportunities > REDSTONE TEST AND ENGINEERING SERVICES -													
	Details	Description	Contacts	Qualification	Notes	Documents	Review	Sch						
	Select Temp	late: ABC Prime B	id 🖸 Take	Snapshot 🛃 🏕 E	xport 🗆	Edit + Add	(Interest)	Gate						

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			Matrix Gate 1 (Intere	est) Gate 2 (Pursue) G	ate a (rian) lest Pursuit De	cision Capture Checklist							
	Select Template: ABC Prime Bid	Take Snapshot Area Expor	t 🗹 Edit 🕇 Add								1	Reset	
	Criteria	0	1	2	3	4	Notes	Rating	Weight	Score	Final RFP	Gate 1 Review	
н	Does the opportunity fit with Strategic Plan?	Have not assessed	No Strategic Plan Swim Lanes Match	1-2 Strategic Plan Swim Lanes Match	3-4 Strategic Plan Swim Lanes Match	5+ Strategic Plan Swim Lanes Match	B	3	4	12	12	12	C
	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		4	7	28	28	28	(
	Are there negative impacts on current commitments, Financial Goals, and/or Operational Ability?	Significant Negative Impacts Critical Condition	Moderate Negative Impacts Slow Recovery	Recoverable Negative Impacts	Mitigatable Negative Impacts	No Negative Impacts		4	4	16	16	16	(
	Program Manager ID'd?	No PM 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	10	40	40	40	0
н	What is the impact on Expansion Goals?	None	Low	Moderate	High	Very High		4	4	16	12	12	Ī
	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		4	8	32	32	32	C
	What is the contribution to Future Growth Potential?	None	Low	Moderate	High	Very High		4	4	16	16	16	ſ
	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		4	10	40	40	40	(
		0%	1%	26%	51%	76% 100%				416 / 616 68%	412 / 616 67%	262 / 616 43%	

- 8 Make the desired changes to the Criteria, Responses under the score numbers, and the weight for each line entry.
- **9** When finished, select  $\checkmark$  Save.

unchecked.

- **10** Select the Edit button to exit Edit mode. Edits will be in effect for this matrix, but do not change the master template in Company Settings.
- **11** Make selections in qualification matrix and notice how the score updates. (Capture Manager)

Select Take Snapshot to create a snapshot of that date's qualification
 score. The 'Add' window will open for you to add a title of the snapshot and any notes.

Take Snapshot	
Title *	
Notes	
	🗙 Cancel 🗸 Save

Select  $\checkmark$  Save to save the snapshot.

**13** This saves the score for each row and the overall score and percentage. OneTeam automatically assigns the date to the Title of the Snapshot, which can be seen if you hover over the title of any snapshot. (Capture Manager)

#### Free Trial Reference and Training Guide

#### 6.0 Add Notes to Opportunity

Completed

- 1 Select an Opportunity from the Pipeline or Opportunities list to open it. (Capture Manager)
- 2 Select Notes tab. (Capture Manager)
- 3 Select +Add button on upper left to add New Note. (Capture Manager)

ONEteam Opportunities - Contacts	• Searc	h - Analytics Support	🗘 99+ 🛛 🌒 Donna Hamby 🔒
Opportunities > REDSTONE	TEST A	AND ENGINEERING SERVICES -	
Secription Contacts	Qualific	ation Notes Documents Review Schedule Team Strategy Proposal Capability Matrix Communication	
+ Add			🗎 Delete 🏷 Reset 🗸 Sa
Email to Customer		Title	Occurred On Privat
Hey Donna,	2/07/2024	Email to Customer	02/07/2024
Check on Venue Need to call and check if venue is still available.	1/25/2024	Associations	
Customer phone call Talked with Ray, the CO about the recompete. C	10/26/2023	John Adama Context 📋 Eddie Crusbie Context 🖹 REDSTONE TEST AND ENGINEERING SERVICES 💿 🔒 🚺 AIR COMBAT COMMAND 💿 🔒	+ A
Lorem Ipsum Advanced	3/21/2023	Format • B I U E E E Ø Ø E E E @ @ © © E	
Customer Phone Call		Hey Donna,	
Contacted CO and COR	1/18/2022	James Andes had to drop off the demo early but had a question about pricing. He is the Director of National Security in Knoxville. He has been more involved with	th discussions about Salesforce.
Weekly Briefing		Would the pricing below apply to people out of Knoxville?	
Last Update (from last status update entry): Marc	1/04/2022	Anita	
Teaming Discussion			
Teaming Discussion with Obsidian.	11/09/2021	Anita Mills, Ed.D., MA, CRA	
		University of Tennessee Space Institute - Huntsville	
		Director of Enablement	
		210 Wynn Drive	
		Huntsville, AL 35805	
		Mobile: 859-512-6765	
		Office: 931-393-7277	

Add Note Title – use specific terms and keywords such as Customer Meeting, Customer Phone Call,
 Teaming Discussion, Weekly Brief, etc. OneTeam automatically records the person creating the note and the date. (Capture Manager)

Add any needed Associations in the Associations field. Select the **+Add** button on the right side of the field to open the 'Add Associations' window.

This window includes Contacts, Opportunities, and Organizations from your Company's OneTeam database.

These entries are shown by the labels Con, Opp, and Org with a gray box to denote where each of those options start.

5 All of the options are not easily viewable due to there being hundreds of possibilities, so begin typing the name you wish to add, and OneTeam autosearches for potential matches to fill in. .

This associates or links this note to whatever associations you select. You may link the note to multiple contacts, multiple companies, and multiple opportunities.



6 Add Note narrative in the content box and format as desired. (Capture Manager)

#### 7 Select ✓ Save. (Capture Manager)

The note is now also viewable in the Contacts drop-down menu in any Organizations or Contacts that it was associated to. The screenshot here shows the note associated to John Adams, and also shows all associations.

Actions -	🔊 Reset 🗸 Save	Opportunities Notes			
First Name *	Last Name *	+ Add		Delete      Reset	🗸 Save
John	Adams	Email to Customer	Title	Occurred On	Private
Phone (Cell)		Hey Donna, 2/07/2	Email to Customer	02/07/2024	
Organizations () ABC Company (an E-MAIL: prime@o	neteam.net		Associations John Adams Control © Eddie Crosble Cares © REDSTONE TEST AND ENGINEERING SERVICES Con @ AIR COMMAND CONTROL OF CONTRO	l Security in Knoxville. He	+ Add



All Notes can be viewed and are searchable in the Activity Feed for each Opportunity.

9

You can also add a Note from the Activity Feed by selecting the + button and then selecting +New Note.



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7.0	Select Teaming Partners Completed
1	Select Opportunity name from Pipeline to open it. (Capture Manager)
2	Select <b>Team</b> tab. (Capture Manager)
3	Select the Search button on upper left to initiate Company Search. (Capture Manager)
4	If the name of the company is known, type the company name in the Search box. Select Search button. (capture Manager)
5	TRIDENT GROUP, INC, THE       TGI       ID       IN       Not Selected       Mitsion Readiness Data Management ()       SOTTWARE DEVELOPMENT APPLICATL. ()         Select correct company name from list or review each one to find correct company.         A company will have a listing for every location with a Cage Code. (Capture Manager)
6	Select +Add to Team button (upper right) to add company to the Opportunity Team tab. (Capture Manager)
7	Select <back (upper="" <b="" [opportunity="" button="" left)="" name]="" opportunity="" return="" to="">Team tab. (Capture Manager)</back>
8	If the company name is not know, you can perform an advanced search using the Search menu at the upper left of the OneTeam application. This uses filters to select a specific type of team partner – select specific location, NAICS, Socio-Economic certification, customers, and much more. (Capture Manager)
9	Review companies and select the +Add to Team button as detailed above. Return to Opportunity. (Capture Manager)
10	Assign team members a percent work share (not required). (Capture Manager)
11	Change Member Status to 'Selected' to build your team. (Capture Manager)
12	Select <b>✓ Save.</b> (Capture Manager)

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#### 8.0 Create a Capability Matrix

Completed

- **1** Select Opportunity name from Pipeline to open it. (Capture or Proposal Manager)
- 2 Select Capability Matrix tab. (Capture or Proposal Manager)
- **3** Use the +Add Requirement button to add Requirement rows to the matrix. (Capture or Proposal Manager)

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🗆 BTI	O	PWS 3.5	.1 Objective	s: The basic	service objective	includes th	e following; Re	ceive and a	nnotate all r					
ECG	•	PWS 3.5	.2 Submit W	ork Orders	(WO) to Base O&	M contracto	or as required.							
INNOVA STRAT	EGIES, 🔍	PWS 3.5	.3 Provide d	aily, weekly,	and monthly rep	orts as need	ded.							
POWERNET	O	PWS 3.5	.4 Provide c	ourteous, fri	endly customer :	service to all	DPW custome	rs.						
RADIANCE TEC RTI	HNOLO O	PWS 3.6	Scope: Se	ervices inclu	des: Establishing	and trackin	g all requests f	or repairs a	nd maintena					

- 4 Add Reference Number, usually the PWS or SOW number to the Reference field. (Capture or Proposal Manager)
- **5** A window opens with a text box for the Requirement. Copy and paste from an RFP or type requirement directly into box. (Capture or Proposal Manager)



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#### 9.0 Create a SWOT Analysis

Completed

- **1** Select Opportunity name from Pipeline to open it. (Capture or Proposal Manager)
- 2 Select Strategy tab. (Capture or Proposal Manager)
- **3** Complete SWOT on self by adding team members in the appropriate field. (Capture or Proposal Manager)
- **4** Use the +Add buttons under each section to add content. Add team Strengths, Weaknesses, Opportunities, and Threats. In the Rating drop-down menu, select an overall rating the government would likely assign to your team. (Capture or Proposal Manager)

Opportunitie	es > Se	curity Op	perations C	enter -														
🥰 Details D	Description	Contacts	Qualification	Notes	Documents	Review	Schedule	Team	Strategy	Propo	osal	Capability Matrix	Communicatio	n				
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		Opportunitie	s 😧							Thre	eats 📀							
		Regreen th	e workforce								Will our r	normal PP evaluator	s still evaluate us, t	he are all on SSB			1	

5 Select ✓ Save. (Capture or Proposal Manager)

Use the **9** Search button (above your company's name on the left side) to search for competitors to
 evaluate. Follow instructions under 'Select Teaming Partners' for using the Search function. (Capture or Proposal Manager)

- Select the +Add to Competition button to add the selected company to the SWOT sub-tab. (Capture or Proposal Manager)
- 8 Select <Back to [opportunity name] button (upper left) to return to Opportunity Strategy tab. (Capture or Proposal Manager)
- **9** Select the Competitor's name and then add known or likely Team Members, and complete the SWOT analysis on the competitor. (Capture or Proposal Manager)

Yrimary NAICS     NAICS Code		+ Add to Team + Add to Competition
SBA Certifications	Website C http://www.dnigov.com/	
Socio-Economic Status Company Profile	Address © 1617 INDUSTRIAL RD, ANADARKO, OK, UNITED STATES 73005	B
> Core Competencies Company Profile	Locations ANADARKO, OK, United States	

#### **10.0** Create a Data Call for an Individual Opportunity

- **1** Select an Opportunity name from Pipeline to open it. (Capture or Proposal Manager)
- 2 Select Documents tab, Data Calls sub-tab. (Capture or Proposal Manager)

Select your own Word, PowerPoint, Excel, or pdf document to upload. Either use the Upload button and navigate to the document on the computer, or select a file and drag to the document area. (Capture or Proposal Manager)

4 DTo notify a contact to complete the Data Call, select the Distribute button and select the company name. Select Distribute. Note, the Data Call will go to the person(s) under the Contacts tab who have been selected to receive communications. (Capture or Proposal Manager)

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**5** Select **Save**. (Capture or Proposal Manager)

Completed

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#### 11.0 **Create Data Call for all Opportunities – Company Administrator** Completed Go to menu under your name on upper right. (Company Administrator) 1 2 Select Company Settings. (Company Administrator) 3 Select Capture tab, and then select Documents sub-tab. (Company Administrator) Select the **Defaults** sub-tab. (Company Administrator) 4 ONETeam Search - Opportunities - Analytics Support 🗘 99+ 🛛 🕘 Donna Hamby (ABC) ~ **Company Settings** bscription Organization Capture Dashboard Bid Services Stages Required Fields Custom Fields Revenue Contact Roles Buying Organization Contacts Qualification Matrix Qualification Checklist Documents Tags Review ♣ Upload ▲ Download Zip Defaults Writer Package Templates 🖱 Reset 🛛 🗸 S Drag a column header and drop it here to group by that column File Name Description Data call for Win themes.doc Data call for Win themes 07/07/2022 2:12 PM 🕘 Donna Hamby 8 06/12/2019 1:48 PM George Washington Default Document.docx Default Document Û Formatted Proposal Template.docx Formatted Proposal Template 02/08/2022 12:00 PM 🛛 🕲 Donna Hamby 龠 Select Word, PowerPoint, Excel, or pdf document to upload. Either use the Upload button and navigate to the document on the computer, or select a file and drag to the document area. (Company 5 Administrator)

- **6** Provide a Description for the document. (Company Administrator)
- 7 Select ✓ Save. (Company Administrator)
- 8 Select the Opportunities menu, and Select Opportunities. (Capture or Proposal Manager)
- **9** Select an Opportunity name from Pipeline to open it. (Capture or Proposal Manager)
- 10 Select Documents tab, Data Calls sub-tab. (Capture or Proposal Manager)
- **11** Select the **Copy Defaults** button and the 'Copy Defaults' window will open. Select desired Data Call from list by checking the box to the left of the File Name. Select **Copy**. (Capture or Proposal Manager)
- **12** To notify a contact to complete the Data Call, select the **Distribute** button to open the 'Distribute to Team Members' window.

Check the company name(s) to receive the data call. Companies that are grayed out have already received this data call, and those in black font have not received the data call. By default all eligible companies will be checked, but you may un-select companies.

Select **Distribute**. Note, the Data Call will go to the person(s) under the Contracts (Capture or Proposal Manager)

#### Free Trial Reference and Training Guide

Senu a Commun		completed
Select an Opportunity	y name from Pipeline to open it. (Capture or Proposal M	anager)
	,	
Select Communicatio	n tab. (Capture or Proposal Manager)	
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Opportunity: SECURITY OPERA Invitation         @ George Washingt (1) Sent 8/11/2020         Select one of the pre-         Notice that the Recip         receive communication         ONEtGam Search · Opportunities         Opportunities > Security         • Details Description Contact         Opportunities > Security         • Details Description Contact         • Opportunities > Security         • Details Description Contact         • Dena Hamby (1) • New Message -         • Deportunity: Security Operat Invitation         • Donna Hamby (1) • Dena Hamby (2) • Sent 2/10/2022         • Denas Hamby (1) • Draft 11/16/2021         • Donna Hamby (1) • Draft 11/16/2021         • Donna Hamby (1) • Security OPERA Invitation         • Donna Hamby (1) • Security OPERA Invitation         • Donna Hamby (2) • Sent 8/11/2020         • Oportunit	Thank you for participating as a Writer for the Security Operations Center proposal. Opportunity: Security Operations Center SOC Solicitation #: RFISOC	nager) tab, who are authorized * Communication * Cancel * Save Draft * Ser * Cancel * Save Draft * Ser * Cancel * Save Draft * * *

Add any addition data to the template, remove recipients if desired, and select ⊠Send. (Capture or Proposal Manager)

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#### 13.0 Assign Tasks and Create Schedule

Completed

- **1** Select an Opportunity name from Pipeline to open it. (Capture or Proposal Manager)
- 2 Select Schedule tab. (Capture or Proposal Manager)

If the following dates are populated on the Details Tab, they will automatically show up on the Schedule: RFI Release, RFI Due, Draft RFP, Industry Day, Final RFP, Proposal Due, Contract Award, and Contract Start. (Capture or Proposal Manager)

RFI Release 😢	RFI Due 🔮	)		Draft RFP 🚷		Industry Day 🌘	9	inal RFP 🔻 😮	Pro	oposal Due 🄻 😮	Contract Award 🕑	Contract Start * 🖲
Expected 11/25/2021	Expected	12/01/2021		Expected 01/13/2022	<b>#</b>	01/09/2025		Expected 03/12/2022	þ	spected 04/14/2022	Expected 08/01/2022	Expected 09/03/20
Actual MM/DD/YYY	Actual	MM/DD/YYY		Actual MM/DD/YY				Actual MM/DD/YYY	A	tual MM/DD/YYY	Actual MM/DD/YYY	Actual MM/DD
	Submitted	MM/DD/VVV	m									

- **4** If these items are not shown in the Schedule tab, select the Details tab and input either E (Expected Date) or A (Actual Date) in the date fields.
- Select the Schedule tab, and notice that the dates from the Details tab are now shown. (Capture or Proposal Manager)
- Add more events, milestones, or tasks by selecting the +Add Task button.You can also add assignments to the Schedule. (Capture or Proposal Manager)
- 7 Add custom events such as Red Team, Kick-Off Meeting, Questions due to Government, etc. (Capture or Proposal Manager)

End 02/16/2022 02/18/2023 02/23/202 03/11/2022 03/29/2022 10:00 AM 8 04/01/2022 11:00 AM Red Team Pens Do 05/26/202 07/22/2022 2:00 PM Red Team Re Red Team Edits 01/19/2023 R Stra ٠ R Act New Tas

Select **✓** Save for each new task. (Capture or Proposal Manager)

#### Free Trial Reference and Training Guide

#### 14.0 Shred an RFP

#### READ BEFORE UPLOADING DOCUMENT TO SHRED

For the Free Trial, Start small with the shredding process. DO NOT UPLOAD a 150 page RFP consisting of sections A-M. To learn the process, upload a short (25 pages or less) PWS or SOW, Section L and Section M.

If your test RFP is all in one document, considering removing pages from the pdf to remove Section A, B, D, E, F, and J at the very least. These sections are not meant to be mapped to proposal outline headings and users will spend too much time with the inaccurate and odd numberings (contract and FAR clause numbers, and 'X' or checkmarks)

- **1** Select an Opportunity name from Pipeline to open it. (Proposal Manager)
- 2 Select Proposal tab. (Proposal Manager)
- **3** Select the **+Project** button to create a new project for the opportunity. (Proposal Manager)
- **4** Give the Project a Title (required), description, and Due Date.(Proposal Manager)
- 5 Select **√**Save button to save Project.
- 6 Select +Shred buttonto initiate Shred Process and select pdf document to shred and parse terms.



nsisting of section

Completed

### **ONE**team<sup>®</sup>

added.

9

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Shred Solicitation PDF Configure Parse Terms Select Solicitation PDF Parse Terms 🔞 Will e 🗇 Continue to add terms, until all desired parse terms have been Should 1 🗹 Shall 1 Must 1 + Add

#### Select Next or 'Select Solicitation PDF'.

The dialog box changes the selection function from 'Configure Parse Terms' to 'Select Solicitation PDF', as shown by the dark blue highlight box.

If pdf files currently exist in the Solicitation Documents library for the opportunity, those files will be shown in a list in the middle of the window.

10 If no pdf files are in the Solicitation Documents library, the Proposal Manager must upload one or more pdf files to shred.

Select the Upload Solicitation PDF button to navigate to the desired pdf file for this opportunity.

The pdf will then be automatically added to the Opportunity Documents library, Solicitation section [Documents tab, Solicitation sub-tab].

The selected document will also appear here in the Shred Solicitaion PDF window.

In this example, two pdfs are already loaded into the Solicitation Document library.

- Select the desired file to shred. 11
- When a pdf file is selected to be shredded, it will be highlighted in blue and the **Shred** button is activated.

Note: Previously, the Shred button displayed 'Select document' and was not active. As soon as a pdf file is selected from the list in the middle of the window, the **Shred** button appears.

c	onfigure Parse	Terms	Select So	dicitation PD	F
🏝 Uplo	ad Solicitation P	DF			
W91CRB	-18-R-0009_RD	SS.PDF			
Beta Tes	t RFP File.pdf				



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14 If the RFP is in multiple files, you must shred documents one at a time. Simply repeat the process using the +Shred button, navigate to or upload the desired document(s) and Shred each document.

When all documents are uploaded and shredded, begin the review process to continue to the Proposal Outline and Requirements mapping.

**15** The explanation and documentation of this process for the Free Trial is abbreviated, and will not go into all the details of correcting erroneous numbering. Further More training is provided to users after subscription purchase. The Free Trial application contains the entire Shred process.

#### Free Trial Reference and Training Guide

#### 15.0 Review the RFP Shred

Completed

Note: CTRL and Shift are keyboard shortcuts that allow users to select multiple cells of parsed content. CTRL selects multiple cells that are anywhere in the parsed content, not necessarily next to each other. Shift selects a group of cells that are contiguous (i.e. next to each other) by clicking one cell, and then holding Shift and clicking the last cell. All the cells in between are then selected.

- **1** Select the Opportunity name from the pipeline of opportunities.
- 2 Select the **Proposal** tab and the correct Project (if more than one project for the opportunity currently exists).
- **3** Select a shredded document to review.

The Document will now open as shown in the example below, with sub-tabs for Shred, Outline, Assignments, and Writer Packages.

The document in the screenshot has many sections, your trial document should only have Sections C, L, and M, as described at the beginning of Lesson 14.0.

<b>Details</b> Description	Contacts Qualificat	tion Notes Documents	Review Schedule Team	Strategy Propose	Capability Matri	ix Communication		
Projects > Final RFP			Shred Outline	Assignments Write	Packages			
Final REP 30C RDS	pdf •	D C < > Search te	Parsed Content	Save	Push +	View of pdf		
Sections FAR Bookmarks Issue:	Outline to Preview	include, but not limited to, Burea	au of Labor Statistics, Department of	Labor, Department of		administering of active, and appeting derivery of meanals. Significant deficiency means a shortcoming in the upder the meanally affects the activity of officials of the Department of Definition to upday on information activities of the Activities in sended for management propose.		
Section B		ate, DCAA, or DCMA. This DOES N ubmission instructions.	NOT excuse the Offeror from followi	ig the proposal		(b) General The Contractor shall adold shand manness as acceptable purcharing speen. Takine its manness as acceptable purcharing spaces, we defined in this datase, may reach in disapprend of the updam by the Contracting Official with withhold or of partness.		
Section C		L.3.c.[Factor 5]#9 Offeror and sub	bcontractor proposals will be evaluat	ed based on the cost/price		(d) Spatem criteria. The Contractor's post-heaving options shall = (0) Heavier and equilation description including policies, providence, and particles (policies that comply with)		
E Contan D		asonableness and alism criteria contained in FAR 15 4	404-1 The manner and degree of the	criteria used will be		The Federal Registrator Registrator (RAR) and the Online Indexis Registrator Registrator Supplement (DRAIS). (2) Ensure Take at applicable particles under and substrations content all findems classes, including terms and conditions and any other classes results in any compare to the suppresente of the partners intertunit.		
Section D	Section D determined by the contracting officer based on co			actors. A proposal is	(1) Wentern an expensation plan that autoblahas class I has of automaty and respondshity.			
Section E	🖋 🖻 🛛 P	resumed to represent the offeror's	s best effort to respond to the solicit	ation. Any significant		(a) Ensure of purchase others are based on authorized requisitions and include a complete and assurate holes of perchase transactions to support under selected, price peed, and decoment the subcontext/purchase order Nex which are subject to Generiment rever.		
Section F		inconsistency, if unexplained, raises a fundamental issue of the offeror's understanding of the				(b) Braidrick and manteen adequate documentation to provide a complete and accurate instany of purchase presentations to support senders selected and procespeed;		
El Castian C		Wot/CPR-10-P-0000			00. Apply a sensionent main-arr-bup poly ( that is in the basic internet of the Government, (5) Size competitive scoring to the maximum extent practicalite, and ensure determined recoperated contractors are			
La section G						property excluded framcontract assess; (b) Evolutes price, quarty: definery: technical capabilities, and Enancial capabilities of competing sendors to ensure		
Section H	1 🖻 💆	I Page 139 of 151				ter ent reacteurs proces. (1) Regime management level justification and adequate cost or price analysis, so applicable, for any sole or single		
Section I	1	L.3.c.[Factor 5]#10 Offeror shall p	provide proposed cost and/or fee as i	ion B.	(20) Perform timely and adequate station price analysis and technical evolution for each subtertractor and supplier progress or quate to ensure for and manyoldie subsection) prices,			
ID Castion I		L.3.c.[Factor 5]#11 Each offeror's c	cost/price proposal shall contain suf	icient quantitative and narr	ative	(1) Desument registrations in accordance with FAR ISA06-3,		
La Section 3	documentation necessary to adequately support and explain the reasonableness and realism of the proposed cost/price proposed in proposal Section 8. Offeror proposals shall conform to the Section K							
Section K					A D's			
	Z 🖻 🧧	enerally accepted format for cost p	proposals. More specifically, each off	eror's cost proposal shall	AKS			
ID Section M		e broken out by cost element as sp	pecified in Table 15-2, II Cost Elemen	s. To help ensure this		WINCOS IS 8 0000 Page 10 of 10		
Section L     Section L				AR's	W123118-1-000			
		tachment to this solicitation. Instru	nuctions for completing LOE Spread	theet vis are contained in		(2) Seek, take, and document economically Seecible purchase discounts, including cash discounts, trade discounts,		

Review Section L to see if any requirements were erroneously split into 2 requirements.

**5** This may include a requirement that spans the pdf page break or requirements that contain another Section or reference number.



Select Merge from the **Context Menu** and the rows will be merged into a single requirement.

L3.c.[Sub-factor la]a.#1 Describe its plan to provide Logistics support for Arms, Ammunition, and Explosives (AA&E). The plan must clearly demonstrate the offeror's understanding of AA&E Support and should provide details as to how the requirements presented in PWS Section								
L.4.1.1.#1 will be met	and/or exceeded							
L.b.#1 A Describe i	Merge		laintenance Support to include facilities, range					
and	Split							
laboratories. The plan	Mark as	Þ	strate the offeror's understanding of					
PWS Sections 4.1.2 and	Numbering	Þ	d/or exceeded.					
L.c.#1 Describe its p	Outline	•	ties Planning Support. The plan must clearly					
demonstrate the offer	Copy Content		of Facilities Planning Support and should					
and/or exceeded.	+/- Bookmark		s presented in 1 ws Section 4.1.7 will be met					

L 2 c [Sub\_factor ta]#2 The Offerer shalls

7

Many times, the RFP provides a lot of information and directives within a single paragraph. In that case, it would be advantageous to split a single cell requirement into smaller pieces, especially when the Proposal Manager anticipates multiple writers will be addressing those proposal headings.

L.3.c.[Sub-factor lb]b.#1 Describe its workforce recruitment and retention plan. This plan should include hiring and retention practices to ensure the offeror's corporation/team possesses, or can readily obtain, experience and expertise to accomplish the range of tasks described in PWS Section 2.3.1. Describe the offeror's plan to achieve the goal of recapturing 85% of the incumbent workforce during the transition period of this contract. Address how the offeror will ensure the continuation of services during personnel absences due to leave or termination from employment such that the impact to the Government is minimal. Address how the offeror will notify and continuously provide status updates to the Government regarding imminent vacancies; and how personnel turnover will be minimized. The offeror shall describe the compensation plan to be used for obtaining and retaining a quality workforce. Provide organization chart and narrative plan that leads to the success of the contract, streamlining middle management to minimize cost.

	To split a cell in the parsed content panel, select the cell to be split.	L3.c.[Sub-factor Ib]a,#1 Provide an approach that addresses the <u>Continuous</u> <u>Process</u> <u>Improvement</u> aspects of Section 4.2.5 of the PWS. Discuss strategy for identifying potential areas to improve efficiencies. Provide examples of corporate experience with Continuous Process Improvement efforts.
8	Right click to see the <b>Context</b> Menu. Select Split.	L3.c.[Sub-factor Ib]b.#1 Describe its workforce recruitment and retention plan. This plan should include hiring and retention practices to ensure the offeror's corporation/team possesses, or can readily obtain, experience and expertis. Merge range of tasks described in PWS Section 2.31. Describe the offeror Section 2.31. Describe the offeror Split Fits contract. Address how the offeror will ensure the continuat Mark as g personnel absences due to leave or to the Government is minimal. provide status updates to the Government regarding immine Outine W personnel turnover will be tion plan to be used for obtaining and hard ress of the contract, stree Add Section Add Section Add Section Add Section Add Section Section 2.5. Factor Ib]c,#1 Provi H- Bookmark H- Bookmark
		"Key") located in the Quality Management section of PWS Section 2.3.1. Provide
9	The selected requirement will then be displayed as individual words and is visibly more expanded than before. Place the mouse cursor between the words where the	#1 Describe its workforce recruitment and retention plan. This plan should include hiring and retention practices to ensure the offeror's corporation/team possesses, or can readily obtain, experience and expertise to accomplish the range of tasks described in PWS Section 2.3.1.   <b>Describe</b> the offeror's plan to achieve the goal of recapturing 85% of the incumbent workforce during the transition period of this contract.

Select the  $\checkmark$  button to save split changes.

**10** The resulting split of a single row will appear as shown in the screenshot below. Note: OneTeam keeps a unique number for each cell of parsed content When this requirement was split into 4 separate cells, the unique numbering at the end of the RFP number, are #1, #2, #3, #4.

L.3.c.[Sub-factor lb]b.#1 Describe its workforce recruitment and retention plan. This plan should include hiring and retention practices to ensure the offeror's corporation/team possesses, or can readily obtain, experience and expertise to accomplish the range of tasks described in PWS Section 2.3.1.

L.3.c.[Sub-factor lb]b.#2 Describe the offeror's plan to achieve the goal of recapturing 85% of the incumbent workforce during the transition period of this contract.

L.3.c.[Sub-factor lb]b.#3 Address how the offeror will ensure the continuation of services during personnel absences due to leave or

termination from employment such that the impact to the Government is minimal.

L3.c.[Sub-factor Ib]b.#4 Address how the offeror will notify and continuously provide status updates to the Government regarding imminent vacancies; and how personnel turnover will be minimized. The offeror shall describe the compensation plan to be used for obtaining and retaining a quality workforce. Provide organization chart and narrative plan that leads to the success of the contract, streamlining middle management to minimize cost.

g on control modules

### Designate Parsed Content Rows as Requirements

Right click in a row to bring up the **Context Menu.** 

Select Mark As, then select either Requirement or Ignore

11 Requirement –designates the cell as a requirement to be addressed in the proposal, turns the cell shading to yellow, and will include this requirement when Pushing requirements to the Outline Workspace.

2.#1 Business Relations							
actor shall successfully integrate and coordinate all activity needed to successful							
e requirements of this PWS and	contract effort.	Th	e Contractor shall r	nanage the			
, completeness, and quality of	Copy Content		as well as problem	n identifica			
ition. The Contractor shall prov-	ion of issues, corre	, corrective actio					
proposal submittals. The Cont	Split		establish a history	of reason			
arative behavior, effectively mai	Merge		award timely subcontracts				
satisfaction, as well as maintair	Numbering	Þ	s professional and ethical				
tractor personnel.	Outline	Þ					
3.#1 Contract Administration ar	Mark as	F	None				
actor shall provide one (1) prim- present during normal duty ho	Add Section		Requirement	shall be id oversee			
or the overall management of t	+/- Bookmark		Ignore	actor's prii			
ontact and shall have the author	ity to act or mak	ec	ecisions on all mat	ters on bel			

**Ignore** – which is used for informational only data in the RFP and turns the cell gray when selected. Cells marked as Ignore will not be copied to the **Outline Workspace** to be mapped.

#### Validate Requirements

After Requirements rows have been distinguished from ignore rows, the Proposal Manager must validate that every cell marked as requirement is indeed a requirement to be pushed to the **Outline** 

**12** workspace, mapped to an Outline Heading, and written to by writer so that it is addressed in the RFP response.

To assist with the validation process, each Parsed Content cell has a validation checkbox as shown in the screenshots to the right.

Select the **checkbox** after validating the row IS A REQUIREMENT to be mapped to a Proposal Heading.

C.1.1.2.#1 GENERAL REQUIRE The Contractor shall perform all In accordance with (IAW) all app other applicable regulations and type of testing, the Contractor sl transportation, management, ar support to all Directorates and E

C.1.1.2.1.#1 Non-Personal Ser The Government will neither sup Contractor performs the require tasks to, or prepare work schedu responsibility of the Contractor t

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#### 16.0 Create a Proposal Outline

Completed

- **1** Select an Opportunity name from Pipeline to open it. (Proposal Manager)
- 2 Select **Proposal** tab, select the appropriate Project, and then select the **Shred** sub-tab. (Proposal Manager)
- Select the shredded document and navigate to Section L or open the Section L shredded document if it is separate from the rest of the shredded documents.
- 4 Select the parsed content rows in the middle panel, which contain the description of the outine for the proposal volumes. Use Ctrl or Shift buttons on keyboard to multi-select rows.

Select the **Outline Preview** in the left navigation panel of the **Shred Workspace**.

Select the + button between the Outline Preview heading and the outline heading that are displayed.

**5** This will initially be blank, until Outline Headings are selected in the parsed content cells. Then a tree view will be displayed.

By default, OneTeam will auto-select the best words to use as Outline Headings, by analyzing the sentence structure and capitalization for all cells that are selected.

The screenshot shows 'Volume I – Factor 1: Technical and Management' highlighted.

OneTeam automatically selects all words up until 'and' for headings.

By selecting the add or edit selection, the user will be able to add the words 'and Management' to the heading.

6

In the example screenshot, all of the words in this cell are designated as Outline Headings.



Projects > Final RFP							
← Final RFP SOC RDSS.pdf							
Sections FAR Bookmarks Issues Outline Preview							
+							
Summary Section							
Narrative discussion							
✓ VOLUME 1- FACTOR 1: TECHNICAL and MANAGEMENT							
Sub-factor la -Logistics Environmental and Safety a							

7

9

Continue selecting Outline Heading terms and then use the Outline Preview in the left navigation panel to set the correct levels for each heading.

After editing or adding any words to the Outline Heading selection, select the Checkbox to confirm the outline heading.

#3 VOLUME 1- FACTOR 1: TECHNICAL and MANAGEMENT

This an example of only a few words that were auto-selected in L.g.a#1 – Continuous Process Improvement.

 Continue to mark terms for the Outline Headings, until all outline for all volumes of the proposal are completed.

Lg.a.#1 Provide an approach that addresses the <u>Continuous</u> Process <u>Improvement</u> aspects of Section 4.2.5 of the PWS. Discuss strategy for identifying potential areas to improve efficiencies. Provide examples of corporate experience with Continuous Process Improvement efforts.

The Outline Preview also allows users to alter heading levels using the < and > buttons, which shift the heading to the left to move it up a level or to the right to make the heading subordinate to the one preceding it.

OneTeam will automatically set each Volume level heading as a Heading 1, and headings below that will be Heading 2 or lower.

~	VOLUME 2: FACTOR 2 -PAST PERFORMANCE
	Section 1 - Contract Descriptions
	Section 2 - Performance
	Section 3 - Subcontracts
	Past Performance Questionne
~	VOLUME 3 - FACTOR 3: EXPERIENCE
	V Logistics Support competency areas

Push Headings from Shred Workspace to Outline Workspace

Select **✓**Save to save the splits, merges, numbering **10** corrections, and requirements marking.

This is useful if the review process needs to be paused and completed at a later time.

If Outline Heading identification is complete, select the **Push** button.

This will save and push content to the **Outline Workspace**.

11 The Push button allows users to select the Outline, Requirements, or both Outline and Requirements, to be pushed to the Outline Workspace, where the entire Outline can be reviewed and edited.



Q < >	✓ Save Push
	Outline Requirements Outline and Requirements

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After Outline Headings have been marked from the RFP text and pushed from the **Shred Workspace** to the **Outline Workspace**, it is time to review and validate the entire proposal outline.

**12** Take the time to validate every line of the Outline to ensure that the Outline is correct and compliant BEFORE any writing begins, thus reducing reworks that cost valuable time.

Headings may be moved by selecting a heading and dragging it to the desired location.

This is also a good time to determine if additional headings are needed that were not found in the

#### 13 RFP.

This process is covered in the next exercise - Section 17.0.

2	De	tail	5	De	scrip	tion	C	onta	acts	Qu
oje	cts	> F	ina	I RFF	•					
· A	dd ۱	/olu	me	]				1	+	0
•	, Ó	רי זי	VOL and	UME MAN	1- FA		25	<b>*</b>		
	0	<i>?</i> 1	Sun	nmar	y Sec	tion	1			
	0	? 2	Nar	rativ	e disc	ussio	n 3			
II 3 Introduction to Volume										
<ul> <li>A Sub-factor la -Logistics,</li> <li>Environmental and Safety, and Information Management Support</li> </ul>										
		~	d	<b>4.1</b> A E	rms, xplos	Amm ives (	uniti AA&I	on, a E) 7	nd	
			4.1	.1 Ap	proa	ch 💿				
			4.1	.2 RI	sks 🕤					
		Ó	2 4.	2 Ma	inten	ance	Supp	oort (	29	
II 🔗 4.3 Facilities Planning Support 🧿										
		Ó	2 4.	4 Env Suj	vironr pport	menta 8	lanc	l Saf	ety	
II 🔗 4.5 Systems Programming and									and	

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#### 17.0 Create Manual Proposal Headings

Completed

Review the Outline Headings to determine if additional headings are needed. For the Technical and Management sections, additional headings not found in the RFP may include items such as

- Understanding
- Approach
- Risks

1

- PWS Staffing Plan
- Efficiencies, Strengths, and Innovations
- Experience Examples or Proof Points
- Summary

In the Outline example to the right, the blue shaded headings were added in the **Shred Workspace**.

2 The orange shaded headings were manually added in the **Outline Workspace**.



To add a same level heading after an existing heading, hover over the heading, which will turn gray, and select the Add Sibling button.

**3** If there are multiple headings at the same level and Add Sibling is selected, the new heading will be added to the end of that level of headings. It will not be added just below the headed selected.

To add a lower-level heading (sub-heading) under any heading, hover in the Heading Name field and select the Add Child icon/button.

When manually adding a heading to the Outline in the **Outline Workspace**, by either using the **Add Sibling or Add Child**, a new line with an entry

5 field will be created.

4

Type the name of the heading, in the appropriate case, and save by selecting the gold check mark.

 1.1.1 Understanding and Knowledge 8
 1.1.2 Approach 🧿
 1.1.3 Risk Identification and Mitigation   Add Sibling

 1.1.2 Approach 🥑	£	<b>2</b> 8	1
 1.1.3 Risk Identification and Mitigation		Ad	d Child

1.1.7	Staffing Approach
	× •

### **ONE**team<sup>®</sup>

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#### **18.0** Add Required Terms to Requirement

Completed

Required Terms may be added to any manual or automatic requirement which was pushed from the parsed content in the **Shred Workspace**. Add Required Terms BEFORE mapping requirements to headings to streamline the mapping and validation process.

1	To add Required Terms that need to be included in the go to the Requirements panel of the <b>Outline Workspa</b> the individual requirements.	All 62 L 23 M 2 C 62 Other C C 5 Search requirement ID and content. Mapped Inmapped Deprecated C Mapped Immapped Deprecated C Mote 1 MAPPED Add our completed Team table here. Mote 2 MAPPED Add table to show technical improvements and goals for this contract. Required Terms Technical mprovements goals Graphic-1 Add the Company Org Chart in this section	
2	Select the requirement that the Required Term will be Select the Edit button to open the Requirement Windo	added to. w.	
3	Highlight the desired term in the Description field and select the <b>+ Add Required Term</b> button. The OneTeam Word Add-in will notify the assigned proposal Writer to include this term in the appropriate outline section – see <u>Contribute to a</u> <u>Proposal through a Writer Package</u> .	B I Щ + Add Reque Qualification this contract Experience w GR Processon III ▼ 5 PWS a III 1 A	abc       Image: Second s
4	When creating or editing a Requirement, the Required Terms that have been set will be displayed in the Requirements box, at the bottom, as shown in the screenshot to the right.	Create Requirement	Section L M C Other



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This is the requirement after saving. The Required Terms are still at the bottom but appear in quote marks and gray boxes as

in

screenshot to the right.

the

	Shred Outline Assignments Writer Packages	
<b>†</b>	Compliance Matrix	
		+
		Note Add ou Note Add ta
	Note 2 Add table to show technical improvements and goals for this contract. Required Terms	Requi "techi
ON- IND AWARD	"technical" "improvements" "goals"	Grap Add th

Select the Save button to add another requirement to the selected heading.

6 Save before using the + Add Requirement button for another requirement.

Repeat these steps until all requirements are mapped to their respective headings in the outline.

#### **Best Practice**

Mapping requirements to the Outline is essential for getting to the first draft. It is also essential to ensure that every requirement in the RFP is thoroughly addressed.

- It is not possible to copy a requirement and then change it to get 2 separate requirements. There is only one requirement allowed per ID number.
- Break down requirements into multiple sections if needed using the 'SPLIT' command from the Context Menu in the Shred Workspace.
- Map a requirement to multiple Outline Headings when it is needed a single requirement can provide needed content for multiple Writers and sections.
- Use the Required Terms to help Writers know which terminology is preferred for their inputs and to ensure all requirements are thoroughly addressed.

7

5

shown

#### **19.0** Map RFP Requirements

Completed

- **1** Select an Opportunity name from Pipeline to open it. (Proposal Manager)
- 2 Select **Proposal** tab, Select a Project, then select the **Outline** sub-tab.

The Requirements from the parsed content were pushed to the **Outline Workspace** with the Outline Headings previously. Now when **Outline Workspace** is selected, all cells that were designated as Requirements and validated by the Proposal Manager with a checkbox, will appear in the Requirements

panel on the right.

The screenshot here shows the Outline Panel on the left and the

Requirements Panel on the right.

3

The center panel is the location to drag requirements from the right panel to visually see that it is mapped to a specific heading.



The words 'No Requirements' will be displayed in the center panel when no requirements have been mapped to a selected heading.

The requirement cell will be displayed in the center Requirements Mapping panel when it is mapped to a selected heading.

In this example, notice that Heading 1.1.1 Approach has a dark border around it, indicating that heading is selected or highlighted.

Note that the center Requirements Mapping 4 panel does change based on which heading is selected. It may show no requirements mapped to heading 1.1.1 Approach, but may then show requirements 2 mapped to heading 1.1 Arms, Ammunition, and Explosives.

dd Volume	Compliance Matrix	All 22 L 12 M S C O Other					
I VOLUME 1- FACTOR 1: TECHNICAL and MANAGEMENT	No Requirements	Search requirement ID and content      Mapped ① Deprecated ①					
Safety, and Information Management Support	<b>Requirements Mapping Panel</b>	L.1.[5] MAPPED					
II v 1.1 Arms, Ammunition, and Explosives (AA&E).		In accordance with FAR (9200-2, the small business Administration (SAA) we determine the eligibility of the participants for award of the contract. Eligibility will be determined by the SBA as of the time of submission of ionitial effect which include arise. Eliability is based on Satting 9(2) presented as a set of the state of the stateo					
II 1.11 Approach 💿		criteria. An 8(a) participant must represent that it is a small business in accordance with the size standard corresponding to the NAICS code assigned to the contract.					
11.2 Key Aspects, Challenges, Uncertainties, and Risks		L.3.c.[3] MAPPED					
II 1.1.3 Required Personnel Mix/Hours		VOLUME 1- FACTOR 1: TECHNICAL and MANAGEMENT					
II 1.2 Maintenance Support		L.3.c.[6]					
II 13 Excilition Planning Support		Management Support					

5

6

Here is an overview of the elements and info that is contained in the Requirements panel of the **Outline Workspace**.

At the top of the panel are the filters which all users to select which 'Sections' of requirements are displayed below. If a filter is dark blue, it is selected.

In the example the 'All' filter is selected so All Requirements from Sections L, M, C, and Other are displayed in the listed below it.

The L, M, C, and Other filters can only be displayed one at a time, unless 'All' is selected to display them all.

Filters for displaying     requirements	riter Packages	
Section Name	All 22 L 7 M 3 C O Other O	
<ul> <li>Number of requirements in that section</li> </ul>	Search requirement ID and content     Requirement ID and content	nent word searcl
Manually add requirement	Mapped () Unmapped () Deprecated ()	
• Mappedicon	L1.15 MAPPED In accordance with FAR 19.805-2, the Small Business Administration (SBA) will determine the eligibility of the participants for award of the contract. Eligibility will be determined by the SBA as of the time of submission of initial offers which include price. Eligibility is based on Section 8(a) program criteria. An 8(a) participant must represent that it is a small business in accordance with the size standard corresponding to the NAICS code assigned to the contract.	ted Filter – toggle
<ul> <li>No mapped icon indicates</li> <li>'Unmapped'</li> </ul>	L.3.C.[3] MAPPED VOLUME 1- FACTOR 1: TECHNICAL and MANAGEMENT	

There is also a Search bar to search for specific words.

There is a + button manually add requirements, such as instructions to Writers.

There are filters to Display either Mapped, Unmapped, or Deprecated (obsolete) requirements that also shows the number of each. These filters may be selected in any combination of 1, 2, or 3 all filters.

In the **Outline Workspace**, users can select a proposal heading, then select a requirement from the Requirements panel, and drag it to the center mapping panel. This will immediately map that requirement to the selected Proposal Outline Heading.

Continue this process until all requirements are mapped to the correct headings.



 A requirement can be mapped to headings by selecting one heading at a time, and dragging the requirement to mapping panel.



 Multiple requirements can be mapped to a single heading by using the CTRL button to multi-select requirements, then drag them all together to the mapping panel.



• You cannot multi-select headings to add the same requirement to multiple headings.

After a requirements is 7 mapped, the 'Mapped' icon appears in the requirement.

#### & C.[2] MAPPED

Vision Statement Department of Defense premier Test Center, providing safe, timely, and cost effective test services in support of the Warfighter.

N 🗎

In the Requirements panel on the right, select a

8 requirement and hover over the link icon to see the shredded document name that provided the requirement.

Every Outline Heading that was created in the **Shred Workspace** will display a link icon as shown in the example here.

**9** Hover over this link to see the name of the shredded document where it was marked before being pushed to the **Outline Workspace**.



Vis Exported from: Final RFP SOC RDSS.pdf of Defense premier Test ( and cost effective test services in support of the Warfigh

 5.3 Quality Management 11
5.4 Training 12

The Outline Headings also display a number at the end of the heading indicating the number ofrequirements that are currently mapped to that heading. In the example above, the Quality Management heading has 11 requirements mapped to it and Training has 12 requirements mapped.

To view the list of requirements for a specific heading, select the Outline Heading. In the center Mapping Panel, all requirements will be shown in alphabetic order of numbering schema. There is a scroll bar for the Mapping Panel to scroll through all 12 requirements for the *5.4 Training* Outline Heading.



To see which heading(s) that requirement is to mapped, make sure the Outline Heading are fully expanded in the left panel by selecting the Expand button.

**12** Then select the requirement in the right Requirement Panel. The heading that the requirement is mapped to will appear in bold and underlined.



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Completed

#### 20.0 Add Manual Requirements

Ocassionally, a Proposal Manager may wish to add a manual requirement, that is one that is not verbatium from the RFP.

This might be a note or instruction to a writer, such as to add a specific graphic or additional information that will assist in developing the proposal narrative for a specific section.

This might also be an overview of the customer, their mission, or important facts to remember that are not strictly requirements designated in the RFP document during the shred process.

1	Select an Opportunity name from Pipeline to open it. (Prop	osal Manager)
2	Select <b>Proposal</b> tab, Select a Project, then select the <b>Outline</b>	e sub-tab.
3	Select the + button in the right Requirements panel. This is next to the search bar under the All, L, M, C, and Other filter buttons.	All 840 L 136 M S + Search requirement ID and conter Add Requirement IMAPPEN 27 Unmappe
4	The 'Create Requirement' window will open. This window contains several fields and options for the requirement – ID, Section, Description box, and Required Terms. In the example here, all fields are blank upon adding the requirement and the cursor is shown in the ID field.	Create Requirement

5

6



Note-1, Note A, and Graphic 1 would all be good IDs for a manual requirement. Avoid G-1, as that might be confused with Section G of the RFP.

Select the Section as Other.

		Sec	tion								
Conten B X	Saved Info Graphic-1 Last Used Note-1 Section C.1.1[2] Section C.1.1[3]	L	м	с	Other	×	 eə	Ç	X2	ײ	
Require	Section C.1.2[2]	info				_					

The example to the right shows 2 Notes, which have been mapped to a proposal outline heading, and 1 Graphic requirement, which has not been mapped to a proposal outline heading.



7 Continue adding manual requirements as desired.

Manually added requirements will not have a link icon since they are not created in the Shred Workspace by marking parsed requirements.

All 841 M 58 L 136 C 644 Other 3 + Search requirement ID and content.. Mapped 2 Unmapped 1 Deprecated 0 1 Note 1 MAPPED Add our completed Team table here. Note 2 MAPPED Add table to show technical improvements and goals for this contract. Required Terms "technical" "improvements" "goals" Graphic-1 Add the Company Org Chart in this section

#### 21.0 Delete Requirements

**1** To delete a requirement mapping to a specific Outline Heading, select the appropriate Outline Heading in the left panel.

2 Scroll through the list of requirements that are currently mapped by looking in the center Mapping Panel.

Hover over the upper right corner of the requirement that you wish to delete from the outline. Select the trash icon to remove that requirement from the heading.



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#### 22.0 Create Proposal Assignments

Completed

- **1** Select an Opportunity name from Pipeline to open it. (Proposal Manager)
- 2 Select **Proposal** tab, select the Project, and select the Assignments sub-tab. (Proposal Manager)

		Jecu	inty Ope	acion											
2	Details	Descripti	Contac	Qualificati.	Notes	Documen	Review	Schedu	Team	Strate	Prop	osal	Capability Mat.	. Commur	icati
roject	ts > Fina	I RFP				Shred	Outline	Assignment	s Write	er Packages					
													Reset Ratings	D Reset	<ul> <li>Save</li> </ul>
ID	н	eading		Page Limit	Writer	<li>Case 1 Control Con</li>	t Modified	Progress	Book Bos	5	<b>(</b> )	eviewers		Rating	9 8
1	v	OLUME 1- FACTOR	1: TECHNIC					0 / 25	Abigail /	Adams ABC		George Wa	shington (ABC)		
1	S	ummary Section			Donna Hamby 🔼	BC		0/1	Abiga	il Adams ABC					
2	N	arrative discussion			Eddie Crosbie	BC		0/3	Abiga	il Adams 🔼					
3	In	troduction to Volur	ne		Donna Hamby 🚺	BC			Abiga	il Adams 🔼					
4	S	ub-factor la -Logisti	ics, Environ					0/4	Abiga	il Adams 🔼					
4.1	A	rms, Ammunition, a	nd Explosiv	3	Abigail Adams 🚺	BC		0/7	Abiga	il Adams ABC					
4.2	м	laintenance Suppor	t	3	Alexander Hamilto	on ABC		0 / 29	Abiga	il Adams ABC					
4.3	Fa	acilities Planning Su	ipport	3	Glenn Meyer AB	3		0/9	Abiga	il Adams ABC					
4.4	E	nvironmental and S	afety Support	3	Alexander Hamilto	on ABC		0/8	Abiga	il Adams (ABC)					
4.5	S	ystems Programmin	ng and Admi	3	Molly Pitcher AB	3		0 / 18	Abiga	il Adams 🔼					
4.6	0	perations Support	for Comput	3	Eddie Crosbie	BC		0 / 18	Abiga	il Adams 🔼					

3 Notice the Proposal Outline with Heading numbers in the left most columns. (Proposal Manager)

If desired, add page limits to each heading. This is a guide for Writers, it does not actually prevent **4** Writers from adding more pages than they are assigned.

These are for reference only and do not roll up to the Volume level page limit. (Proposal Manager)

Assign Writers in the Writer column from a drop-down list of Contacts on this Opportunity.

- 5 Only one Writer may be assigned to a Proposal Heading. (Proposal Manager)
- 6 If additional names are needed, add them in the Contacts tab, then they will be available to select here to assign as Writers. (Proposal Manager)
- 7 If desired, add a Book Boss to each Volume on the Volume Name line (Volume level). (Proposal Manager)
- 8 Add Reviewers in the Reviewers column. Reviewers must be in the Opportunity Contacts tab. (Proposal Manager)

The Last Modified, Progress, and Rating columns will populate as Writers write and check offg requirements in Writer Packages, and as Reviewers provide ratings to a review document. (Proposal Manager)

**10** Select **✓** Save. (Proposal Manager)

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23.0	Create Proposal Writer Packages	Completed 🗌
1	After completing Assignments, select the Writer Pa	ackages sub-tab. (Proposal Manager)
2	Select the Actions button and Generate Format Template and Volume Masters. (Proposal Manager)	Projects > Final RFP            ① Upload Actions -             ⑦ Generate Format Template and Volume Masters             ⑦ Generate Format Template             ⑦ Generate Writer Packages             ⑦ Merge Writer Packages             ⑧ Split Merged Packages             ⑧ Generate Final Volume             ⑧ Split Merged Packages             ⑧ Generate Final Volume             ♥ Volume: 1
3	The 'Generate Format Template' window will open list.	. Select the Proposal Template from the drop-down
4	This generates a Format Template based on you previously uploaded in the OneTeam Company Set Now you may customize this template for this spec and other requirements per the RFP instructions a	or company's style guide template that you have tings. cific bid. For example, check the margins, font sizes and then update this template.
5	After generating the Format Template, it is locate Template'.	d in a separate section and called 'Volume Format line Assignments Writer Packages © Reset © Surve Or Assigned To OT Due Date OT Tags T Pri (Volume Format Template)
6	If the format template needs to be updat throughout the proposal process. Open the templa and update as needed The 'Reapply Format Templa from the Actions button menu to flow those form changes to the Volume Masters.	Opportunities > Security Operations Center -         Image: Contacts Operations Oper

#### Free Trial Reference and Training Guide

Next Generate Volume Masters using the

6 Generate Format Template and Volume Masters in the Actions button menu.

Select which Volumes to Generate the Volume Template for.

You may use the 'Select All' and 'Deselect All'

7 filters to quickly select all at once, or use the checkboxes beside the Volume numbers/names to select or deselect individual volumes.

Select the **Generate** button.

#### 8

This creates formatted Volume template(s).

Select the Actions button and Generate Writer Packages. (Proposal Manager)

9

**10** Select Due Date for Writers. (Proposal Manager)

Select Volumes for Writer Packages by checking the box next to the volume name.

**11** By default, all Volumes are selected. Deselect any you do not wish to create. (Proposal Manager)

**12** Select **Generate**. (Proposal Manager)

Gen	erate Format Template	Chief .	∓⊡ = ×
Volu	ime Template 👔		
1184	Proposal Response Te 🔻		
Sele	ct Volumes	Select All	Deselect All
	1 VOLUME 1- FACTOR 1: TECHNICA	L and MANA	GEMENT
	2 VOLUME 2: FACTOR 2 -PAST PER	FORMANCE	
	3 VOLUME 3 - FACTOR 3: EXPERIE	NCE	
	4 VOLUME 4: FACTOR 4 -TRANSITI	ON PLAN	
	5 VOLUME 5 - FACTOR 5: COST/PR	ICE	
	6 VOLUME 6 - PARTICIPATION- SC	DLICITATIONS	, OFFER AN
	[	X Cancel	✓ Generate

Projects > Fi	nal RFP	
1 Upload	Actions -	
	T Generate Format Template and Volume Masters	
♦ Volume ×	🖗 Reapply Format Template	
Fi	Generate Writer Packages	n
Volume:	🕲 Merge Writer Packages	
	Dit Merged Packages	Forma
Volume: 1	Generate Final Volume     Volume 1- FACTOR 1: TECHNICAL and MANAGEMEN	т

Due Da	te	9/9/2022 10:00	AM	<b>@</b>
Docum	ent Template	1184 Proposal F	Response Template	.docx 🔹
Select	Volumes/Write	ers	Select All	Deselect All
⊠ ∽	1 Volume 1 Co	ntract Data		
	🕘 Donna H	amby ABC		
	🌍 George V	Vashington ABC	•	
⊠ ~	2 Volume 2 Te	chnical		
	<b>.</b>			-



<b>NE</b> team	Search - Opportuniti	es 🗸 🛛 Analyt	ics Support					Û 994 🤞	Donna Hamby 🔒
Opportu	nities > Security	y Operati	ons Cente	r-					
😍 Detail	s Description Cont			Documents			Proposal Capability Mati		
L Upload	📥 Download Zip 🛛 🗞 Ta	g අ Copy De	afaults Actions	-					්ට Reset 🗹 Sa
	Business Development 10		Solic	itation 19	Data Calls	23	Graphics 3	Pi	roposal 20
≜ Volume ¥									
• volume ~	ile Name		÷ T	Volume 🌲	T Assigned To 🗢 T	Due Date	≑ ▼ Private 👩 ≑ ▼	Uploaded On 🗘 🕇	Created By
	RFP Question Template	xlsx						01/25/2022 12:16 PM	🕘 Donna Hamby 🔼
Volume:	1 Volume 1 Contract Data								
	SOC - 1 Volume 1 - Volu	me Draft.docx		1 Volume 1 Contra			0	04/09/2021 9:38 AM	🔕 Donna Hamby 🔼
	SOC - 1 Volume 1 - Don	na Hamby (ABC	).docx	1 Volume 1 Contra	Donna Hamby (ABC)		0	01/28/2022 2:45 PM	Donna Hamby M
Volume:	2 Volume 2 Technical								
	SOC - 2 Volume 2 Techi	nical - Donna Ha	amby (ABC).d	2 Volume 2 Techni	🔕 Donna Hamby 🕼	03/04/2022 8:00 AM	M 🖬	01/25/2022 4:56 PM	🔕 Donna Hamby 🔼
	SOC - 2 Volume 2 Techi	nical - Blake Her	rin (ABC).docx	2 Volume 2 Techni	🕒 Blake Herrin (ABC)	03/02/2022 8:00 AM	M 🖬	01/25/2022 12:07 PM	🕘 Donna Hamby 🔼
	SOC - 2 Volume 2 Techi	nical - George W	ashington (A	2 Volume 2 Techni	George Washington (ABC)	03/04/2022 8:00 AM	M 🖬	01/25/2022 4:56 PM	🚯 Donna Hamby 🔼
	SOC - 2 Volume 2 Techi	nical - Molly Pito	her (ABC).do	2 Volume 2 Techni	Molly Pitcher	03/04/2022 8:00 AM	M 🖬	01/25/2022 4:56 PM	🚳 Donna Hamby 🔼
	SOC - 2 Volume 2 Techi	nical - Paul Hunt	ter (SUB).docx	2 Volume 2 Techni	🕑 Paul Hunter SUB	03/04/2022 8:00 AM	M 🖬	11/11/2021 3:01 PM	🚳 Donna Hamby 🚺
	SOC - 2 Volume 2 Techi	nical - Volume D	raft.docx	2 Volume 2 Techni				01/25/2022 4:54 PM	Donna Hamby (All
	SOC - 2 Volume 2 Tech	nical - Molly Pite	her (SUB).do	2 Volume 2 Techni	Molly Pitcher SUB	03/04/2022 8:00 AM	M 🖬	01/25/2022 4:56 PM	🛞 Donna Hamby 🔼
Volume:	3 Volume 3 Past Performan	ce							
	SOC - 3 Volume 3 Past	Performance - V	olume Draft	3 Volume 3 Past P				06/10/2022 3:08 PM	🕼 Donna Hamby 🔼
	SOC - 3 Volume 3 Past	Performance - D	onna Hamby	3 Volume 3 Past P	Donna Hamby (ABC)	06/11/2022 3:00 PM		06/13/2022 3:46 PM	🚯 Donna Hamby 🔼

#### Free Trial Reference and Training Guide

#### 24.0 Adding Content to Writer Packages

Completed

**1** Writers will receive an email with link to document and due date.



- 2 OneTeam will also create a Volume Draft for each Volume, which contains the entire Volume Outline.
- **3** Writer Packages will look like this example, which has added notations.

Writers will add the custom OneTeam Word Add-in with panels for Outline, Requirements, and Required Terms. The first one shown below is the Proposal Outline panel

Writers see the entire Volume Outline, but only have headings for their assigned sections in the Word document. They will be able to see how their assigned sections fit in with the entire Volume Outline.





This is a View of the Word Add-in Panel with the Requirements panel selected, instead of the Proposal Outline Panel. This view shows Section L selected, and only shows the Section L requirements for a selected outline heading.



This is a View of the Word Add-in Panel with the Requirements panel selected. This view shows Section M selected, and only shows the Section M requirements for a selected outline heading.



This is a View of the Word Add-in Panel with the Requirements panel selected. This view shows Section C selected, and only shows the Section C requirements for a selected outline heading. Likewise, when selecting the 'Other' filter, any requirements mapped to 'Other' will be displayed.





**10** When using Microsoft 365, you do not have to upload any documents. Word autosaves the documents and the Writer simply validates the document is saved, and closes the document.

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#### 25.0 Color Team Reviews

Completed

- 1 Select an Opportunity from the Pipeline or Opportunities list. (Proposal Manager) Select the **Document** tab, **Proposal** sub-tab. (Proposal Manager) 2 3 Select 'Merge Writer Packages' from the Actions button drop-down menu. (Proposal Manager) oneteam Opportunities ~ Contacts ~ Search 🗸 Analytics Support **Opportunities** > Security Operations Center -**P** Details Qualification Notes Description Review Projects > Final RFP Shred 0 🌲 Upload Actions -T Generate Format Template and Volume Masters ♦ Volume × 👿 Reapply Format Template ¢τ Volume ÷Υ Fi 🗈 Generate Writer Packages 'n ✓ Volume: ↓ Merge Writer Packages Split Merged Packages Format Template Generate Final Volume Volume: 1 VOLUME I- FACTOR I: TECHNICAL and MANAGEMENT SOC - 1 VOLUME 1- FACTOR 1 TECHNI... Volume Master 1 VOLUME 1- FACT ...
- **4** Select the appropriate template, if not previously selected, and which Volumes to Merge.(Proposal Manager)

2	Detai	ls	Description	Contacts	Qualifi	cation	Notes	Documents	Re	view	Schedul	le	Team	Strategy	Proposal	Capability Mat	trix Commu		
<b>1</b> U	pload		Download Zip	🔊 Tag 🕻	Copy De	alts	Actions -					Me	erge V	Business Dev Vriter Packad	elopment 10 ges	Solicitation	19 Data Calls # 🕀 🖨 🗙		
≑ Vo	lume >																Î		
		File N	lame		\$ T	Descrip	otion		¢Υ	Volume		Doc	ument	Template 1184	Proposal Resp	onse Template.d	ocx 🔹		
~ v	olume											6.1		Destaurs		Colore All	Destation		
		1184 Proposal Response Template.d 1184 Proposal Response Template									Sele	ect wrn	er Packages		Select All	Deselect All			
			Gate 1 (Interest).pptx Gate 1 (Interest)									🛛 🗸 1 Volume 1 Contract Data							
			RFP Question T	estion Template.xlsx RFP Question Template															
¥ V	olume	1 Vo	lume 1 Contract	t Data									S0 50	JC - I Volume I	- Donna Hamb	y (ABC).docx			
		<b>a</b> )	SOC - 1 Volume	e 1 - Volume Dr	aft.do	Merge	d Volume D	raft		1 Volume	1 Contr		¥ 2 V	olume 2 Technic	al				
			SOC - 1 Volume 1 - Donna Hamby ( Writer Package						1 Volume	1 Contr		S S	DC - 2 Volume 2	nna Hamby (ABC	Hamby (ABC).docx				
v v	olume	2 Vo	lume 2 Technica	al									-						
		1	SOC - 2 Volume	e 2 Technical -	Donn	Writer	Package			2 Volum	e 2 Tech		⊠ S	DC - 2 Volume 2	Technical - Bla	ke Herrin (ABC).c	locx		
		<b>a</b>	SOC - 2 Volume	e 2 Technical -	Blake	Writer	Package			2 Volume	e 2 Tech		S S	DC - 2 Volume 2	Technical - Ge	orge Washington	(ABC).docx		
		-			-	141-11-1	Deckerge			2 Volum	2 Toch					Canal			

5	Select Merge button. (Proposal Manager)												
6	elect the <b>Communication</b> tab. (Proposal Manager)												
7	elect the New Message button and select 03 Color Team Reviewer Kick-off or In-Brief Template. Proposal Manager)												
8	inter Review Team Kick-Off information such as date and time, telecon information and other nstructions. (Proposal Manager)												
9	During the Kick-Off Meeting, email the Reviewers a link to their review document – there is 1 document or each volume of the proposal and all reviewers share the document through Microsoft 365 Co- Authoring. Explain the Rating system for each Outline Heading/Section. Reviewers select a rating from he drop-down menu for EACH heading/section.												
10	hare document link with the reviewers and ensure they can navigate to and open their document. Explain the Word Add-In to Reviewers and ensure they all load it to Word. (Proposal Manager)												
11	<complex-block></complex-block>												



12 Reviewers may also use @ mentions to other members of the team – Writers, other Reviewers, Capture Manager or Proposal Manager.



Reviewers ratings stay with the document and are also relayed to the Assignments Workspace, where the Proposal Manager can view them in near real-time, instead of waiting for the documents to be completed by Reviewers.

This is shown on the far right under the Rating column.

Opportunities > Security Operations Center ·																
🧏 Detai	ls Description	Contacts	Qualification	Notes	Documents		Schedule		Strategy	Proposal	Capability Matr	ix Comm	nunication			
Projects >	Final RFP						Shred	Outline	Assignment	s Writer P	ackages					
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1	Summary Secti	on			Donna Hamby	ABC	01/08/	2025	1/1	- 4	Abigail Adams 🔼					4
2	Narrative discu	ssion			Eddie Crosbie	ABC			0/3	- 1	Abigail Adams (ABC)					
3	Introduction to Volume				Donna Hamby (ABC) 01/06/2025					- Abigail Adams (ABC)						2
4	Sub-factor la -Logistics, Environmental and								0/4 — Abigail Adam							
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**15** The Proposal Manager does NOT have to Combine or Compare documents for a completed review version. OneTeam and Microsoft Word combine the Review comments and track changes.