Doctrine 09 — Capture and Competitive Strategy

One durable concept: by the time the solicitation drops, the outcome is largely already decided — by the capture work done before it.

This doctrine takes you inside the stage that decides more outcomes than any other: **capture** — the disciplined work of learning the customer, understanding the competition, choosing what to chase, and shaping a position *before* anyone writes a proposal. It is the least glamorous stage and the most decisive one.

Capture is a discipline of its own

The profession draws a hard line between capture and proposal writing. The skills, cadence, inputs, and outputs differ. Capture is the pre-proposal work: market research, opportunity assessment, customer engagement, competitive intelligence, teaming, and win strategy. Proposal writing is the production work that turns that strategy into a compliant, persuasive document.

The line matters because of a brutal fact every experienced pursuer knows:

> **Proposal production defends the position capture established. It does not create new position.**

By the time the RFP drops, the customer's preferences, the competitive set, and your credibility are largely fixed. The proposal can lose the deal — by being non-compliant, unconvincing, or out-priced — but it rarely *wins* a deal capture did not already put within reach. Teams that skip capture to rush straight to writing are spending the highest-value phase of the pursuit on the lowest-value activity.

The capture window and its gates

Capture begins long before a solicitation exists. The industry's standard business-development lifecycle runs *marketing → capture → proposal → negotiate → award*, and the capture window is the entire pre-RFP stretch. It is organized around checkpoints — the **BD lifecycle gates**:

1. **Market segmentation** — decide which markets, agencies, and vehicles you play in at all.
2. **Opportunity identification** — spot the specific opportunities worth watching.
3. **Pursuit decision** — the pre-RFP **bid / no-bid** call (Doctrine 04) with the score arithmetic (Doctrine 05).
4. **Capture readiness** — build the plan, execute the engagement, then pass a **readiness review** before any proposal effort begins.

A pursuit that has not passed its capture gates is not ready to be written. **Capture decides whether to compete and how to win; proposal decides how to say it.**

Opportunity assessment: qualify before you chase

The earliest capture work is assessment. Each opportunity gets a fast, honest screen: *Are we eligible? Is it real? Does it fit?* Eligibility is a hard knockout — if the size standard, set-aside, clearance, or vehicle eligibility fails, nothing else matters. Fit is strategic: does this opportunity build toward the portfolio, capabilities, and customer relationships we actually want?

The survivors get scored — probability of win and value (Doctrine 05) — and the pursuit decision becomes arithmetic plus judgment: *which opportunities deserve our finite capture capacity and budget?* A disciplined no-bid is a professional outcome, not a failure; it is how you protect the resources that winning pursuits need.

What a capture plan actually is

A capture plan is not a to-do list or a slide deck. It is a **written declaration of how this pursuit will be won**, and it is the central artifact of the capture stage. A complete capture plan answers:

- **The win strategy** — the named themes, the discriminators, the pricing posture.
- **The customer** — who the decision-makers and evaluators are, what they care about, and how we will reach them.
- **The solution** — a preliminary technical approach credible enough for the customer to recognize as a real answer.
- **The team** — who will staff it, what partners fill the gaps, and what teaming arrangements we are forming.
- **The competitive landscape** — who else is bidding, what the incumbent's record is, and where the price band sits.

The plan's job is to force every strategic choice into the open *before* the proposal calendar starts eating weeks. Choices not made in capture get made in panic during production — and panic is where losing decisions come from.

Win themes, discriminators, and baseline features

This vocabulary separates people who understand capture from people who write features at the customer. Learn it once; it organizes every proposal you ever touch.

- **A win theme** is a customer benefit stated as the customer's outcome, not your capability: from *"we offer X"* to *"you achieve Y by working with us."* Themes are threaded through every volume and every page.
- **A discriminator** is a claim your competitors cannot credibly make — unique, defensible, backed by evidence. Discriminators move evaluator scoring.

- **A baseline feature** is a claim any qualified offeror could make: a certification everyone holds, a standard practice everyone performs. Baselines establish credibility; they do not win.

The discipline is brutal about the difference: **discriminators move scores; baselines do not.** A proposal full of baselines reads competent and forgettable; a proposal with two or three real discriminators, repeated until the evaluator cannot miss them, is the one remembered at the scoring table.

Ghost themes: naming the competitor without naming them

The most sophisticated capture concept is the **ghost theme**: targeting a competitor's weakness *without naming the competitor*, by stating your strength in a way the customer recognizes as a deficiency in the alternative. *"We staff this effort with personnel who have delivered this exact mission at this agency"* is a ghost theme when the incumbent is known to be hiring for the same work.

Ghost themes are powerful because they let the evaluator draw the conclusion themselves — and a conclusion a reader reaches on their own is far more persuasive than one asserted to them. But they have a hard requirement: **a ghost theme is only as good as the capture intelligence behind it.** It must cite a real engagement event, a real customer signal, a real competitive observation. Without evidence, a ghost theme is hollow posturing — and evaluators, who sit on the other side of the same discipline, read straight through it.

Customer engagement: the currency of capture

Capture is measured in **customer contact, not slide decks**. Progress is documented engagement — briefings, technical exchanges, industry days, reference calls — each logged with who was there, what was discussed, what was signaled, and what was committed.

Engagement does three things no desk research can. It lets the customer know you exist and are credible. It lets you learn what they actually value, including the unstated preferences that become ghost themes. And it lets you *shape* the requirement, because agencies listen to credible offerors during the pre-RFP window. A pursuit that is not actively engaged decays: if the relationship stalls, the win probability stalls with it.

The readiness review: the gate into proposal

Capture ends at a **readiness review** — the checkpoint that asks, honestly: *are we actually positioned to win, or are we about to spend proposal money defending a position that was never built?* It checks that the win strategy is clear, the customer's needs and evaluation preferences are understood, the teaming is solidified, the key personnel are identified, the competitive landscape is mapped, and the preliminary technical approach aligns with the customer's mission.

The outcome is one of three: **proceed** (open the proposal effort), **defer** (continue capture to the next review), or **withdraw** (formal no-bid). Each is a professional decision. The gate exists so the expensive, adrenaline-heavy proposal stage starts only when the foundation justifies it — and so a weak foundation is caught while it is still cheap to fix.

Two organizations, one pursuit: the capture and proposal staffing model

The hard line between capture and proposal is not just a conceptual one — in a professional pursuit organization it is **two distinct organizations**, with different skills, different cadence, and different owners. They are often different *rooms*: the capture organization lives with the customer and the market; the proposal organization lives with the calendar and the page count. Both are necessary, and the pursuit only works if the two hand off cleanly.

The capture organization owns the pre-RFP world. Its leader is the **capture manager**: the person accountable for the win strategy, the customer engagement, the competitive intelligence, the teaming direction, and the capture plan. The capture manager does not write the proposal — they build the position the proposal will defend. Around them works a **capture team**: a business-development or capture analyst (market and competitive intelligence), a pricing or price-to-win analyst (the preliminary price position), a teaming/subcontracts lead (who to go to market with), and often a capture writer or two who draft the win story and themes before production begins.

The proposal organization owns production. Its leader is the **proposal manager**: the person accountable for turning the capture position into a compliant, persuasive, on-time submission. The proposal manager runs the machine — the schedule, the page budget, the compliance matrix, the color-team reviews, the final assembly. Around them works the **proposal team**: volume leads and **writers** for each volume (technical, management, past performance, pricing), an editor or production specialist, a compliance coordinator who guards the matrix, and a pricing analyst who reconciles the cost volume with the technical volume. The **reviewers** — the color teams (pink, red, gold, white-glove) — are a separate, independent resource: the same people who judge the proposal must not be the people who wrote it.

Organization	Leader	Team	Owns	Lives where
Capture	Capture manager	BD/capture analyst, price-to-win analyst, teaming/subcontracts lead, capture writer	Win strategy, customer engagement, competitive intelligence, teaming, the capture plan	With the customer and the market, before the RFP

Organization	Leader	Team	Owns	Lives where
Proposal	Proposal manager	Writers, volume leads, editor, compliance coordinator, pricing analyst	Schedule, page budget, compliance matrix, color teams, submission package	With the calendar and the page count, after the RFP
Review (cross-cutting)	Color-team leads	Independent reviewers (pink/red/gold/white-glove)	Independent, criterion-mapped review at each gate	Standing apart from the writers

Resourcing and budget. Both organizations run on **bid-and-proposal (B&P) budget** — the scarce pool of money and attention the firm is willing to spend to win. The discipline of the budget is *timing*: capture is comparatively cheap and early (intelligence, travel, engagement), while proposal production is comparatively expensive and late (writers, review cycles, production). A firm that skips capture to save money usually ends up spending more on a proposal that defends a position that was never built. The gates exist in part to ration this budget — no pursuit spends proposal money until it has passed its capture gates.

The hand-off at proposal kickoff. Capture ends and proposal begins at the **proposal kickoff**, the meeting that follows a passed readiness review. The capture manager hands the proposal manager the position: the capture plan, the win strategy and themes, the discriminators, the customer and evaluation intelligence, the teaming direction, the preliminary price position, and the decoded solicitation. From kickoff, the proposal manager owns the calendar and the production — but the capture manager does not disappear. They stay accountable through submission (the capture team feeds the writers with new customer signals and the win story) and through the debrief, because the debrief is where the next pursuit's capture begins. The kickoff is a *ceremony* for a reason: it is the moment the position the capture team built becomes the responsibility of the team that must express it.

What this means for your career

Capture is where business development stops being a lottery and becomes an engineering discipline. The person who can read an opportunity and say *what is the win strategy, what are our discriminators, what does the customer actually value, and are we positioned before we start writing* is the person who wins consistently.

For the Strategic Initiative student, capture is portfolio strategy at the level of a single pursuit. For the MBA student, it is scarce resources — attention, bid-and-proposal budget, reputation — allocated against expected value. For the MPA student, it is the private half of the same transaction the public side runs. All three meet at the same truth: **the proposal is written in the last weeks; the pursuit is won in the months before.**

Self-check

1. Why does the discipline draw a hard line between capture and proposal — and what does each stage actually do?
2. What is the difference between a win theme, a discriminator, and a baseline feature, and which one moves evaluator scores?
3. What is a ghost theme, and why does it fail without capture intelligence behind it?