Case 04 — The Ghost Theme

The loss where the winner saw something the loser never did. Lesson: a ghost theme is a win theme your competitors never saw — and you find it by reading the evaluation the way the agency will apply it, not the way you wish it would.

> This case is a composite, patterned on publicly available debriefs and press. No company, award, or agency in it is real.

Situation

A seasoned IT and engineering services company — a few hundred people, a long and profitable tenure on a major agency contract — was the incumbent, and it knew it. It had staff on site. It knew the systems cold. Its leadership had, over years of delivering the work, developed a comfortable and entirely reasonable belief: *we know this customer better than anyone, and when the recompete comes, that knowledge is the win.*

The belief was not wrong about the firm's knowledge. It was wrong about what the agency was about to value.

The solicitation

The recompete for the incumbent's own contract. Same general scope, but a new evaluation structure — and, in the pages of Section M, a quiet re-weighting that a careful reader would have noticed. The technical approach factor had been expanded to include a specific, newly emphasized requirement that had been a footnote in the prior acquisition. The solicitation's language around the new emphasis was standard procurement prose — which is to say, it was there, in plain words, for anyone who read it as a contract rather than a formality.

The agency had also, in the months before the recompete, published a stream of public signals: a budget document that named the new emphasis as a priority, an agency report describing a problem the current approach was not solving, and a Q&A period in which the agency's answers had repeatedly steered offerors toward the new requirement. None of these were secret. All of them were on the public record.

The competitors

The incumbent's self-assessment placed it comfortably first. The field included two or three credible challengers, but the incumbent had the customer relationships, the past performance, and the incumbent's knowledge. It had, in short, every advantage except the one that mattered.

The decision

The incumbent wrote a proposal that led with its greatest strength: incumbent continuity. The theme was *we know your systems, your people, your mission — nothing will be lost in transition.* The proposal was thorough, well-written, and completely comfortable. The capture team's self-review praised the theme's credibility. Nobody on the team asked the uncomfortable question the debrief would later answer: *what does the agency actually want now, as opposed to what it has wanted for the last five years?*

The competitor that won did not make that mistake. Its entire proposal was built around the newly emphasized requirement — the one the incumbent treated as a footnote. It was not a stronger proposal in the aggregate. It was a proposal whose theme matched the agency's stated direction, repeated until it was unmissable, with discriminators the incumbent had not even registered as factors.

What actually happened

The incumbent lost its own contract. The debrief was the part that stung, because it was clinical. The agency's evaluation, in the evaluators' own words, weighted the newly emphasized requirement heavily — and the incumbent's proposal had addressed it only in passing, as an extension of its existing approach. The winner's proposal had made it the center of the story. The incumbent's technical rating was strong on the factors it had assumed mattered and weak on the one the agency had quietly made decisive. The winner's discriminators — which were, on inspection, built entirely from public signals the incumbent had read and dismissed — were invisible to the incumbent's self-assessment.

The debrief lesson

The incumbent did not lose because it was worse. It lost because it read the solicitation as evidence of continuity, while the winner read it as evidence of change. Every signal the winner used was public: the re-weighted evaluation factor, the budget document, the agency's own report, the Q&A steering. The incumbent saw the same words and filtered them through what it wanted to be true. That is the definition of a ghost theme: a win theme that was visible all along — but only to the team that went looking for what the agency actually wanted, rather than confirming what it already believed.

What this teaches

> **A ghost theme is a win theme your competitors never saw — and you find it by reading the evaluation the way the agency will apply it, not the way you wish it would. The signals are almost always public: the re-weighted factors, the budget documents, the agency's own complaints, the questions it answers in the Q&A. The incumbent's greatest**

weakness is not the competitor — it is its own comfortable story about itself.

This is the core of doctrine/09 and doctrine/10: competitive strategy means treating the agency's stated direction as the ground truth and building your theme on it — even when it contradicts what you have always been rewarded for. Incumbent knowledge is an asset only if it is used to see the agency's future, not to relive its past.