

Course 2 Lesson 27 (Short) EXAMPLE PRE BID DELIVERABLES (TEMPLATES INCLUDED)

Learn how to create clear, decision-ready pre-bid deliverables that support early SLED capture strategy. This short practical course covers core deliverable types, quality standards, common red flags, and how offshore research work supports the prime's process.



Created by **Collab P Learn**



Course Objectives

- Identify the main pre-bid deliverables used in early SLED capture support and explain why they matter before an RFP is released.
- Recognize the core components of agency profiles, opportunity forecasts, competitor snapshots, pre-bid summary briefs, and capture input sheets.
- Apply quality standards to produce accurate, insight-driven, cleanly formatted, decision-ready deliverables and spot common red flags.
- Explain how pre-bid research supports the prime's broader capture process in real SLED contexts.

Skills and Knowledge

SLED procurement

pre-bid deliverables

capture support

competitive intelligence

agency research

proposal operations

Table of Contents

1. Introduction
 - 1.1. Welcome
2. SECTION A Core Pre-Bid Deliverables
 - 2.1. What Pre-Bid Deliverables Are
 - 2.2. Core Deliverables You'll Produce
 - 2.3. Quiz - Core Pre-Bid Deliverables
3. SECTION B Template: Agency Profile through SECTION F Template: Capture Input Sheet
 - 3.1. Templates Overview: What Each Section Must Answer
 - 3.2. Decision Inputs: Summary Brief and Capture Input Sheet
4. SECTION G Formatting Standards for All Pre-Bid Deliverables and SECTION H Common Red Flags in Pre-Bid Deliverables
 - 4.1. Formatting Standards That Make Deliverables Usable
 - 4.2. Red Flags to Catch Before Delivery
 - 4.3. Quiz - Quality Standards and Red Flags
5. SECTION I Real SLED Examples of Pre-Bid Deliverables and SECTION J What the Prime Is Doing While You Prepare Deliverables
 - 5.1. Real SLED Example Patterns
 - 5.2. How the Prime Uses Your Inputs
 - 5.3. Final Quiz - Pre-Bid Deliverables Recap
6. Summary
 - 6.1. Summary

1. Introduction

1.1. Welcome



Coursebox Avatar Video

Watch this video online in the course

Designed for offshore remote service providers, research support staff, and capture support team members who assist primes on SLED opportunities, this short practical course teaches how to produce clear, decision-ready pre-bid deliverables that shape early capture strategy. You will learn to create agency profiles, opportunity forecasts, competitor snapshots, pre-bid summary briefs, and capture input sheets while applying quality standards and formatting checklists that signal professionalism and reliability . The course also shows how to turn research into win themes and positioning for the prime, and how to spot common red flags such as outdated data, missing budget signals, and vague recommendations before delivery .

What You Will Learn



Insight-Driven Deliverables

Master the art of crafting decision-ready documents that propel your team's bidding strategy forward with clarity and precision.



Strategic Research Skills

Develop the ability to transform complex data into actionable insights that shape competitive bids and improve win rates.



Quality Standards Expertise

Learn to apply rigorous quality standards that ensure your deliverables not only meet but exceed client expectations.



Agency-Focused Analysis

Gain the skills to create comprehensive agency profiles that highlight funding priorities and procurement behaviors effectively.

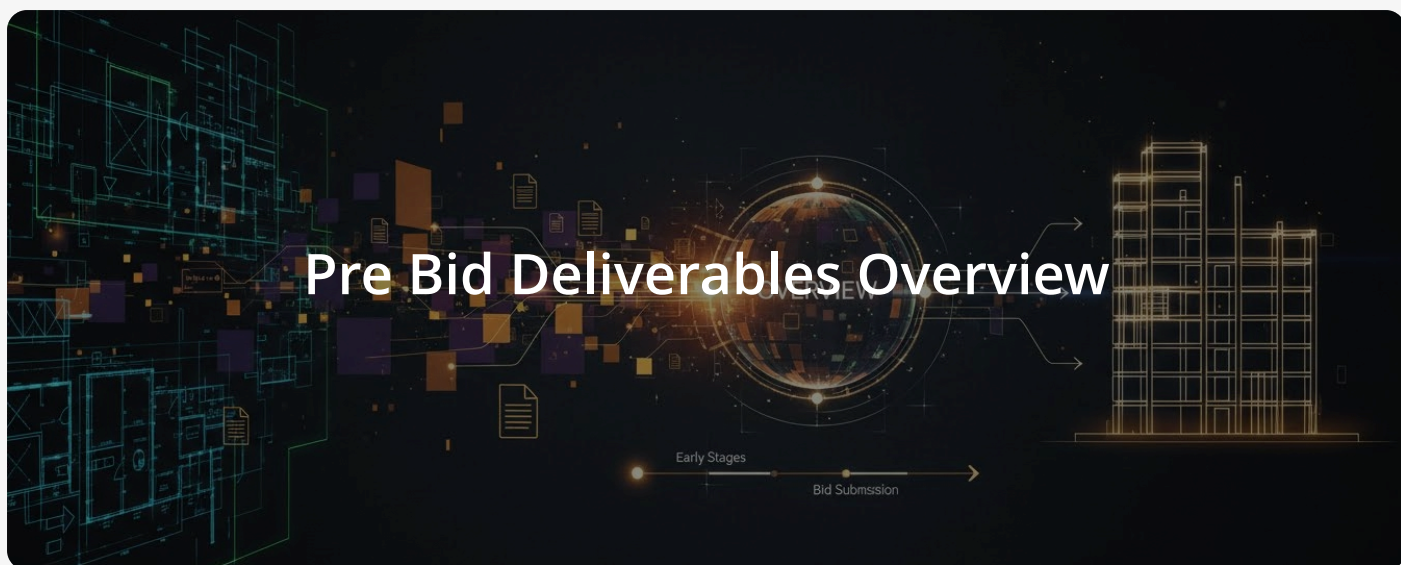


Risk Management Acumen

Equip yourself with techniques to identify and mitigate risks in deliverables, enhancing your team's overall strategic posture.

2. SECTION A Core Pre-Bid Deliverables

2.1. What Pre-Bid Deliverables Are



High-quality pre-bid deliverables are targeted research and intelligence products produced before an RFP is released. They supply capture leaders with verified facts, early signals, and clear recommendations so decisions about pursue, resourcing, and positioning happen before formal solicitation work begins. For offshore research teams, accuracy, insight, and clean formatting make these outputs operationally useful to primes.

Explore these three sections on pre-bid deliverables by expanding each to learn more.

What Are They?

High-quality pre-bid deliverables are research products created before a Request for Proposal (RFP) is issued. They provide valuable insights, verified information, and actionable recommendations for decision-making.

Why They Matter

Effective pre-bid deliverables enhance project pursuit strategies by:

- Ensuring informed decision-making.
- Saving time and resources in facilitation.
- Providing a competitive edge in the bidding process.

Best Practices

To produce impactful deliverables:

- Focus on accuracy and credible sources.
- Present findings with clarity and precision.
- Tailor outputs to meet the specific needs of primes and capture teams.

Actionable Insights

Focus on producing agency profiles, opportunity forecasts, competitor snapshots, pre-bid summaries, and capture input sheets. These five deliverables transform research into immediate action, allowing your team to make informed go/no-go decisions for RFPs.

Swipe through 6 slides highlighting key deliverables and their purpose.

Deliverable types and purpose

Agency profiles summarize mission, budgets, procurement behavior, leadership, and pain points so the prime can judge fit and strategic angles. Templates and quality checks for agency profiles emphasize insight over raw data and verified budget numbers.

Deliverable types and purpose

Opportunity forecasts predict likely presolicitation activity, expected RFP timing, funding signals, and renewal indicators. Forecasts let primes schedule SMEs and align internal resources ahead of release.

Deliverable types and purpose

Competitor snapshots capture likely bidders, recent wins, pricing tendencies, and gaps. These inform teaming choices and early discriminators.

Deliverable types and purpose

Pre-bid summary briefs are one-page, decision-ready summaries that prioritize go/no-go guidance, top risks, and recommended next steps for capture managers.

Deliverable types and purpose

Capture input sheets translate research into early win themes, discriminators, mitigations, and concrete next steps the prime can act on immediately.

How these deliverables change decisions before an RFP

Timing: Accurate forecasts let the prime move from reactive to proactive scheduling of proposal teams and subject matter experts.

2.2. Core Deliverables You'll Produce

Early, decision-ready deliverables let capture teams act before an RFP appears. Focus on five specific outputs that the prime expects, the core facts each must contain, and the concrete quality checks that signal professional work. Use these outputs to convert research into clear recommendations the prime can execute immediately.

Explore the five core deliverables essential for capture teams by expanding the sections below.

Key Outputs

Identify five main deliverables that primes need for effective SLED procurement. Focus on clarity to ensure actionable insights are presented.

Core Facts

Each output should include:

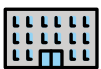
- Relevant data points
- Contextual explanations
- Potential impacts for decision-making.

Quality Checks

Ensure professionalism by applying quality measures:

- Validate statistics with reliable sources
- Review for clarity and conciseness
- Solicit feedback for continuous improvement.

Review these key takeaways about activity page components, with 5 distinct points outlined for clarity.



Agency Profile: what to capture and why

Purpose: Summarize an agency's priorities, budget posture, procurement patterns, and decision makers so the prime can align outreach and positioning.



Quick quality checks

Include insight not just raw facts, verify budget numbers, confirm leadership names and titles, tie pain points to recent signals.



Opportunity Forecast: how to predict what matters

Purpose: Predict likely RFPs, renewals, and presolicitation timing so the prime can plan resources and outreach.



Competitor Snapshot: what to include for effective positioning

Purpose: Show who will bid, their strengths and limits, and how the prime can differentiate.



Actionable closing checklist

Use primary sources for budgets and awards. Add a confidence level for forecasts and timelines. Make at least one concrete recommendation per deliverable. Run the quality checklist for each deliverable before submitting.

QUESTION 1

What is the primary purpose of the Agency Profile deliverable?

- To summarize the agency's priorities and decision makers for better outreach alignment.
- To predict the timing of likely RFPs and resource planning.
- To analyze competitors and suggest how to compete.
- To create a one-page summary for decision-making.

2.3. Quiz - Core Pre-Bid Deliverables

QUESTION 1

Which of the following statements best describes the purpose of an Agency Profile in pre-bid deliverables?

- It is exclusively a financial overview of the agency's annual budget without any strategic recommendations.
- It outlines the anticipated risks involved in submitting a proposal to the agency without mentioning funding allocations.
- It provides an exhaustive list of competitors along with their detailed financials and market shares.
- It serves as a detailed summary of an agency's funding signals, procurement behaviors, and some historical performance data related to the agency's contracts.

QUESTION 2

Discuss the significance of the Opportunity Forecast deliverable in the SLED procurement lifecycle.

3. SECTION B Template: Agency Profile through SECTION F Template: Capture Input Sheet

3.1. Templates Overview: What Each Section Must Answer



Capture work should name the specific signals you tracked, explain the timeline you expect, and attach verifiable evidence that supports any recommendation. Focus on concise, evidence-linked claims so capture managers can act with confidence. Below are the precise items to record for Agency Profiles, Opportunity Forecasts, and Competitor Snapshots, with examples of acceptable signals, realistic timeline estimates, and the kinds of evidence to attach.

Flip through 5 flashcards to reinforce key concepts on capture work.

Agency Profiles

- Track specific agency signals.
- Note changes in leadership or policy.
- Provide background on agency missions and priorities.

Opportunity Forecasts

- Estimate timeline for opportunities.
- Identify key signals for upcoming bids.
- Backup with market research and trend analyses.

Competitor Snapshots

- Record competitor strengths and weaknesses.
- Track their recent projects and bids.
- Use public data and news as evidence.

Evidence Linking

- Attach verifiable proof for claims.
- Include links to relevant contracts or announcements.
- Use data from reputable sources.

Concise Recommendations

- Make clear, short recommendations.
- Support with data-driven insights.
- Ensure actionable conclusions for team confidence.



"In seeking truth you have to get both sides of a story."

~ **Walter Cronkite**

Swipe through 6 slides to learn about agency profiles, opportunity forecasts, competitor snapshots, and actionable insights.

Agency profile, essential signals and evidence

What to capture: **agency mission and core services**, key programs, total and line-item budget signals, procurement behavior (contract vehicles, renewal patterns), leadership and procurement contacts, operational pain points, and any active strategic initiatives. These fields follow the agency profile template and quality checklist for verified budget numbers and actionable strategic notes.

Signals to record

Recent budget allocations or cuts, new strategic plans, public testimony or press releases naming priorities, procurement notices showing preferred vehicles, procurement officer changes, and program sunsets or launches.

Timeline guidance

Note when budgets are adopted, fiscal year boundaries, and any statutorily driven procurement cycles. Flag dates that commonly drive solicitations, such as contract end dates or renewal windows.

Evidence to attach

Official budget documents, agency strategic plan excerpts, procurement portal notices, meeting minutes or public hearing transcripts, and agency press releases. Prefer primary sources and add a one-line provenance note for each item that explains why it matters.

Competitor snapshot, signals that change strategy

What to capture: company overview, relevant capabilities, recent wins, strengths and weaknesses, pricing patterns, and known relationships with the agency or potential teammates. Keep strategic notes focused on how to compete or team.

Actionable reinforcement

Quick checklist: verify budget numbers, confirm renewal dates, attach primary-source evidence for every claim, and state timeline confidence. **Reflective prompt:** which two signals would most change a go or no-go recommendation for this opportunity, and what exact documents would you attach to prove them?

3.2. Decision Inputs: Summary Brief and Capture Input Sheet

Decision Inputs: Summary and Capture

Convert raw research into clear decisions by focusing on four outputs: whether to pursue the opportunity, the top win themes, the principal risks with mitigations, and a short list of next steps. Make each output traceable to the evidence that produced it, so capture managers can act fast and primes can verify assumptions.

Flip through 5 key decision inputs related to SLED procurement.

Pursuit Decision

Evaluate if the opportunity aligns with strategic goals. Consider:

- Resources available
- Competitive landscape
- Client needs.

Win Themes

Identify the primary factors that will drive your success. Examples include:

- Unique capabilities
- Relevant experience
- Strong partnerships.

Risk Assessment

Outline the main risks associated with the opportunity. Address:

- Financial implications
- Technical challenges
- Market uncertainties.

Mitigation Strategies

Develop actions to manage risks identified. Look for:

- Alternative solutions
- Contingency plans
- Resource reallocations.

Next Steps

Define immediate actions to take. Consider:

- Team assignments
- Information gathering
- Deadline clarification.

Explore strategies for making go/no-go recommendations, crafting win themes, and identifying risks across three tabs.

Decision-Relevant Evidence

Gather only decision-relevant evidence. Pull the few strongest signals from the agency profile, opportunity forecast, and competitor snapshot such as confirmed budget allocations, explicit program priorities, incumbent performance issues, or a hard timeline. Where possible, record the source and date for each signal so reviewers can validate it quickly. The templates and quality checks emphasize evidence over raw data, and clarity over length.

Win Themes and Discriminators

Start with the agency priority, then map to a prime capability. For each theme, state: agency priority, why it matters, and how the prime meets it. Keep themes short and defensible. Example format: "Improve user adoption for statewide LMS, because the agency cites training shortfalls; propose turnkey training plus change management, leveraging the prime's statewide training contracts." The capture input sheet template calls for early win themes tied to agency priorities and realistic discriminators.

Identifying Risks and Mitigations

Convert every risk into a mitigation action. For each risk, list the evidence, the impact, and one concrete mitigation step. Use a short table or triad: Risk, Evidence, Mitigation. Example: Risk: tight timeline; Evidence: agency calendar shows award by Q3; Mitigation: prepare a compressed capture plan and propose a phased delivery that reduces near-term staffing pressure.

Next Steps Action Plan

Make next steps specific, timebound, and assignable. Use plain phrasing such as: "Call procurement officer to confirm incumbent contract end date, by May 5, assigned to S. Patel." Avoid vague items like "continue research." Include immediate low-effort wins. Examples include a targeted LinkedIn mapping outreach, scheduling a short SME interview, or requesting budget confirmation from a public records contact.

Category	Key Points
Decision-Relevant Evidence	Gather strong signals: budget, priorities, performance issues, timeline.
Decision Rule	If 2 of 3 lenses (funding, timeline, competitiveness) favor, recommend pursue.
Win Themes	Tie agency priorities to prime capabilities; concise, defensible claims.
Risk Mitigations	Convert risks to mitigation actions; summarize top two risks.
Next Steps	Make actionable, timebound, and assigned; include low-effort wins.
Summary Brief Structure	One page: snapshot, go/no-go line, win themes, risks, actions.
Capture Input Sheet Structure	Expand on evidence, risks, discriminators, and a capture plan.

Category	Key Points
Actionable Checklist	One sentence go/no-go, max three win themes, two highest risks, specific next steps.

4. SECTION G Formatting Standards for All Pre-Bid Deliverables and SECTION H Common Red Flags in Pre-Bid Deliverables

4.1. Formatting Standards That Make Deliverables Usable



Clear, consistent formatting makes pre-bid work usable and decision-ready for capture managers and reviewers. Use tidy headings, deliberate spacing, and a consistent voice so reviewers can locate evidence and recommendations quickly. Well-formatted deliverables also signal reliability and reduce follow-up questions from primes.

Explore these three cards on formatting best practices to enhance pre-bid work for capture teams and primes.

Formatting Essentials

Clear formatting is crucial for making pre-bid documents easy to read. Utilize tidy headings and consistent spacing to help reviewers find key information swiftly.

Consistency Matters

Maintain a uniform voice throughout the document. This helps in reducing follow-up questions and builds trust in the reliability of your deliverables.

Enhancing Usability

Deliverables should be immediately decision-ready. Well-organized documents allow capture managers to locate evidence and recommendations quickly, fostering efficient evaluations.

Explore the key formatting guidelines for pre-bid work across 5 tabs by clicking and comparing.

Clear heading levels

Use a strict heading hierarchy so content is scannable. Reserve the largest heading for the deliverable title, then use one lower level for major sections (for example, Opportunity Snapshot, Key Insights, Recommended Actions), and a third level for subpoints (for example, Funding signals, Timeline issues). Keep heading labels short and consistent across deliverables; use the same label for the same content type every time. Consistent headings, clean spacing, and clear section hierarchy are required standards for pre-bid work and reflect professional brand expectations.

Make documents skimmable

Lead with a concise top-level summary (one to three bullets) that gives the decision and why. Use short paragraphs and bullets; limit bullets to three to six items each. Put evidence that supports a recommendation immediately after the recommendation, not in a separate appendix. Use bold sparingly to highlight the single most critical fact on a page, not to create visual noise. The goal is that a reviewer can read the title and the first bullet of each section and understand the core recommendation.

Consistent tone, tense, and voice

Write in plain, professional language and maintain a single tense across a deliverable, usually present tense for facts and present or modal verbs for recommendations. Avoid speculative language unless explicitly labeled as hypothesis and supported by a gap analysis. Maintain the same level of formality across headings, bullets, and captions so the document reads as a unified product. The course quality checklist lists consistent tense and tone as a nonnegotiable formatting criterion.

Visual layout and spacing

Use a single clean typeface and size palette for body text and headings. Align bullets and ensure line spacing leaves 30 to 40 percent white space between sections so the eye can rest. Keep tables narrow, with a single clear header row and no decorative borders. Avoid logos, decorative flourishes, or multiple color schemes unless the prime explicitly requires branding. Keep file formats consistent (typically editable DOCX plus a flattened PDF).

Fast checklist before delivery

- Title present and accurate
- Heading levels consistent and labeled
- Top-level summary present (1 to 3 bullets)
- Bullets short, aligned, and prioritized
- Tone and tense consistent throughout
- No spelling or grammar errors
- Key evidence placed immediately with recommendations
- File exported to required formats (DOCX and PDF)

4.2. Red Flags to Catch Before Delivery

Before handing over a pre-bid deliverable, run a quick diagnostic focused on analysis, evidence, and actionability. Small, fixable problems can stop capture work cold if they leave the prime unsure about funding, timing, or competitive risk.

Explore these 5 key red flags to watch for before delivery—flip each card for insights!

Funding Clarity

Ensure that all financial requirements are precisely detailed. Lack of clarity can lead to misunderstandings about budget limits and cause issues later.

Timeline Issues

Verify that all deadlines are clearly outlined. Uncertain timelines can result in rushed work or missed opportunities.

Competitive Risks

Identify any competitors and their potential advantages. Understand how the deliverable positions against these risks to avoid surprises.

Evidence Strength

Check if the analysis is supported by solid data. Weak evidence can undermine the credibility of the deliverable.

Actionability

Assess whether the deliverable leads to clear and actionable steps. If not, it may fail to generate the intended impact.

Review these six common red flags and their fixes before delivering your next procurement brief.



Outdated data

Common red flags include outdated data, which can undermine confidence and slow decision making. What to check: source dates, fiscal year labels, and the most recent award or budget action cited. Fix: replace or annotate with the latest public document or internal data. If up-to-date sources are not available, add a short note that explains the gap and a suggested follow-up action.



Missing budget signals

Missing budget signals can further complicate procurement processes. What to check: explicit line items, budget allocations, legislative language, or agency budget plans that indicate available funds. Fix: add a Funding Signals subsection that lists the evidence (document title, date, page or table) and a one-line interpretation of whether funding is likely, uncertain, or unlikely. If there is no clear signal, mark funding as unverified and recommend outreach or FOIA checks.



Unclear timelines

Unclear timelines can hinder effective planning. What to check: contract end dates, presolicitation calendars, procurement office notice dates, and any legislative deadlines that affect procurement. Fix: create a short Timeline table with dates and confidence levels (high, medium, low). Where dates are estimates, label them and give the rationale.



No competitor context

Lacking competitor context can lead to poor strategic decisions. What to check: recent awards, incumbents, likely bidders, and pricing patterns for similar contracts. Fix: add a Competitor Snapshot summary with 3 to 5 likely bidders, one-line strength/weakness for each, and a source for each claim. Avoid speculation without evidence; flag assumptions explicitly and list what to verify.



Vague recommendations

Vague recommendations can impede clear action plans. What to check: whether recommendations are concrete, prioritized, and tied to evidence. Fix: convert vague lines into actionable items: Go or No Go (with rationale), two recommended next steps, an owner, and an estimated time to complete each step.

QUESTION 1

What is the purpose of checking for outdated data before delivering a pre-bid brief?

- To ensure all recommended actions are vague and general
- To verify that all claims are supported with up-to-date sources and enhance decision-making confidence
- To add more historical context without contemporary relevance
- To highlight inconsistencies in formatting only

4.3. Quiz - Quality Standards and Red Flags

QUESTION 1

Which of the following is NOT part of the shared quality checklist for an Agency Profile template?

- Leadership names spelled correctly
- Budget numbers verified
- Pain points tied to real signals
- All data included, regardless of relevance

QUESTION 2

List three red flags that indicate weak analysis in prebid deliverables and explain why each is significant to correct before delivery.

5. SECTION I Real SLED Examples of Pre-Bid Deliverables and SECTION J What the Prime Is Doing While You Prepare Deliverables

5.1. Real SLED Example Patterns



Patterns in state, local, and education work shape what primes need from pre-bid deliverables. Small differences in procurement culture, vendor density, and contract scale change which sections of an agency profile, forecast, or competitor snapshot matter most. Use local signals to prioritize evidence and format so the prime can act quickly.

Explore these 5 key concepts about procurement patterns; flip to learn more.

Procurement Culture

Each locality has its own procurement culture that influences how agencies interact with vendors. Understanding these variances is essential for tailoring responses to specific agency needs.

Vendor Density

The number of vendors in a region can impact competition and pricing. A highly dense vendor landscape might push primes to seek unique selling points in their bids.

Contract Scale

Larger contracts typically require more detailed proposals. Smaller contracts might focus on speed and flexibility, altering the information primes need for effective pitches.

Agency Profiles

Reviewing agency profiles can reveal vital insights into their past procurements and priorities. Pay attention to their unique requirements and past contract performance.

Local Signals

Use local signals to highlight relevant data in your deliverables. These could include local news, community feedback, or specific regulatory changes that might affect procurement.

Explore key state delivery strategies across 4 tabs and compare the insights.

How deliverables shift by state context

Washington often centers forecasts on IT renewals and technology refresh cycles, so emphasize validated renewal dates, incumbent behavior, and timeline certainty when building an opportunity forecast. California requires deep technical context and leadership mapping, so expand procurement officer and program leader details in agency profiles and tie priorities to current statewide initiatives. Texas has a dense vendor market, which raises the value of granular competitor snapshots that document recent wins, pricing patterns, and regional presence. New York's recurring statewide contracts mean pre-bid briefs should highlight contract vehicle history, renewal patterns, and statewide scale implications. These state patterns come from real SLED examples used to guide RSP outputs.

Practical implications for each deliverable

Opportunity forecasts: Prioritize the signal most relevant to the state. In places where renewals drive activity, validate contract end dates and incumbent posture. In states with legislative funding fluctuations, flag budget changes as the top insight. Agency profiles: Map decision-makers and procurement behavior where political or technical leadership is decisive. Add program-level budget snapshots when statewide programs are common. Competitor snapshots: Add more pricing and recent-win evidence in high-vendor markets, reduce speculative scoring where public records are sparse. Pre-bid briefs: Make recommendations tightly actionable, matching the state context, for example go/no-go guidance driven by contract scale or incumbent advantage. These recommendations follow the same deliverable structure and quality priorities used by capture teams.

Worked scenario

Scenario: A prime asks for a fast brief on a potential IT replacement contract in Washington. Start with an opportunity forecast that confirms renewal timing and incumbent identity, add a short competitor snapshot focused on typical bid ranges in that state, and finish with a one-page pre-bid brief that gives a clear recommended next step. The prime will use that brief to decide whether to assign SMEs and begin outreach. The example pattern for Washington shows why forecasts and timelines are the highest priority in that context.

What the prime is doing in parallel

While RSPs prepare these deliverables, the prime typically reviews pipeline strategy, aligns internal subject matter experts, evaluates competitive posture, and plans early capture activities and outreach. Knowing these parallel actions helps tailor deliverables to the prime's immediate decisions, for example producing a decision-ready brief if the prime is about to commit SMEs.

State	Key Focus Areas	Deliverable Implications
Washington	IT renewals, technology refresh cycles	Validate renewal dates, incumbent behavior, timeline certainty
California	Technical context, leadership mapping	Expand agency profiles with procurement officer details
Texas	Dense vendor market	Granular competitor snapshots, recent wins, pricing patterns

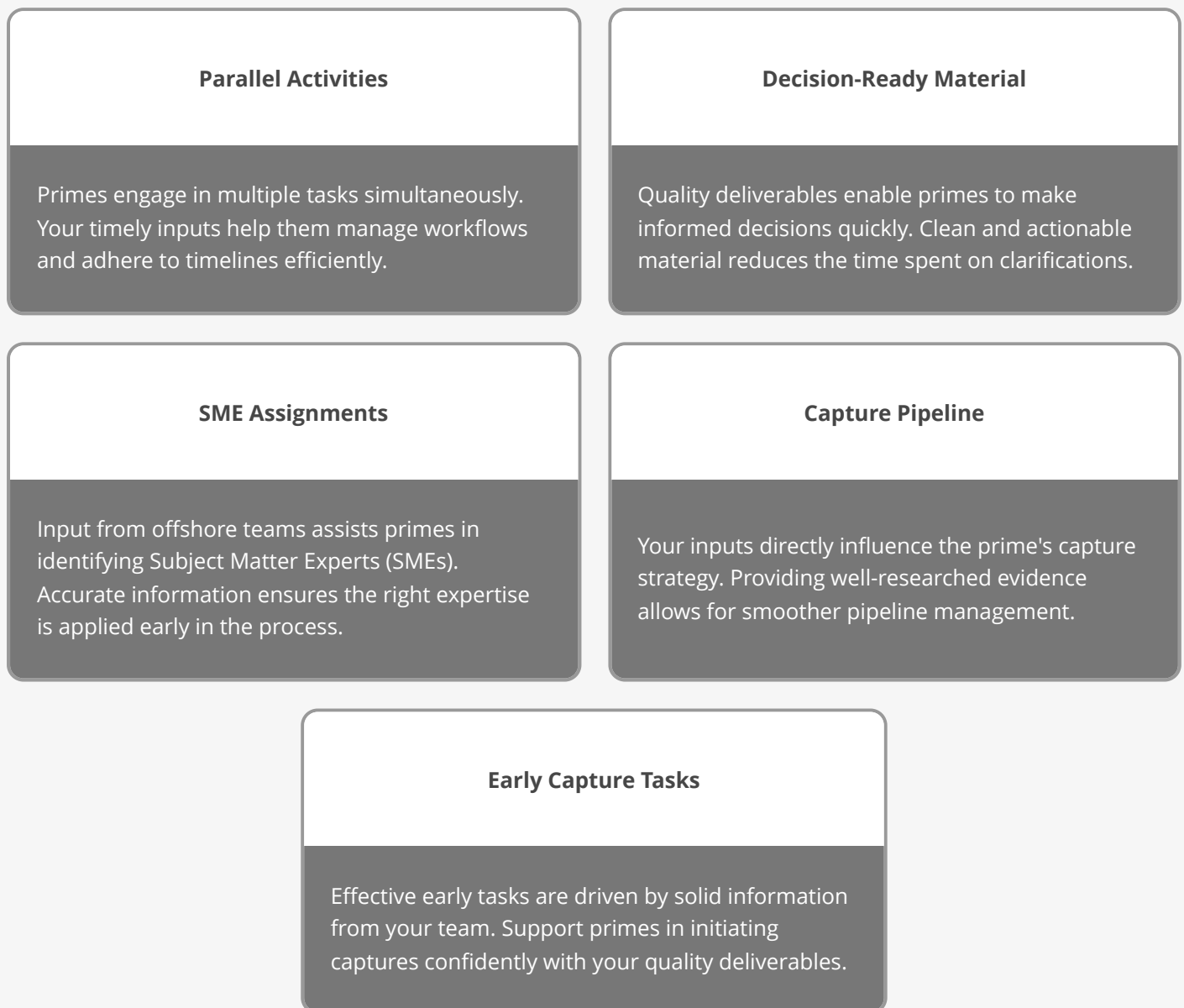
State	Key Focus Areas	Deliverable Implications
New York	Statewide contracts	Highlight contract history, renewal patterns
Opportunity Forecasts	State-specific insights	Prioritize relevant signals, validate key dates
Agency Profiles	Decision-makers mapping	Add budget snapshots when relevant
Competitor Snapshots	Evidence in high-vendor markets	Focus on pricing evidence, reduce speculative scoring
Pre-bid Briefs	Actionable recommendations	Match state context for decision guidance

5.2. How the Prime Uses Your Inputs

How the Prime Uses Inputs

Primes run several parallel activities while offshore teams produce pre-bid deliverables, and they depend on decision-ready material to move the capture forward without delay. Your inputs feed the prime's pipeline decisions, SME assignments, and early capture tasks. When deliverables arrive clean, actionable, and evidence-linked, the prime wastes less time clarifying facts and can act with confidence.

Flip through 5 cards to learn how primes utilize inputs in pre-bid work.



"In the midst of chaos, there is also opportunity."

~ Sun Tzu

Swipe through 6 slides to explore parallel actions the prime takes in procurement pre-bid work.

Pipeline review and prioritization

Capture leaders scan incoming forecasts and briefs to decide which opportunities belong in the active pipeline and which should be parked for later. Those pipeline decisions drive where budgets and senior attention go, so accurate opportunity forecasts matter for prioritization.

SME alignment and staffing

Once an opportunity looks viable, the prime matches subject-matter experts to the opportunity, checks availability, and defines early roles. Capture input sheets that list suggested win themes, discriminators, and required skills let the prime assign the right experts quickly.

Competitive and risk assessment

The prime contrasts your competitor snapshots and risk notes with internal knowledge to refine positioning and decide whether to pursue a sole-source, teaming, or full bid strategy. Clear competitor evidence reduces second-guessing and shortens analysis time.

Capture sequencing and outreach planning

While research is being finalized, capture managers plan next steps, such as stakeholder outreach, messaging development, and timeline milestones. Decision-ready summaries let them schedule early client engagement and internal briefings without waiting for follow-up research.

What decision-ready means for a prime

Decision-ready deliverables present prioritized insights, a short recommendation, and evidence tied to specific risks or actions. Templates like the PreBid Summary Brief and Capture Input Sheet are designed so capture managers can act immediately, from go/no-go to SME assignment and client outreach. Clean formatting and a short, ranked recommendations list signal reliability and cut clarification cycles.

Worked example you can apply

Scenario: An RSP produces an opportunity forecast and a capture input sheet for a state IT modernization opportunity. The forecast highlights a likely presolicitation and funding indicators. The capture input sheet lists two win themes, three discriminators, and two credible risks with suggested mitigations.

How the prime uses it: The capture manager reads the one-page summary, decides the opportunity fits an existing pursuit lane, requests one technical SME who matches the discriminators, and schedules an introductory client touchpoint. Because the deliverables already link evidence to recommendations, the prime skips follow-up clarification and begins capture tasks immediately.

QUESTION 1

What is the primary purpose of decision-ready deliverables for a prime during the pre-bid process?

- To reduce the operational costs of the prime's team.
- To provide unclear insights that require extensive clarification.
- To present prioritized insights with evidence for immediate action.
- To list all possible opportunities without any prioritization.

5.3. Final Quiz - Pre-Bid Deliverables Recap

QUESTION 1

What is the primary purpose of a PreBid Summary Brief in the prebid process?

- To outline the roles and responsibilities of the bidding team.
- To deliver fast, decision-ready insights for capture managers.
- To evaluate the final proposal before submission.
- To provide a structured overview of the agency's mission and priorities.

QUESTION 2

Describe common red flags in prebid deliverables and their implications for the capture process.

QUESTION 3

Which element is NOT considered a high-value prebid deliverable?

- Cover Letter for Proposal Submission
- Capture Input Sheet
- Competitor Snapshot
- Opportunity Forecast

6. Summary

6.1. Summary

Congratulations on completing the Pre-Bid Deliverables course! This training was designed specifically for offshore remote service providers (RSPs), research support staff, and capture support team members who are instrumental in aiding primes with SLED (State, Local, and Education) procurement pre-bid work. Throughout the course, you learned to create precise, decision-ready pre-bid deliverables that enhance early capture strategy in SLED opportunities.

Course Overview:

This short yet practical course covered essential topics including:

- **Core Deliverable Types:** Understanding the various pre-bid deliverables such as agency profiles, opportunity forecasts, competitor snapshots, pre-bid summary briefs, and capture input sheets.
- **Quality Standards:** Ensuring that your deliverables are accurate, insight-driven, well-formatted, and align with the prime's broader capture process.
- **Common Red Flags:** Identifying and addressing frequent issues in deliverables, such as outdated data, missing budget signals, and vague recommendations.
- **Real-World Contexts:** Utilizing examples and templates derived from established practices in the SLED environment.

Objectives Achieved:

By the end of this course, you should be able to:

- Identify the main pre-bid deliverables utilized in early SLED capture support and articulate their importance prior to the release of an RFP.
- Recognize the fundamental components of each deliverable type.
- Apply stringent quality standards to generate clean, decision-ready outputs and identify common red flags in your work.
- Explain how effective pre-bid research feeds into the prime's capture efforts within real SLED scenarios.

Your newfound skills will empower you to enhance the efficiency and effectiveness of your team's pre-bid preparations, ultimately supporting stronger capture strategies for primes in the competitive SLED procurement landscape.

This course consists of 6 sections; expand to learn more about each.

Section 1: Introduction to the Course

- Overview of course objectives and structure.
- Introduction to key concepts and terminology.

Section 2: Basic Principles

- Explanation of fundamental principles that underpin the subject matter.
- Discussion on how these principles apply in real-world scenarios.

Section 3: Advanced Techniques

- Exploration of more complex techniques relevant to the course topic.
- Emphasis on practical application and examples for better understanding.

Section 4: Case Studies

- Analysis of case studies that illustrate key concepts in practice.
- Identification of lessons learned and best practices derived from these cases.

Section 5: Practical Applications

- Insight into applying the skills and knowledge gained in real-life situations.
- Discussion on resources and tools available for practical implementation.

Section 6: Summary and Next Steps

- Recap of the course content and main takeaways.
- Guidance on how to continue learning and applying knowledge beyond the course.

Further Readings

If you would like to find out more information about this course, follow the links below:

- [\[PDF\] 6. Procure - Digital NSW](#)
- [\[XLS\] Content - GOV.UK](#)
- <https://www.tenders.sa.gov.au/tender/view?id=271944>
- [\[PDF\] Transport Infrastructure Project Delivery System Volume 2](#)
- [Contract Notice View - CN3998957 - AusTender](#)