Kazzaz Consulting LLC

Pre-Positioning Checklist

1. Form Strategic Capture Team

- ☐ Assign a client relationship lead with deep client knowledge
- ☐ Include relevant Subject Matter Experts (SMEs)
- ☐ Involve leadership representatives for strategic guidance
- ☐ Integrate the proposal manager early in the process

2. Involve Proposal/Marketing Managers

- ☐ Include proposal/marketing managers from initial opportunity identification
- ☐ Allow proposal/marketing SMEs to fully utilize their expertise
- ☐ Recognize the distinct skills required for effective proposal writing and marketing

3. Develop Capture Plan

- ☐ Create a document outlining analysis, strategies, and actions for the opportunity
- ☐ Ensure the plan is regularly updated with new information and insights

4. Conduct Stakeholder Meetings

- ☐ Schedule regular meetings with the client
- ☐ Meet with local business owners affected by the project
- ☐ Engage with relevant members of the public
- ☐ Connect with political representatives
- ☐ Document insights and concerns from all stakeholder meetings

5. Hold Regular Internal Meetings

- ☐ Discuss outcomes of client meetings
- ☐ Share project updates
- ☐ Develop and refine technical approaches
- ☐ Identify and select key personnel
- ☐ Explore potential teaming strategies
- ☐ Review relevant past performance projects

6. Implement Pre-Positioning Activities

- ☐ Offer lunch-and-learn sessions focused on project scope or challenges

- ☐ Create and distribute white papers or articles through LinkedIn
- ☐ Ensure firm's website and landing pages are up-to-date with relevant experience
- ☐ Identify and leverage existing relationships within the firm

7. Maintain Digital Presence

- ☐ Update website with relevant project experience and knowledge
- ☐ Create targeted landing pages for the specific opportunity
- ☐ Share thought leadership content on social media platforms

8. Leverage Internal Networks

- ☐ Identify team members who have previously worked with the client
- ☐ Gather insights from these team members about client preferences and pain points

9. Iterative Strategy Refinement

- ☐ Regularly revisit and refine strategy based on new information
- ☐ Adjust approach to align with evolving client needs and project requirements

10. Transition to Formal Pursuit

- ☐ Compile all insights and activities from pre-positioning phase
- ☐ Integrate pre-positioning information into the win strategy plan
- ☐ Ensure seamless transition when RFP is released

11. Final Pre-RFP Review

- ☐ Conduct a comprehensive review of all pre-positioning efforts
- ☐ Ensure deep understanding of client's needs
- ☐ Finalize tailored technical approach
- ☐ Refine compelling value proposition
- ☐ Prepare team for immediate action upon RFP release