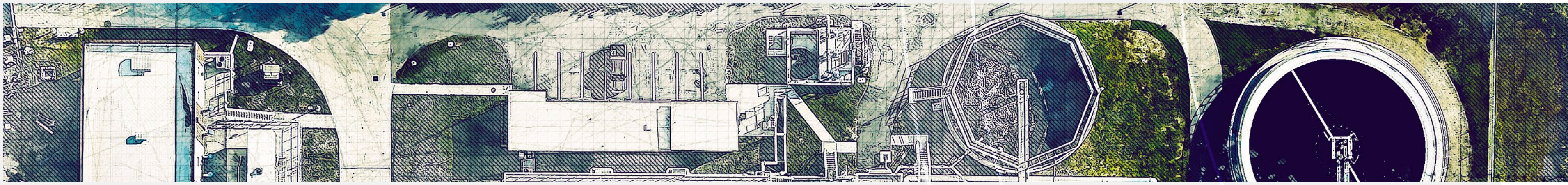
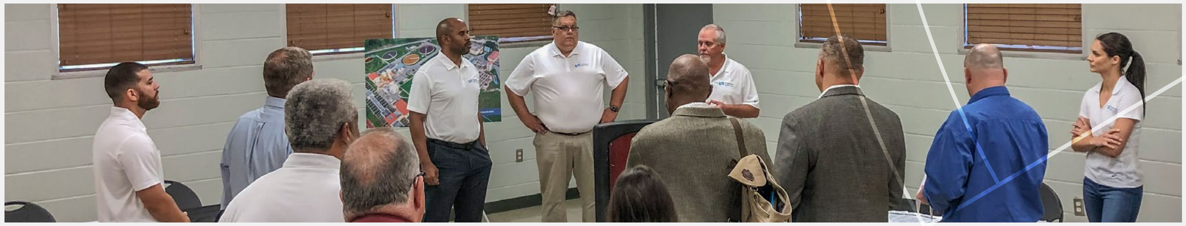




LAST UPDATE // APRIL 2021

OPL

PURSUIT TOOLBOX

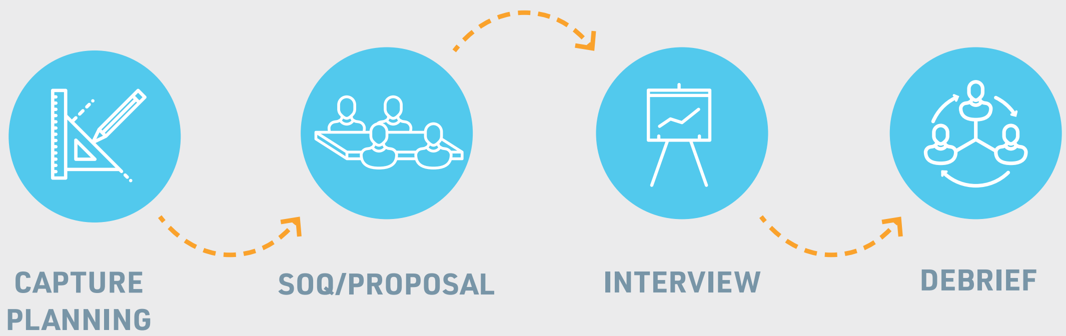
A GUIDE TO WINNING COLLABORATIVE DELIVERY WORK

PURPOSE

Welcome to the Operations Proposal Lead (OPL) Pursuit Toolbox –

A comprehensive guide to help you win more work.

The OPL Pursuit Toolbox is broken up into four modules (shown below) and includes helpful resources to guide you through the pursuit lifecycle.



WE'D LIKE TO HEAR FROM YOU

Please feel free to send questions and suggestions related to the Pursuit Toolbox.

- **marketing@garney.com**

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ROLES

OPERATIONS PROPOSAL LEAD (OPL)

PURSUIT CHAMPION AND OVERALL RESPONSIBILITY

Identifies potential project opportunity and is responsible for developing a strategy to win that opportunity. They serve in a leadership role, working in partnership with Operations and Marketing to assess Garney's competitive position in the market and then develop a plan and strategy to strengthen that position and relationship with the client. They serve as a project champion, leading efforts to identify staffing needs and teaming relationships required for the project. They hold all parties accountable throughout all stages of pursuit, driving results and accountability. They are decisive and enthusiastic, offer broad technical knowledge, garner support and excitement for the project and win strategy, and build client relationships.

PROFIT CENTER

EXECUTIVE LEADERSHIP

Involved in various stages of the capture planning process and is responsible for approving the pursuit, identifying staffing resources, signing MOU, JV or Teaming agreements and standard T&C's, and strengthening client relationships with executive decision-making authority for all budget, risk, and pursuit decisions.

MARKETING LEAD

SUPPORT, ORGANIZATION, CORRESPONDENCE

The OPL's counterpart serving a fundamental role in the organization, correspondence, and compilation of deliverables required to win new work, which may include capture planning, proposal development, proprietary meetings, presentations, and/or interviews. They support the OPL with marketing tasks, but are not typically involved in building relationships with the client.

OPERATIONS STAFF

SUPPORT WIN STRATEGY & DEVELOPMENT

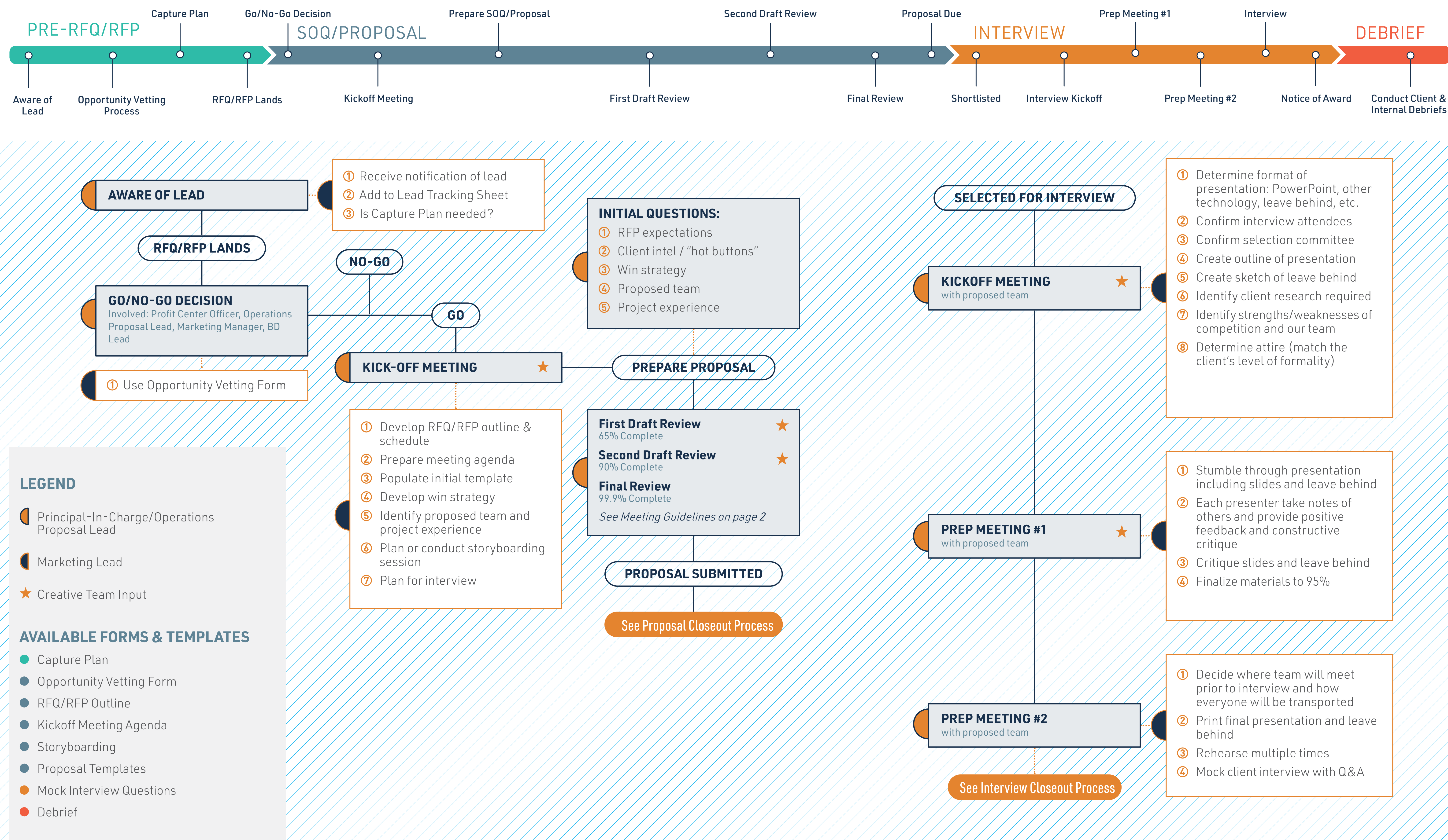
Assists the OPL in building client relationships through client meetings and site visits. They support the OPL as needed with technical tasks, including strategic development of project differentiators related to approach, means and methods, risk registers, schedules, and cost.

OUTSIDE TEAMING PARTNERS

STRATEGIC BENEFITS

Depending on the delivery method and project scope, the OPL and Profit Center may choose specific outside teaming partners for a variety of reasons. Depending on their anticipated project involvement and/or client relationships, the OPL will champion outside partner support on an as-needed basis.

PURSUIT LIFECYCLE



CAPTURE PLANNING

WHAT IS CAPTURE PLANNING?

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- PROFIT CENTER
- OPERATIONS STAFF
- OUTSIDE PARTNERS (IF NEEDED)

DURATION

VARIES: 3 MONTHS TO YEAR(S)+

ACTIVITIES

GAIN KNOWLEDGE AND USE IT TO IMPROVE OUR CHANCES OF WINNING A PROJECT

GOAL

- STRATEGICALLY POSITION FOR THE WIN

WHAT IS THE PROCESS?

Imagine a capture plan as a framework, a series of folders or buckets, where you assemble and **POPULATE** data by topic. The process is formalized, yet flexible since all opportunities are different and require varying levels of effort. The capture plan process leads us to ask certain questions, **VALIDATE** known information, and identify information gaps. As we work through the process, we research unknowns, document and **UPDATE** our intel, and **IMPLEMENT** action plans to refine our knowledge. Capture plans are living documents that are repeatedly updated as you gain information.

WHY CAPTURE PLAN?

We capture plan to win more, make smarter go/no-go (Pursuit Vetting) decisions, and make best use of Garney resources. Our goal is to develop an understanding of the client's project-specific wants and needs and then formulate a plan, team, and solution to best meet those needs.

We develop specific action plans to build relationships with clients in order to gain insight on their goals for a project. As we gain understanding of the project and expected proposal requirements, we are able to streamline work internally once an RFQ or RFP is issued. The process can also allow Garney to realize if the opportunity is better aligned for our competition and we should no-go an opportunity.

CAPTURE PLAN PROCESS

POPULATE | VALIDATE | UPDATE | IMPLEMENT

CAPTURE PLAN PROCESS

The process of managing and engaging in the pre-competition phase in an organized way that is designed to increase win potential.

POPULATE

- Populate capture plan with known information
- Identify the holes and areas with information gaps and set forth action items to gain that knowledge
- Maintain client focus and perspective throughout process

VALIDATE

- Use multiple sources for client and competitor information
- Confirm agreement and support for internal information and decisions

UPDATE

- Use capture plan to develop action items
- Seek information to fill gaps
- Add new information as it becomes available and update outdated intel
- Continue to build action plans that improve positioning

IMPLEMENT

- Track progress of action items
- Maintain team communication and develop a win strategy

BENEFITS OF CAPTURE PLANNING

- Win more frequently by developing a plan or "win strategy"
- Create action plans that build trust and relationships with clients to improve positioning
- Knowledge source – Share information between Operations, Business Development, and Marketing
- Identify gaps in win strategy and capabilities and take action to improve
- Save money and reduce wasted resources
- Make better go/no-go decisions
- Head start on proposal and presentation

TEAM ROLES & RESPONSIBILITIES

USE THE RIGHT SKILLS

Capture plan team members' skills must be suited to their assigned action, whether direct customer contact, internal development, or assisting the proposal team with technical deliverables. Leverage the different strengths and capabilities of your capture plan team to make effective action plans with reasonable deadlines.

EXPECTATIONS

Capture planning is interactive and always takes place in a group meeting. Capture planning should be led by an OPL and supported by the Profit Center, Marketing Lead, Operations Staff, and outside teaming partners depending on the size and scope of the pursuit.

OPERATIONS PROPOSAL LEAD	PROFIT CENTER	MARKETING LEAD	OPERATIONS SUPPORT	OUTSIDE PARTNERS
KEY RESPONSIBILITIES ▪ Drive Process/ Project Champion ▪ Build Client Relationships ▪ Win Strategy Development ▪ Facilitates Meetings and Calls	**KEY RESPONSIBILITIES** ▪ Resource Allocation ▪ Risk Assessment ▪ Build Client Relationships	**KEY RESPONSIBILITIES** ▪ Support OPL ▪ Marketing assistance and deliverables	**KEY RESPONSIBILITIES** ▪ Build Client Relationships ▪ Win Strategy Development through Technical Tasks	**KEY RESPONSIBILITIES** ▪ Varies – Depending on Role and Client Relationship

WIN STRATEGY & WIN THEMES

TOOLS

- CAPTURE PLAN
- PROPOSAL OUTLINE
- COMPETITOR PROPOSALS
- PAST DEBRIEFS

DURATION

1 TO 2 HOURS PER SESSION

PLAYERS INVOLVED

- PROFIT CENTER
- OPL
- MARKETING LEAD
- OPERATIONS SUPPORT STAFF

ACTIVITIES

- DETERMINE THE STRATEGY
- EVALUATE THE CRITERIA FOR DEVELOPING THE STRATEGY
- DEVELOP FEATURES, BENEFITS, AND PROOFS

A strategy is a way of describing how you are going to uniquely build the project and differentiate from our competitors. It is less specific than an action plan (which tells the who-what-when); instead, it tries to broadly answer the question, "How do we get there from here?"

DIFFERENCE BETWEEN THE WIN STRATEGY & WIN THEMES

Your win strategy is how you intend to beat the competition and win the contract. The OPL leads the charge in developing the win strategy with support from Profit Center and Operations.

The win themes are reinforced throughout the proposal and interview and are influenced by the project's evaluation/selection committee hot buttons and goals. The capture team is responsible for determining win themes that are unique (differentiators) or offer unique value.

DETERMINING YOUR WIN STRATEGY

Your win strategy is driven by information about the opportunity, the client, and Garney. With respect to the opportunity, you need to understand:

- **What the opportunity is**
- **What the need behind the need is**
- **The scope of the opportunity**

Win strategies should be focused on:

- **Addressing the client's hot buttons (and provide best value solutions)**
- **Team differentiators (what can we say or do that our competition can not?)**

PROPOSAL WIN THEME

Win themes are unique differentiation statements that illustrate why Garney is most qualified to complete a client's project. As you develop each proposal section, the focus should incorporate the identified win themes.

STEPS TO THE CAPTURE PLAN

STEPS TO THE CAPTURE PLAN

There are six general steps to the capture plan listed below that focus on identifying specific objectives related to the opportunity. The tools used to assist with these steps, the individuals involved in each step, and other details are outlined in the following pages.

1. **THE PURSUIT:** Pursuit overview, description, and scope; key challenges & issues
2. **THE CLIENT:** Key issues & influences; client relationships
3. **THE TEAM:** Organizational chart; teaming partners; qualifications/experience
4. **THE STRATEGY:** Competitor analysis; Teaming partner analysis; SWOT analysis; "Issue-Feature-Benefit-Proof"; anticipated selection criteria
5. **THE SUMMARY:** Identify discriminators/differentiators; Win Theme development; identify information gaps and opportunities for action
6. **ACTION ITEMS:** Make an action plan; identify action items; regroup and progress

	1. THE PURSUIT	2. THE CLIENT	3. THE TEAM	4. THE STRATEGY	5. THE SUMMARY	6. ACTION ITEMS
TOOLS	• Pursuit Vetting Form (Go/No-Go)	• Capture Plan (typical) • Client Players sheet (for more detailed analysis)	• Organizational chart • Team Experience Matrix	• Capture Plan • SWOT Analysis • Win Theme Development: Issue, Feature, Benefit, and Proof Formula	• Win Strategy Development • Action Items	• Action Items

STEP 1: THE PURSUIT

TOOL

PURSUIT VETTING FORM

DURATION

30 TO 60 MINUTES

PLAYERS INVOLVED

- **OPL**
- **PROFIT CENTER**
- **MARKETING LEAD**

PURPOSE

- **QUICKLY ORGANIZE OPPORTUNITY**
- **DETAIL AND IDENTIFY KNOWLEDGE GAPS**

GOAL

ASSESS CURRENT POSITIONING, INCLUDING STRENGTHS AND WEAKNESSES TO ESTABLISH EFFECTIVE PLAN MOVING FORWARD

IDENTIFY OPPORTUNITY

The first step to any capture plan is identifying a potential opportunity or pursuit. Intel can come from a variety of sources:

- Existing relationships: Clients, Advisors, Engineers, Contractors
- Research
- News, Websites, Social Media, Annual Reports
- Prospecting and Networking
- Industry Events

GETTING STARTED: GATHER THE BASICS

Once a potential opportunity is identified, the OPL should gather the basic information about the pursuit including Client/Owner information, project scope, delivery method, project value, pursuit dates, and project drivers. Once basic information is gathered, the capture planning process can begin by completing the Pursuit Vetting Form.

Details	Response	Justification Notes
Project Name:	Three Oaks WRF Expansion (	
Client/Owner Name:	Lee County Utilities (LCU)	
Proposal Operations Proposal Lead:	Adam Corn	
Profit Center:	Scott Reuter	
Project Description / Scope	Existing WRF expansion from 6 ro 8 MGD	
PROPOSAL DETAILS		
Delivery Method:	Progressive Design-Build	
Project Value:	20M - 25M	
RFQ Release:	6/12/2020	
Proposal Due Date:	7/12/2020	Interviews ~8/12
Preconstruction Start:	10/1/2020	
Preconstruction End:	10/1/2021	
Construction Start:	10/1/2021	
Construction End:	10/1/2023	
CLIENT DETAILS		
Primary Client Contact:	Mikes Maillakakis	
Have we worked for this client before?	Yes	
If yes, do we have a positive relationship with this client?	Yes	Mikes - Yes
When was the last time we contacted this client?	Ongoing / this week	
Does the client have available funding for this project?	Yes	
Have we worked at/visited this site before?	Yes	Josh & Mark visited
Do we know who are the influencers/decision makers/selection committee?	No	Lyssa Lott - PM; Need to vet

The Opportunity Vetting Form is an easy way to organize basic pursuit information and should be completed by the OPL and Marketing Lead together with Profit Center input. The form can be completed quickly and is color coded so that negative responses appear red, positive responses appear green, and neutral responses appear yellow. Revisiting this form as information is updated is a good way to determine if the project should be a go or no-go once the RFQ/RFP drops.

STEP 2:
THE CLIENT

TOOLS

- CAPTURE PLAN (TYPICAL)
- CLIENT PLAYERS SHEET
  (FOR MORE DETAILED ANALYSIS)

DURATION

30 MINUTES INITIALLY;
ONGOING AS TEAM GATHERS INTEL

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- OPTIONAL: OTHER OPERATIONS STAFF/PROFIT CENTER IF CONNECTED TO CLIENT

PURPOSE

IDENTIFY CLIENT PLAYERS, INFLUENCERS, AND SELECTION COMMITTEE

GOAL

STRENGTHEN RELATIONSHIPS WITH KEY PLAYERS TO MOVE GARNEY INTO FAVORED POSITION

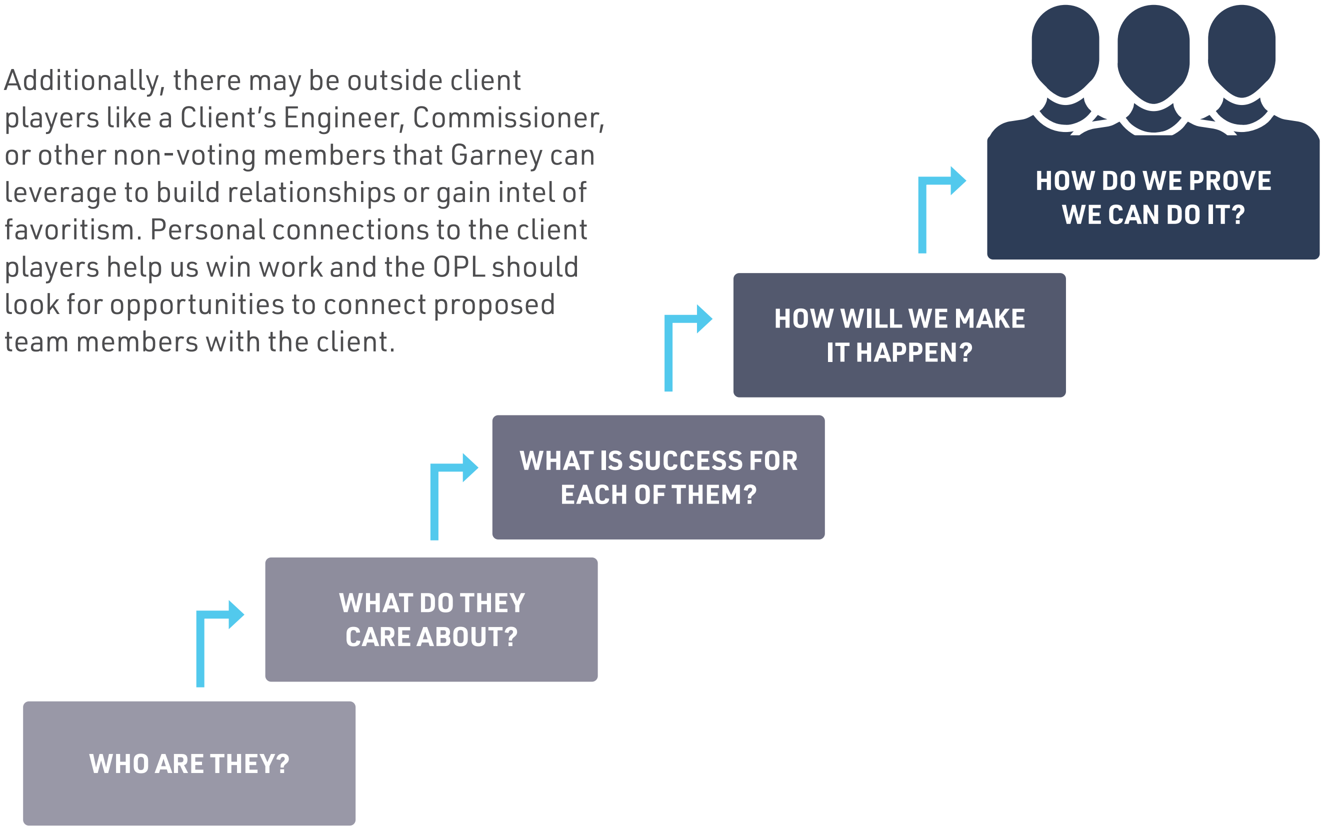
GET TO KNOW THE DECISION MAKERS

Identifying the client players is one of the most important steps because these are the people who will decide and influence who wins the pursuit. As part of the capture planning process, the OPL's goal is to figure out who the selection committee and other decision makers are and what matters to them. We need to strengthen those relationships and create confidence in their belief that Garney will achieve their definition of project success. We want to build trust and positive relationships with the players because people want to work with people they know and like. Building these relationships strengthens our positioning favorably.

Additionally, there may be outside client players like a Client's Engineer, Commissioner, or other non-voting members that Garney can leverage to build relationships or gain intel of favoritism. Personal connections to the client players help us win work and the OPL should look for opportunities to connect proposed team members with the client.

CLIENT PLAYERS MATRIX

The **CAPTURE PLAN TEMPLATE** contains a matrix to organize names, titles, likes, dislikes, teaming relationships, and other notes/actions associated with that player. If Garney is chasing a pursuit for a new client or one that we do not have strong relationships with and we need to spend more efforts understanding the client players, the Marketing Lead can set up a more detailed **"CLIENT PLAYERS SHEET."** This sheet allows the team to capture extensive details and research on possible players, and identify personal connections or "touch points."



STEP 3: THE TEAM

TOOL

ORGANIZATIONAL CHART

DURATION

15 MINUTES INITIALLY; ONGOING AS TEAM GATHERS INTEL

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- PROFIT CENTER

PURPOSE

IDENTIFY RESOURCES TO COMMIT TO PROJECT

GOAL

- ENSURE PROJECT SCOPE IS COVERED AND GARNEY RESOURCES AVAILABLE

- IDENTIFY STRATEGIC TEAMING PARTNERSHIPS THAT DIFFERENTIATE OUR TEAM FROM COMPETITION

BUILD YOUR ORGANIZATIONAL CHART

The **ORGANIZATIONAL CHART** is a tool that identifies which proposed staff members will work on the project and ensures project resources are available. Additionally, building an organizational chart forces the capture plan team to think about the varying needs, risks, and challenges of the project scope, and ensure that scope is met.

It also serves as a tool for the OPL and Marketing Lead to understand what "story" they are going to tell the client. In creating a unique story of why your proposed team was put together, you begin to develop differentiators and themes of why the client would want this team over others. As you are deciding roles and staff to fill them, think about who would be in an interview (if required) and how your selections will perform in the interview and what early training or coaching they may need.

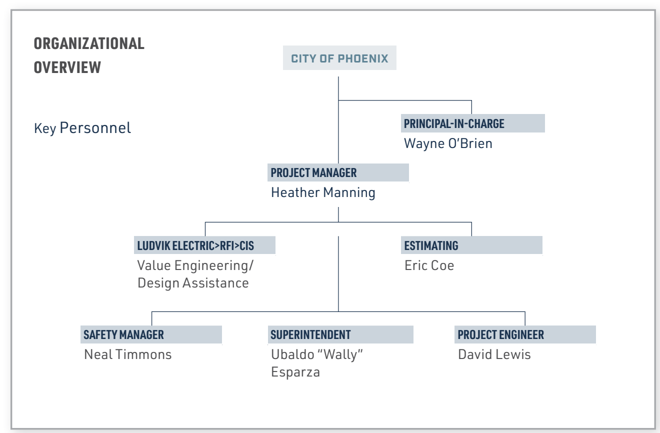
As we refine the staff on our organizational charts, it is important that we build relationships between proposed staff members and client decision makers. Remember: clients want to work with people they like and trust, so capture planning is where we foster those relationships.

It is also important that we build our organizational chart around the client's wants and needs. What is a successful teaming structure in the eyes of our client?
Do they prefer a team with ample staffing resources or a more streamlined team with fewer layers of management?

STRATEGIC TEAMING OPPORTUNITIES

The capture planning process is a pursuit of knowledge, and as the capture team gains more knowledge of project drivers, client hot buttons, and project challenges, the capture team may choose to add strategic teaming partners to the org chart. Strategic teaming partners suffice a need for the Client, whether that be a specialized scope of work, a minority business utilization goal, or trust in the form of an established positive working relationship.

When developing an organizational chart, it is important to think about the team members our competition may be proposing. What are strengths and weaknesses of our competitors' organizational charts? If they are not locally based and our team is, then we can emphasize that. If our competitors offer services in-house that are outside of our capabilities, then we should consider adding a specialty subconsultant to our team.



Q: WHY DID WE BUILD OUR ORGANIZATIONAL CHART THIS WAY?

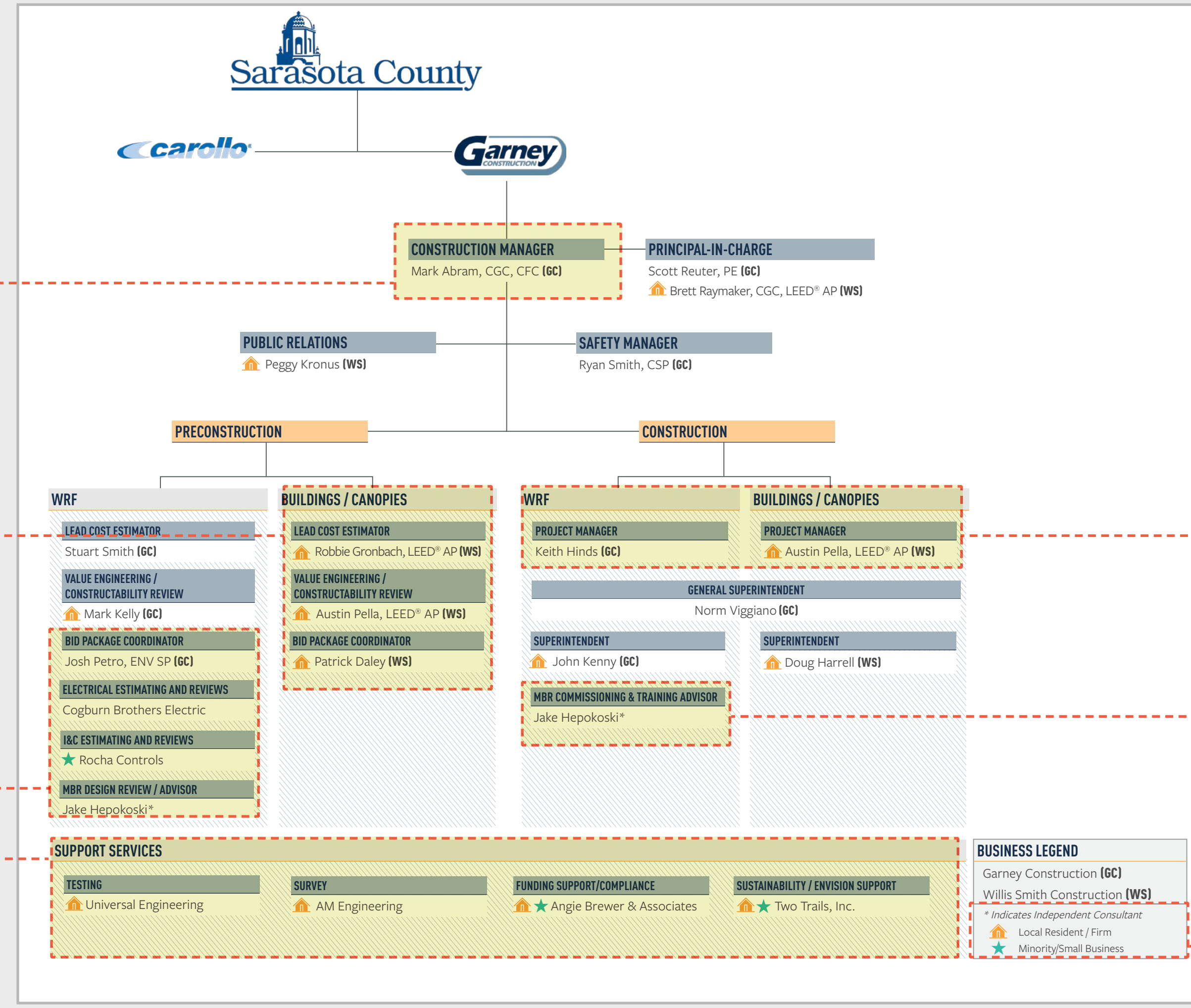
A: TO SUPPORT THE CLIENT'S GOALS AND PROJECT VISION.

Senior CM with recent experience on project with several similarities in scope to **client's project**

Strategic subconsultant with strong **client relationships**

Years of successful partnership with Garney offers **client seamless partnerships**

Local teaming partners supporting **client's economy**



Resources for WRF and Building construction expedite **client's schedule**

Expert in new technology **client** is installing at WRF

Staffing project with resources local to **client** and that **support client MBE/ WBE goals**

STEP 3: THE TEAM (CONT.)

TOOL

TEAM EXPERIENCE MATRIX

DURATION

30 MINUTES INITIALLY; ONGOING EFFORT REQUIRED

PLAYERS INVOLVED

- **OPL**
- **MARKETING LEAD (SUPPORT)**

PURPOSE

LIST COMPREHENSIVE RELEVANT TEAM EXPERIENCE

GOAL

- **IDENTIFY REFERENCE PROJECTS**
- **ENSURE TEAM MEETS MINIMUM QUALIFICATIONS**

BUILD YOUR TEAM EXPERIENCE MATRIX

In proposals, what are we selling? Part of that answer is that we are selling **EXPERIENCE**. The Team Experience Matrix is a tool to assist us in organizing our team's comprehensive relevant experience so we ensure to translate that to our proposals. Building a Team Experience Matrix forces the capture plan team to think about the varying needs, risks, and challenges of the project scope, and ensure our team has experience that covers those hot buttons.

The OPL is responsible for building out this spreadsheet with support from the other capture team members. The Marketing Lead will work with the OPL to identify various reports to be pulled from the Marketing database (Cosential). Reports can be specific to a region, client, delivery method, project value, staff involvement, and scope. Because the reports are exported in Excel, it is easy for the OPL to populate into the Team Experience Matrix.

Additionally, other Operations Team Members may provide input to the matrix and/or outside teaming partners may populate the spreadsheet with their experience so the OPL has a list of organized comprehensive team experience.

This spreadsheet is multifunctional and can be used to:

- Confirm we meet client minimum qualifications
- Identify experience with client and/or local experience
- Identify experience with client's engineer
- Identify experience with teaming partners
- Identify projects of relevant scope, size, complexity
- Experience strengths/weaknesses in relation to competition
- Preferred reference project
- Supplemental matrices for proof of team's qualifications

THE TEAM EXPERIENCE MATRIX

Proj	Project Name	Contrac	Sta	City	Owner Name	Primary Project Type	Completion Dat	Garney	Carollo	Delivery Method	$ > $75mil	within 10 yrs	Multiple Year Program (Phased)	Capacity (MGD)	Rehab / Mods to Exist	Preliminary Treatement	Headcell	Equalization	Aeration / Blowers	MBR Process	Chlorine Contact	Sludge Holding	Chemical Facilities	Ground Storage	Electircal	Instrumentation	Staff Involvement
5211	Wakarusa Wastewater Treatment Plant & Conveyance Corridor	45,098,879	KS	Lawerence		Plant	3/14/2018	X		DBB						X	X										
334	Plant City Water Reclamation Facility Expansion	44,046,696	FL	Plant City	City of Plant City FL	Plant	Jun-08	X		CMAR			X	12	X				X		X		X	X	X	X	
6360	Cherokee TDS Reduction Facility	40,000,000	CO	Colorado Sprir	Cherokee Metro District	Plant	Sep-22	X		PDB										X							
7212	PK Second Stage Drought Strategy - Transmission System	38,527,386	TX	Breckenridge	Enprotec / Hibbs & Todd, Inc.	Plant	Jan-17	X		CMAR																	John Sedbrook
6233	Evans Consolidated Wastewater Treatment Plant	38,433,896	CO	Evans	City of Evans, CO	Plant	Jun-18	X		CMAR				3											X	X	Stephen Hagy
547	Southwest Water Reclamation Facility	38,114,163	FL	North Port	City of North Port FL	Plant	Dec-19	X		CMAR				2							X				X	X	Max Glynn
6310	Soldier Canyon Filter Plant 15 MGD Expansion	31,000,000	CO	Fort Collins	Soldier Canyon Water Treatment Authority	Pipeline	Jun-20	X		CMAR		X	X	60											X	X	
2249	Doby Creek and Little Sugar Creek Tributary to Fairview Road Sanitary Sewer Improvements	30,087,526	NC	Charlotte	Charlotte Water	Pipeline	Aug-19	X		CMAR		X															
527	Lake Marion WRF Replacement & Expansion	28,964,517	FL	Kissimmee	Toho Water Authority	Plant	Jan-20	X		CMAR			X	3	X	X	X								X	X	
442	Polk Reclaimed Water Treatment Plant	28,856,022	FL	Mulberry	TECO - Tampa Electric	Plant	May-15	X		DBB															X	X	Tom Manning
6279	Wastewater Treatment Plant Improvements	28,840,050	CO	Loveland	City of Loveland, CO	Plant	Jul-19	X		CMAR				20											X	X	Brett Green
0433	Solids Handling Facility at Western Wake WRF Contract 2	27,781,495	NC	New Hill	Town of Cary, NC	Plant	Mar-15	X		DBB															X	X	don trujillo
0554	New Headworks & Grit Removal Facility	27,160,153	FL	St. Petersburg	Pinellas County FL	Plant	3/21/2022	X		PDB			X		X		X										
0297	North County Water Reclamation Facility Expansion	25,173,969	FL	Naples	Collier County	Plant	Nov-05	X		DBB			X	24.1	X				X		X				X		Tim Behler
333	Wesley Center Sub-Regional Reuse Facility Expansion	24,569,696	FL	Wesley Chapel	Pasco County Utilities	Plant	Aug-07	X		DBB				6	X	X					X				X	X	Scott

WE CAN CREATE EFFECTIVE PROPOSAL CONTENT AND IDENTIFY OUR MOST RELEVANT PROJECTS TO FEATURE

GARNEY + HAZEN RELEVANT WRF/WWTP EXPERIENCE

Below is a sample of our team's relevant WRF/WWTP experience with a significant portion of our experience completed in Florida and via collaborative delivery methods.

		PROJECT DETAILS			DELIVERY				RELEVANCY			
Project Name	Location	Value	Garney	Hazen	Collaborative Delivery	On-Schedule	On-Budget	Key Personnel Involvement	WWTP/WRF Expansion or Rehab	Completed in Last 10 Years	Comparable Scope and Complexity	Maintaining Plant Operations
Apopka WRF Expansion (CMAR)	Apopka, FL	$64.1M	💧		+	+	+	+	+	+	+	+
T.Z. Osborne WRF Expansion (CMAR)	McLeansville, NC	$53.5M	💧	💧	+	+	+	+	+	+	+	+
Plant City WRF Expansion (CMAR)	Plant City, FL	$44.0M	💧		+	+	+	+	+		+	+
Southwest WRF (CMAR)	North Port, FL	$38.1M	💧		+	+	+	+		+	+	
Lake Marion WRF Expansion (CMAR)	Kissimmee, FL	$29.0M	💧		+	+	+	+	+	+	+	+
Airport WRF Phase 2 Improvements	Brooksville, FL	$20.1M	💧			+	+	+	+	+	+	+
CSU WWTF (DB)	The Villages, FL	$12.7M	💧		+	+	+	+	+	+	+	+
North County WRF Expansion	Naples, FL	$25.2M	💧	💧		+	+	+	+		+	+

3 APOPKA WRF EXPANSION (CMAR), APOPKA, FL

WRF expansion from 4.5 MGD to 8.0 MGD AADF while treating sewage using a biological treatment reactor designed for nitrogen removal. Construction included a headworks, odor control system, chemical feed facilities, aeration (blowers and surface aerators), submersible mixers, two secondary clarifiers, two belt filter press dewatering systems, RAS/WAS pumping facilities, an influent lift station, an EQ pump station, chlorine contact basin, three transfer pump stations, media filter system, rotary drum thickeners, grit removal equipment, and various other electrical, I&C, and miscellaneous components.

MAINTAINING PLANT OPERATIONS: The project required maintaining consistent and reliable treatment throughout construction. The influent flows to the facility eliminated the ability to take the existing unit processes out of service until the new treatment train was completed and producing reuse quality effluent for the City's reuse customers.

SELF-PERFORMANCE: Garney self-performed 50% of the project which included concrete, mechanical, process piping, yard piping, equipment procurement, installation, start-up, and commissioning.

VALUE ENGINEERING AND COST SAVINGS: Garney provided additional savings by recommending an owner direct purchase of $16M worth of equipment which created $1M in tax savings. In addition, VE ideas generated within partnering meetings created $3M worth of savings that were incorporated as added project scope.

MAINTAINING PROJECT SCHEDULES: To comply with the FDEP consent order, the project was constructed to produce effluent that complied with permit requirements. This limited the total project duration for preliminary design, permitting, final design, and construction to within a three-year overall duration and just 2.5 years to complete construction of the facilities required to meet the effluent requirement of the permit.

RELEVANCY TO THREE OAKS WRF

+ WWTP in Florida
+ MOPO / Existing Facility

OWNER & CONTACT

City of Apopka
Glenn Brooks, Water Resources Operations Manager
407.703.1731
gbrooks@apopka.net

PROJECT ADDRESS

740 E. Cleveland Street
Apopka, FL 32703

COSTS

$60,061,551 (anticipated)
$62,283,343(actual) – City had $6M contingency for which Garney received 120 change orders mainly for rehabilitation of existing plant. Garney provided VE savings of $4.5M.

SCHEDULE/CONTRACT TERM

5/2016 – 9/2018 (initial);
5/2016 – 9/2018 (actual)

STAFF INVOLVEMENT

Behler / Principal-in-Charge
Smith / Safety Manager
Wagner / Chief Estimator
Herbert / Project Engineer

STEP 4: THE STRATEGY

TOOL

CAPTURE PLAN

DURATION

ONGOING – MULTIPLE MEETINGS

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- OPERATIONS STAFF PROPOSED FOR PROJECT
- POSSIBLY OUTSIDE TEAMING PARTNERS

PURPOSE

- ANALYZE CLIENT ISSUES AND UNIQUE PROJECT SOLUTIONS
- DETERMINE GARNEY'S POSITION IN RELATION TO OUR COMPETITION IN ACHIEVING CLIENT GOALS

GOAL

DEVELOP A STRATEGY TO IMPROVE GARNEY'S POSITION OF WINNING

GARNEY VERSUS THE COMPETITION

An important aspect of capture planning involves **COMPETITION ANALYSIS,** which involves identifying potential competitors who may be chasing an opportunity and identifying who might be on their teams. Knowing this information, we can begin to analyze our competition's strengths and weaknesses to formulate our pre-proposal strategies. SWOT Analysis is a simple but useful framework for analyzing both Garney's and our competition's strengths, weaknesses, opportunities, and threats. It helps our positioning by building on what we do well, and addressing what we're lacking.

Once we have this analysis complete, we can determine how Garney's team compares to each competitor. We can look at each competitor's weaknesses and see if our team has any strengths that counter those and also if our competitors have strengths where we have weakness.

It's important to note that when an RFP advertises, there is typically a code of silence, meaning we are no longer allowed to contact the Client. Because we are in the pre-proposal phase, we can develop action plans geared towards turning our weaknesses into strengths and some of these action plans may include interaction and/or relationship building with the Client. In other cases, we can overcome weaknesses by adding a specialty subconsultant to add qualifications or a "local presence" that our team may be missing.

STRENGTHS

INTERNAL ORIGIN

HELPFUL

- Specialty Capabilities
- Competitive Advantages, i.e. incumbent
- Strong Portfolio with Client
- Unique Selling Points
- Client Experienced Staff Resources
- Innovation in Similar Scope of Work
- Location to Site / Locality
- Accreditations, Qualifications, Certifications
- Price, Value, Quality

WEAKNESSES

INTERNAL ORIGIN

HARMFUL

- Gaps in Capabilities
- Competitive Disadvantages
- No Portfolio with Client
- Lack of Competitive Strength
- No Local Office
- No Prior Work in Location and/or Industry
- No Local State Registration; Lacking Accreditations, Certifications, Registrations
- Rates Too High
- Availability Too Low

OPPORTUNITY

EXTERNAL ORIGIN

HELPFUL

- Market Development
- Competitor Vulnerabilities
- Technology / Software Development and Innovation, i.e. Builder, BIM, Hololens
- New Markets, Vertical, Horizontal
- Information and Research
- Partnerships
- Agencies
- Volumes, Productions, Economics
- Seasonal, Weather Influences

THREATS

EXTERNAL ORIGIN

HARMFUL

- Political / Funding Effects
- Legislative Effects
- Environmental Effects
- IT Developments
- Competitor Intentions
- New Technologies, Services
- Sustaining Internal Resource Capabilities
- Insurmountable Weaknesses

STEP 4: THE STRATEGY (CONT.)

TOOL

CAPTURE PLAN

DURATION

ONGOING – MULTIPLE MEETINGS

PLAYERS INVOLVED

- **OPL**
- **MARKETING LEAD**
- **OPERATIONS STAFF PROPOSED FOR PROJECT**
- **POSSIBLY OUTSIDE TEAMING PARTNERS**

PURPOSE

ANALYZE CLIENT ISSUES AND UNIQUE PROJECT SOLUTIONS

GOAL

DEVELOP A STRATEGY TO IMPROVE GARNEY'S POSITION OF WINNING

WHAT IS THE STORY WE ARE TELLING?

A good proposal tells a compelling story, and to tell a compelling story you must have a strong Win Theme. A Win Theme helps selection committee members understand why they prefer your company and your solution over the competition. Our Win Theme should align with the overall goals of the client and be supported by qualifications unique to our team, which we call discriminators or differentiators. But how do we develop these differentiators?

We develop differentiators as part of capture planning through the **ISSUE - FEATURE - BENEFIT - PROOF** framework. This brainstorming activity should involve the OPL and Marketing Lead at a minimum, and is beneficial to include other Operations Staff, Profit Center, or outside teaming partners to maximize contributions.

IDENTIFY THE ISSUE: Compelling proposal Win Themes are customer-focused and address a problem for the client, owner, user, community, or operators. This problem is a situation that presents difficulty, uncertainty, or perplexity. That "problem" may or may not be mentioned in the RFP, and is referred to as the issue.

RESOLVE THE ISSUE: For each issue, there is a corresponding feature. The feature is the solution to the problem. The feature is what our team is proposing and/or able to provide to alleviate the client's problem.

AFFIRM THE BENEFIT: For each solution to a client's problem, we should recognize the benefit of that solution. How does a Garney-specific feature improve your client's problem? Does it save them time or money, reduce risk, or enhance quality or safety?

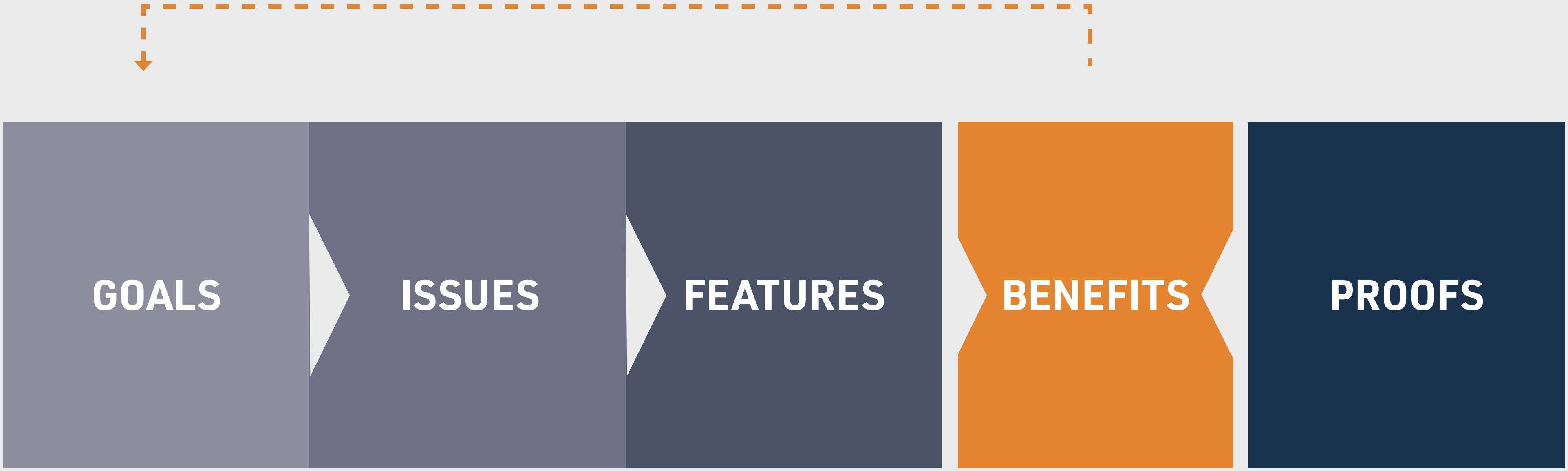
PROVE IT: Lastly, we want to offer the client confidence in our team's ability to solve their problems. By giving previous proofs or project-specific examples of how we have solved similar issues, we validate the client's opinion that our team is uniquely qualified to solve their issue(s).

STANDING OUT AGAINST THE COMPETITION

As we capture plan and work through the Issue-Feature-Benefit-Proof framework, it is our goal to identify features and benefits that are unique to our team. If we can solve a client's problem and provide benefits that other teams cannot, then we set ourselves apart from the competition and bring added value, which increases our chances of winning a project.

FOLLOWING THE FORMULA:

DEVELOPING DIFFERENTIATORS AND OUR WIN THEME



GOALS:
What the client needs to achieve in making this investment.

ISSUES:
The client's concerns in selecting a firm/team to achieve their goals.

FEATURES:
What we propose to do or provide.

BENEFITS:
What will it do for the client?

PROOFS:
Validation and substantiation that the benefits are real.

STEP 5: THE SUMMARY

TOOL

CAPTURE PLAN

DURATION

ONGOING – MULTIPLE MEETINGS

PLAYERS INVOLVED

- **OPL**
- **MARKETING LEAD**
- **OPERATIONS STAFF PROPOSED FOR PROJECT**
- **POSSIBLY OUTSIDE TEAMING PARTNERS**

PURPOSE

ACKNOWLEDGE CURRENT POSITIONING AND GOALS

GOAL

CHART AND ACTION PLAN TO DEVELOP OPPORTUNITIES THAT STRENGTHEN OUR CHANCES OF WINNING

WHAT DO WE KNOW - WHAT DON'T WE KNOW?

Remember that capture planning is a journey to gain knowledge and improve our positioning for a pursuit, and like any journey, it will take time for our positioning to evolve, our team to gain intel, and our staff to build relationships with key client players. It is also important that we not only capture information throughout this process, but take time to review what we've learned and confirm it is still accurate, identify areas where we are lacking information, and develop action plans to keep our progress moving forward.

Throughout the Capture Planning process, ask yourself: *"What is Garney doing to gain trust and be liked by the client and the decision makers?"* Capture Planning is the process that will help us find and uncover these answers so when an RFP advertises, we can prepare a proposal and presentation that speaks to the client in a way such that they think: *"this team understands my needs and has solutions."* If the selection process comes down to two qualified teams, it is likely the client will choose the team they know and trust more, so building client relationships is crucial. To help us understand where we are in our capture planning efforts, the following are four phases of capture planning and common activities and goals associated with each phase:

1 RESEARCH

- Opportunity background and summary
- Client overview, relationship status, touch points, and interactions
- Client issues and influencers
- Evaluation process and selection criteria
- Competitors and incumbents
- Past performance

2 ANALYSIS

- Project team identification
- Teaming SWOT analysis
- Competitor SWOT analysis
- Win theme development

3 STRATEGY

- Finalize organizational chart
- Win strategy development
- Continued client relationship building
- Strategic pre-positioning

4 EXECUTION

- Teaming agreements
- Continued client relationship building: site visits and client meetings
- Finalize theming
- Draft proposal components (resume, project profiles, etc.)

STEP 6: ACTION ITEMS & FOLLOW-UPS

TOOL
ACTION ITEMS

DURATION
ONGOING

PLAYERS INVOLVED
- **OPL**
- **MARKETING LEAD**
- **OPERATIONS STAFF PROPOSED FOR PROJECT**
- **POSSIBLY OUTSIDE TEAMING PARTNERS**

PURPOSE
ESTABLISH ACCOUNTABILITY AND PROGRESSION

GOAL
GAIN INTEL AND STRENGTHEN POSITIONING/CHANCES OF WINNING

ACCOUNTABILITY AND PROGRESSION

A capture plan is a tool that will help us compile our intel, but without an action plan our efforts will soon turn into a dead end. Building client relationships, uncovering project drivers, and improving our position in the marketplace all take action. In order to keep our capture planning efforts successful, accountability and action must be clearly identified. So what makes a good action plan?

An action plan is a list of all our current action items. An action item is something that needs to happen to help improve our positioning or increase our knowledge of a pursuit. For action items to be effective they need to be:

1. **Specific**
2. **Clear on how it helps our positioning and/or our project knowledge**
3. **Time bound**
4. **Assigned to a capture team member**

Effective capture planning requires a balance between action and planning. If building client relationships is one of our top priorities, then we should focus our efforts on building relationships. If we are still missing critical details on the project which may influence whether we even pursue the project, then intel gathering should be our priority.

With every action completed, the Marketing Lead and OPL should factor newly gained information into their analysis: fine-tune your organizational chart, update competitor analyses, and update Win Strategy. It is best practice to set and schedule specific measurable action objectives to simplify task management and most importantly set follow-up capture plan meetings. As employee-owners, many of us wear multiple hats, which means we are simultaneously working on a variety of projects. By setting reoccurring capture planning meetings, we provide accountability and a set schedule to ensure progression continues.

CARRY IT FORWARD

Eventually, the time will come when the RFP advertises and we transition from pre-pursuit planning to proposal execution. When this happens, it is important the team revisits the Pursuit Vetting Form to determine if it is still in Garney's best interest to pursue an opportunity. Resource availability may be less than originally planned when capture planning efforts began, or intel that a client favors another team may influence our decision to execute a proposal or sit this one out. The capture planning process allows our team to make the appropriate go/no-go decision and use Garney resources more responsibly.

SOQ/PROPOSAL

PREPARE SOQ/ PROPOSAL

TOOLS

V

THE SOQ/PROPOSAL PROCESS

During the pursuit lifecycle process, responding to an RFP is one of the steps in presenting your win strategy to the client. The go/no-go process is a great tool to circumvent risk and avoid chasing work with a low chance of winning due to limited resources or limited experience/qualifications. Once a pursuit is approved, it's time to focus on building a plan that follows the criteria of the RFQ/RFP. Like building a project, the pursuit lifecycle truly depends on the overall team's efforts and results-based accountability. This section will cover topics such as strategy, content development, and submittal preparation.

BUILDING A SUCCESSFUL PURSUIT TEAM

To be effective, the OPL and Marketing Lead's initial conversation should include assembling a pursuit team. A few critical roles include:

- **OPL**
- **Marketing Lead**
- **Operations Support Staff**
- **Creative Lead**
- **Peer Reviewer (Marketing & Technical)**

PREPARE SOQ/ PROPOSAL (CONT.)

TOOLS

- RFQ/RFP OUTLINE
- CAPTURE PLAN NOTES

DURATION

1 TO 2 HOURS

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- PURSUIT TEAM

ACTIVITIES:

- PROJECT BRIEF AND CLIENT BACKGROUND
- WHY ARE WE PURSUING?
- RFQ/RFP OUTLINE AND SCHEDULE
- IDENTIFY PROJECT TEAM AND SIMILAR EXPERIENCE
- CONDUCT OR PLAN FUTURE STORYBOARDING SESSION(S)

PROPOSAL OUTLINE

DOWNLOAD THE OUTLINE

Design-Build Services for Water Conserv I WRF Rehabilitation and Expansion

SECTION	DESCRIPTION	FIRM	LEAD	NOTES
	Proposal Cover			
1	Letter of Introduction	Garney	Adam/Silvia	*The Letter of Introduction shall give the name and address of the Respondent. The letter shall name the person or persons authorized to make representations for the Respondent and give address(es) and telephone number(s) for same. The letter must be signed by an individual, partner, or officer of the Respondent who is authorized to bind the Respondent. Letter of Introduction shall be addressed to the City of Orlando's Chief Procurement Officer.*
2	Table of Contents	Garney	Silvia	*The Table of Contents shall list the items (3 and 4) below along with page numbers and Tabs indicating where this information can be found.*
3	Cover Page from this solicitation with the completed information.	Garney	Silvia	
4	Business Experience and Qualifications	Garney/Carollo	Silvia/Laura	*Furnish information concerning finances, facilities, personnel, and experience as is necessary to determine its responsibility and competency to execute the Work covered in the Proposal. The following shall be included: a - k*
a	Completed Qualification Questionnaire **(Attachment 1)**	Garney	Silvia	*(This questionnaire may be re-typed with the responses, if desired.) (Silvia to provide template) Projects moved under experience section - E. Provide the following information on ten of your projects that are similar to the project of this inquiry. For Project Type, please indicate if Design/Build, Construction Manager or Construction only. Include projects at wastewater treatment plants with total project costs greater than $5 Million Dollars. For the Percentage of Involvement, indicate the percent of work performed by the Respondent for the listed project. (Please attach a separate sheet if needed.)*
	Part II **Attachment A (for Engineer)**	Carollo / EDA	Laura/Bill	*(Silvia to provide template) E. Provide the following information on ten of your projects that are similar to the project of this inquiry. For Project Type, please indicate if Design/Build, Construction Manager or Construction only. Include projects at wastewater treatment plants with total project costs greater than $5 Million Dollars. For the Percentage of Involvement, indicate the percent of work performed by the Respondent for the listed project. (Please attach a separate sheet if needed.)*
				Respondent will not be permitted to replace team members or personnel named without

PROPOSAL MILESTONES

1 Define roles and responsibilities

2 Develop compliance checklist and schedule (RFQ/RFP outline)

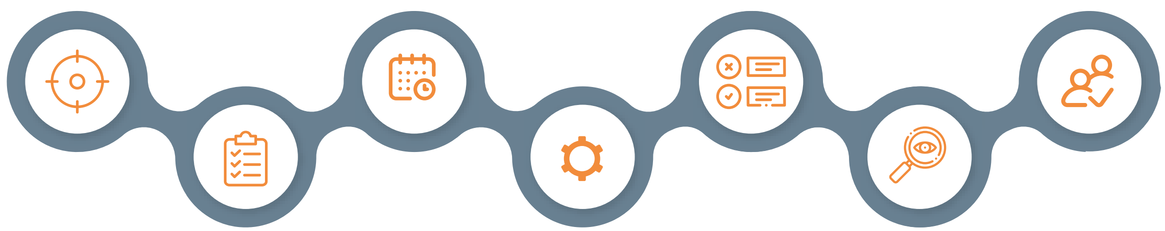
3 Kick-off Meeting

4 Develop proposal strategies and write-ups

5 Conduct effective reviews

6 Oversee final revisions and production

7 Follow-up with team and outside stakeholders



PREPARE SOQ/ PROPOSAL (CONT.)

TOOLS

- RFQ/RFP OUTLINE
- STORYBOARD TEMPLATE
- SOQ/PROPOSAL DRAFT

DURATION

30 MINUTES TO 2 HOURS (PER SESSION)

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- OPERATIONS SUPPORT STAFF
- CREATIVE LEAD

ACTIVITIES

- INDIVIDUAL OR GROUP STORYBOARDING
- MICRO-MEETINGS
- INTERACTIVE REVIEWS

GOAL

- FACILITATE COLLABORATION
- FOCUS THE GROUP'S ATTENTION

EXPECTATIONS AND TEAM RESPONSIBILITIES

Together the project team will leverage their strengths, talents, and expertise. As a result of their efforts, the goal is to deliver consistent, complete, and compelling proposal content. The OPL, with assistance from the Marketing Lead, is responsible for keeping the team engaged and accountable for target deadlines. A few activities that can facilitate collaboration include:

STORYBOARDING

Individual or group storyboarding sessions are helpful when working through narratives. During these sessions, you get to decide what you're going to write about before you start writing, so you have structure and a firm grasp on the topic at hand.

MICRO-MEETINGS

Brainstorming sessions allow for focused conversation about a specific topic. Smaller groups can help the conversation stay targeted and yields positive results because it sharpens the group's focus and attention.

INTERACTIVE REVIEWS

Interactive review sessions between drafts allow the team to review comments as a group. These meetings aim to get everyone on the same page about the proposal's development and provide an opportunity to incorporate significant edits with everyone's buy-in in real-time.

PREPARE SOQ/ PROPOSAL (CONT.)

TOOLS

- RFQ/RFP OUTLINE
- OUTLOOK CALENDAR

DURATION

30 MINUTES

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- OPERATIONS SUPPORT STAFF
- CREATIVE LEAD

GOAL

- EMBRACE THE POWER OF SCHEDULING YOUR TASKS TO MEET ESSENTIAL DEADLINES
- BREAK UP TASKS INTO ACHIEVABLE MILESTONES - ALLOWING FOR A STREAMLINED PROPOSAL AND PRODUCTION PROCESS

DRIVING THE PROPOSAL SCHEDULE

One of the most critical aspects of planning and scheduling is to develop baseline standards of productivity and success. Without setting a plan in place with specific milestones defined by completion dates, you won't know if you are meeting goals. In addition, the OPL and Marketing lead is responsible for maintaining team accountability. Adhering to the set schedule and communicating consistently about status allows the team to spend adequate time creating client-centric material and reviewing content to produce a high-quality submittal.

WHY THIS MATTERS?

Production problems are common—printers jam, internet issues, and so on. These problems are easy to correct, as long as the schedule has allowed sufficient time to do so. A well-designed proposal schedule will distribute work as evenly as possible across available days. Taking the time to develop an effective plan at the beginning of the process and adhering to it will save a lot of time and alleviate stress later on.

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
NOVEMBER	15	16	17	18	19 KICK-OFF CALL	20	21
	22	23	24	25 PROJECT PROFILES, LICENSES, AND RESUMES DUE	26	27	28
DECEMBER	29	30	1 PREBID 9:00 AM (ZOOM MEETING)	2 FIRST DRAFT NARRATIVES DUE	3	4 FIRST DRAFT ISSUED	5
	6	7	8 FIRST DRAFT COMMENTS DUE	9	10	11 SECOND DRAFT ISSUED	12
	13	14 FINAL COMMENTS DUE COB	15	16 PRINT/SHIP	17	18 PROPOSAL DUE 3:00 PM	19

WRITING CHECKLIST

TIPS FOR WRITING THE BEST CONTENT

- Is the theme or value proposition stated first? Is it specific and quantified?
- Do you name the customer before your company?
- Did you state benefits before features?
- Is your solution linked to the customer's hot buttons?
- Did you preview the content for the reader?
- Is content organized as instructed?
- Do you clearly identify how your solution benefits the customer?
- Are your discriminators obvious?
- Did you substantiate your approach and claims?
- Did you use clear visuals with action captions?
- Did you use telegraphic and informative headings on proper level?
- Is information organized logically?

DRAFT REVIEWS

TOOLS

- RFQ/RFP OUTLINE
- CLIENT DOCUMENTS

DURATION

2 TO 4 HOURS (PER REVIEW)

PLAYERS INVOLVED

- OPL
- MARKETING LEAD
- OPERATIONS SUPPORT STAFF
- CREATIVE LEAD

ACTIVITIES

- THOROUGHLY READ THE RFP
- UNDERSTAND THE CUSTOMER
- SEGMENT YOUR REVIEW
- CONDUCT AN ASSESSMENT USING THE EVALUATION CRITERIA
- SUMMARIZE YOUR FINDINGS

PURPOSE

GENERATE RECOMMENDATIONS THAT IMPROVE THE WIN PROBABILITY

CONDUCTING EFFECTIVE REVIEWS

Before an SOQ or proposal is submitted to a client, it should undergo a series of peer reviews, including an executive-level, Profit Center review. The executive reviewer has the authority to approve the proposal. For large complex pursuits, it can also be helpful to have someone not directly involved in creating the proposal bring a fresh, unbiased perspective to the process.

DRAFT 1 *(Profit Center, OPL, Marketing, Operations Support Staff, Creative)*

70-85% CONTENT

At this stage, the document should mirror the outline including, content, approach, or intent in every section and initial graphics and tables.

- Emphasis is on content, not on form, style, or grammatical perfection
- If content is missing, the section should contain a description of what will go there and what action has been taken to obtain the information
- Have RFQ/RFP references leading the sections to help during the compliance review
- The document should begin to incorporate consistency
- Is the story correct? Is the information and data current and relevant? Does it speak to the RFQ/RFP requirements and underlying customer needs?

DRAFT REVIEWS (CONT.)

ACTIVITIES

THINGS TO LOOK FOR INCLUDE:

- Compliance
- Quality
- Highlighting of win themes
- Clarity of proposal
- Consistency between volumes or major proposal sections
- Effectiveness of graphics and action captions
- Customer focus
- Persuasiveness; and proposal score based on customer evaluation criteria and rating methodology

DRAFT 2 *(Profit Center, OPL, Marketing, Operations Support Staff, Creative)*

90-95% CONTENT

This draft should have all changes, additions, and corrections identified during the first draft review. The document should have final or near-final graphics, tables, data, and resumes. All sections should have complete narratives, and the document should be formatted the same way it will be submitted.

- Conduct an in-person meeting page flip, if possible
- Review the draft from the perspective of the selection committee
- Compliance and clarity are priority
- Does it tell a compelling story? Does it show best value? Does it prove that it is technically acceptable? Are there features and benefits stated and documented?
- The document should be consistent in tense, voice, acronyms

FINAL DRAFT *(Profit Center, OPL, Marketing, Operations Support Staff, Creative)*

100% CONTENT

This document is pre-submission quality.

- It should be complete in all sections, including all information and graphics, and be fully compliant.
- It should be formatted and look exactly like it will for submission.
- Identify any fatal flaws (compliance, grammar, typos, photo/graphic quality, signatures)

BEST PRACTICES

- Coordinate with OPL on who should conduct draft reviews (mega teams will require specialized review teams to ensure it meets all requirements)
- If shipping a proposal, ship it two days before the due date
- If hand delivering, ensure it's submitted the day before and request confirmation
- If submitting an electronic proposal, make sure to bookmark the PDF for ease of review and follow these guidelines:
- EMAILED SUBMITTAL: CC Profit Center, include pursuit title and RFP/RFQ number in the subject line, request delivery confirmation, and read receipt verification
- ONLINE PORTAL: Include Garney and pursuit title and RFP/RFQ number as the file name, submit three hours before the deadline and confirm delivery with procurement
- Send final proposal documents to the pursuit team
- Determine if an internal debrief with the team is necessary

PRO TIPS FOR OPLs

COMMUNICATE, COMMUNICATE, COMMUNICATE

This is probably the most important aspect of being a good OPL. Make sure to stay in frequent contact with your Marketing Lead throughout the proposal creation process so that you're both on the same page. Answer their emails and phone calls; don't make them feel like a low priority to you.

ESTABLISH A TIMELINE

During the kick-off meeting, discuss and agree to a schedule/timeline for the proposal creation process. Take note of any vacation or other commitments that may take time away from your focus on the pursuit.

SCHEDULE, SCHEDULE, SCHEDULE

The entire proposal creation process is driven by a timeline initially created by your Marketing Lead. If you, or other members of the team, are not able to stick to your agreed-upon timeline, make sure to communicate with your Marketing Lead.

DECIDE ON KEY PERSONNEL

Decide on key team members and an org chart as early in the process as possible. Most proposals are driven by who is chosen to be the key personnel, so knowing this information early can help your Marketing Lead get a jumpstart on the proposal draft.

DECIDE ON REFERENCE PROJECTS UPFRONT

Your Marketing Lead can help by providing customized reports generated from Cosential, narrowing down options based on RFQ/RFP criteria. Help them select the best projects to highlight in the proposal. Doing this early helps the Marketing Lead begin formatting project profiles, choosing compelling photos and captions, and filling out necessary project forms, which can take a lot of time.

WRITE NARRATIVE DRAFTS ON TIME

Send write-ups as early as possible to your Marketing Lead since it takes time for us to review, edit, and format everything sent to us. If you are having trouble with what to write about, reach out to your Marketing Lead, who can provide various tools to help.

DECIDE ON PRIMARY POINT-OF-CONTACT

Clarify upfront who is responsible for contact with the client for submitting questions and checking on any addenda. Drive the bus with partners. When it comes to managing any engineer, JV, or subcontractor partners, you have more clout with these contacts than any of us on the Marketing Team, so make sure they stick to agreed-upon deadlines.

PROVIDE CONSTRUCTIVE FEEDBACK

Review all drafts sent by the Marketing Lead and respond with feedback by the established deadlines. It helps us when you thoroughly review our team's work and suggest improvements to wording, layout, photos, etc.

INTERVIEW

WHAT IS AN INTERVIEW?

TOOL

- INTERVIEW GUIDE

DURATION

VARIES: 2 WEEKS TO 2 MONTHS

PLAYERS INVOLVED

VARIES:

- OPL
- MARKETING LEAD
- CREATIVE LEAD
- KEY PERSONNEL PROPOSED
- OUTSIDE CONSULTANTS

ACTIVITIES

- CREATE A PRESENTATION THAT IS TAILORED TO THE CLIENT
- PREPARE FOR PRESENTING TO THE SELECTION COMMITTEE
- CREATE A COMPELLING LEAVE-BEHIND

GOALS

- BUILD TRUST WITH THE CLIENT
- CLEARLY PRESENT THAT GARNEY IS THE BEST CHOICE FOR THEIR PROJECT

WHAT IS THE PROCESS?

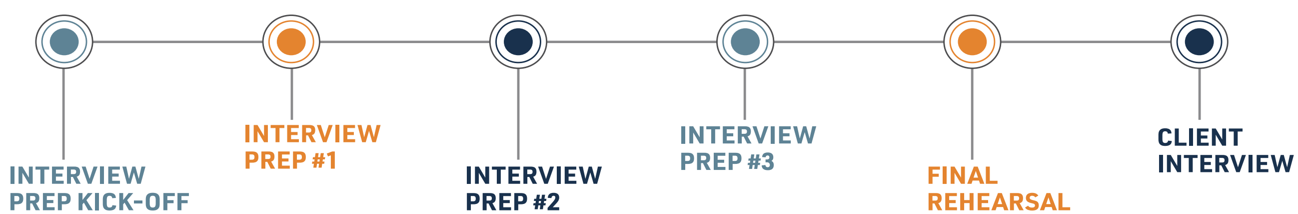
The interview process allows us to prepare for winning over the client. We ask questions to determine what makes Garney the best choice for the project. We identify the client's needs, wants, and concerns that should be addressed during the interview. As we work through the process, we focus on developing a strong understanding of the project, confidence in presenting, and creating a strong connection with the prospective client. The Interview Guide is a helpful tool that will be developed and maintained throughout the interview lifecycle.

WHY INTERVIEW?

Interviewing with the client allows the proposed project team to get face-to-face with the client. Having the opportunity to persuade the client that Garney is the right choice and leaving a lasting impression is, oftentimes, what ultimately wins Garney the project.

The interview allows the client to get to know our team. Additionally, it allows the client to gain a better understanding of Garney's approach and ask questions to further clarify information. Interviews are a critical step in the pursuit process.

INTERVIEW LIFECYCLE



INTERVIEW PREP

The process of considering goals and qualifications relative to the project or client and creating a presentation that effectively communicates these.

SHORT LIST

Client has determined Garney is qualified to move to the interview phase.

INTERVIEW PREP KICK-OFF

- Determine format of presentation (PowerPoint, other technology, leave-behind)
- Confirm interview attendees
- Confirm selection committee
- Create outline of presentation
- Determine leave-behind (if needed)
- Identify client research required
- Identify strengths/weaknesses of competition and our team
- Determine attire (match client's level of formality)

INTERVIEW PREP #1

- Review the leave behind
- Walk through presentation
- Determine which team members will speak to each slide
- Stumble through presentation
- Finalize materials to 95%

INTERVIEW PREP #2

- Practice run-through of the presentation
- Make final edits to presentation
- Rehearse presentation to determine timing, adjusting where necessary
- One-on-one break out sessions
- Rehearse presentation implementing constructive criticism from one-on-ones
- Finalize materials to 100%

INTERVIEW PREP #3

- Review the final leave behind
- Rehearse presentation multiple times
- Take notes and provide positive feedback and constructive criticism
- Rehearse Q&A

FINAL REHEARSAL

- Mock client interview
- Mock Q&A
- Determine where the team will meet prior to the interview and if a run-through will be needed

MESSAGING

STRUCTURING YOUR MESSAGE

Developing the right content is key. Successful messages address the client's key issues, are specific to them and their project, shows you understand their needs and have solutions to those needs. There are two suggested ways to develop your message: The Bun Method or the IFBP

THE BUN METHOD

Structure your message to show the listener you understand their issue—it relates to them and makes them want to listen. Provide proof that you have successfully overcome the issue they are facing and help them understand the benefit you will provide.

ISSUE-FEATURE-BENEFIT_PROOF (IFBP) METHOD

- What is the client's need?
- What is our solution based on experience?
- What is the benefit to the client? So what?
- How can you back it up with real proof?

THE BUN METHOD EXAMPLE:

Safety is paramount. This route serves 5,000+ residences / businesses.
Here's how we plan to mitigate disruption and keep the public safe.

THREE KEYS CRITICAL TO OUR SAFETY PLAN INCLUDE: [THREE POINTS]

1. Door-to-door public outreach to inform residences and businesses
2. Crews will perform work at night when traffic is less congested
3. Temporary fencing installed around the perimeter of the work site

THIS SAFETY PLAN WILL PROVIDE COMMUNICATION AND KEEP RESIDENTS/ BUSINESSES UP TO DATE ON THE PROJECT, THUS LESSENING THEIR CURIOSITY, WHICH WILL KEEP THEM SAFE.

" I've been working on congested pipeline corridors for 20+ years and I've never had an incident on any of my projects. "

CLIENT Q&A

What questions do we anticipate the selection committee will ask?

What questions are we dreading?

As a team, work to come up with a list of relevant questions.
Practice the best response and determine who is best suited to speak.

EXAMPLES

The Marketing Team has a database of questions that have been asked during client interviews. Use this document to determine what questions are relevant to your project and practice answering these questions during interview prep.

Q&A QUESTIONS DOCUMENT

PRESENTATION BASICS

PERSUADING THE CLIENT

The best way to convince the client that Garney is the best is by connecting with them on a personal level, clearly establishing what separates Garney from the competition, and establishing how that benefits them.

Convincing the client that we are the right choice takes more than technical competence—it takes trust and likability.

SHOW THEM WE UNDERSTAND THEIR SITUATION AND NEEDS

PRESENT A SOLUTION TO THEIR CHALLENGES

CLEARLY COMMUNICATE OUR VALUE OF SERVICES AND DIFFERENTIATORS

PERSONALLY CONNECT WITH THE CLIENT BY CALLING OUT SPECIFIC PEOPLE IN THE AUDIENCE OR SELECTION COMMITTEE

PRESENTATION BASICS (CONT.)

SEPARATING GARNEY FROM THE COMPETITION

Simply telling a client that we will complete their project on time and on budget will not differentiate our team. That is an expectation. Think outside the box and consider what really makes Garney stand out from the competition. If it aligns with the win theme, don't be afraid to be aggressive. If they know we can build the job, say that and don't spend any time on it.

DETERMINING OUR DIFFERENTIATORS

Similar to the way we perform a SWOT analysis during capture planning, you should perform another one with the pursuit team during interviews. This process can help you determine what sets us apart from the others shortlisted to interview. Below are some sample differentiators.

CULTURE/VALUES ALIGN WITH THE CLIENT'S

CLIENT EXPERIENCE

INNOVATIVE SOLUTIONS

UNIQUE APPROACH

PRESENTATION BASICS (CONT.)

PRESENTING TO THE CLIENT

Each firm shortlisted to interview with the client is qualified to perform the work. During the interview stage, the ONLY thing we can do to affect the outcome of the selection is to give a presentation that connects with the client and convinces them to choose Garney.

Presenting to a selection committee can be intimidating, but it's important to remember that you are talking about a job you know inside and out, and that you do every day.

FOCUS ON:

CONFIDENCE

VOICE INFLECTION

CONNECTING WITH THE AUDIENCE

ELIMINATING WIMPY WORDS

POWERPOINT ANIMATIONS

EXECUTION TIME

VARIES: 2 DAYS - 1 WEEK

CRITICAL ELEMENTS NEEDED

CONTENT

CAUTION

USE IN MODERATION – A GOOD BALANCE OF STATIC AND MOVING GRAPHICS IS IDEAL

PowerPoint animations can make a presentation a bit more exciting and encourage audience engagement. Depending on what content is animated, it can help tell a story or explain an idea.

Keep in mind, static graphics do serve a purpose. A balance of both static and moving graphics in a presentation is wise, as it gives the audience a place to rest their eyes. We'll need to evaluate how many and to what level animations will complement the overall message.

VALUABLE CONTENT IS KEY

Adding an animation into the mix will not make up for invaluable content. Developing good content is the best place to start before thinking about how that content may be animated.

VIDEOS WITH ADDED GRAPHIC ANIMATIONS – DRONE FOOTAGE FLYOVERS & MAPS

LEAD TIME ESTIMATE

2-4 WEEKS
DEPENDING ON LENGTH OF FINAL VIDEO

CRITICAL ELEMENTS NEEDED

DRONE FOOTAGE OR SATELLITE IMAGERY

Using project area footage or maps with the addition of project-specific graphics can help explain a project and allows the audience see real-world footage of locations that resonate with them. We can use this footage to call out specific things in the terrain, locations of utilities, show alternative routes, etc.

FOOTAGE OPTIONS

1. **2D MAP WITH ANIMATIONS**
Taking a flat map and adding animated visual elements.

2. **DRONE FOOTAGE**
Real-world fly-through video with the addition of visual elements. This requires hiring an outside vendor for drone footage.

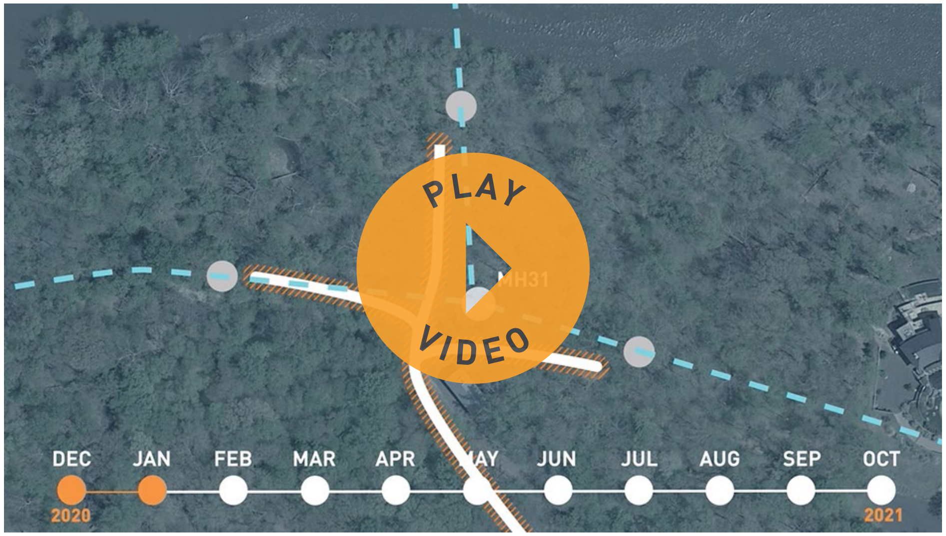
3. **SATELLITE IMAGING FOOTAGE**
Using satellite imaging (Google Earth) to fly-through. This is easier to control than a drone, but the satellite imagery may not be the most up-to-date.

* MAY REQUIRE OUTSIDE VENDOR

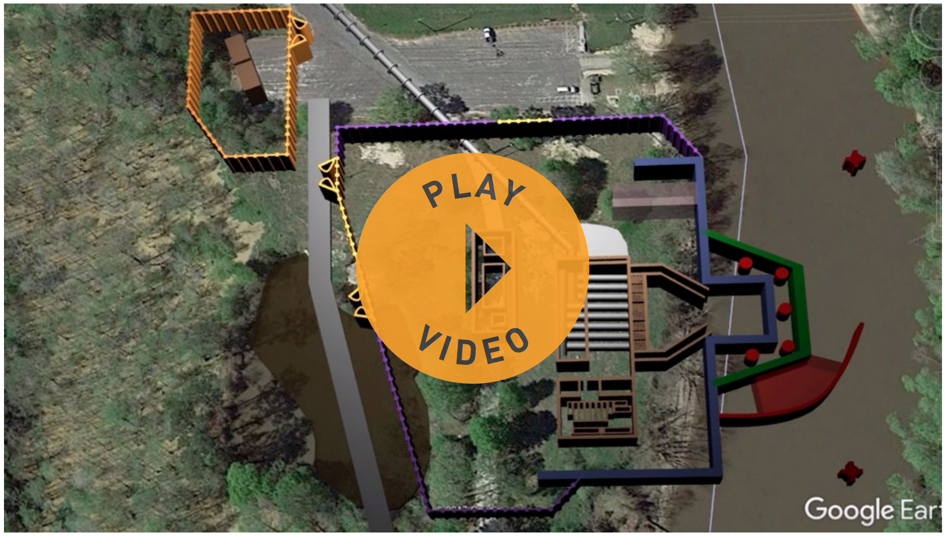
VIDEO ANIMATION SAMPLES

Drone flyover with graphic overlays

Google Earth flyover with graphic overlays



2D map with animation overlay



Static Google Earth with graphics phased in

3D MODELING/ VIDEO ANIMATIONS

LEAD TIME ESTIMATE

3-5 WEEKS DEPENDING ON LENGTH OF FINAL AND SCOPE

CRITICAL ELEMENTS NEEDED

BUILDING PLANS

CAUTION

NOT TO BE CONFUSED WITH A BIM MODEL

* MAY REQUIRE OUTSIDE VENDOR

3D models can be used to show a digitally produced conceptual idea in 3D space. By placing these 3D objects in real-life digital environments, they become easier to visualize. Depending on the level of accuracy needed, a plan drawing is needed.

THIS IS NOT BUILDING INFORMATION MODELING (BIM)

BIM has an intelligent component that contains data associated with the physical and functional characteristics and is used for estimating, building, scheduling, etc. We can use a BIM model, but a BIM specialist is needed to create BIM models. (More information provided on the following page.)

BIM

BIM uses a 3D model with added dynamic intelligent data associated with the physical and functional characteristics of the model. Built in specific software for specific uses, BIM is very useful in the design, construction, and post-construction processes.

INDUSTRY TECHNOLOGY

Using BIM shows that we are on par with industry technology.

LEAD TIME ESTIMATE

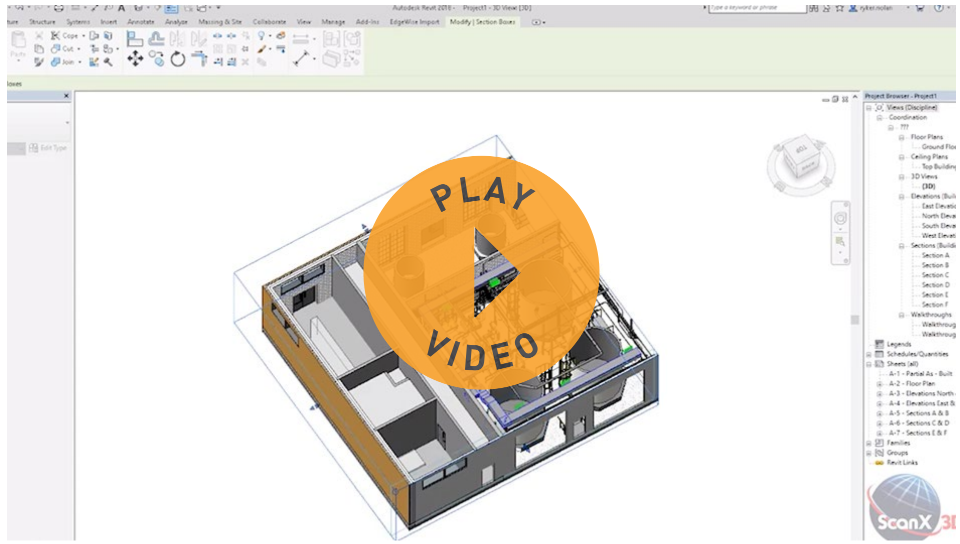
DEPENDENT ON PROJECT SCOPE

COST

$-$$$

CRITICAL ELEMENTS NEEDED

BUILDING PLAN



BIM model in Revit software

4D BIM animation

* MAY REQUIRE OUTSIDE VENDOR

DRONE IMAGING

LEAD TIME ESTIMATE

2-4 WEEKS
TBD BY OUTSIDE VENDOR

COST

$-$$

CRITICAL ELEMENTS NEEDED

ACCESS TO PROJECT AREA

CAUTION

DEPENDING ON AIRSPACE CLASSIFICATION, SOME AREAS MAY NOT BE ABLE TO BE CAPTURED FROM THE AIR

* MAY REQUIRE OUTSIDE VENDOR

Drone vendors can be hired for a variety of aerial imaging and mapping services. This allows us to be more efficient with visualizations and learn more about the potential project landscape.

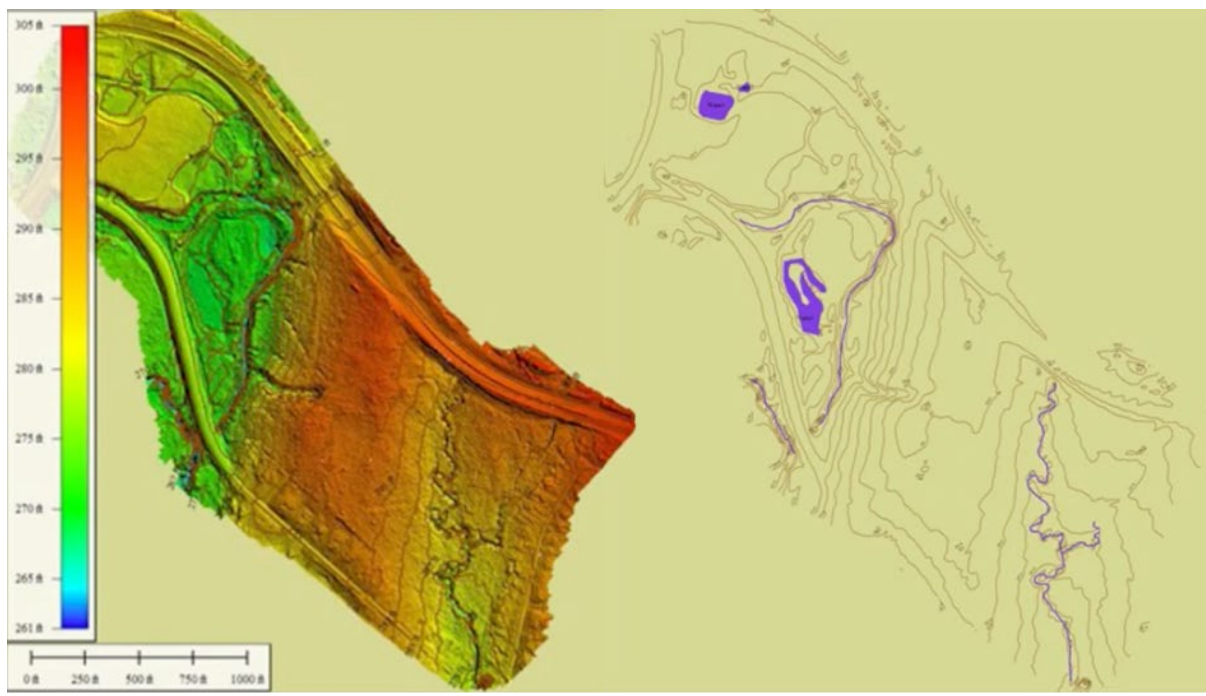
Some of these services include:

- Videography/photography
- UAV surveying
- Photogrammetry
- Lidar mapping

AIRSPACE RESTRICTIONS

Not all areas can be reached via drone due to airspace restrictions. Generally, the closer you are to other airspace services or national parks, the more restrictions will be in place.

Drone Lidar elevation grid with topographical map



AUGMENTED REALITY (AR)

LEAD TIME ESTIMATE
DEPENDENT ON PROJECT SCOPE

COST
$$-$$$

CRITICAL ELEMENTS NEEDED
- PERIPHERAL DEVICE
  PHONE, TABLET, OR GOGGLES
- DIGITAL ASSETS

* MAY REQUIRE OUTSIDE VENDOR

AR takes the physical world around us and adds elements digitally viewed through a device. This device could be a phone, tablet, or a headset (goggles).

Apps that you may be familiar with that use the same technology are Snapchat filters, IKEA room planner, and Pokémon GO.

USER INTERACTIONS

User-controlled visuals work well when explaining a concept. This allows multiple users to see digital assets and explore the digital world at their own pace.

VIRTUAL REALITY (VR)

LEAD TIME ESTIMATE

DEPENDENT ON PROJECT SCOPE

COST

$$-$$$

CRITICAL ELEMENTS NEEDED

- **PERIPHERAL DEVICE**
  PHONE, TABLET, OR GOGGLES
- **DIGITAL ASSETS**

✱ MAY REQUIRE OUTSIDE VENDOR

VR takes the user out of the world they're in and virtually places them into a different one. Blocking out the real-world gives the user an immersive experience in a world that does not exist. If the viewing device is a tablet or phone, the real-world will not be completely blocked, but does still provide a view into the virtual world.

A VR headset is required for each individual user.

CROSS-TECHNOLOGY

This technology would likely be used in conjunction with 3D models and BIM.

360°
PHOTO & VIDEO

LEAD TIME ESTIMATE

1-3 WEEKS

COST

$

CRITICAL ELEMENTS NEEDED

PHYSICAL LOCATION TO DOCUMENT

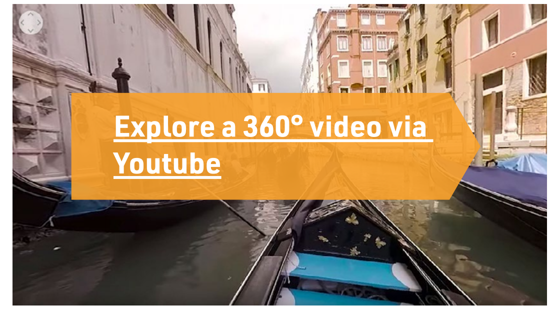
✱ MAY REQUIRE OUTSIDE VENDOR

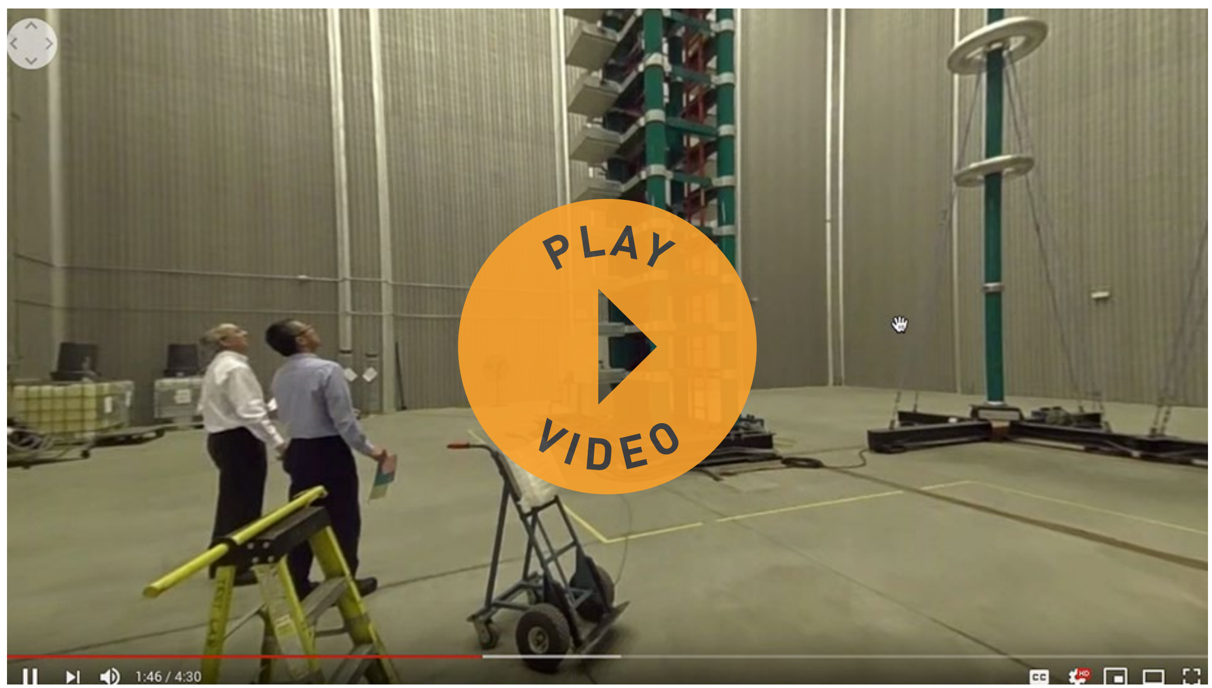
360° photos and videos use a special camera to document the physical world in all directions. The final output gives the user the ability to control the view where they can pan around a 360° sphere. Since all angles are captured, the view is not cropped which lends itself to a more open-ended solution.

Imagine if you stood in one place and looked in all directions–this is what the 360° shot captures.

CROSS-TECHNOLOGY

360° footage could be used in conjunction with VR headsets, phones, and tablets.





HOLOGRAPHIC PROJECTION

LEAD TIME ESTIMATE

TBD BY OUTSIDE VENDOR

COST

$$$-$$$$

CRITICAL ELEMENTS NEEDED

- BUILDING PLAN
- 3D MODEL

CAUTION

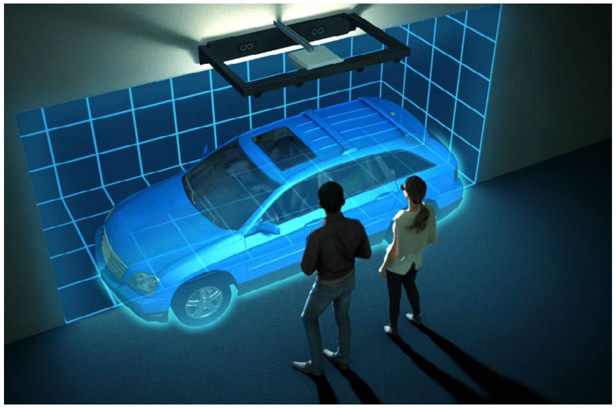
THIS MAY BE MORE ENGINEERING-FOCUSED (TECHNOLOGY AS THE DELIVERABLE WOULD BE A MODEL.)

* MAY REQUIRE OUTSIDE VENDOR

Holograms or holographic projections are 3D elements projected with light. Where VR/AR requires a headset, this technology allows all users to see the same visual at the same time.

Examples include the holographic versions of Tupac in 2012 or Michael Jackson in 2014, where each were brought back to life for a holographic concert.

Some hardware is required based on the chosen system, and the hardware can be very expensive.



Users interacting with a wall-mounted holographic projector

PROJECTION MAPPING

LEAD TIME ESTIMATE

TBD BY OUTSIDE VENDOR

COST

$$$-$$$$

CRITICAL ELEMENTS NEEDED

ACCESS TO ROOM FOR SETUP PRIOR TO PRESENTATION

CAUTION

REQUIRES TIME FOR TESTING AND SETUP BEFORE THE PRESENTATION

* MAY REQUIRE OUTSIDE VENDOR

Projection mapping is a video projection technique where video is mapped onto a surface, turning common objects into interactive displays. These objects could be as elaborate as buildings or water infrastructure and as simple as a tabletop.

USE CASE

In lieu of a leave behind, we could project information downward onto the table for the selection committee to read and digest. This content could be integrated into the presentation and dynamically change based on what topics are being discussed.

On a large scale, this technique has been used in Super Bowl halftime shows.

Projecting onto a table where the only real-life elements are utensils, napkin, and glass.

LEAVE BEHIND

PLAYERS INVOLVED

- MARKETING LEAD
- CREATIVE LEAD
- OPL
- KEY PERSONNEL

DURATION

VARIES: 2 WEEKS TO 2 MONTHS

ACTIVITIES

- DETERMINE THE MESSAGE WE WANT TO CONVEY
- DETERMINE THE BEST ROUTE TO CREATE A COMPELLING LEAVE BEHIND

GOALS

- WOW THE CLIENT
- LEAVE A LASTING IMPRESSION

DETERMINING MESSAGING

When creating a leave behind, it's important to start by determining the key messages you want to give the client. Think outside the box and create a leave behind with content that will leave a lasting impression and aid in your chance of winning the project.

LEAVE BEHIND OPTIONS

There are many types of leave behinds. Depending on the budget and the timeline, you can work with the **Marketing and Creative Leads** to determine which would be best-suited for your project. The leave behind should align with the win theme and resonate with the client's wants and needs.

LEAVE BEHIND MATERIALS

LEAD TIME ESTIMATE
5–7 DAYS

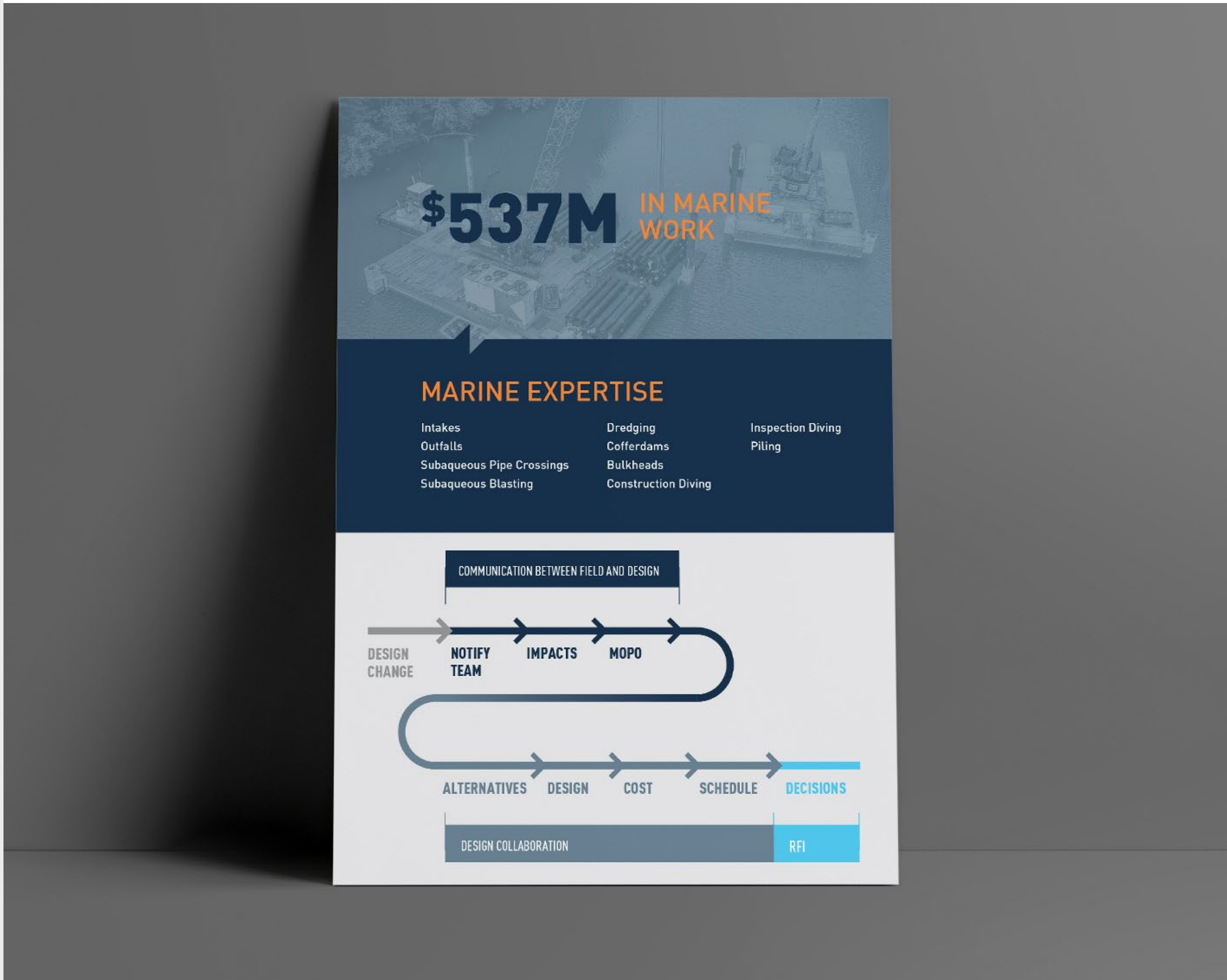
COST
$

CRITICAL ELEMENTS NEEDED
RELEVANT INFORMATION TO PRESENT

✱ OUTSIDE VENDOR FOR PRODUCTION

Additional printed materials may be necessary and advantageous to the interview presentation. These are generally large-format printed pieces that aid in the presentation for quick or repeated references. Content could include maps, routes, graphics, timelines, and/or processes.

BOARDS	SIGNS
POSTERS	BANNERS



LEAVE BEHIND

PLACEMAT

LEAD TIME ESTIMATE

2-4 DAYS

COST

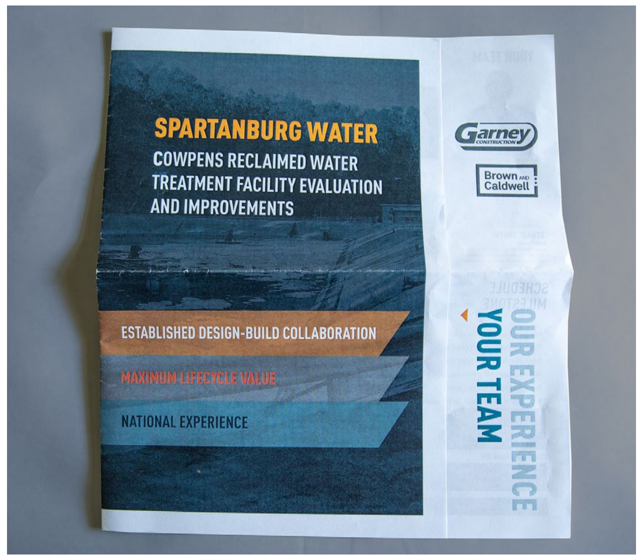
$-$$

CRITICAL ELEMENTS NEEDED

RELEVANT INFORMATION TO PRESENT

Placemats are a simple way to get information in front of the selection committee. This industry standard deliverable has little flash, but works for what it is. Content on these menu-style brochures can include anything we want to emphasize or recap for the selection committee–could be a mix of information from the presentation as well as new information.

There are ways we can make placemats a bit more exciting by folding them in unique ways. This will help the placemat feel more like a brochure with some personalization and customization.



LEAVE BEHIND

CUSTOM PRINTED PIECES

LEAD TIME ESTIMATE

1–2 WEEKS
DEPENDING ON COMPLEXITY

COST

$-$$

CRITICAL ELEMENTS NEEDED

ADDITIONAL TIME TO CREATE AND EXECUTE

A leave behind that informs and engages is ideal. Custom printed brochures and hand-outs are one way to get (and keep) the attention of the selection committee. These give a tailored message where the deliverable can enhance the message and create a larger impact, similar to receiving a package in the mail that you didn't anticipate coming. They can generate feelings of intrigue and excitement while you open the package. Even if those feelings only last a few moments, it makes you feel different.

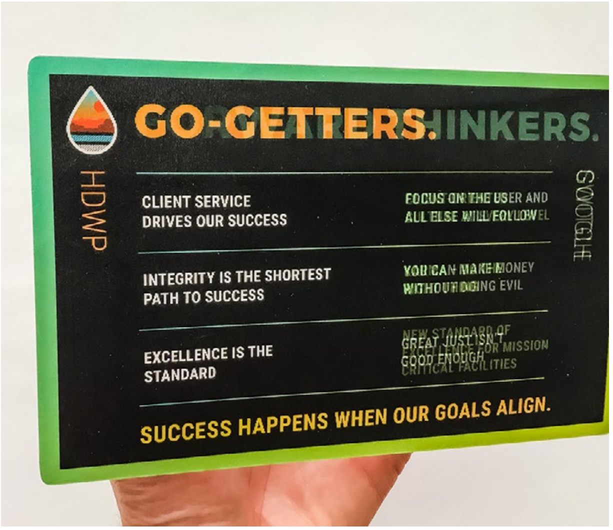
Ideally, the message, unique deliverable, and usefulness culminate and create one solid leave behind.

VALUABLE CONTENT IS KEY

Content and concept should be strong enough to stand with the deliverable. We don't want a flashy shell wrapped around an empty message.

Pinwheel showing construction phase with company involvement

Lenticular printed card that changes messages as it is rotated



LEAVE BEHIND

VIDEO CARDS

LEAD TIME ESTIMATE

1–2 WEEKS

COST

$$

CRITICAL ELEMENTS NEEDED

VIDEO OR ANIMATION
TO PLAY ON VIDEO SCREEN

* OUTSIDE VENDOR FOR PRODUCTION

Almost everyone wants to be entertained. It requires less effort to watch something rather than read. Giving a video card that allows the selection committee the ability to watch a video brings high impact.

FRONT-END WORK

There is front-end work that needs to be done to create and produce the videos that will be included. Additional time will be needed to execute.

LEAVE BEHIND

UNIQUE SOLUTIONS

LEAD TIME ESTIMATE

1–3 WEEKS
DEPENDING ON COMPLEXITY

COST

$-$$

CRITICAL ELEMENTS NEEDED

CREATIVE TEAM MEMBER ENGAGED FOR THE PROJECT

Creating super customized leave behind ideas can make a wow factor and impact the client to show that we are thinking about their best interests and their project.

WHY MAKE IT UNIQUE?

Unique solutions have a tendency to be more memorable. These deliverables speak directly to the specific project as well as being a reflection of our company as a whole.

Custom water bottle leave behind with brochure hanging from neck of bottle.

DEBRIEF

DEBRIEF

DEBRIEF

TOOLS

INTERNAL/EXTERNAL DEBRIEF FORMS

DURATION

1 TO 2 HOURS

PLAYERS INVOLVED

- PROFIT CENTER
- OPL
- MARKETING LEAD

PURPOSE

THE ABILITY TO GATHER INFORMATION USED TO IMPROVE THE QUALITY OF FUTURE PROPOSALS.
IT IS AN OPPORTUNITY TO CONTINUE BUILDING RELATIONSHIPS

WHAT IS A DEBRIEF?

An **Internal Debrief** is where team members reflect upon a recent pursuit experience, discuss what went well, and identify improvement opportunities. Similarly, an **External Debrief** with the client is conducted to hear directly from them what worked and what didn't.

Both Internal and External Debriefs help build a shared understanding – by clarifying roles, priorities, and goals, removing obstacles to collaboration, and reaching agreements about how to ensure future success. Win or lose, a successful debrief is a powerful tool that enables a team to self-correct, strengthen relationships, and enhance future performance.

DEBRIEF GUIDELINES

INTERNAL DEBRIEF	**When necessary, ask the team for a debrief, ideally within one or two weeks of submittal (proposal/interview)** - Use the Internal Debrief Document as a guide and feel free to determine additional questions you'd like to ask the team - There's no better time than immediately following completion of a project, when everything is still fresh in everybody's mind - Giving your team an opportunity to reflect on lessons learned is a way to uncover project management lessons to apply in the future
EXTERNAL DEBRIEF	**Win or lose, ask the client for a debrief, ideally within one month of the Notice of Award** - Use the Client Debrief Document as a guide and feel free to determine additional questions you'd like to ask the team - Conduct the debrief with the mindset of a third party - Don't get defensive - Listen to their feedback rather than making excuses - Keep the conversation positive so that they'll want to hire Garney for their next project

EVER-EVOLVING

This process and document will be ongoing. As our clients are constantly evolving and progressing, so will our methods of pursuing project opportunities.

WE'D LIKE TO HEAR FROM YOU

Send us ideas that you see or hear about and we will explore the uses for possible applications.

marketing@garney.com