Company Settings

Company Administrators can customize many settings that are pre-loaded as defaults in OneTeam.

Company Settings for Company OneTeam Administrator

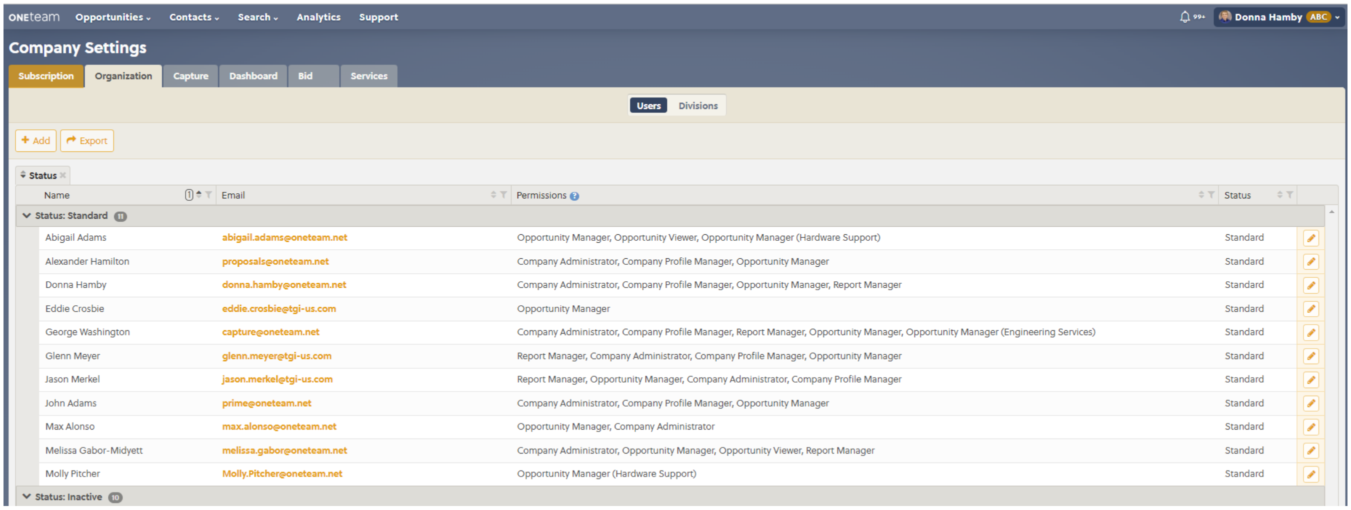
- Add or edit company users.
- Assign or change permissions levels to users.
- Designate company divisions.
- Determine names for Opportunity *Stages.*
- Create and manage *Required Fields* per Stage.
- Create and manage Custom Fields.
- Manage contract roles.
- Manage and modify company templates for *Qualification Matrices*, including criteria, responses, and weighting for each.
- Create and manage *Qualification Checklists*.
- Add *document templates* for data calls, meetings, and proposals.
- Create and manage document *Tags*.
- Create and manage *Gate Review Templates*.
- Create and edit *Revenue Targets* and Win Rate for the entire company and/or each division.
- Set custom date ranges for *RFP Window* fields.
- Develop custom Capability Matrix terms and options.
- Create or edit *Communication* templates.
- Customize color team Reviewer Ratings.
- Manage integrated services such as Microsoft 365, GovWin, Salesforce, and the OneTeam API.

Subscription

View Subscription information, including renewal date, plan type, current price per year, number of Standard and Limited Users, active opportunities and active proposals.

Organization

Company Users



Goal: Manage internal company users, roles, and permissions.

OneTeam: Designate Standard Users and assign role-based permissions. Easily inactivate users who no longer require OneTeam access.

Location: Company Menu, Organizations, Users Sub-Tab

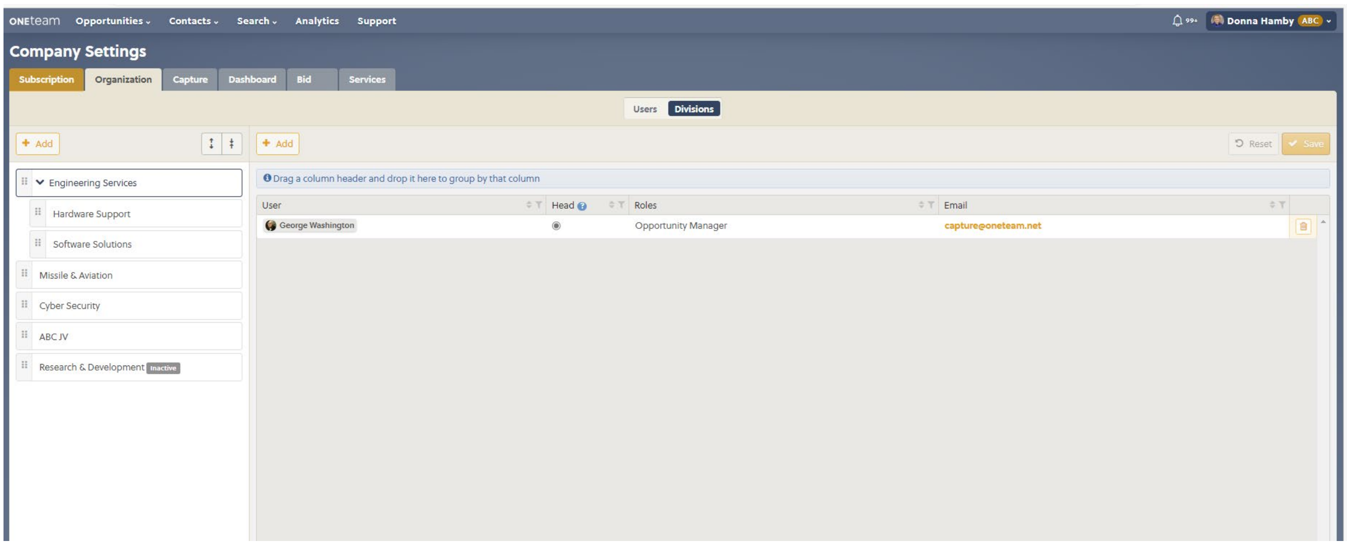
Actions: Company Administrators designate users and assign permissions based on their BD role.

Edit users and change users from Active to Inactive to instantly remove their OneTeam access.

Designate Limited Users within internal company, these will have same permission level as subcontractor Writers and Reviewers.

Best Practice: When users leave the company or no longer need access to OneTeam data, immediately edit their status from Active to Inactive to maintain data security. All actions and connections between inactive users and documents and notes, are maintained.

Company Divisions



Goal: Designate Company Divisions, enter and produce more detailed data at a lower level than overall company data.

OneTeam: Use divisions to control access to data, set revenue targets and win rates, view revenue projections, and other data at the division level.

Location: Company Menu, Organizations, Company Divisions Sub-Tab

Actions: Set company Divisions and also divide divisions into lower level sections.

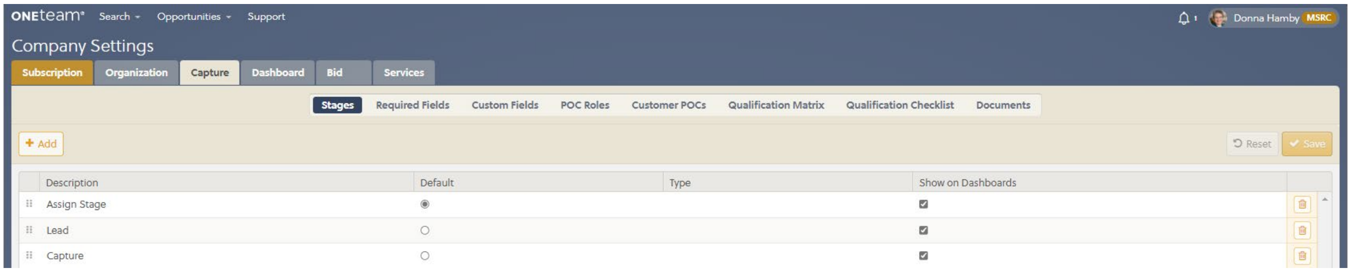
Set Revenue Targets for entire company and each Division or lower level section.

Set Win Rate Targets for entire company and each Division or lower level section.

Best Practice: If your company uses consultants to serve as Capture or Proposal Managers, set up a separate division for the consultant, and limit their access to Opportunitites in that Division only. This allows the consultant to have the same level of permission as any Capture or Proposal Manager, without access to any other opportunities in your company's pipeline.

Capture

Stages



Goal: Define Stages that align with your company's BD process.

OneTeam: Designate custom Stage names, set default Stage and other info regarding Stages.

Location: Menu, Capture Tab, Stages Sub-Tab

Actions: Designate Stages that support and align with company BD process.

Set default stage for all new opportunities that are automatically imported from GovWin or manually added.

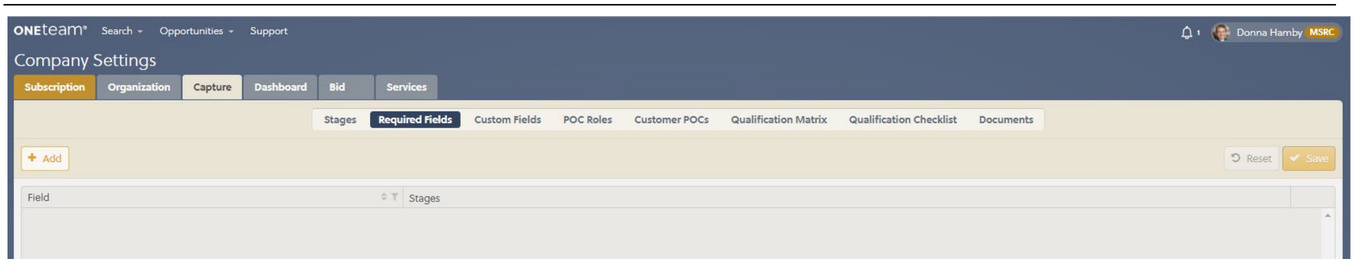
Determine Type of Stage, to support Analytics Reports.

Determine which Stages will automatically populate Opportunity Views and Dashboard by defining as Active Stage.

Re-order Stage listing to preferred list.

Best Practice: Use Stage names that your company and BD personnel already use, this will increase adoption and proficiency with OneTeam.

Required Fields



Goal: Designate specific data field(s) that must be completed to proceed to specific Stage(s).**OneTeam:** Customize data requirements and align with your BD processes.

Location: Menu, Capture Tab, Required Fields Sub-Tab

Actions: Company Administrators can designate required fields for creating opportunity to advance opportunity through BD Stages. Required fields can be different for each Stage.

Best Practice: Determine what information is required to be completed to proceed to specific Stages.

Custom Fields

Goal: Create Custom Fields to collect and manage data not available with OneTeam's default data fields on each Opportunity Details Tab.

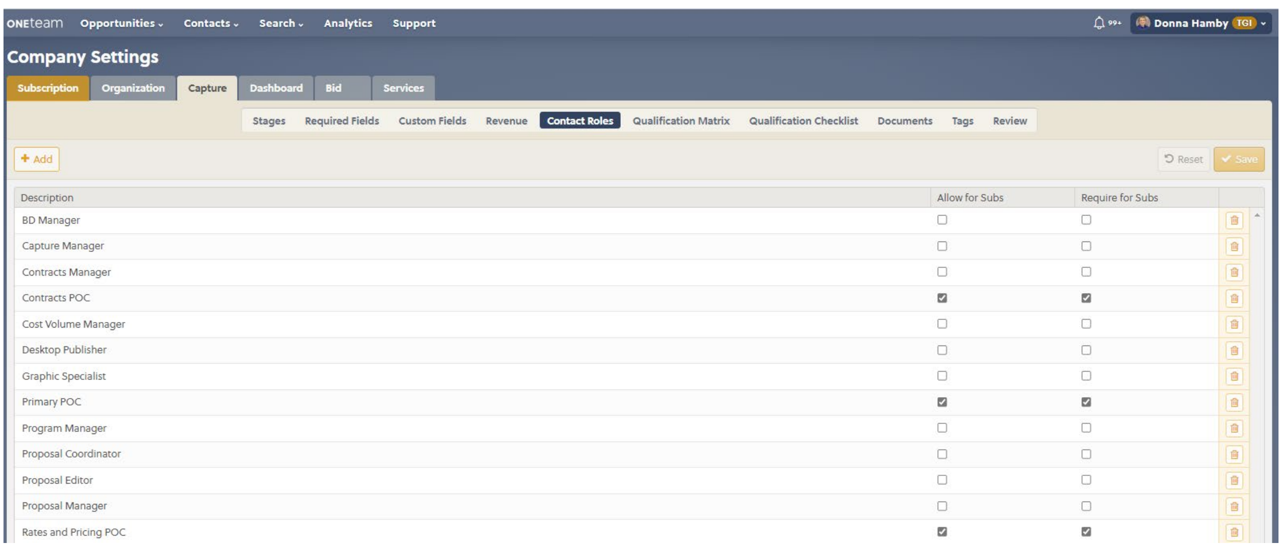
OneTeam: Add custom data fields to align OneTeam with your current BD processes.

Location: Menu, Capture Tab, Custom Fields Sub-Tab

Actions: Create custom fields, including text, drop-down, currency, date, integer, decimal, and checkbox.

Best Practice: Determine information that will help your team work best. Custom Fields can also be sorted, filtered, or grouped in the Opportunities Pipeline view.

Contract Roles



Goal: Create POC list of BD team members specific to each opportunity.

OneTeam: Edit, Add, and Manage all Contact Roles to provide easy access to list of POCs.

Location: Menu, Capture Tab, Contract Roles Sub-Tab

Actions: Create and edit Roles with description, whether role is allowed for subcontractor, and required for subcontractor.

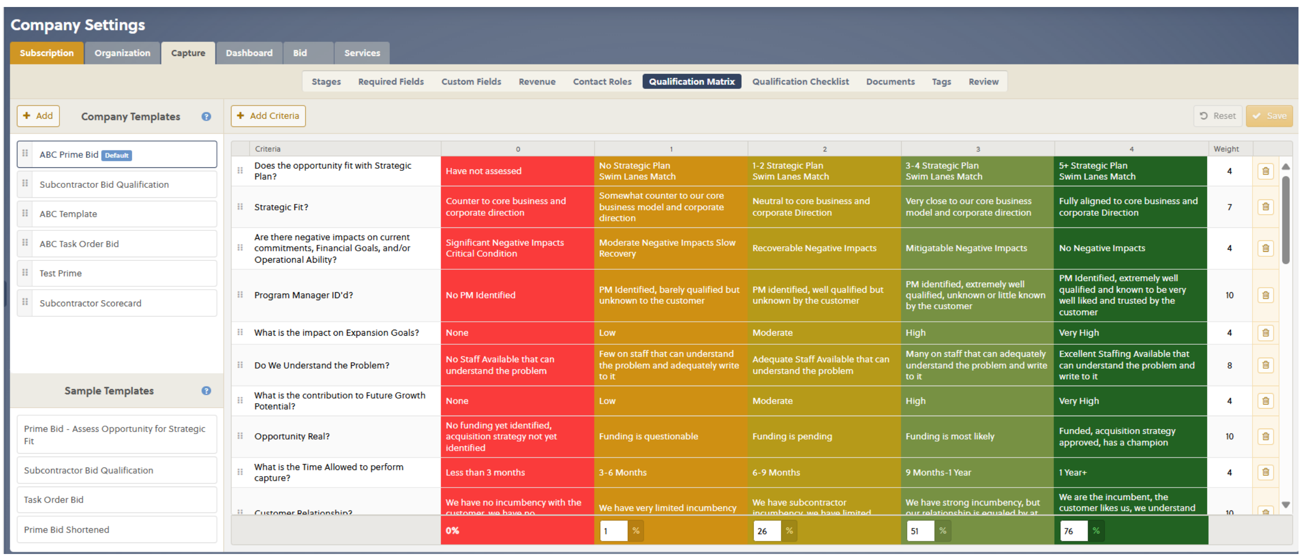
Best Practice: Create Roles that align with your BD process to encourage OneTeam adoption.

Qualification Matrix

Quantitatively evaluate Opportunities against criteria to determine which bids are best for your company at this time. Set up the customizations so that Capture Managers can use the interactive Qualification Matrix to assess readiness and alignment with the customer's goals for each individual opportunity in the pipeline.

Qualification Matrices are customized by Company Admins in the **Company Settings** Menu, **Capture** Tab, **Qualification Matrix** Sub-Tab.

The screenshot below shows the set-up area with various template names on the left side, and the content of a selected template filling the rest of the screen. In the example below, The ABC Prime Bid, which is the default matrix for the ABC Company, is selected on the left, and the contents of that template are displayed.



The Template area on the left is divided into two sections:

- Company Templates – templates that have been created by a Company Admin or copied from a Sample Template and customized.
- Sample Templates

When setting up OneTeam initially, there will be one default template under Company Templates and four Sample Templates provided by OneTeam. These sample templates are:

- Prime Bid – an extensive set of qualification criteria for a major prime bid with 34 rows of criteria.
- Subcontractor Bid Qualification – criteria is geared towards a subcontractor position with criteria addressing prime and subcontractor criteria with about 15 qualification criteria.
- Task Order Bid – a shorter 8-criteria evaluation focused on Task Orders under an IDIQ contract vehicle.
- Prime Bid Shortened – a 12-criteria evaluation selected from the full Prime Bid template.

Company Admins may choose to copy the sample templates and use them as is or customize them to their own BD process.

Company Admins may modify Qualification Matrix templates including description, responses, and weighting of qualification criteria. Select the desired criteria or response to change and edit with the selected cell.

Best Practice: Multiple custom Qualification Matrices for different Government agencies or based on your role in the bid, such as Prime Matrix, Subcontractor Matrix, or Task Order Matrix.

Streamline your process so that the Qualification Matrix works for your BD process.

Your company will retain your current Qualification Matrix as your company's default Qualification Matrix. Your opportunities that have been scored with your matrix will not change.

But for opportunities that you have not completed a Qualification Scoring for, you will see your company's default matrix in the Qualification Tab. A company administrator can go into OneTeam Company Settings and make changes to the default matrix or use one of the new matrix templates that OneTeam has loaded into your workspace.

OneTeam has provided several sample Qualification Matrices, which you can duplicate and further customize to your company's specific BD Process.

These sample or template matrices included in this release are:

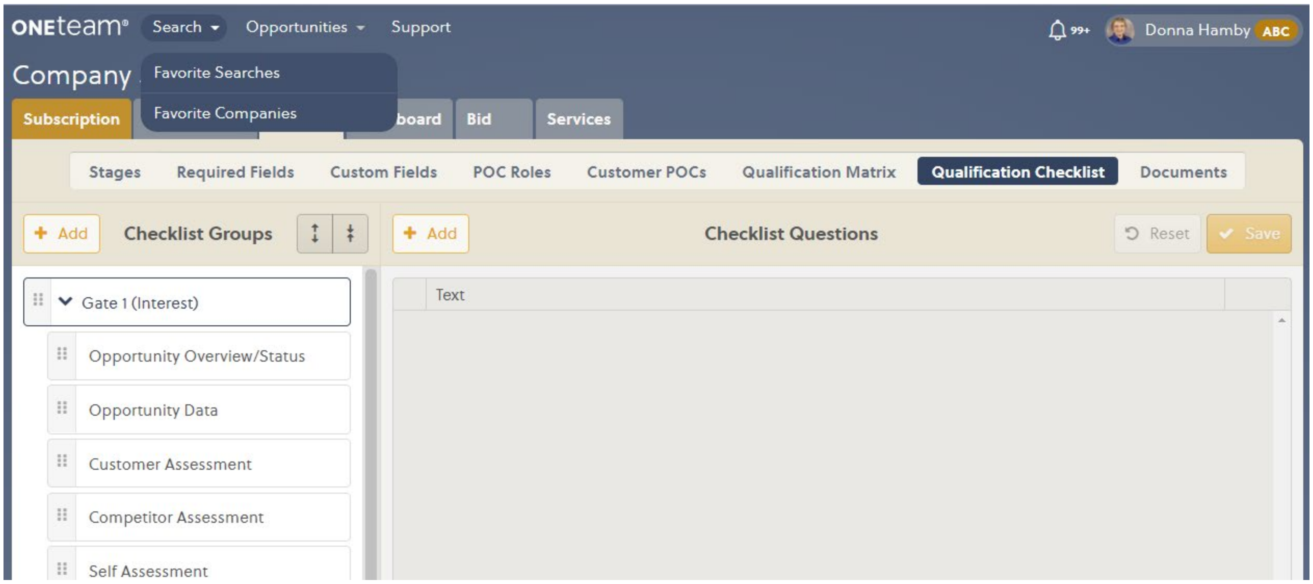
- Two expanded matrices for Prime Bids
- One matrix specifically focused on Subcontractor Bids
- One matrix focused on criteria for Task Order Bids

In the coming months, we expect to release more matrices including:

- Direct Award Matrix
- Recompete Bid Matrix

You may select a OneTeam sample matrix as a starting point and make customizations or use them as provided.

Qualification Checklist



Goal: Create checklists to provide a way for the BD Team to keep track of activities completed.

OneTeam: Create unlimited checklists that are available for every Opportunity in your pipeline.

Location: Company Settings Menu, Capture Tab, Contract Roles Sub-Tab

Actions: Develop custom checklists for Gate Reviews, including checklist Name, Sections, Subsections, and Questions or Actions.

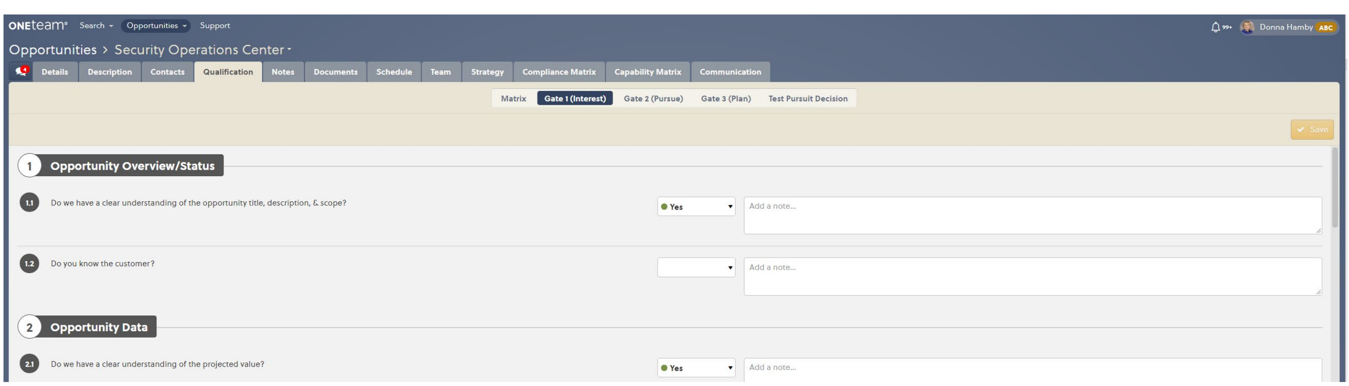
Develop custom checklist for new BD personnel.

Develop checklist for proposal production.

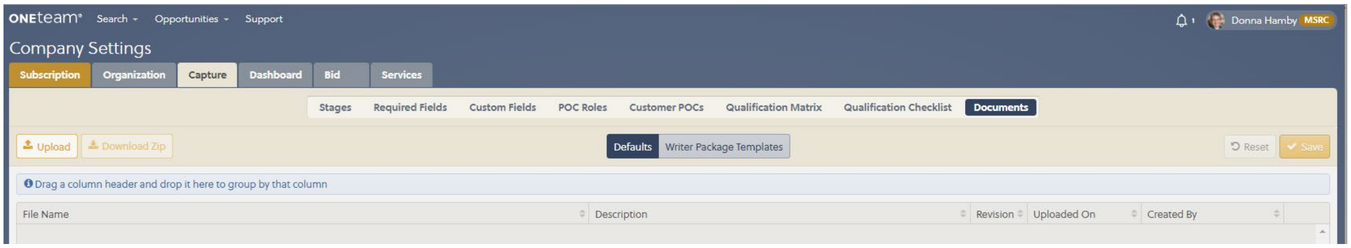
Develop checklist for Before Red Team, During Red Team, and After Red Team actions.

Best Practice: Here are ideas of Checklists you can create:

- '20 Questions to ask the Contracting Officer', that the new Capture Manager can check-off and make notes about the answers. This is great for new BD Team members to show the process your company follows.
- Gate Reviews in a Checklist format.
- Red Team Review Checklist for Proposal Managers.
- Production Checklist.



Capture – Documents - Defaults



Goal: Create library for all Documents that will be available to use in all Opportunities in the Pipeline.

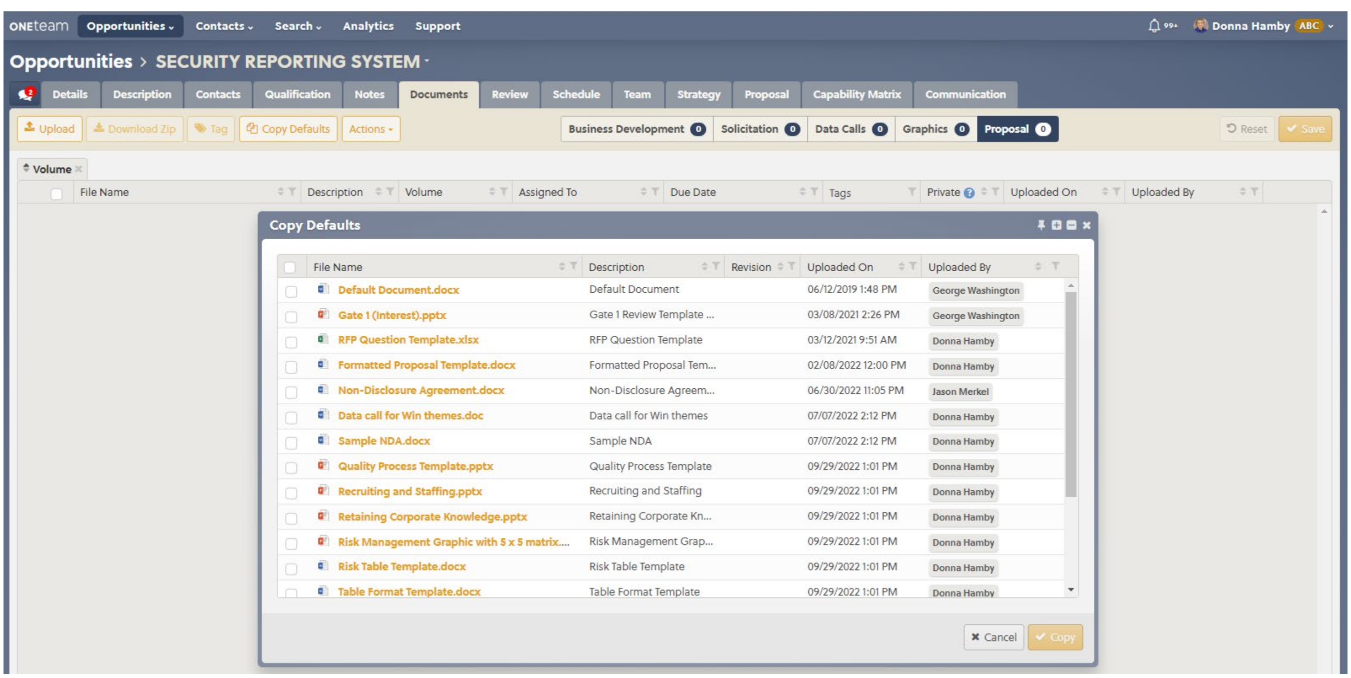
OneTeam: Central Document Repository for most company document that will be re-used in proposals. This is accessible in all Opportunities in the Data Calls, Proposal, Graphics, and Business Development libraries. Documents can be Word, PowerPoint, Excel, pdf, png, jpeg, and mp4 files.

Location: Menu, Capture Tab, Contract Roles Sub-Tab

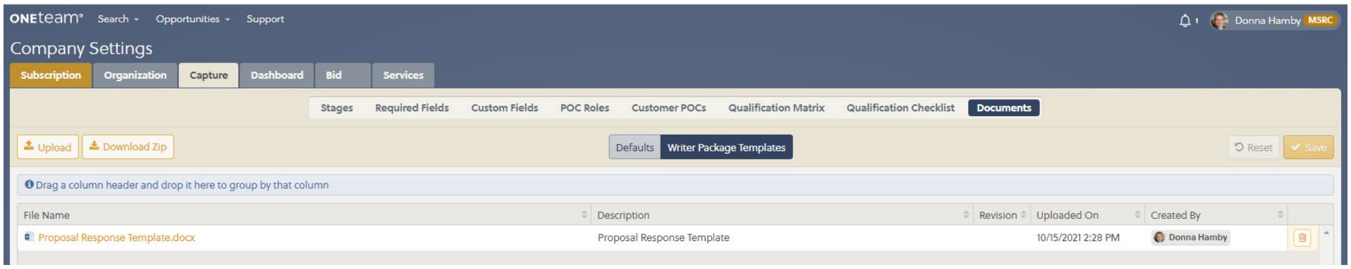
Actions: Upload custom default documents, such as NDAs, TAs, data calls, graphics masters, and more.

Best Practice: Create a library of commonly used graphics in PowePoint with one graphic per file. Name and tag the file appropriately and load into Default Documents. All Documents can be used by all Opportunity Managers in any Opportunity by adding that document from the Defaults library to the Opportunity library.

Below is an example of how the Default Documents are available to the Opportunity Document libraries, where they can be selected or multi-selected, and copied to a specific Opportunity. The original remains in the Default Document Repository unchanged**.**



Writer Package Templates



Goal: Create Document Repository for Word Templates for Proposal Writer Packages.

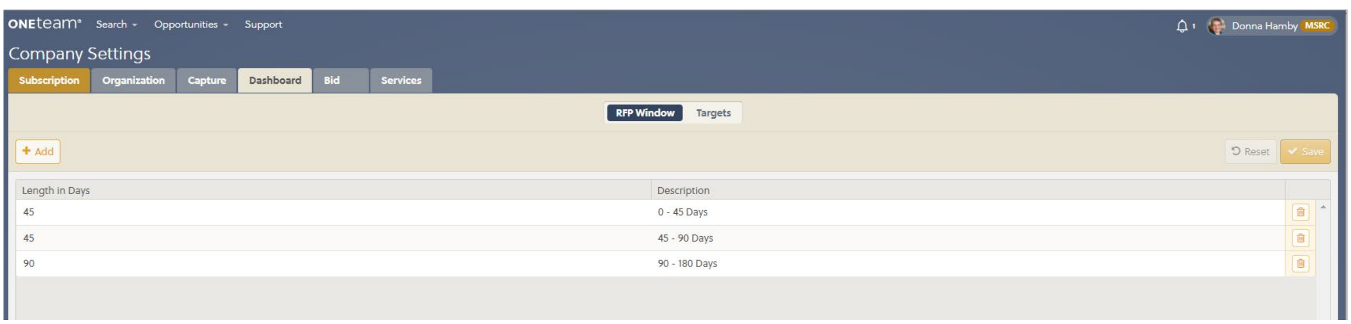
OneTeam: Use the Writer Package Temlates library to store customized Word templates for all proposal documents.

Location: Menu, Capture Tab, Contract Roles Sub-Tab**Actions:** Add or modify Writer Package templates.

Best Practice: Use a clean Word document that does not have hundreds of styles. Create your customized Word template using your corporate style guide, and designated set of styles for proposals. Include a title page, your company logo, headers and footers, page numbers, disclaimer statement, Table of Contents, List of Figures, and other customized features in your template. Use this template to create proposal specific templates that match RFP font and margin requirements.

Dashboard

RFP Window



Goal: Customize the RFP Window to help the BD Team visualize upcoming opportunities in relation to the entire Pipeline.

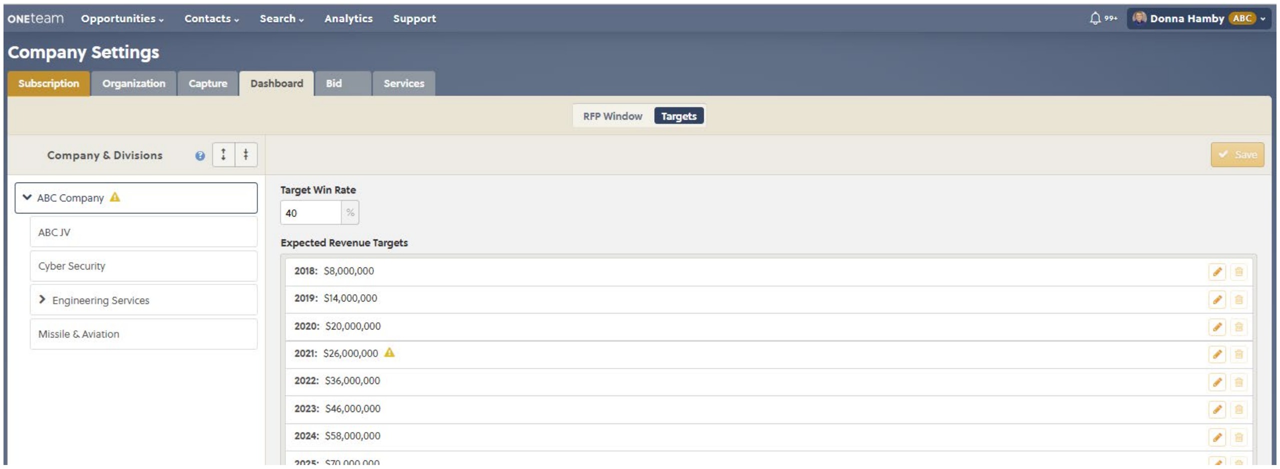
OneTeam: OneTeam has a default set of days to calculate RFP Window:0-45 days, 45-90 days, and 90-180 days. These are used in the Dashboard and Opportunity Pipeline to provide visuals of upcoming RFPs and in strategic planning.

Location: Menu, Dashboard Tab, RFP Window Sub-Tab

Actions: Set custom ranges for RFP Window.

Best Practice: Set the RFP Windows for the number of days that best supports your proposal process. For example, usually 0-90 days, 90-180 days, and 180-365 days work well for most BD teams.

Targets



Goal: Set Target Win Rate and Target Revenue Goals to support strategic planning.

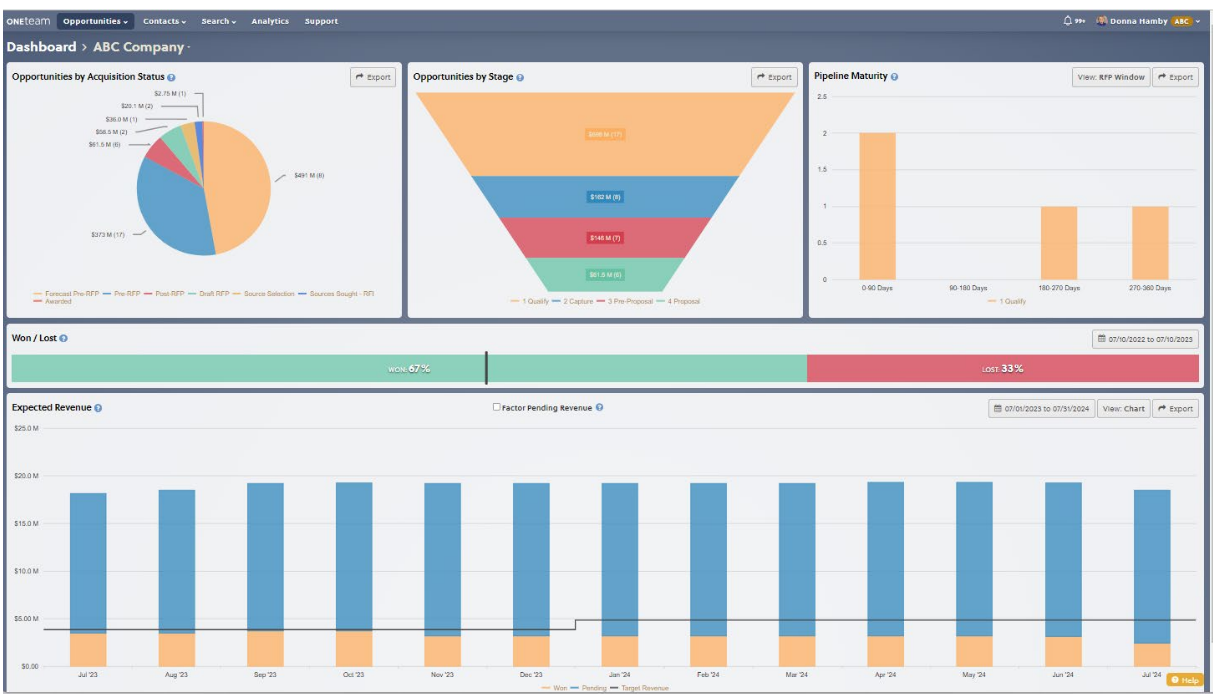
OneTeam: Set targets and then keep up-to-date with progress totals goals.

Location: Menu, Dashboard Tab, Targets Sub-Tab

Actions: Set revenue target for entire company for multiple years.

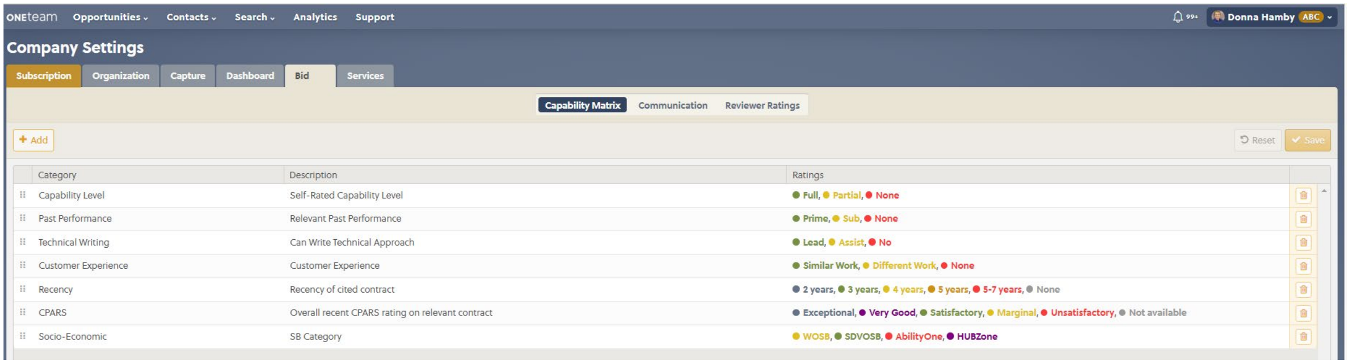
Best Practice: Projections are only as good as the data you use to create them. Be sure to update Company Revenue after contract wins to accurately reflect actual contract value. Always mark opportunities as Won or Lost to keep accurate statistics and revenue projections.

Note: Win Rate Target shows on Dashboard as black line in bar graph, makig it easy to see when you are not hitting or exceeding set target. Revenue projections also show as black line in Revenue bar chart on Dashboard page.



Bid

Capability Matrix



Goal: Assess potential teaming partners based on quantitative analysis customized per RFP.

OneTeam: Create multiple categories with standard color-coded responses, that can be customized for each opportunity. Automatically tally combined team responses and make best teaming decisions.**Location:** Menu, Bid Tab, Capability Sub-Tab

Actions: Develop custom Capability Matrix response choices.

Create or edit ratings including words and color coding.

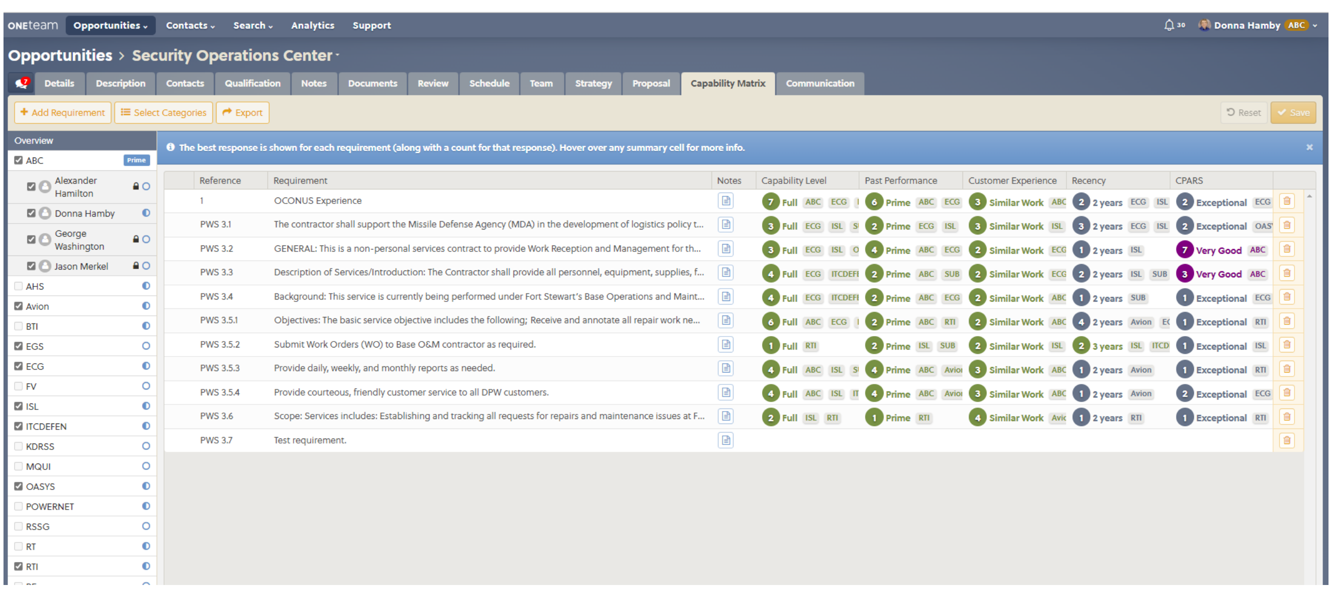
Customize Capability Matrix based on data required to making teaming decision.

View each potential teaming partner's response alone, or in combination with other team members.

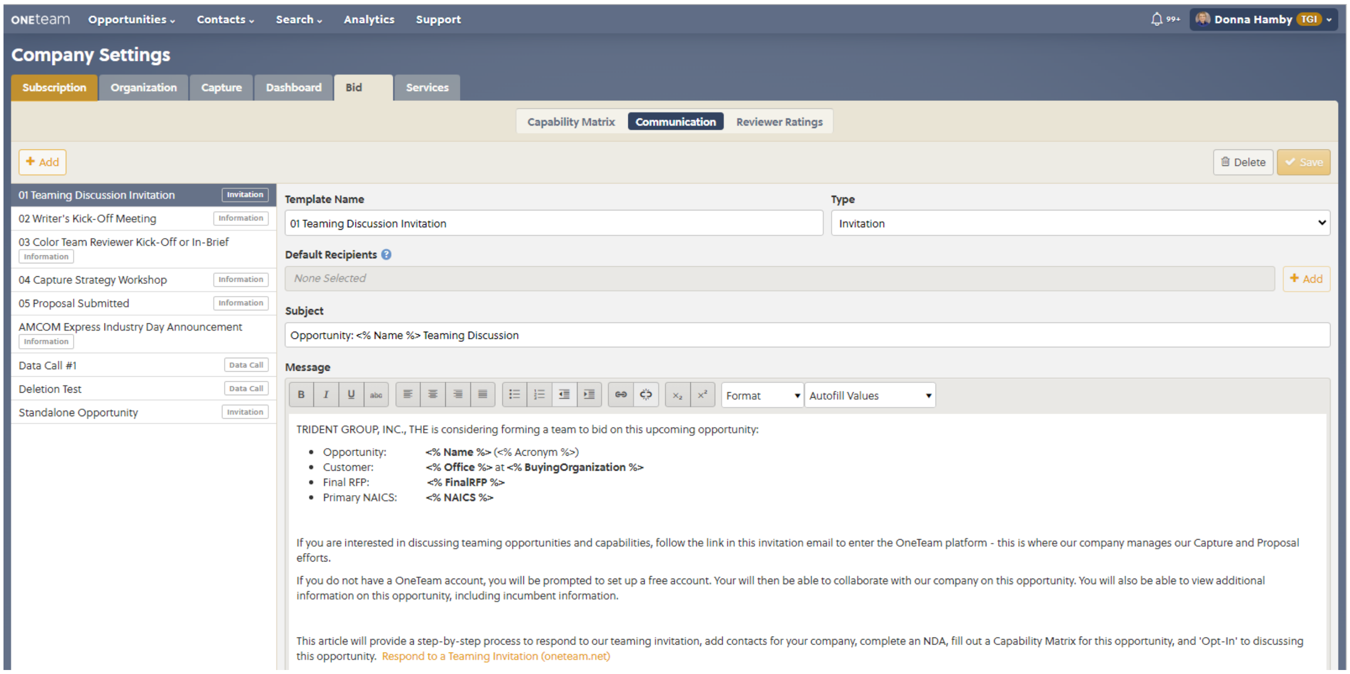
Play 'What-If' scenarios by selecting the best team with the best PWS coverage.

Automatically see team response combined without cutting and pasting.

Best Practice: Create the Capability Matrix early during Capture to gather information from potential teaming partners BEFORE signing Teaming Agreements.



Communication



Goal: Send emails to team regarding specific opportunity while maintaining the emails with the opportunity.

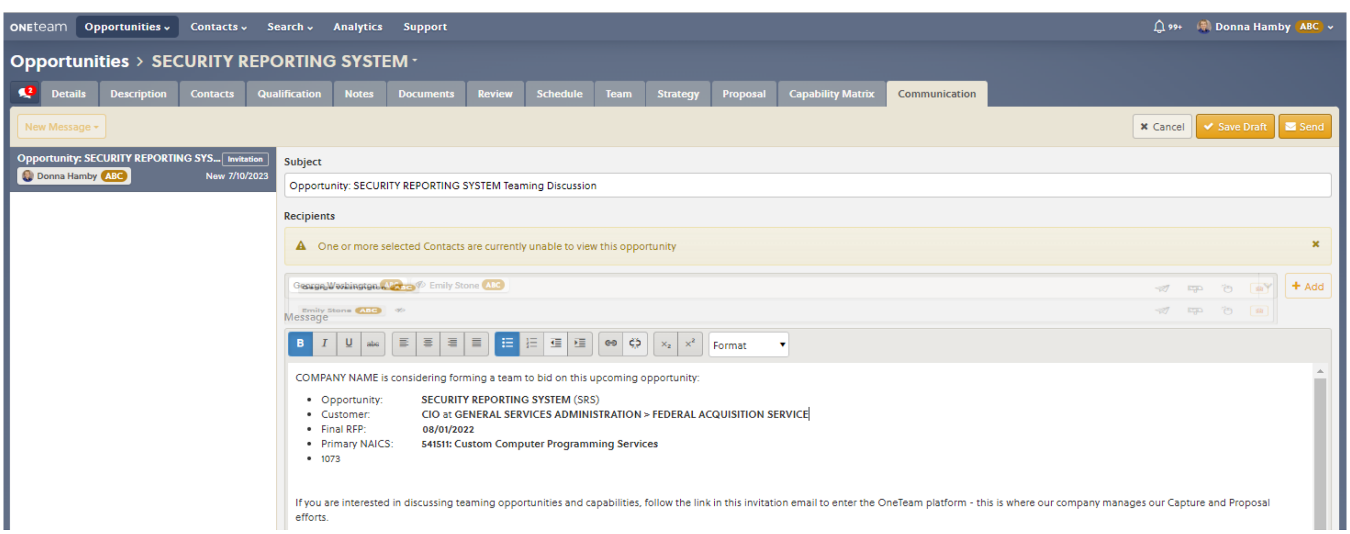
OneTeam: Create email templates, complete with dozens of auto-fill data points from OneTeam about the opportunity.

Location: Menu, Bid Tab, Communication Sub-Tab

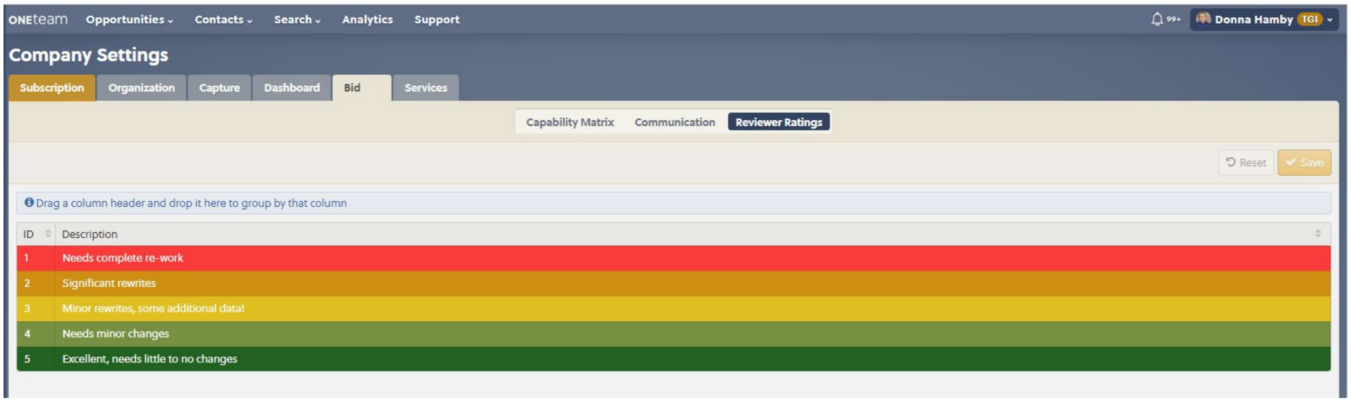
Actions: Create custom communication templates for teaming invitations and information requests that auto-populate opportunity information.

Best Practice: Use Communication to send team-wide emails, such as review notices, win party, or to thank the BD Team.

The graphic below shows how the email looks as it is auto-filled with opportunity data.



Reviewer Ratings



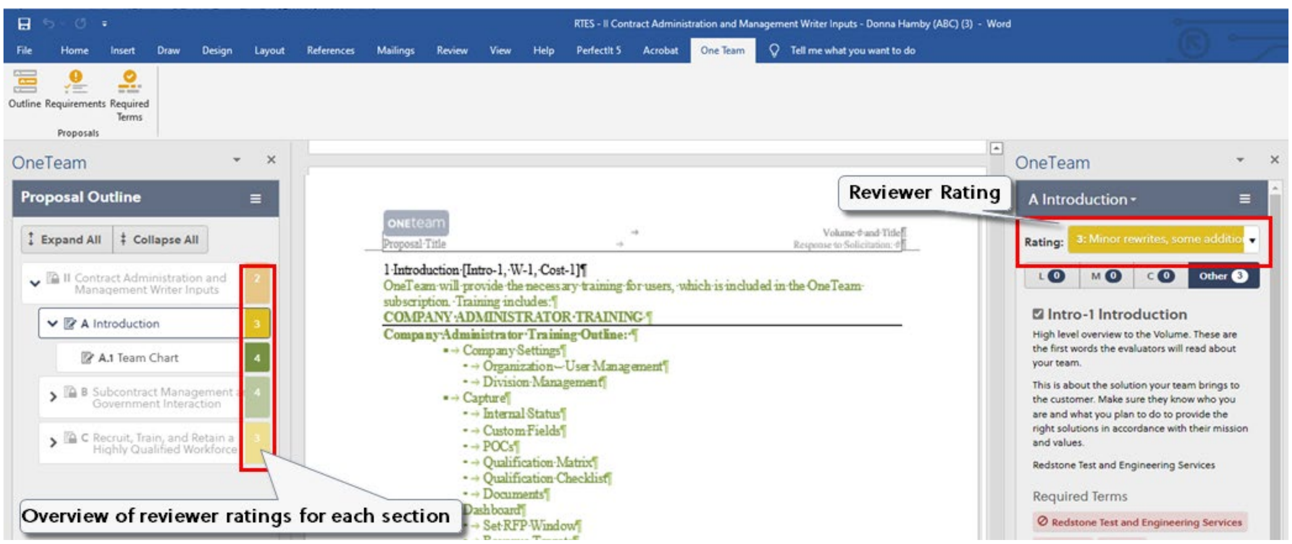
Goal: Set ratings that align with your BD process to use in color team reviews.

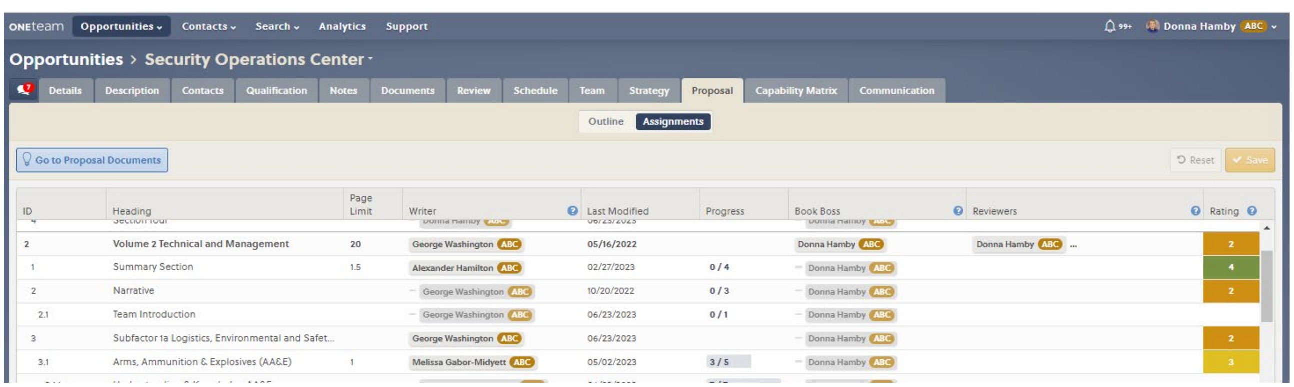
OneTeam: Edit words for color-coded ratings.

Location: Menu, Bid Tab, Reviewer Ratings Sub-Tab

Actions: Edit descriptions of color-coded ratings.

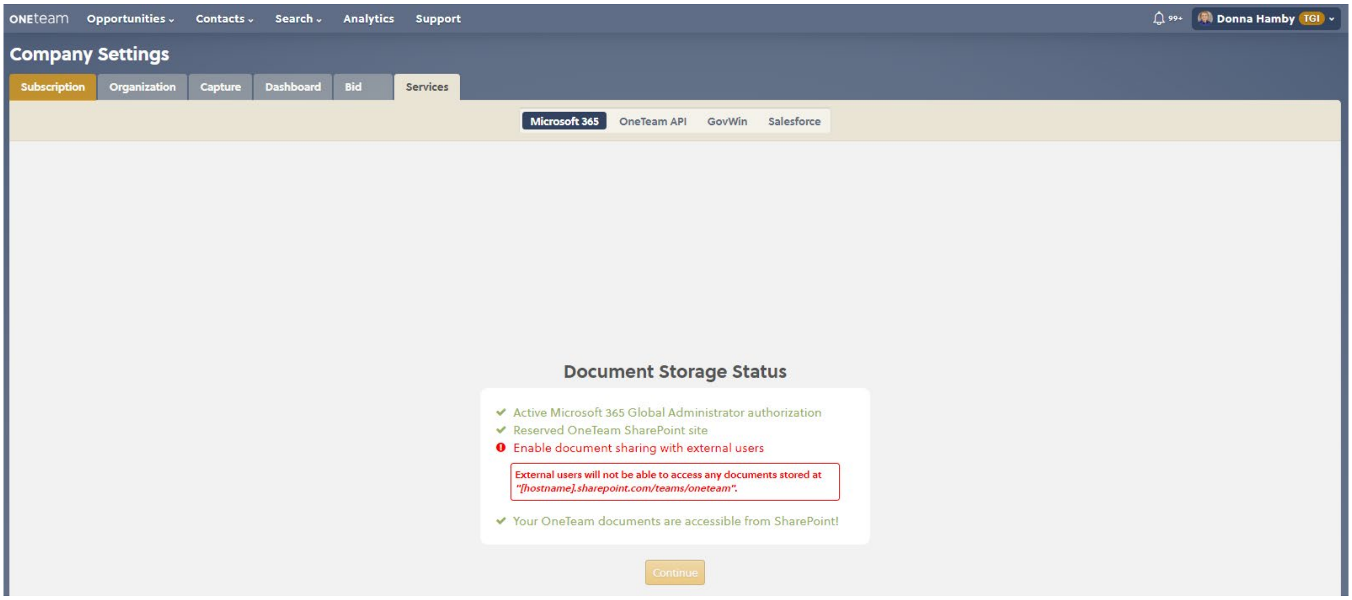
Note: This is how the Reviewer Ratings appear in the OneTeam Word Add-In and in the Proposal Management Dashboard.





Services

Microsoft 365



Goal: Store your company's documents within your own Microsoft 365 (SharePoint Online) tenant rather than the default OneTeam storage.

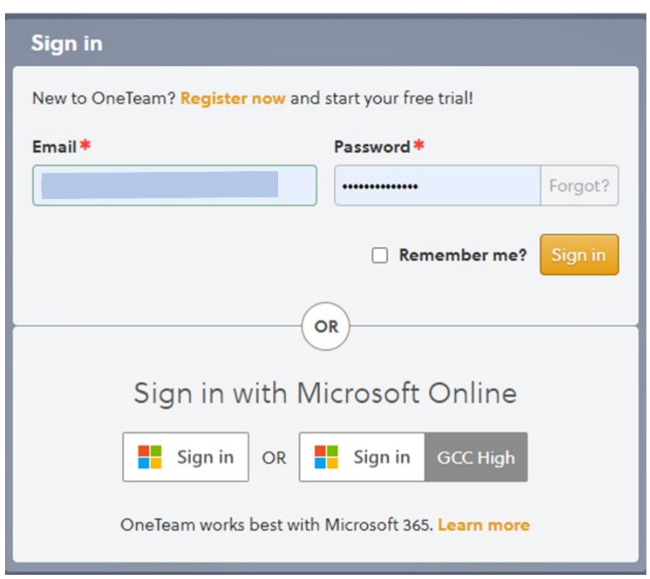
OneTeam: Enabling this feature integrates OneTeam with your Microsoft 365 tenant and migrates existing documents there.

Location: Menu, Services Tab, Microsoft 365 Sub-Tab

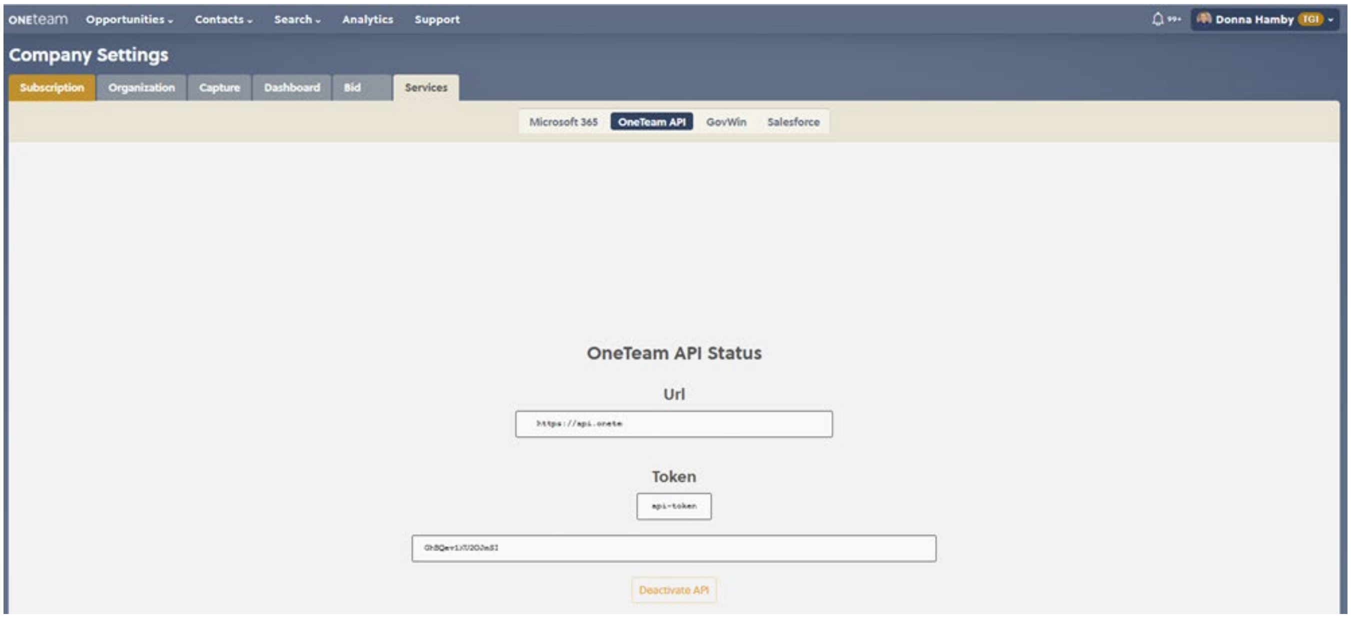
Actions: Enable Microsoft Online SSO

Note: Microsoft 365 must be enabled by OneTeam. Contact the Product Manager or Engineering Team through the Support function to enable Microsoft 365 for you company users.

The Sign-In window with Microsoft 365 enabled.

1. 

OneTeam API



Goal: Retrieve your opportunity pipeline data for use in external systems.

OneTeam: The OneTeam API allows you to securely pull your pipeline data into external systems for reporting purposes.

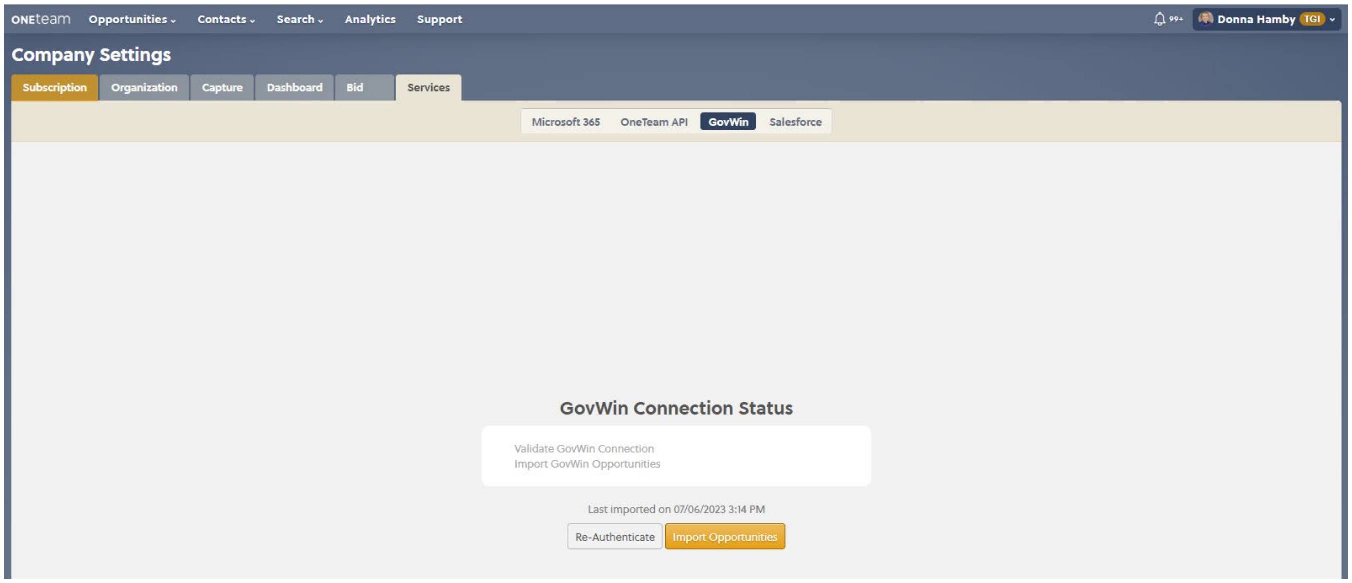
Location: Company Menu, Services Tab, OneTeam API Sub-Tab

Actions: Activate the OneTeam API to push OneTeam data to Power BI for performing analytics reporting.

Use the API to integrate OneTeam data with your accounting system data for financial projections.

Follow the instructions at https://support.oneteam.net/export-opportunity-data-to-power-bi-using-the-oneteam-api

GovWin



Goal: View GovWin automatic connection status.

OneTeam: Validate GovWin connection status.

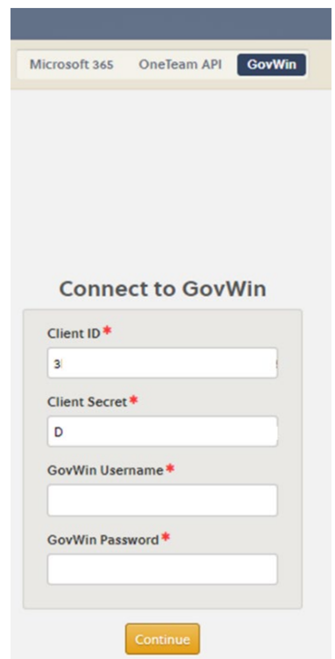
Location: Menu, Services Tab, GovWin Sub-Tab

Actions: Check last import date.

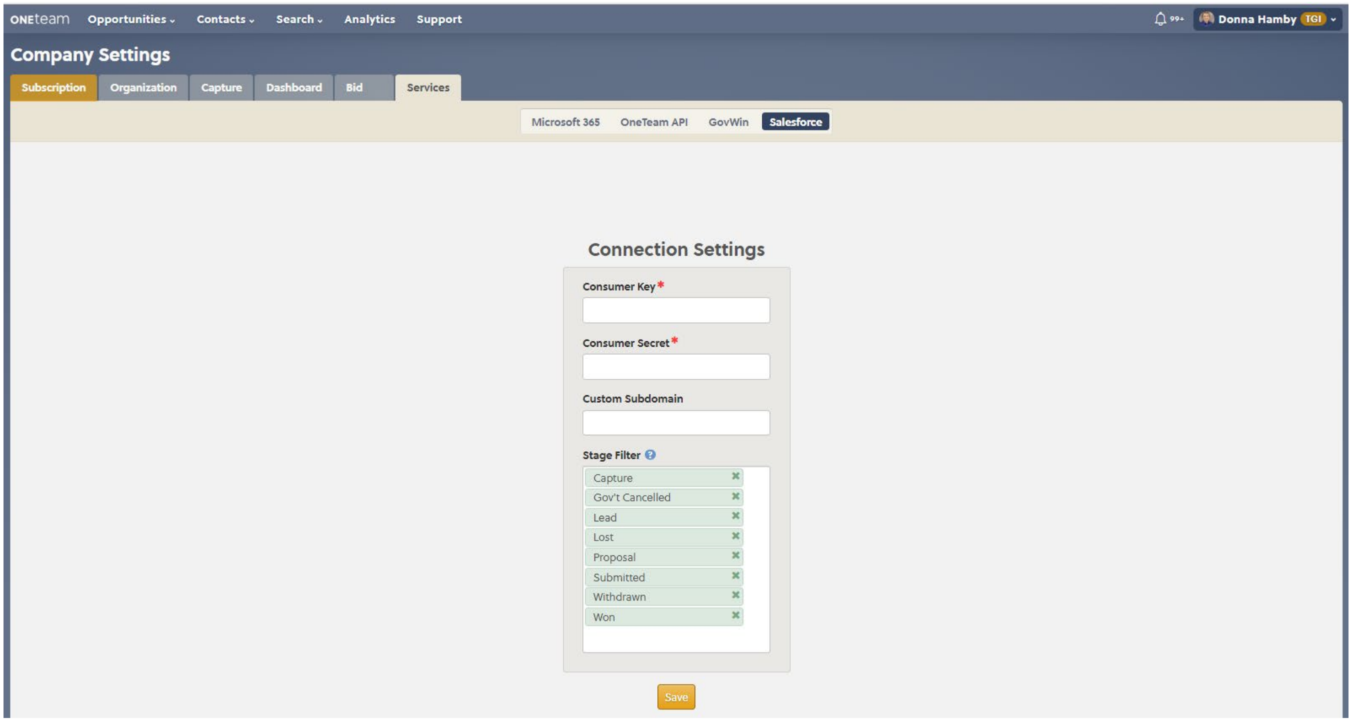
Update or Re-Authenticate GovWin token when expired.

Best Practice: Company OneTeam Administrators should be an appointment on their calendar to update the GovWin token every 30 days, so that they will not miss any updates from GovWin. When the token expires, your Pipeline Opportunities that are automatically updated via GovWin, will not be updated until the token is entered.

Note: When your GovWin token expires (every 30 days), you will see this box to connect your OneTeam account with GovWIn.



Salesforce



Goal: Manage Salesforce integration settings.

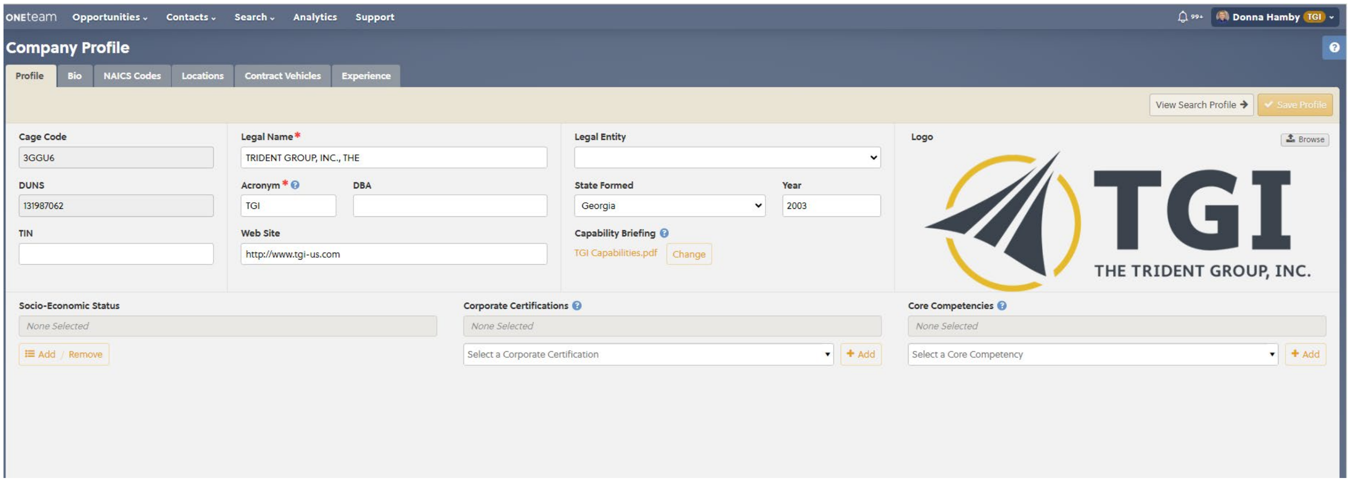
OneTeam: Allows download of opportunities from Salesforce to OneTeam to build Opportunity Pipeline.

Location: Menu, Services Tab, Salesforce Sub-Tab

Actions: Follow the instructions at https://support.oneteam.net/import-opportunities-from-salesforce to implement the Salesforce integration

Note: Salesforce integration must be enabled by OneTeam. Contact the Product Manager or Engineering Team through the Support function to enable Microsoft 365 for you company users.

Company Profile



Goal: Maintain Company information for viewing by potential teaming partners.

OneTeam: Add contract vehicles, NAICS codes, and company capability briefing to allow teaming invitations from potential teaming partners.

Location: Account Menu, Company Profile in drop-down menu

Actions: Upload company logo. Upload Corporate Capability Briefing.

Update contact information.

Create customized company biography.

Detail all corporate locations.

Best Practice: Keep information up-to-date to find potential teaming partners.

Profile

- Cage Code
- Legal Name
- Legal Entity – Corporation, LLC, Tribal, University, etc
- Logo
- DUNS
- Acronym
- DBA
- State Formed and Year
- TIN
- Website
- Capability Briefing
- Socio-Economic Status
- Corporate Certification
- Core Competencies
- Bio
- NAICS Codes
- Locations
- Contract Vehicles
- Experience