

## Welcome to your OneTeam Free Trial!

Congratulations on starting your 30-day free trial of OneTeam – this is the first step in streamlining and automating your company’s BD process. Are you ready to get started?



OneTeam fully integrates the entire Business Development Lifecycle including Pipeline Management, Capture Management, and Proposal Development.

We have put this guide together to guide you through your trial period and show you the potential of OneTeam. You do not need to complete every possible function shown here, but we wanted to provide a roadmap for the location of all the functions we support.

You have had a demo or maybe two, but now you are ready to see how OneTeam works for you. If you want a quick refresher on OneTeam Navigation and Features – feel free to set up a meeting with a member of our Customer Satisfaction Team – [Free Trial Overview Meeting](#).

Your Company’s Trial Site has been loaded with 20 DEMO opportunities. Feel free to practice on these opportunities or add an opportunity that is of interest to you! This guide is full of practice opportunities, but you don’t have to complete them all in one day – and some you will definitely use more than others.

Here are some good tasks for you to perform

- Add an opportunity to the Demo pipeline using the  button.
- Add more internal contacts to Company Settings (pull down menu under your name on the upper right). OneTeam automatically open to Organization tab, User sub-tab. Use the  button.
- Add dates for RFI, DRFP, RFP, Proposal Due, Contract Award and Contract Start – and view on the Schedule tab.
- Qualify an opportunity using the Qualification Matrix. Select your criteria answers and then take a snapshot for a mock gate review.
- Add Notes about an opportunity under Notes, create sample Phone Call, Email, and Meeting notes.
- Select Teaming partners under the Team tab, using the Search function in the Team tab.
- Create a SWOT analysis in the Strategy tab
- Create a Capability Matrix and Edit it for your example opportunity.
- Upload example data call documents to the Documents tab, Data Call sub-tab and route to an internal team member, who is listed on your contacts tab.

OneTeam does provide free Training for your Team when you purchase a subscription, including Company Administrator Training, Capture and Pipeline Training, and Proposal Training. Additional training is always available as an add-on.

Essentials Plan	5 hours training
Pro Plan	10 hours training
Premium Plan	15 hours training

OneTeam is here to help you each step of the way. If you have questions, just reach to OneTeam at [Free Trial Assistance](#)! We look forward to talking with you again soon!

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