



 **VisibleThread**

# The Opportunity Assessment Playbook

Your First Step in a Winning Strategy.



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# Introduction

Bidding and Proposal Management feels like navigating a maze sometimes, doesn't it? You're constantly weighing which opportunities deserve your team's precious time and energy. Here's the thing - getting this decision right can make or break your entire year.

Smart opportunity assessment isn't just about checking boxes on a spreadsheet. It's about building a systematic approach that helps you cut through the noise and focus on what matters. When your process works, win rates go up, time isn't wasted, and you focus only on bids you can win.



The contractors who consistently win understand something fundamental, they treat opportunity assessment like the strategic weapon it is. They've moved beyond gut feelings to create frameworks that work. These aren't theoretical concepts we're talking about here; they're battle-tested approaches that separate the winners from the also-rans.

This guide is the first in the five-part Mastering the RFP Lifecycle series, each one designed to walk you through a critical stage of the government contracting process from first glance to final award. Throughout this guide, we'll explore proven strategies that help you:

- **Spot opportunities that genuinely align with what your team does exceptionally well**
- **Eliminate those energy-draining pursuits that look promising but lead nowhere**
- **Position yourself strategically against incumbents who seem unbeatable**
- **Make every proposal dollar count by focusing where success is possible**

Think of this as your roadmap for making smarter decisions faster. Because in bids and proposals, speed and accuracy aren't luxuries, they're necessities.



# Technology in Your RFP Process

Let's talk about something that might surprise you: the best contractors aren't just good at writing proposals. They're exceptional at making smart decisions about which proposals to write in the first place.

Automation and AI has become the secret weapon for teams who want to work smarter, not harder.

Where Technology Has the Greatest Impact in Opportunity Assessment

## Market Research & Analysis

AI monitors market trends, competitor movements, and public data to identify and structure emerging opportunities.

## Historical Performance Comparison

Automated analysis of past wins and losses helps determine business fit, guiding more informed bid/no-bid decisions.

## Risk Identification & Mitigation

AI scans solicitation documents to flag risks, red-line critical requirements, and surface potential scope creep early in the process.

## Internal Communication & Planning

AI supports the creation of planning documents and internal messaging, ensuring teams are aligned and reducing downstream misunderstandings.

## First Draft Generation

AI accelerates initial response creation by leveraging solicitation documents and prior proposals, grounding outputs in the right language for faster, higher-quality drafts.

## Evaluate Business Fit

This step assesses how well an opportunity aligns with your organization's goals and capabilities. Teams compare requirements to internal strengths, asking: Is this a good fit, and can we deliver?

### How VisibleThread Can Help:

- Upload and compare documents (e.g., opportunity briefs, capability statements).
- Use Dictionary scans to match language with your strengths (e.g., tech stacks, certifications).
- Identify gaps early with Discovery to support informed bid/no-bid decisions.

VisibleThread enables objective, evidence-based evaluations—going beyond gut instinct.



# Section 1: Understanding Opportunity Assessment

## Why Most Teams Get This Wrong

Here's something that might sting a little: most proposal teams are terrible at opportunity assessment. They either chase everything that moves or rely on whoever yells loudest in the conference room. Neither approach works particularly well.

Opportunity assessment represents that crucial moment where you decide whether a potential contract deserves your organization's attention. Get it right, and you're setting yourself up for success. Get it wrong, and you'll waste months on something you were never going to win.

The teams that excel at this have learned to treat assessment as both an art and a science. They've developed structured approaches that remove emotion and politics from the equation. Instead, they focus on data-driven insights that actually predict success.

**Across B2B and government proposal teams, it's estimated that up to 50% of resources are spent chasing bids with a low probability of win (PWin), largely due to poor qualification decisions (multiple benchmarking sources: Lohfeld, Shipley, APMP).**





## The Building Blocks of Smart Assessment

Every effective opportunity assessment touches on five core elements:

**Strategic Alignment** comes first. Does the opportunity match your strengths? Many teams chase contracts they aren't equipped to deliver.

**Competitive Landscape Analysis** follows closely behind. Who else is competing, and what are their strengths? Knowing this helps you stand out, not copy them.

**Resource Requirements** demand honest evaluation. Do you have the team, tools, and budget to deliver—not just win? Many focus on winning and forget to assess execution.

**Risk Assessment** requires looking beyond the obvious. Sure, compliance and tech risks matter—but don't overlook market shifts, staffing changes, or shifting customer needs.

**Financial Returns** need realistic calculation. What's this opportunity actually worth to your organization, and does that justify the investment required to pursue it?





## Learning from Success Stories

Consider Oshkosh Defense's 2009 assessment of the M-ATV opportunity with the U.S. Department of Defense. This wasn't just another vehicle contract—it was a chance to address urgent battlefield needs in Afghanistan.

Oshkosh recognized something important: their core engineering strengths aligned perfectly with what the military desperately needed. They weren't trying to be something they weren't; they were leveraging what they already did exceptionally well. The result? A significant defense contract that played to their strengths rather than exposing their weaknesses.

That's what smart opportunity assessment looks like in practice.

**Source** [www.army-technology.com/projects/m-atv-extended-medical-exm/](http://www.army-technology.com/projects/m-atv-extended-medical-exm/)

### **BVTI Success Story: How Opportunity Assessment Delivered Proposal Confidence**

For Cheryl's team, successful proposal outcomes began well before the first draft. After months of influencing solicitation requirements, they used VisibleThread to validate their capture efforts and support the final bid/no-bid decision.

By analyzing word frequency patterns and customer language trends, Cheryl's team created a starter compliance matrix to verify alignment with solicitation needs. This early assessment provided clear visibility into whether the opportunity truly fit their capabilities — reducing the risk of investing in poorly qualified bids.

When the proposal process officially kicked off, VisibleThread continued to guide both internal writers and external subcontractors. VT Docs reports helped onboard partners quickly, ensuring everyone shared a common understanding of proposal direction, compliance priorities, and partner responsibilities. This alignment across teams significantly improved collaboration and positioned the proposal for success from day one.

# BVTI

#### **Key takeaway**

Effective opportunity assessment isn't about intuition - it's about objective, data-driven decision-making. Set clear criteria early to quickly spot opportunities you can win and deliver.



# Section 2: Strategic Criteria for Evaluating Opportunities

## Building Your Decision Framework

Most organizations approach opportunity evaluation backwards. They start with an interesting RFP and then try to figure out if they should pursue it. Smart contractors flip this process entirely, they know exactly what they're looking for before opportunities even appear.

A robust evaluation framework becomes your north star, guiding decisions when emotions run high and deadlines loom. This framework typically includes several key components that work together to create a complete picture.

**Pipeline Reviews** should happen regularly, not just when someone remembers to schedule them. These sessions help you objectively compare opportunities and focus your resources. Top teams treat them as strategy not admin.

**Scoring Criteria** should match your strengths and goals. Generic criteria lead to generic results, use what sets you apart.

**Market Engagement** should be proactive. Winning teams build relationships and understand needs before RFPs appear.

**Resource Preservation** means saying no to tempting deals that don't fit your strengths. Chasing the wrong ones can cost more than missing the right ones.

Hope Skywell, a Digital Strategist, captures this perfectly:

**“Now is the time to get crystal clear with your brand. What is that value? What makes you uniquely suited to deliver a solution that’s going to bring exceptional value and innovation?”**

— Hope Skywell, Digital Strategist

She's highlighting something crucial, clarity about your value proposition isn't just marketing speak. It's the foundation of every smart opportunity decision.



## Learning from Success Stories

Kentucky's launch of Kynect, their state health insurance exchange, demonstrates strategic evaluation in action. Instead of chasing the flashiest or cheapest option, Kentucky chose based on their real needs and limits.

They selected Deloitte not because of clever marketing or personal relationships, but because of proven expertise and appropriate technology. This strategic decision based on objective criteria rather than subjective preferences led to timely, successful, and cost-effective implementation.

That's what happens when evaluation frameworks work: decisions become clearer, outcomes become more predictable, and success becomes more likely.

**Source** [www.pewtrusts.org/en/research-and-analysis/blogs/stateline/2013/11/11/how-kentucky-built-the-best-obamacare-site](http://www.pewtrusts.org/en/research-and-analysis/blogs/stateline/2013/11/11/how-kentucky-built-the-best-obamacare-site)

## VT Example

VisibleThread's VT Docs can automatically compare opportunity documentation against your organizational strengths. Dictionary scans quickly identify alignment between opportunity requirements and your team's proven capabilities, making evaluations more accurate and objective.

Instead of spending hours manually analyzing requirements, you can focus on strategic decision-making where human judgment truly adds value.

The screenshot displays the 'VT Docs' interface with a focus on 'Dictionaries'. The main content area shows a table of dictionaries with columns for 'Created by', 'Created on', 'Last updated', 'In Use', 'Used by', and 'Last used'. A callout box titled 'Key takeaway' is overlaid on the right side of the screenshot.

Dictionaries (44)	Created by	Created on	Last updated	In Use	Used by	Last used
Airbus - Acquire Business	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	✓	Bid - No Bid Past, 2016 Presidential, RFP-DOD.Pi	19 Aug, 2022
Airbus - Acquire Business	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	✓	ASTRO_1st..., Computacenter	19 Jun, 2022
Bad Language Scan	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	✓	Bid - No Bid Past, 2016 Presidential, RFP-DOD.Pi	19 Jun, 2022
Cobham - Kyle	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	✓	2016 Presidential	19 Jun, 2022
Cobham - Orchard Park	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	✓	Sections_L_M_From, Computacenter, Fergal M	19 Jun, 2022
Compliance Matrix Scan	Eoin.Wren	12 Dec, 2021	19 Jun, 2022	✓	Bid - No Bid Past	
Compliance Matrix - Simplified	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	✓	Fergal M, Computacenter, B	
Contract Kickoff v1	Eoin.Wren	12 Dec, 2021	19 Jun, 2022	✓	Bid - No Bid Past, 2016 Presiden	
DRS play	Eoin.Wren	12 Dec, 2021	19 Jun, 2022	✓	ASTRO_1st..., Computacenter	
FAR (S2) DFAR (252) - Care	Jason.O'Connell	12 Dec, 2021	19 Jun, 2022	✓	Bid - No Bid Past, 2016 Presiden	
FCA	Jason.O'Connell	12 Dec, 2021	19 Jun, 2022	✓	2016 Presidential	
Cliches and Jargon	Jason.O'Connell	12 Dec, 2021	19 Jun, 2022	-		
Plain Language (Complex Wor...	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	-		
FAR Extractor Dictionary	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	-		
MasterFormat: Division 00	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	-		
MasterFormat: Division 01	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	-		
MasterFormat: Divisions 02-09	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	-		
Facility Construction Subgrou...	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	-		
MasterFormat: Divisions 10-14	Eoin.Wren	12 Dec, 2021	19 Jun, 2022	-		
MasterFormat: Divisions 21-28	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	-		
MasterFormat: Divisions 31-35	Eoin.Wren	12 Dec, 2021	19 Jun, 2022	-		
Site and Infrastructure Subgrou...	Eoin.Wren	12 Dec, 2021	19 Jun, 2022	-		
Airbus - Acquire Business	Jason.O'Connell	12 Dec, 2021	19 Jun, 2022	-		
Airbus - Acquire Business	Jason.O'Connell	12 Dec, 2021	19 Jun, 2022	-		
Bad Language Scan	Fergal.McGovern	12 Dec, 2021	19 Jun, 2022	-		
Cobham - Kyle	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	-		
Cobham - Orchard Park	Paddy.Dore	12 Dec, 2021	19 Jun, 2022	-		

**Key takeaway**

Successful opportunity evaluation combines disciplined pipeline management, clear evaluation criteria, and proactive market engagement. When these elements work together, your ability to select and win valuable contracts improves dramatically.



# Section 3: Effective Go/No-Go Decision-Making

## Why Traditional Approaches Fall Short

Let's address the elephant in the room: most Go/No-Go processes are broken. They're often swayed by the loudest voice, chasing anything that seems promising or by internal politics unrelated to winning.

Traditional Go/No-Go decisions suffer from predictable biases. Teams often overrate themselves, overlook the competition, and chase paper-perfect opportunities that don't match reality. Sound familiar?

Effective Go/No-Go decision-making requires structured processes that expose these biases and challenge assumptions before they become expensive mistakes. This isn't about eliminating human judgment, it's about making that judgment more accurate and reliable.

## The Four Pillars of Smart Go/No-Go Decisions

**Opportunity Validation** starts with basics: Are the timelines doable? Are you eligible? Do you understand the customer? These simple checks are often missed.

**Internal Alignment Assessment** checks if the opportunity fits your goals and capabilities not just skills, but timing, capacity, and strategy. If you need partners, find them now.

**Competitive Analysis** means knowing rivals' strengths, weaknesses, and tactics. What sets you apart? Where are you at risk and how will you fix it? Being honest now avoids surprises later.

**Delivery Feasibility** checks if you have the people, time, and budget to deliver. Do your plans cover risks? Winning teams never overpromise.

Ceri Mescall from Strategic Proposals Canada observes:

**“Bias is subtle, but it's everywhere... You're never going to eliminate bias entirely, but we can design processes that expose it and challenge it.”**

— Ceri Mescall, Strategic Proposals Canada

This insight is crucial. You can't eliminate human nature, but you can design systems that account for it.



## Learning from Failure

Boeing's Secure Border Initiative Network (SBI-net) illustrates what happens when Go/No-Go assessment fails. Despite their exceptional aerospace capabilities, Boeing pursued an IT-centric border security project that required different skills entirely.

The result? Technical failures, contract termination, and significant financial losses. This wasn't a case of poor execution, it was a fundamental misalignment between organizational strengths and project requirements.

A strong Go/No-Go process could've flagged the mismatch early, saving Boeing millions and protecting its reputation.

**Source** [www.gao.gov/products/gao-11-6](http://www.gao.gov/products/gao-11-6)



# Section 4: Comprehensive ROI and Strategic Fit Analysis

## Beyond Simple Financial Calculations

Here's where most teams oversimplify things: they treat ROI analysis like a basic math problem. Revenue minus costs equals profit, right? If only it were that straightforward.

Comprehensive ROI and fit analysis weighs value across finances, strategy, capabilities, growth, and risk. The best opportunities often provide value that extends far beyond immediate financial returns.

This doesn't mean ignoring financial realities. It means knowing some opportunities are worth it, even with low short-term ROI, because they set you up for future success. Others might look financially attractive but create strategic problems that outweigh short-term gains.

## The Four Elements of Complete Analysis

**Revenue Estimates** need more than hope. Use past data, market insight, and realistic assumptions. Consider follow-on work, but don't rely on it upfront.

**Cost Understanding** means accounting for hidden expenses like training, tech, and overhead, not just the obvious ones. Winning teams know their real costs, not just best-case guesses.

**Strategic Alignment** checks if the opportunity supports your bigger goals. Like entering new markets or building key relationships even if the finances aren't perfect.

**Risk Assessment** means spotting and preparing for what could go wrong, like competition, market shifts, or technical issues. The goal isn't zero risk, but smart planning.

Courtney Madecchi from 3C Digital Solutions makes an important point:

**“What are the outcomes that you were able to gain with that? Perhaps you haven't done this particular innovation with this toolset, but maybe you have evidence of innovating in some other fashion.”**

— Courtney Madecchi, 3C Digital Solutions

She's highlighting something critical. Your track record of success often matters more than specific experience with particular tools or technologies.



## Learning from Success Stories

The Cover Oregon health exchange project (2011-2014) demonstrates what happens when strategic fit analysis fails. Oracle pursued this significant health IT initiative without adequate expertise in the specific domain.

The result was major financial and reputational damage when the project failed spectacularly. A thorough check of Oracle's fit for the project could've flagged the mismatch early and saved both sides major losses.

This wasn't bad luck or poor execution. It was a clear mismatch that should've been caught early in the assessment.

**Source** [www.npr.org/sections/health-shots/2014/04/25/306751942/oregon-abandons-troubled-health-insurance-exchange](http://www.npr.org/sections/health-shots/2014/04/25/306751942/oregon-abandons-troubled-health-insurance-exchange)

## VT Example

Leverage VT Docs Discovery to quickly identify capability gaps and risks early in your ROI and strategic fit analysis. By aligning your organization's strengths directly with opportunity requirements, you improve assessment quality while reducing risk.

This automated analysis frees your team to focus on strategic considerations rather than getting bogged down in document review.

**Key takeaway**

In-depth financial and strategic analysis helps focus resources on high-impact opportunities that match your goals and strengths. The investment in comprehensive analysis pays dividends through better decision-making and improved outcomes



# Conclusion: The Value of Structured Opportunity Assessment

Government contracting has become increasingly competitive, and the stakes keep rising. Teams that approach opportunity assessment casually, or skip it entirely, find themselves burning through resources without meaningful results. Meanwhile, organizations with structured, repeatable processes are strengthening their strategic position and boosting their win rates year after year.

The difference isn't luck or connections, though those certainly help. The difference is treating opportunity assessment as a core competency rather than an administrative task.

## Your Action Steps Forward

You don't need a perfect assessment process to start. Just take these steps and improve as you go:

**Develop clear criteria:** Ensure your opportunity assessment uses objective, consistent measures.

**Reduce bias through structured evaluation:** Leverage guided questioning and technology with supported frameworks to keep the decision objective.

**Align closely with organizational strategy:** Always connect your assessments directly to your organization's strategic objectives and financial goals.

**Adapt continually:** Regularly update your assessment criteria and methods based on market changes and organizational priorities.

Maggie Bullard from BTW & Co offers a final insight worth remembering:

**“Strategy is not just something that should get accomplished at the executive level. Those engineers, those operators, those folks who are executing the work—they are your frontline of marketing and growth.”**

— Maggie Bullard, BTW & Co

This perspective is crucial. Opportunity assessment isn't just a business development function, it's an organizational capability that touches every aspect of your operation.



## Optimize25 Referenced Sessions

Optimize is VisibleThread's top virtual event for GovCon professionals. At Optimize25, experts shared real-world strategies across the RFP process.

Two key sessions from Optimize25 specifically support the opportunity assessment principles we've discussed throughout this guide:



Tan Wilson



Aaron Tilock

### Panel: What Makes a Good Opportunity?

Experts shared practical ways to spot valuable opportunities, build early relationships, and manage pipelines efficiently.

[Watch the full session here.](#)



Ceri Mescall

### Session: The Go/No-Go Reboot.

Learn how to modernize Go/No-Go decisions using structured, AI-supported methods to reduce bias and focus only on winnable bids.

[Watch the full session here.](#)



## Learn More About VisibleThread

Ready to see how these concepts work in practice? Here are your next steps:

- **Schedule a personalized demo** at <https://www.visiblethread.com/sign-up-vt-docs/>
- **Download our comprehensive RFP Guide** at <https://www.visiblethread.com/research/the-rfp-lifecycle/>
- **Check out all our past webinars** at <https://www.visiblethread.com/events/>

## References for Real-World Examples

- **Oshkosh Defense and the M-ATV Contract:** <https://www.army-technology.com/projects/m-atv/>
- **Kentucky Kynect Exchange:** <https://www.pewtrusts.org/en/research-and-analysis/blogs/stateline/2013/11/11/how-kentucky-built-the-best-obamacare-site>
- **Boeing and SBInet:** <https://www.gao.gov/products/gao-11-6>
- **Cover Oregon Health Exchange:** <https://www.npr.org/sections/health-shots/2014/04/25/306751942/oregon-abandons-troubled-health-insurance-exchange>