CaptureBridge FEDERAL ADVISORS

PLAYBOOK · FREE

The Federal Capture Playbook

A playbook for deciding what to pursue, and what to walk away from, in the federal market.

How pursuits work · the four score method · the five disqualifiers · the 12 signals · the set aside programs · a worked example · a plain English glossary

THIS IS FOR YOU IF

You are tracking too many opportunities and pursuit calls feel political	You are entering the federal market and need to place the first bid dollars well	You run capture with a small team and need a method leadership trusts

WHAT IS INSIDE

How federal pursuits work. Where opportunities live, and why most of what you see you cannot win.

The four score method. Fit, win probability, value, and timing, with five questions that disqualify first.

The set aside programs and 12 signals. What changes your odds, and what to read on every opportunity.

A worked example and a glossary. 520 records narrowed to 28, plus the terms that matter, in plain English.

CAPTUREBRIDGE FEDERAL ADVISORS

The bridge between commercial strength and federal revenue.

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01 How federal pursuits work

Before any method helps, it helps to see the board. Federal work is not one open market. It arrives through lanes, and the lane an opportunity sits in decides more about your odds than the quality of your proposal. Here is the short version.

Most opportunities are posted on SAM.gov, the government's official site, usually once a requirement is nearly defined. Paid market intelligence services surface them earlier, alongside agency forecasts and spending history. The earlier you see a requirement, the more room you have to shape it, and the less you are simply reacting to a solicitation everyone else also just saw.

Work is competed in three broad ways. Full and open, where anyone capable can bid. Set aside, where only a category can bid, such as small business, 8(a), service disabled veteran owned, HUBZone, or woman owned. And directed or sole source, where the government has effectively chosen one company, often through a certification like the 8(a) program. What each means for your odds comes later in this guide.

On any given list, a large share is reserved for a category you do not hold, defended by an incumbent you would have to unseat, or written onto a contract vehicle you do not carry. That is not failure. It is the shape of the market. The skill that separates strong contractors is seeing that shape quickly, and spending only where there is a real path to win.

> **Federal pursuits run from spotting a requirement early, to qualifying it, to capturing it, to the bid, to the proposal. This playbook lives at qualify, the gate that decides where all of the later effort goes.**

02 Why most federal pipelines lie to you

A pull from the federal opportunity databases feels like progress. Hundreds of rows, billions in advertised value, every agency represented. It looks like a pipeline. In practice it is a reading list, and most of it is filler: work you are not allowed to bid, contracts reserved for businesses you are not, master contracts you do not hold, and companies already in place who will not be easy to beat.

The real cost is not the list. It is what the list does to your team. Hours disappear into pursuits that were never winnable. You start late on the few that were. And leaders lose the ability to tell, at a glance, which pursuits are real. When everything is on the list, nothing is a priority.

The qualification pass fixes that. One disciplined pass puts every row into one of three buckets, chase now, watch, or skip, with scoring clear enough to defend in a leadership review and simple enough to finish in an afternoon. A list of two to five hundred opportunities comes out as the ten to thirty worth chasing.

A QUALIFICATION PASS IS	A QUALIFICATION PASS IS NOT
A defensible sort of your whole opportunity list	A full plan for any single pursuit
A repeatable score anyone can apply the same way	A black box number with no reason behind it
A short list with a clear next step on each	A promise you will win the ones it surfaces
A living document you refresh each month	A one time spreadsheet that goes stale in a month

The goal is not a longer pipeline. It is a shorter one you can actually win.

200 to 500	10 to 30	An afternoon
opportunities on a typical raw list	worth active capture after the pass	from a raw list to a defensible short list

03 The method, start to finish

The qualification pass moves your list through five steps. Each one removes work that does not belong in active pursuit, so by the end you are spending time only on opportunities that passed every earlier test.

STEP	WHAT HAPPENS	WHAT YOU END WITH
1 · Gather	Pull every opportunity that fits your work and region into one list with the same columns for each.	200 to 500 raw rows
2 · Screen	Ask the five disqualifiers. Anything you cannot legally bid or cannot reach is removed before scoring.	About half removed

STEP	WHAT HAPPENS	WHAT YOU END WITH
3 · Score	Rate every survivor 1 to 5 on fit, odds, value, and timing.	100 to 250 scored rows
4 · Rank	Add the four scores into one total and sort into three tiers.	A ranked list
5 · Assign	Give every top tier opportunity an owner and a next step with a date.	10 to 30 worth chasing

STARTED	AFTER SCREEN	SCORED	TOP TIER	CHASE NOW
520	**224**	**224**	**28**	**28**
100%	43%	43%	5%	5%

Read it left to right. A list of **520** opportunities is screened to **224** worth scoring, then ranked to **28** worth chasing now. That is the whole job.

> **A healthy pass is aggressive at the screen. If more than a third of your list survives to active pursuit, the gates were too soft.**

04 The five disqualifiers

Before you score anything, every opportunity has to pass five plain yes or no questions. These are the things no amount of attractiveness can fix. If the answer to any one is no, the opportunity is a skip, written down with the reason so you can revisit it if the facts change. Screen first; score only what passes.

QUESTION	SKIP IT IF	WHERE TO CHECK
Are we allowed to bid?	It is reserved for a business type or category you do not hold.	Set aside field

QUESTION	SKIP IT IF	WHERE TO CHECK
Can we do the work?	The core scope is outside your skills and track record entirely.	Scope and industry code
Can we get in the door?	It needs a master contract you do not hold and cannot team into.	Vehicle field
Are we the right size?	It is a small business contract and you are too big to count as small.	Size standard for the code
Is there still time?	It has effectively closed and no rebid window is coming.	Due date and renewal flag

A worked total. Note the third row: a high value, high fit opportunity that is still a skip, because it failed the first question.

OPPORTUNITY	FIT	ODDS	VALUE	TIME	TOTAL	PASS?	TIER
Large new program, no company in place yet	5	4	5	4	**18**	**Yes**	**A**
Support task order, capable company already in place	4	3	3	3	**13**	**Yes**	**B**
Rebid reserved for a category we do not hold	5	4	5	3	**17**	**No**	**C**

> *A perfect score on an opportunity you are not allowed to win is the most expensive kind of false start.*

05 The four scores

Every opportunity that survives the screen gets four scores, each from 1 (weak) to 5 (strong). The four are kept separate on purpose: an opportunity can be a perfect fit yet nearly impossible to win, or easy to win yet too small to matter. Each level has a written definition, so two reviewers reach the same result without it turning into opinion.

	FIT	ODDS (WIN PROBABILITY)	VALUE	TIMING
5 Strong	Core work, with directly relevant past performance.	No strong rival in place. Team, access, and price all stack up. Reserved or directed work lifts this sharply.	Big enough, with renewals, to change your year.	Out now or shapeable, with runway to compete.
3 Mixed	Adjacent to your core. You would lean on a teammate.	A capable rival or crowded field, but a real opening if you team and shape early.	A solid mid size award, but not a game changer.	Months out, or the window is half closed.
1 Weak	Outside your skills, or needs credentials you lack.	A strong rival entrenched, or nothing sets you apart. A long shot.	Small or one time. Cost to pursue nears the award.	Closing, past shaping, or stale by release.

Add them up

The four scores add to a total between 4 and 20. Weight them equally to start, and change it only with a stated reason.

TOTAL	TIER	MEANING	WHAT YOU DO
16 to 20	**TIER A**	Chase now	Assign an owner today. Start teaming and customer contact.
11 to 15	**TIER B**	Watch	Track it. Re score when the contract or rules change.
4 to 10	**TIER C**	Skip	Take it off the active list. Write down why.

06 The 12 signals worth reading

Scoring goes faster and stays consistent when everyone reads the same things. These are the 12 fields to pull on every opportunity, from SAM.gov and any market intelligence service you use, and what each one tells you.

SIGNAL	WHAT IT TELLS YOU
1 · Status / stage	Where it sits: planning, posted, or closing. Early stage means more time to shape it.
2 · Due or release date	When it is due or expected. Tells you whether there is still time to compete.
3 · Set aside	Who it is reserved for. The most common reason to skip an opportunity outright.
4 · Vehicle required	Whether you need a master contract to bid, and whether you hold it or can team to it.
5 · Industry code (NAICS)	Whether the work is in your lane, and the size standard that decides if you count as small.
6 · Incumbent	Who holds the work now, and whether they are beatable or worth teaming with.
7 · Competition type	Open to everyone, small business only, or reserved and directed. This drives your odds more than anything else.
8 · Value	The size, and whether it is a real estimate or a placeholder. Do not assume blanks are big.
9 · Period of performance	How long the work runs, including option years. Affects both value and staffing.
10 · Scope language	How detailed the requirement is. Detailed and dated is real; vague and undated is usually filler.
11 · Customer contacts	Named buyers you can reach to build a relationship and shape the requirement early.
12 · Amendments	Changes to the notice. Frequent late changes can signal a moving target or a wired requirement.

Pull these 12 into your register once and every opportunity scores from a single row. If a field is blank, that is a finding to chase, not a cell to ignore.

07 Worked example: 520 to 28

These numbers come from a sample run on a fictional small business we call the Firm. The data is made up to show the method clearly, but the shape matches a real run. The Firm holds one small business certification, which turns out to be the most important fact in the run. We pulled

520 opportunities worth more than 58 billion dollars in advertised value. Asking the five disqualifiers removed 296 right away, leaving 224 to score.

BUCKET	COUNT	VALUE	NOTE
Chase now	28	$9.2B	The short list, each with an owner
Watch and qualify	196	$3.1B	Re check when the rules are set
Skip	296	-	Cannot bid, cannot reach, or not our work
Total	**520**	**$58B+**	Excludes 64 rows with no value listed yet

Two findings that changed the plan

One: the certification is the biggest advantage. Of the 224 scored, 71 were reserved for the Firm's certified category, where it can win with little or no competition. Another 88 were small business contracts to verify, and 35 were reserved for veteran or women owned firms the Firm could not bid at all.

Two: the best money sits behind closed doors. 132 of the highest value opportunities required a master contract the Firm did not hold. The first move was not a bid. It was to press the work it can win through its certification, while lining up teaming and getting on the master contracts that guard the rest.

The short list, described by facts not field

#	OPPORTUNITY	VALUE	FIT	ODDS	NEXT STEP
1	Large rebid, no company named yet, reserved for our category	$420 M	5	4	Chase now. Pursue the reserved path.
2	New requirement, open to small businesses, single award	$90M	5	4	Chase now. Submit early questions.
3	Rebid on a master contract we do not hold	$260 M	5	4	Team with a current holder.
4	Mid size task order, reserved for our category	$45M	5	4	Chase now. Direct award path.
5	Forecast about a year out, open, high ceiling	$300 M	5	4	Start shaping now. Meet the customer.

#	OPPORTUNITY	VALUE	FIT	ODDS	NEXT STEP
6	Single award, open to small businesses, weak company in place	$70M	5	4	Chase now. Lead with our record.
7	Rebid, reserved for our category, strong renewals	$185M	5	4	Chase now. Lock in the reserved path.
8	New requirement, open to everyone, high ceiling	$240M	5	4	Team with a lead. Shape the requirement.

08 How the government competes the work

Of everything on the list, the single biggest driver of your odds is not your past performance, your team, or even your price. It is how the government decides to compete the work. The same requirement can be a strong bid or a long shot depending only on who is allowed to bid against you. This is why eligibility sits at the top of the screen, and why a small business certification is often the most valuable asset a company holds in the federal market.

HOW IT IS COMPETED	WHO CAN BID	TYPICAL ODDS
Directed or sole source	One company, by name, often through an 8(a) or similar lane	**60 to 80%**
Set aside for a category you hold	Only that category: small business, 8(a), SDVOSB, HUBZone, WOSB	**35 to 55%**
Full and open competition	Anyone capable and registered to do the work	**10 to 30%**

These ranges are typical, not promises. They move with how strong the incumbent is, whether you have worked the customer before, and how crowded the field is. But the pattern holds: the fewer companies allowed to bid against you, the higher your odds, before you write a single word of a proposal.

> **Read the set aside and competition type first. Weight the work you can win through a certification or a directed lane, and treat full and open recompetes with a strong incumbent as the hardest money on the board.**

09 The set aside programs worth knowing

A small business certification is the most valuable lane most companies can hold, because it shrinks the field of who is allowed to bid against you. Each program below carries a governmentwide goal, a share of federal dollars the government aims to award to that category every year. Qualifying for one, or teaming with a company that does, can move a pursuit from a long shot to a real one.

PROGRAM	WHO QUALIFIES	GOAL
Small business set aside	Firms under the size standard for the NAICS code in play	**23%**
8(a) Business Development	Small disadvantaged firms, including Alaska Native and tribal entities, eligible for sole source and set aside awards	**15%**
SDVOSB	Service disabled veteran owned small businesses	**5%**
WOSB	Women owned small businesses, in eligible industries	**5%**
HUBZone	Firms based, and with staff living, in a historically underutilized business zone	**3%**

Goals are governmentwide targets, not guarantees on any one contract, and the size standard that defines small varies by NAICS code. The practical takeaway is the same as the odds above: the narrower the lane you can compete in, the better your chances, so know exactly which lanes you hold and which you can reach by teaming.

10 The mistakes that quietly kill pipelines

The method is simple. The discipline is hard. These are the habits that drain a federal pipeline one pursuit at a time, and the correction for each. None of them are exotic, which is exactly why they persist.

THE MISTAKE	THE FIX
Bidding everything	A high bid count with a low win rate burns proposal budget and wears out your team. Disciplined no bids are how you raise a win rate, not lower it.
Scoring value before eligibility	A large award is seductive, so teams score it high and only later find a set aside they cannot hold. Check eligibility first, every time.
Starting capture at the RFP	By the time a solicitation drops, the winner has usually already shaped it. Real positioning happens months earlier, in the forecast and pre RFP stage.
Treating a TBD value as large	An unsized estimate is a data gap, not a big number. Flag it, and do not inflate your pipeline on a guess.

THE MISTAKE	THE FIX
Underrating a strong incumbent	A recompete with an entrenched incumbent and a clean record is won rarely, and only with a real discriminator. Be honest about the odds before you spend.
Never revisiting a no bid	Incumbents weaken, set asides change, vehicles get added. Re screen your no bids each cycle, because some become next quarter's best pursuits.

11 Where qualifying fits in the bigger picture

Qualifying is one gate in a longer process. Winning federal work runs from spotting a requirement early, to qualifying it, the discipline in this guide, to capturing it through customer engagement, teaming, and shaping, to the bid decision, and finally to the proposal itself. Most companies spend too much on the last two stages and too little on the first three.

Identify	Qualify *this guide*	Capture	Bid decision	Proposal

A disciplined qualification gate, run early and often, is the cheapest way to raise a win rate, because the surest way to win more is to bid less, and bid better.

12 A short glossary

Federal contracting runs on shorthand. These are the terms that matter most when you are deciding whether to pursue something. Keep this page handy.

TERM	WHAT IT MEANS
SAM.gov	The government's official site for posting and bidding on opportunities.
Market intelligence	Paid services that surface opportunities, forecasts, and agency history earlier than SAM.gov.
NAICS code	The industry code that classifies the work and sets the small business size standard.
Set aside	A competition open only to a category, such as small business or 8(a).
Full and open	A competition any capable, registered company may bid.
Sole source	An award made to one named company without competition.
8(a)	An SBA program for small disadvantaged firms, eligible for set aside and sole source awards.
SDVOSB	Service disabled veteran owned small business, a set aside category.

TERM	WHAT IT MEANS
HUBZone	A set aside for firms based in a historically underutilized business zone.
WOSB	Woman owned small business, a set aside category in eligible industries.
Incumbent	The company currently holding the contract being recompeted.
Recompete	A contract being competed again as the current one expires.
Vehicle	A contract you must hold to bid certain work, such as a GSA Schedule or an IDIQ.
IDIQ	Indefinite delivery, indefinite quantity, a vehicle that issues work as task orders.
Task order	A specific order of work issued under an IDIQ or similar vehicle.
GSA Schedule	A long term governmentwide vehicle with pre negotiated terms, also called MAS.
RFI	Request for information, an early market research notice, not a solicitation.
RFP	Request for proposal, the formal solicitation you bid against.
RFQ	Request for quote, a simpler solicitation, often a small firm's first.
Past performance	Your record on similar work, a major factor in most awards.
Pwin	Win probability, your honest estimated chance of winning a pursuit.
Forecast	An agency's advance list of expected opportunities, your earliest look at what is coming.
Teaming	Partnering with another firm to bid, as a prime with subs or as a sub to their prime.
Period of performance	How long the contract runs, including any option years.
Capture	The work before the RFP that positions you to win: customer contact, teaming, and shaping.

About CaptureBridge Federal Advisors

We help companies pursue and grow in the United States federal market, with a focus on the discipline this guide describes: qualify hard, bid less, bid better, win more. If you would like to talk through your own pipeline, we are glad to.

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