



Proof of Performance Intake Template

A Practical Framework for Uncovering Evidence That Wins Business

Every successful project generates valuable proof of performance but too often, that proof never makes it into your case studies, proposals, website, partner campaigns, or sales conversations.

Use this worksheet during every major project or customer interview to capture the measurable outcomes that differentiate your organization and build buyer confidence.

STEP 1 | Project Overview

Customer / Agency	
Project Name	
Contract Vehicle (if applicable)	
Period of Performance	
Primary Customer Contact	
Internal SME(s)	

STEP 2 | Understand the Challenge

Before discussing the solution, clearly define the customer's problem.

- ***What mission, operational, or business challenge prompted this project?***
- ***Why was solving this challenge important?***
- ***What risks, inefficiencies, or limitations existed before your team became involved?***

STEP 3 | Document the Solution

Keep this section concise.

- ***What did your team deliver?***
- ***What differentiated your approach?***
- ***Were any partners, OEMs, or subcontractors involved?***

STEP 4 | Capture the Proof

This is the most important section. Look beyond technical implementation and identify measurable business or mission outcomes.



Time & Efficiency

- ☐ Reduced processing time
- ☐ Faster deployment
- ☐ Shortened response times
- ☐ Eliminated manual effort

Notes:

Cost & Resources

- ☐ Reduced operating costs
- ☐ Avoided future costs
- ☐ Improved resource utilization
- ☐ Consolidated systems

Notes:

Risk & Compliance

- ☐ Reduced cyber risk
- ☐ Improved compliance
- ☐ Increased resilience
- ☐ Improved visibility

Notes:

Operational Impact

- ☐ Increased productivity
- ☐ Improved accuracy
- ☐ Increased availability
- ☐ Better user experience
- ☐ Enhanced decision making

Notes:

Mission Impact

Complete this sentence. Because of this project, the customer can now...

STEP 5 | Find the Numbers

Record every measurable result you can uncover. Don't stop if exact numbers aren't available. Percentages, ranges, estimates, and directional improvements are often valuable.

Metric	Before	After	Improvement

STEP 6 | Capture the Customer Perspective

- *What was the customer's biggest win?*
- *What positive feedback did they share?*
- *Is there a quote that could strengthen future marketing?*

STEP 7 | Turn Proof into Marketing Assets

Before closing this worksheet, identify where these insights should be reused.

- ☐ Case Study
- ☐ Proposal Library
- ☐ Website
- ☐ Capability Statement
- ☐ Capture Materials
- ☐ Partner Campaign
- ☐ LinkedIn
- ☐ Sales Presentation
- ☐ Executive Brief
- ☐ Press Release
- ☐ Award Submission
- ☐ Customer Success Story



The Scrappy Tip

One interview. Multiple assets.

Every customer conversation should produce content for more than a single case study.

With the right questions, one interview can fuel your proposals, website, sales enablement, partner campaigns, executive presentations, social media, award submissions, and future capture efforts.

Don't create content from scratch. Build a library of proof.

Quick Reference: Questions Every Marketer Should Ask

Before ending an SME interview, make sure you've answered these five questions:

1. What problem did we solve?
2. What measurable outcome did we create?
3. Why did that outcome matter to the customer's mission?
4. What made our approach different?
5. Where else can we reuse this proof?