



4870 Sadler Road, Suite 300
Glen Allen, Virginia 23060
www.ussmccorp.com
1-844-448-7762
1-844-44(USSMC)



A SMALL BUSINESS GUIDE TO DOING BUSINESS



A REAL TRUTH TRAINING SERIES

**USSMC's Corporate Capability
A Guide for Doing Business with the Federal Government for Small
Businesses & 8(a)/SDB & All Subpart 19 Small Businesses**

Agenda for Presentation

Executive Summary

About the President /CEO

New Information:

Starting Your Own Business (how to start)

Advantages and Disadvantages (how to start)

Will You Be Successful (how to start)

Successful Firms (how to start)

Personal Goals Checklist for Starting a Business on page 10

What is a Business Plan pg. 3 (how to start)

Business Plan pages: 2, 3, 4, 5 and 8

Strategic Plan 4 slides pages 6 (Operational and Personnel Plan) 8 and 9

Internal Assessment in Seeking Federal Business

Overview of Business Development External Factors

Understand your market pg. 4 (how to start)

Identifying and Selling to the Government Contacts

Risk Analysis and Financial Pro Forma and Explanations

Financial Plan (how to start)

Marketing pages: last slide on 5, 6 first two slides, 13, 14, 15 and 16

Evaluating Business Opportunities

Pre-Proposal

Do's and Don'ts

Preparing the Proposal

Post Proposal

Tips (how to start)

Evaluation

Closing

(Table of Contents)

Bio of Author.....	5-6
Executive Summary.....	7-8
1. Internal Assessment in Seeking Federal Business.....	8-9
2. Overview of Business Development External Factors:.....	10-11
3. Identifying and Selling to the Government Contacts:.....	11-12
4. Evaluating Business Opportunities:.....	12-13
5. Pre Proposal	13
6. Preparing the Proposal	13-14
7. Post Proposal:	15
APPENDIX A.....	16-19
APPENDIX B.....	19-21
POSCORBE.....	22-23



BRENDA A. CAMPBELL, MBA, MSW

Author:

President/CEO

(National Sr. Management Consultant/Sr. Trainer)

A Masters Level Graduate of Howard University with Special Honorary honors also through the US SBA's UTEP University Executive Level Training Program, Brenda currently serves as the President/CEO for over 29 years for USSMC, Inc a Federal Government Management Consulting Technology, OD and Engineering Services Company. She is an experienced 34 senior management consultant and a nationally recognized senior trainer

and former federal government contracts officer. Her accolades are too numerous to mention but among a few accomplishments:

Under her leadership, USSMC hosted, planned agenda and provided technical assistance for an event for former Secretary of State Condoleezza Rice to address Johannesburg South African Human Rights and Justice Government System Reform for reorganizational efforts. Coordinated with the South African Embassy in Washington, DC for the safe arrival of several official diplomats from the South African government for scheduled meetings in the US. Her company among very few minority women companies to have held a major contract with the National Oceanic Atmospheric Administration-(NOAA) addressing the GOES and POES Satellite for the National Environmental Satellite, Data and Information Service (NESDIS). She has served as Commencement Speaker, Small Business Trainer and Advisory Board Member for several university entrepreneurship, local, state and federal small business development programs and graduation ceremony programs.

Campbell has trained over 15,000 plus small businesses for the SBA in all fifty states. Guest Presenter for the National Veterans Conference in New Orleans, Louisiana for 5,000 veterans attendees. Honored at the Arlington National Memorial Cemetery Veteran Women's Conference, sponsored by the SBA and US Treasury. Presenter for the US Department of Veterans Affairs (90) National Veterans Employee Coordinators, other small business development organizations and thousands of federal, state and local government senior executives and program management officials. She is a graduate of the Veterans Institute Procurement Program. Ms. Campbell has developed several small business proprietary trainings curriculums under what she calls her – **"Real Truth Series"** and a proprietary small business guide entitled **"Direct U"**.

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To give back to the community, she is the Founding/CEO for her own 501(c)(3) organization - The Enhancement Foundation Inc. since 2012. It is a women's empowerment organization where her goal is to leave legacies for the next generation of women. She is a noted special guest presenter and business expert for various television shows to include Channel 6 WTVR's Virginia This Morning and News Channel 8. She wants to see people reach their unlimited potential and be able to leave legacies.

For more info - <https://www.enhancementfoundation.org/our-leadership> and
<https://www.ussmccorp.com/leadership-and-team>

To Book - Ms. Campbell – (Please Complete Prior to Event):
<https://www.ussmccorp.com/speaker-request-form>

Executive Summary

In today's competitive market a key discriminator for success will be a company's ability to have a strategic planning process, which identifies key markets and customers. In the Federal Government the need for target marketing is essential to success. A successful 8(a)/SDB company should be able to identify the agencies and more importantly sub groups within the agencies as well as specific programs or services required by the agency that are a compatible match for their services. It is our attempt through this document to establish a road map of tactical steps required to be successful in the government arena.

Our approach has been to look at the internal, as well as external control factors, pre-existing relationships within agencies, and windows of opportunity that can be exploited followed by a methodical approach to responding to a requirement.

The company selling strategy should be based mainly on making the right fit of service offering and service needs. Strategic Alliances, sub-contracts are also an effective way to gain initial visibility to various agencies within the federal arena. A good way to gather information on the agencies that your company has decided to go after is to form alliances with mentors and or other companies with compatible capabilities. Sometimes, it is as simple as starting with small support project. These future alliances will help you possibly obtain future work from those agencies and gives your company the capabilities to go after larger contracts in the future.

Fundamental to obtaining business in the federal arena is to begin by understanding the government's unique culture. Each government agency has a unique culture that an 8(a) company must understand prior to their pursuit of business. This involves understanding the overall strategic plan, mission, goals and objectives. Agencies provide public documents and special assistance programs to help companies in their quest for information. These documents will usually explain the Agencies special assistance programs, yearly initiatives, and procurement process.

It is essential to determine which services a company should target to which government agency. A company must evaluate market conditions, competition, needs of the government, and the company's strengths and weaknesses to determine where it should direct its marketing efforts.

Not all solicitations will have the same types of requirements. Some are based solely on price while others are based on price and technical approach. It is important for a company to understand the differences in every type of solicitation and what that means to you as the bidder. Let the solicitation dictate how and where you concentrate your efforts.

When preparing your bid package there are key factors that you should pay very close attention to. It is critical that you read and pay close attention to these factors; in the evaluation process it could make the difference between award and debriefing.

As you decide on whether to commit your resources to a proposal effort, a standard go, no-go color scheme has been established and used by many successful companies. The key areas of evaluation are; the opportunity definition, the program strength, competition, wins strategy, customer contact, and teaming possibilities. In these areas the green, yellow and red ratings are

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used to assess the possibility of success in preparing to respond to a requirement. Most of the assigned color codes should be green if you are to proceed with the proposal plan.

In summary, the federal procurement process has enormous potential for growth for 8(a)/SDB companies. Resources, information and support services are available through multiple channels. In order to be successful and to take proper advantage of the program a company should be well prepared and plan their roadmap carefully.

1. Internal Assessment in Seeking Federal Business

Description: For Internal Assessment, the company must understand the purpose of seeking Federal Business. It may be that it hopes to gain a contract, begin a relationship, increase market share for existing or new services. The company must assess the direction and method it would take to provide services to government. There is help available in form of teaming with Prime contractor, subcontractors or Mentor Protégé relationship. The company must assess whether or not it has the capabilities and the corporate organization to manage the Government requirements. The company must evaluate if the internal processes such as audit, inspection, purchasing, acceptance, billing etc. are in place to ensure that company would comply with regulations and Federal requirements.

The company must develop business objectives before seeking Federal contracts. This could be an amount of federal contract on yearly basis with a specific agency, or identifying and marketing to agencies that have the need for company's services. The above factors of Internal Assessment must then become a part of a plan to help the company generate federal business.

How to: The plan that takes into account the purpose, company's direction and method, capabilities and corporate structure, and the internal conditions and forms the key elements for seeking Government business is called Company's Marketing Plan which is briefly described below.

Marketing Plan:

It is essential to determine which services a company should target to which government agency. The company must then evaluate market conditions, competition, needs of the government, and the company's strengths and weaknesses to determine where it should direct its marketing efforts

A successful marketing plan covers:

Purpose: What Company hopes to accomplish within a specific agency, e.g. gaining any contract or becoming a subcontractor on a specific program

Internal Conditions: Factors inside that could enhance or impede the success of the plan, such as organizational boundaries, or corporate preferences

Constraints: Factors that limit the opportunities such as staff availability, ability to design to government specifications etc.

Opportunities: Ideas that represent potential avenues to grow the business related to the plan's purpose

Assumptions: Event statements used as a gauge in evaluating the plan's likelihood of success.

Objectives: Goal statements that help assess milestones throughout marketing plan implementation to assess whether plan is on target to meet its purpose

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Policies: Internal procedures those are required for Government business endeavors.

Programs/Projects: Tasks with resources, dates, and dependencies to chart a team's progress against the plan's purpose.

Schedules: Dates and milestones established for each project.

Organization: Corporate structure required to implement the plan's programs and projects.

Budget: The resources required to meet the plan's purpose.

Each of the above could help the company determine which of the vast number of government programs it should bid on. A marketing plan should be developed for each program a company intends to pursue.

The company must communicate the plan to the people responsible for its implementation. Evaluating the plan's success is critical to assess if it is meeting the purpose. Based on periodic evaluation, including of competition, updating of the plan becomes necessary to stay on the target.

2. Overview of Business Development External Factors:

Description: External Factors are those outside dynamics, activities, solutions and challenges facing small businesses as they seek to do business with the federal government.

The information provided below focuses on the external control factors and process steps needed by 8(a)/SDB companies for significant and measurable marketing results in the federal government business arena. This guide will help your company to further define its niche and posture itself for competing and capitalizing on new federal business initiatives and yet fully reap the benefits of the 8(a)/SDB program and procurement requirements of federal government organizations. The following information will further help your company to take advantage of external opportunities and position your role in the market place:

- Expanding product or services offered
- Entering new markets
- Exploiting new technologies

How to:

- Stay in contact with procurement, Small, and Disadvantaged Business Utilization Offices and with each agency that may have a need for your product and services. Understand their role and how they may help you.
- Get on bidder's list or the equivalent at each agency. Request that a packet of general information concerning the bidding process be sent to you.
- 8(a)/SDB Program participants are encouraged to request marketing assistance information from their Business Opportunity Specialist in their local SBA District Office.
- Check the Federal Business Opportunity (FEDBIZ) for procurement opportunities. All government agencies submit business opportunities for vendors review.

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- Contact procurement officers in the private sector (especially prime contractors) and in local, state, and federal government offices. Make an appointment to meet with them to let them know about your products and services.
- Contact SBA Procurement Center Representatives (PCRs) at their assigned government Headquarters or field offices. To obtain a list of PCRs in your area, contact the Assistant Regional Administrator for Procurement Assistance at your SBA Regional Office.
- Complete the SBA Dynamic Small Business Search Registration. This application can be found if you visit the SBA's website at: http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm . This database of company profiles is accessed by government agencies and the private sector. Federal agencies and prime contractors use the PRONET to find companies that provide the products and services they need.
- Become familiar with federal contracting regulations and the proposal process. Classes are offered by local colleges and small business development centers.
- For access to data on small business development publications, programs and services visit the SBA at: www.sba.gov
- Visit trade fairs and training seminars sponsored by local state, private, and federal organizations. These provide an excellent opportunity to network with the decision makers in many different fields.

3. Identifying and Selling to the Government Contacts:

Description: Your selling strategy should be based mainly on making the right services available to each of the government agencies your company has decided to go after. You should always make sure your service prices consider the client's budget and agencies know where to find you.

If you have not already done so, established a plan for each of the government agencies you plan to go after. Remember that each agency is different from each other.

A good way to gather information on the agencies that your company has decided to go after is to some key alliances with a mentor and or other like key type companies with the same and slightly different capabilities than what you have. These future alliances will help you possibly obtain future work from those agencies and gives your company the capabilities to go after larger contracts. Below are some factors and suggestions to consider.

How to:

- Review procurement information on the internet
- Use established contacts
- Visit Customer and Local Agencies
- Meeting person to person is an absolute requirement
- Making the cold call
- Typically government customers do not want to see you
- Technique in possibly making a cold call:
 - First, leave a message (your name, title and organization)
 - Call at starting time, before and after lunch, before COB

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- Most likely your call will not be returned
 - Send an e-mail
 - Goal is a 15 minute meeting at their site
- Government Customers expect a short 10-15 minute meeting which may consist of a fact finding mission or an explanation of your company's capabilities
- Due your due diligence of the customer
- Practice what your going to say
- Determine what information you may want to obtain from the client
- Prepare to LISTEN
- Know who you are visiting, where you are going, and phone numbers
- Listening Skills
- Arrive early
- Take notes to capture quotes, words, meaning and perception
- Relish bad news
- Bring another co-worker – two people listening is better than one
- Review your note right away after your meeting and write up a contact summary within your contact data base
- Maintain easy to access file of all sales calls
- Review your notes before your next visit
- Practice makes perfect (always ask yourself how can you improve on your next meeting).
- Networking is key
- Acquire knowledge:
 - Internet
 - Contacts
 - Reading Books
 - Attend Seminars

4. Evaluating Business Opportunities:

Description: To evaluate business opportunities, a company must understand the requirement as requested by the agency making sure that the current work force is adequate and that the company has the capabilities to perform the requirement as specified. Resources to obtain the necessary working capital needed for the project and what effect will this have on final cost to effectively compete and win the contract.

How to: Carefully review the business opportunity so a decision can be reached as whether to bid or not to bid, compiling all of the data that is available including previous bid history if this is not a new requirement.

Additional considerations:

- Knowledge of product/service
- Determine availability of product/material
- Delivery schedule
- New requirement
- Period of performance
- Possibility of extension

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- Previous incumbent - learn as much about the previous incumbent as possible
- Location - how many sites
- Accessibility
- Work schedule
- Is additional work force needed?
- Will work have to be performed during evening or weekends?
- Determine if subcontracting or teaming agreements are needed
- Review what impact subcontracting or teaming arrangements might have on final cost
- Is additional equipment required?
- Identify your competition
- Is there a budget that has to be considered?

5. Pre Proposal

Definition: The pre-proposal process encompasses a structured information gathering process and analysis to help you decide if your resources would be appropriately utilized in responding to this requirement. This part of the process entails significant information gathering and internal bid-no bid evaluations. There are several considerations that are used as the basis of evaluation; the strength of the program, evaluation of the competition, potential win strategy, customer contacts, complementary skills needed to put a viable team together as well as others. A color evaluation assessment has been standard for most government contractors to rate their strengths and weaknesses. Assign a green, yellow, or red rating to each area of your evaluation and then tabulate the results. Most of the assigned color codes should be green if you are to proceed with the investment required for the proposal.

How to:

- Obtain vendor list
- Is there an incumbent?
- FOIA request
- Request meetings (OSDBU, Program manager etc.)
- Contact incumbent personnel / transition strategy (if applicable)
- Identify teaming partners
- Identify competitors
- Identify proposal team (technical competencies, writing skill, pricing strategy)
- Identify “ win strategies”
- Review Bid/NoBid process
- External and Internal assessment SWOT analysis
- Develop schedules and budgets

6. Preparing the Proposal

Description: The goal of preparing a proposal is to clearly and concisely provides Agency information to evaluate all the relevant factors deemed necessary in choosing a vendor for a particular task. The key to successfully accomplishing this goal is to understand and carefully craft

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the requested material so that it makes sense not only to you the vendor but more importantly the customer. Be sure to divide the proposal into separate parts and to budget the appropriate amount of time to each part, including a process for at least one review and revision. A proposal is critical in winning an award from an Agency and is a direct reflection of you, your company and your capabilities.

Be sure your figures, rates and statements are true and correct and accurately reflect the proposed services or goods you intend to provide, but also make sure your proposal accurately reflects the services or goods requested by the agency and provides all the requested submittals in the proper format. Focus on the information requested but also highlight your strengths.

How to:

- Be sure to include an executed SF 1449 and all Amendments
- Insert prices for all items on the bid schedule
- Check and recheck all your prices
- Include legal evidence of authority (if requested)
- Include completed Reps & Certs
- Complete Past & Present Performance Questionnaire
- Double check Section E or L and M to ensure you have complied with all the requirements

7. Post Proposal:

Description: Post Proposal phase takes place after your proposal has been delivered on time to the requesting agency. The Post Proposal Phase should not be viewed as the win lose portion of RFP / RFQ process. If the contract is awarded there is a process to follow. If a contract is not awarded, use that opportunity to debrief with the Contracts Officer and inquire about future opportunities. Develop relationships with all of your Contraction Officers and other people in that agency.

How to:

- Proposal sent to the requesting federal agency, completed and on time
- While fresh in your mind, pull contracting team together and discuss the contractual process just completed (discuss ways of improving the process)
- After receiving the Letter of Acceptance, schedule a “Kickoff Meeting” with the contracting team (internal meeting)
- Upon receiving the Letter of Acceptance, decide who will meet with the client
- Contracting team to discuss the milestones and deliverables, schedules, etc.
- WORK BEGIN
- Proposal sent to the requesting federal agency, completed and on time
- While fresh in your mind, pull contracting team together and discuss the contractual process just completed (discuss ways of improving the process)
- Upon receiving a Letter of Rejection, inform the contracting team you did not receive the award
- Contact the Contracting Officer and request a written and oral “Debriefing for Request Number 0000000000000000
- In the debriefing, you should review your scores in the following categories; past performance; samples of work; personnel and experience; facilities, equipment and quality control. Within each category one will list strengths and weaknesses.
- Ask the Contracting Officer if there will be other contracts scheduled for the future.

APPENDIX A

To further understand in greater detail the external factors necessary for access to 8(a)/SDB Business, please find listed below additional information:

UNDERSTANDING THE FEDERAL GOVERNMENT CULTURE:

As an 8(a)/DB company you must understand the government's unique culture. Each government agency has a unique culture that an 8 (a)/SDB company must understand prior to their pursuit of business requirements. This involves understanding the overall strategic plan, mission, goals and objectives, agency's status with procurement opportunities. These documents and information will usually explain the Agency's special assistance programs, yearly initiatives, and procurement process. The understanding of the procurement process and its goals are essential to the 8(a)/SDB or other business procurement vehicle options.

FEDERAL GOVERNMENT BACKGROUND INFORMATION:

Your company should familiarize itself with the Federal Agency's Charters, Strategic Plan and its budget and financial constraints. Strategic Planning is defined as the process of forming a comprehensive statement about the company's mission, and future direction, given the company's overall situation. Some other important external considerations are your company's understanding of Source Directed Marketing Techniques:

- *Self Marketing*
- *Follow-on (Incumbent)*
- *Selection of two or more companies*
- *Specific size standard requirement*
- *Dollar threshold*

ROLE OF THE OSDBU OFFICE:

A company must also fully understand the Office of Small and Disadvantage Business Utilization's role in assisting one's (8) a business practice in seeking business opportunities. The Role of the Office of Small and Disadvantage Business Utilization OSDBU and the Small Business Specialist includes the following:

- Responsible for management of the Agency's Small Business Program.
- Develops policy and procedures for implementing:
- Agency Small Business Program, Minority Business Program, Women-Owned Business Program, Hub Zone Business Program, Veteran Owned Small Business, HBCU and Minority College Programs, Native American Business Programs and the Labor Surplus Cost Program.
- Advises the Administrator or Secretary.
- Represents the Agency before other Government agencies and industry.
- Serves as the agency point of contact on all small, minority, and women business issues.
- Negotiates annual socioeconomic procurement goals with the U.S. Small Business Administration.

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- Locates capable small business, minority, and women-owned business sources for current and future procurements.
- Ensures small business, minority, and women-owned business concerns receive adequate consideration, including initiation of set-asides.
- Participates in the evaluation of prime contractors' small business
- Acts as liaison between contracting officers and SBA field offices.
- Seeks and develops information on the technical competence of small business concerns for R&D contracts.
- Reports functionally to the headquarters OSDDBU but organizationally to the head of Agency.
- Offers counseling on how to best pursue contracting opportunities with the Agency.
- Provides procedures for getting on solicitation mailing lists.
- Advises business on current and planned procurement opportunities.
- Arranges meetings with technical requirements personnel.
- Provides information on assistance and preference programs.

UNDERSTANDING AGENCY MARKETING STEPS AND REGULATIONS

Your company must understand the agency's unique marketing methodologies, far regulations and OMB regulations and its importance to the strategic and marketing planning needed by 8(a)/SDB small businesses.

- Identify significant procurement sources within the agency
- Ensure company is on the bidders list at each site (often used as a mailing list for upcoming conferences) and is included in the various agency procurement systems.
- Become personally acquainted with sources in the Agency.
- Obtain and verify information about forthcoming RFPs.
- Define the opportunity.
- Assess the customer.
- Assess your capabilities and objectives against solicitation requirements.
 - Assess your competition.
 - Assess the program risks.
 - Make the bid decision.
 - Per use of FBO
 - Verify NAICS (SIC) code eligibility requirements.
 - Prime Contractor
 - Subcontractor
 - Make bid versus no-bid decisions made, document the reasons for not responding.

BID VS NO BID PROCEDURES:

A company must understand when to bid and versus not to bid. Listed below are some criteria to help you prepare for this area within your business structure.

- Develop methodology and criteria for a bid versus no-bid decision
- Is more than one award possible?

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- Is this new work or the re-competition of old work? (If old work, request copy of contract through FOI)
- Is the work "Set Aside" (SB/SDB/8(a))?
- Will there be a draft solicitation?
- Will there be a pre-proposal conference?
- Where will the work be performed?
- Are you technically qualified to do the work?
- Can others do it better? Who are they?
- Are they responding as a prime, subcontractor?
- Is your work force adequate for the job?
- Must you recruit new skills? Are the skills
- Readily available?
- Can you be cost competitive?
- Will you require a large "Up-Front" investment?
- Can a winning proposal be written in time?
- Is there a preferred contractor?
- Who is the incumbent?
- Is there an outside contractor with special skills or tools?

STEPS IN WRITING A PROPOSAL: Understanding how to write a winning proposal is essential to the success of your business. Please find below some steps to help you focus on a winning proposal.

- Perform long-term planning and positioning.
- Assess the customer and perform an opportunity assessment to define the opportunity and the program risks
- Establish a core team.
- Conduct pre-RFP activities.
- Assess your capabilities and objectives against solicitation requirements.
- Assess your competition.
- Make the bid decision.
- Write the proposal.
- Conduct post-submittal activities.
- Respond to the draft RFP (if applicable).
- Clarify writing tasks.
- Develop section strategy and design.
- Brainstorm section content and key issues.
- Begin gathering boilerplate.
- Design key section visuals.
- Analyze the RFP
- Review the bid decision
- Attend pre-proposal conference
- Review and update proposal strategy
- Review proposal plan and schedule

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- Hold a proposal kick off meeting.
- Draft the executive summary and volume summaries.
- Develop the proposal sections.
- Review, revise, edit section drafts and visuals

SUBCONTRACTING AND TEAMING AGREEMENTS CONSIDERATIONS:

Leverage your company in subcontracting and teaming agreement relationships.

- Define qualities of an effective subcontractors
- Market to prime based on specified concerns and criteria
- Negotiate effective teaming agreements and subcontracts
- Initiate effective techniques for subcontracting with a larger company

APPENDIX B

Below is a more detailed guideline for preparing and completing your Proposals. Please keep in mind that every proposal has different requirements and some of the following suggestions may not apply:

Preparing the Proposal

When preparing your bid package there are key factors that you should pay very close attention to. Some of these factors are quit simple such as the due date, but depending on the agency, the type of contract and dollar value of the contract there can be and are very different and difficult requirements for your proposal submittal. It is critical that you read and pay close attention to these factors; in the evaluation process it could make the difference between award and debriefing.

Before you begin to prepare your proposal make sure you have carefully read the current solicitation and compare it to the information you gathered in the Pre-proposal stage. Pay close attention to any references or instructions in the solicitation, such as a section on Instructions to Offerors or Evaluation Factors. If the solicitation contains these sections it will usually tell you what factors the agencies are looking for, how each factor will be evaluated, how each factor will be weighted and how to format and submit your proposal. Keep these instructions and references in mind while you are compiling the solicitation, not only will this give you focus working on the solicitation but it will also save you from reworking material.

Not all solicitations will have the same types of requirements for proposal. Some are based solely on price and others are based on price and technical data. It is important that you understand the differences in every type of solicitation and what that means to you as the bidder. Let the solicitation dictate how and where you concentrate your efforts.

The first step to preparing your proposal is to separate the work into distinct categories:

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- *Third party information*
- *Technical proposal*
- *Cost proposal*

The first category is made up of information required for the solicitation as a whole and needs to be requested or distributed to or from a third party. It is good practice to distribute or receive third party information first because you are relying on third party to provide information and have no control on when they might complete your requests, so the more time you budget for this the better. Furthermore, you may need some of this information to complete other parts of your proposal.

Information that may be required form third parties:

- Past performance questionnaires
- Insurance rates
- Vendor costs
- Workers compensation insurance rates
- General liability rates
- Unemployment rates
- Fringe benefit costs
- Resumes for key personnel
- If you have any questions regarding the solicitation (statement of work, schedules, etc.) be sure to ask and if possible ask in writing to keep a paper trail

The second category is the technical proposal. If this is your first attempt at writing a technical proposal it may prove to be very time consuming, challenging, and depending on the type of contract and dollar amount you may not need to submit a technical proposal at all. However, beware, the agencies assume that you are a capable company with sound judgment, policies, and procedures and know how.

The purpose of the technical proposal is to illustrate your company's capabilities by addressing certain questions/situations or providing company plans and procedures for the agencies to evaluate. The solicitation may ask specific questions or request copies of your company's plans/procedures as part of the technical proposal.

Some examples of technical materials that may be requested are:

- Management Plan
- Safety Plan
- Explanation on retaining key personnel
- Organizational Chart with an explanation of duties
- Quality Control Plan
- Maintenance Plan

The third and final category is the cost/price proposal. If this is your first attempt at creating a cost proposal it may prove to be very time consuming, challenging, and depending on the type of contract and dollar amount you may only need to submit a price and not a cost summary. For this

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particular category, no matter what the required submittals are, it is essential that create a realistic and accurate model to calculate your costs. If this is not done accurately it may have a devastating effect on your bottom line or your chances of successfully bidding a proposal. Double check all your rates (e.g. worker's comp, SUTA, general liability) they will mostly likely vary from state to state. Be sure to double check your cost proposal, you don't want to discover that you have left out costs or lose an opportunity over defective pricing.

Some Cost/Pricing data to pay attention to:

- Double checking your rates to ensure accuracy
- Double check your loaded rates to ensure you have included all fringe benefits
- Make sure you have used the correct number of hours for labor
- Double check your insurance rates (worker's compensation & general liability)
- Be sure to include all payroll taxes (FICA, SUTA, FUTA)
- Be sure to calculate your General & Administrative costs correctly
- Be sure to include all Other Direct Costs
- Double check your equipment/supply costs for accuracy
- If you know the price of the current contract, compare your final price with the current contract price

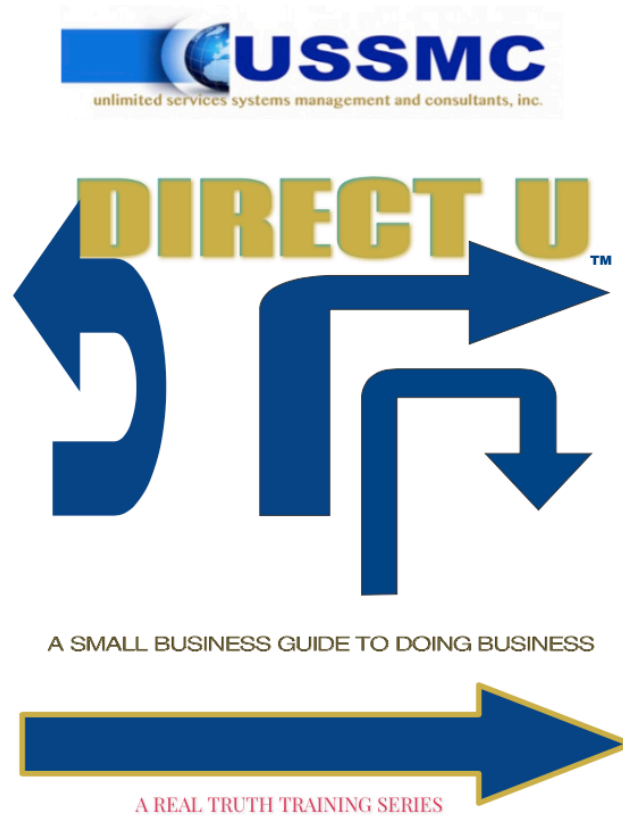
After you have completed a draft of your proposal it is good practice to review your proposal in its entirety on at least two different occasions and if possible by different individuals. You want to make sure your proposal is answering every question posed by the solicitation in a manner that makes sense to the evaluator from a technical perspective and a cost perspective.

Other details to pay attention to:

- Spell check and grammar check
- Make sure the company name and solicitation number is on every page of the bid package
- If there is a page restriction, count pages to make sure your are not over the count
- Carefully, review any Amendments/Modifications for changes to the solicitation and make sure your proposal accurately reflects those changes
- If your proposal requires two volumes, each volume should be clearly marked and identifiable
- Create and double check the table of contents for each volume you have created
- Pay attention to the date and time the solicitation is due. If you are sending the bid package out by courier make sure it will get there on time
- Double-check the Representations & Certifications for accuracy.

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Prepared By:



Business Development Extend External Factors POSCORBE

P=

Plan: Review the organizational strategic plan and related plan and related planning documents

O=

Organization: Make sure you understand the culture of the organization that you are seeking to do business with. Learn how the organization is organized.

S=

Services Needed: Understand the needs of the organization or agency and how you sell to the organization or agency. Have plenty cards and brochures.

C=

Coordination in the Agency: Get to know who within the organization can assist with your marketing efforts. SBA, Procurement Officials: Contract Officers & Specialists, PCR's, Technical

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Representatives, Credit Card holders, OSDBU's, SADBUs and Program Officials and Department Heads. SAM/FEDBIZOPPS

O=

Order of Supplies and Services: Learn what procurement vehicles are utilized to ascertain your services or products. Attend seminars.

R=

Reporting: How concise and clear your reports and those of your customers are critical. Reports provide upper management with important information concerning the progress or opportunities for improvement.

B=

Budget: Make sure you understand the organization's or agency's budget status. Start attending appropriation hearings & observe forecasts.

E=

Evaluation: Understand the organization or agency (sow) evaluation process. Know the FAR. Make sure your services or products have tested past performance.

JUST REMEMBER
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