

Developing your Federal Contract Win Strategy

ORANGE COUNTY
Small Business Development Center

Presenter: Rene Cota

Mr. Rene Cota joined the Orange County Small Business Development Center (SBDC) in August 2014 as a corporate and government contracting specialist. As the president of CMG Alliance, a management consulting firm specializing in government acquisitions, he has advised and assisted numerous clients to successfully bid and win contacts with federal, state and local government, utilities and major corporations.

He has developed training and small business programs for PTAC (Riverside Ca.), PTAC (Los Angeles Ca.), Southern California Edison (VETS Program), LA Metropolitan Transportation Authority (DVBE Program, Mentor Protégé Program and Metro Academy) and the Department of Labor (Veterans Economic Outreach Program).

He has also implemented and managed the program “Veteran entrepreneur.” He has consulted small business startups in the area of marketing, teaming and subcontracting.

Mr. Cota is a USMC combat veteran who served as an infantry platoon leader in Iraq. He credits his success to the core value of a “Can Do Attitude” instilled in him during his Marine Corps career.

About Us.....

ORANGE COUNTY

Small Business Development Center

BUSINESS CONSULTING

Certification, Corporate and Government Contracting, On-line and Traditional Marketing, Accounting/Finance/QuickBooks, International Trade

ACCESS to CAPITAL

Loans & Lines of Credit

INTERNATIONAL TRADE

New to Export
Export Expansion

Agenda

- FAR requirements
- Government documentation
- Focus efforts
- Forecasting
- Marketing Tools

FAR Requirements

FAR 10.001 states the policy of the government, pertaining to Market Research

Contracting officer must conduct M/R prior to developing specifications for acquisitions of 150,000 and above

M/R is mandated by the FAR

Federal Documentation

- FAR does not specify who will conduct the M/R
- Contract officer can delegate the M/R
- The FAR does not have specific documentation standards, but mandates its documentation
- FAR states that the M/R documentation will be reasonable according to the size and scope of the acquisition

Market Research Team

Contracting officer delegates:

- Program manager (PM)
- Contracting officer representative (COR)
- Contracting officer technical rep (COTR)
- Quality assurance representative (QAR)
- Task order representative (TOR)

or contract specialist

Strategic Market Research

- Specific components or services
- Who, What , Where , When
- Professional trade and societies
- Research institutions
- Conferences
- Personal contact and interview
- Users of the product or service

Tactical Market Research

- Tactical market research is defined as the investigation of specific companies and the capability in providing service to the government
- Evaluate candidates
- Check references
- Business practices (FAR 12 mandates)
- Interview current users

Main Purpose of Documentation

- Ready source for follow on and related procurements
- To assist contracting officers who follow in your footsteps
- Other government agencies may contact you for information pertaining to similar procurements

REVIEW

- Assign M/R team
- Define requirements
- Conduct strategic and tactical M/R
- Prepare the document
- Shape the requirements for upcoming RFP
- **BUILD THE LIST OF POTENTIAL VENDORS**

What are you prepared to do?

Marketing is defined by the American Marketing Association ([AMA](#)) as *"the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large."* The term developed from the original meaning which referred literally to going to a market to buy or sell goods or services

Focus Efforts



- Target your customer

<http://www.usaspending.gov/>

- Update or join professional trade organizations
 - Contact your local politicians
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Evaluate Competition

- Award notices
- FBO.gov (interested vendor list)
- SAM.gov
- Web pages

Forecasting

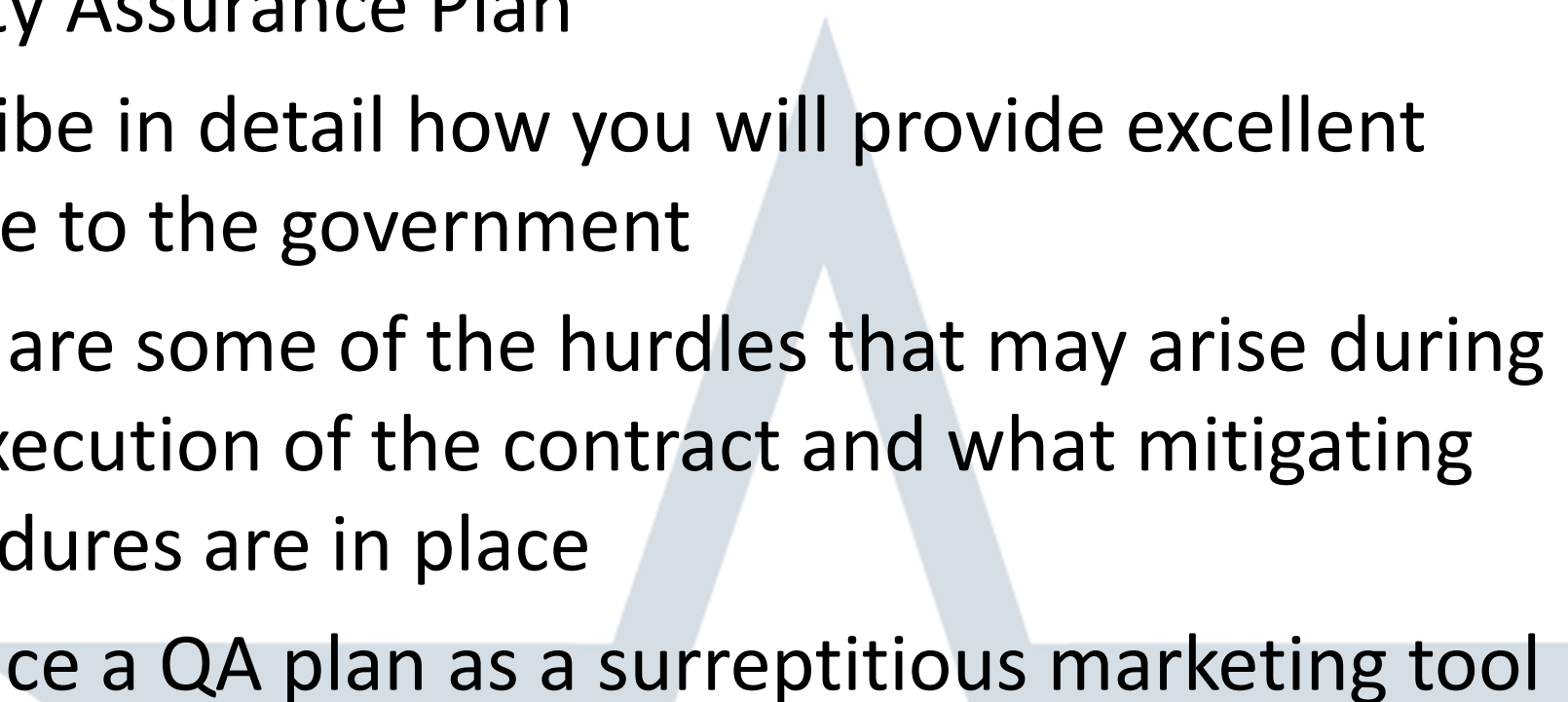
- Obtain forecasting information for your particular customer <https://www.acquisition.gov/>
- Prepare for time lines, have proposal templates ready
- Contact past customers and prepare them for past performance questionnaire

Prepare Teaming Agreements

- Have legal teaming agreements in place
- Joint ventures (JV's)
- Contingent hires
- Letters of intent
- Business plan (technical proposal)

Quality Assurance



- Quality Assurance Plan
 - Describe in detail how you will provide excellent service to the government
 - What are some of the hurdles that may arise during the execution of the contract and what mitigating procedures are in place
 - Produce a QA plan as a surreptitious marketing tool
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Three Marketing Tools in the Belt



1. Capability Statement

2. Statement of Qualifications (SOQ)

3. Capability Brief



Capability Statement

BUSINESS SUMMARY:

The Summary should be a paragraph that tells your reader who you are and what you do. If you wish, the paragraph can include a brief history of the business.

CAPABILITIES:

Areas of expertise – types of work you can do for your client. Use short sentences or bullet statements. This should not be a long narrative about your capabilities or areas of expertise.

FACILITIES AND EQUIPMENT:

List all facilities, equipment and resources used to manufacture the products or provide the service(s). Include unique qualifications, techniques and approaches used to perform work, including any state-of-the-art equipment or capabilities that are part of your business.

EXPERTISE:

A brief summary of your expertise, as well as that of your key personnel/staff, highlighting their education and technical experience as it relates to your business.

CUSTOMERS:

Provide a list of at least three or four of your key customers, past or present. Company names are sufficient.

DIFFERENTIATORS:

What makes your company stand out from the competition – why should a potential customer choose you?

SUMMARY:

Statement of Qualifications (SOQ)

The SOQ will be an in-depth document covering:

- Project specifics
- How the project was under budget and completed before the due date
- Resumes

Capability Brief

Capability Brief is an in person presentation that will speak to the contractors past performance.

Characteristics of a capability Brief:

- 15 minutes to include Q&A
- Past performance
- QA
- Low Risk solution
- The specific request, Prime or subcontract
- Will conclude with a call to action

Next steps...

Orange County Small Business Development Center

**2323 N. Broadway, Ste. 201
Santa Ana, CA 92706**

For further assistance, to [schedule a private consultation](#) or
to register for additional seminars, please call:
(714) 564-5200

Visit us on the web at: www.ocsbdc.org



Thank You

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