OST GLOBAL SOLUTIONS

B&P ACADEMY

Qualifying Opportunities for Your Pipeline

OST Bid & Proposal
Academy Course

www.ostglobalsolutions.com

About OST

OST GLOBAL SOLUTIONS

B&P ACADEMY

WE'VE WON OUR CLIENTS OVER $24 BILLION IN GOVERNMENT CONTRACTS SINCE 2005

BUSINESS DEVELOPMENT, CAPTURE, AND PROPOSAL CONSULTING

Build Portfolio of Indefinite Delivery Vehicles	Develop Opportunity Pipelines	Capture Opportunities	Win Proposals	Optimize Your Processes

REGISTERED APPRENTICESHIP IN GOVERNMENT BUSINESS DEVELOPMENT; 18 COURSES IN ALL ASPECTS OF FEDERAL BUSINESS DEVELOPMENT

Certified Business Developer	Certified Capture Manager	Certified Proposal Manager	Certified Proposal Coordinator	Certified Proposal Writer

VIRTUAL AND COWORKING INCUBATOR FOR SMALL GOVERNMENT CONTRACTORS

GovCon INCUBATOR

Federal Business Development Lifecycle

Begin Business Development Process

Build capacity by investing in new capabilities — 1.0

Conduct Strategic Business Development Planning Session — 2.0

Perform Market Research — 3.0

Enough Info to Make Decisions?

Yes → **Stand up Your Marketing Campaign to Target Agencies & Partners** — 4.0

No → Perform Market Research

Yes ↓

Build the Opportunities Pipeline — 5.0

Check for Strategic Fit

Qualify Each Individual Opportunity — 6.0

Conduct Capture — 7.0

Prepare Proposal — 8.0
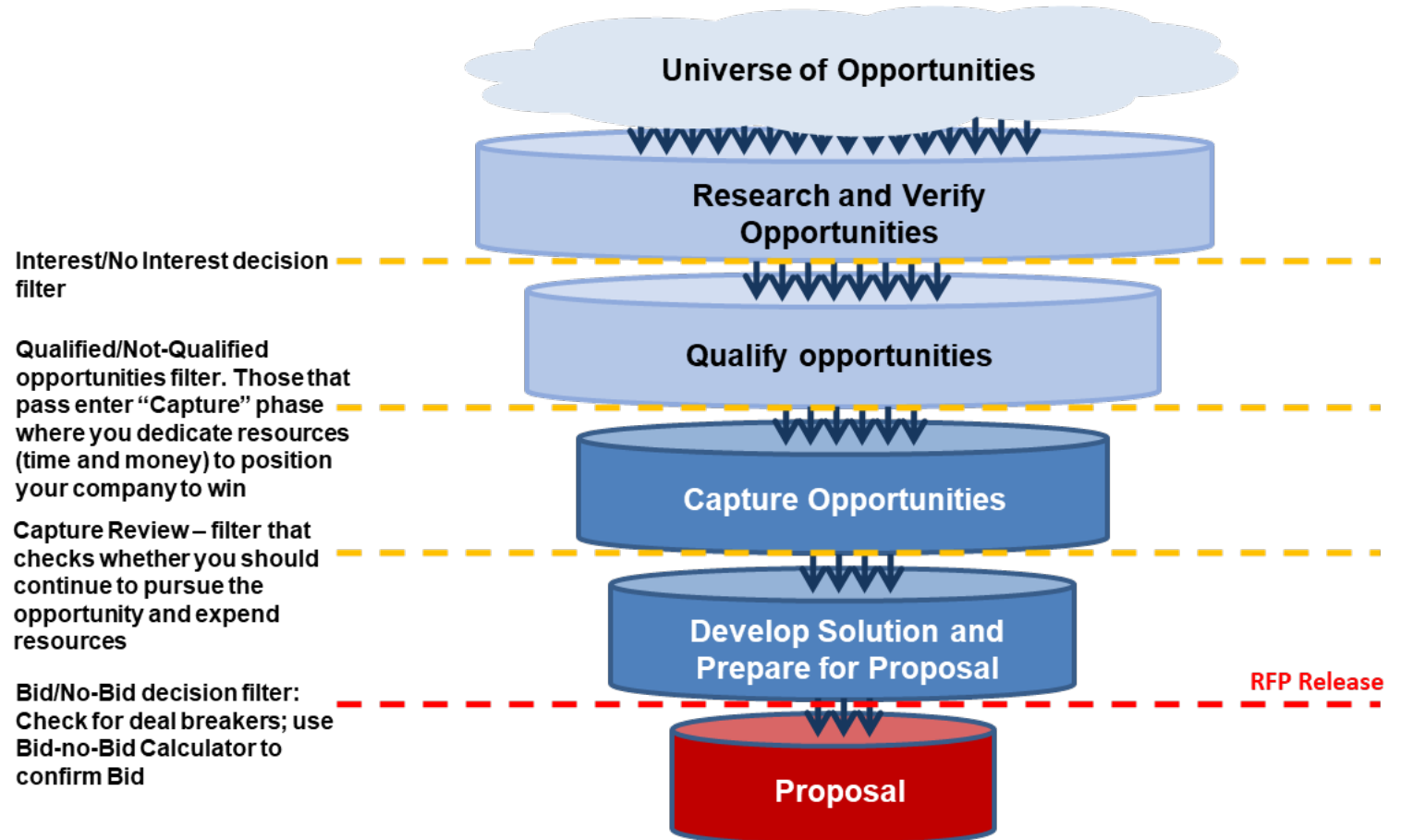
Perform Business Development During Project Execution — 9.0

Explosive Growth Starts with Quality Pipeline

- Pipelines are the engine of business growth

- Quality of the pipeline affects the value of the company

- But Too Many Companies…
  - Operate in a reactive mode
  - Get opportunities on SAM, pay occasional customer visits, and pray for BD miracle

Interest/No Interest decision filter

Qualified/Not-Qualified opportunities filter. Those that pass enter "Capture" phase where you dedicate resources (time and money) to position your company to win

Capture Review – filter that checks whether you should continue to pursue the opportunity and expend resources

Bid/No-Bid decision filter: Check for deal breakers; use Bid-no-Bid Calculator to confirm Bid

Universe of Opportunities

Research and Verify Opportunities

Qualify opportunities

Capture Opportunities

Develop Solution and Prepare for Proposal

RFP Release

Proposal

Creating a Balanced Pipeline That's an Engine of Explosive Business Growth

- Some opportunities are very long-term – from 2 up to 5 years (next re-compete)

- Others are long-term – from 1 up to 2 years

- Mid-term – 6 months to 1 year (typical well-functioning small business will work on opportunities 9 months away – the "Goldilocks Zone" for BD)

- Short-term – from imminent to those in the next 2-5 months

- Ensure opportunities are real

- Rank in the order of priority

- Clean and edit the pipeline regularly

Federal Market Foundations

Executive Branch **President, the White House** **15 Cabinet Agencies**	Legislative Branch **Senate** and **House of Representatives**	Judicial Branch **Supreme Court** and Lower Courts

- Three branches of the U.S. Federal Government
- No central authority
- There are hundreds of buyers and many forms of selling to the government

Who Are the Buyers?

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- 15 Cabinet-Level Agencies such as DOD, HHS, DHS, VA

- Official tally at USA.gov although other tallies exist that have other numbers:
  - 60+ or so Independent Agencies and Government Corporations (CIA, GSA, SSA, etc.)
  - 60+ or so Boards, Commissions, and Committees
  - 4 or 8 Quasi-Official Agencies, 16 International Organizations

- Legislative Branch
  - The U.S. Congress

- Judiciary Branch
  - Various Courts

- State, Local, Educational (SLED) market, Tribal governments, International Organizations, Foreign governments

Government agency tallies all give different agency counts:

USA.gov, FOIA.gov, Federal Register Index and Agency List, Regulations.gov, United States Government Manual, Unified Agenda, Administrative Conference of the United States, etc.

Federal Market Snapshot

Practical Assignment: Let's Get familiar with USAspending.gov

Market Research

- Search your target agency's website for "Doing business with," "Business", or "Procurement" website sections for forecast opportunities and other useful information
- Check the Office of Small and Disadvantaged Business Utilization section for information
- Use USAspending.gov advanced search for:
  - Relevant key words (use quotation marks for keyword combinations)
  - Last five fiscal years
  - Award type: Contracts and Contract IDVs
  - Awarding agency (or Funding agency – may be important for BICs/GWACs)
  - NAICS code
  - PSC code
  - Type of set aside
- Sort by award amount to see the largest players
- Explore the Contract IDVs tab with awarded amounts to see what IDVs are most popular and who is most successful on them

Other Important Market Research Tasks

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- Obtain the agency's organization chart (Web, GovWin IQ, BGov, GovSearch, OSDBU) and contact information

- Identify expiring opportunities to verify with the specific contracting officers

- Identify additional contracting officers who may be in charge of specific opportunities because they buy similar services or products

- Look at the GovWin IQ account planner for useful information nuggets

- Research any related agency reports, plans, initiatives, and other information that impacts your focus area

- Distill and organize this information into an Account Plan

FEMA Region 6 Organization Chart
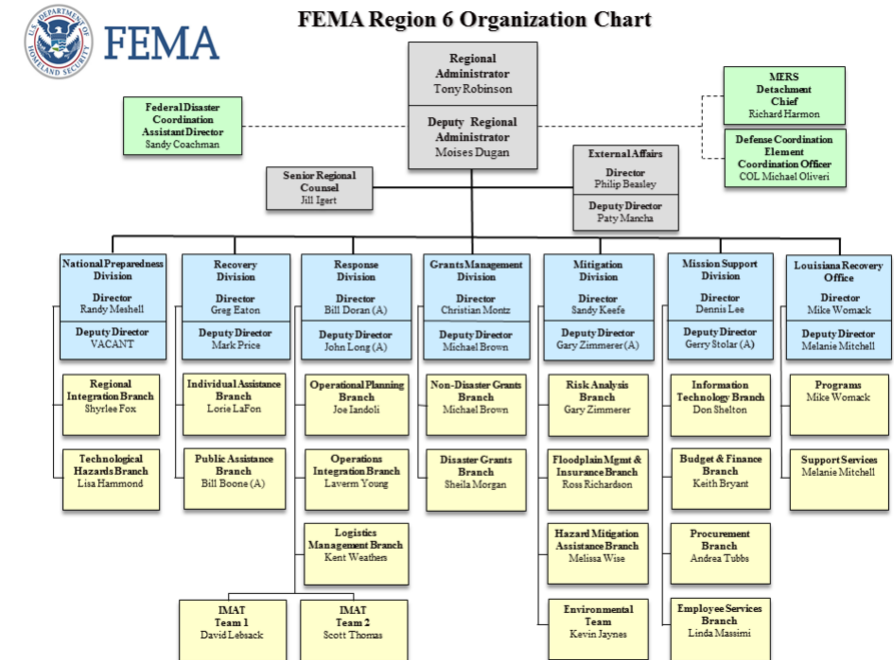
Competitor Insights

- From your USAspending search, select your most successful competitors and research them in greater depth
- Pick an individual competitor and check the following filters:
    - All Fiscal Years
    - Recipient
- Sort by contract Start Date to see how they grew, what contracts they bid on first, how they branched out, and what IDVs they have task orders on (and which ones were useless to them that have zero awards)
    - What lessons can you learn?
- Explore competitors' portfolio by clicking on the company's name – what agencies do they work with?
- Check what socioeconomic status they have
- Explore their websites for certifications, capability description, and other insights to benchmark yourself against
- Check on LinkedIn who works for the company

Visiting the Agency

- Pay a visit to the OSDBU to see if you can get:
  - An overview of how to do business with the agency
  - Information if there is any vendor lists to register (some OSDBUs and contracting officers have their own private lists to notify bidders of opportunities, or use a separate web page, procurement portal, blog, or a social media account to announce forecasts or opportunities)
  - People to whom you should talk – contracting officers and program managers
  - Top contractor contacts that are small business friendly
  - An annual procurements forecast location if you cannot find it on the website
  - Agency's procurement policies and preferences
  - An organization chart or a phone tree

- Go to an Industry Day to meet the contracting officers regarding your target opportunities (the ones that are expiring in the next year or two)
  - Find out if it will be recompeted
  - What vehicle may be used
  - Will it be a small business or socioeconomic set aside
  - Where it is in the acquisition strategy cycle and when will the RFP be issued?

Analyzing the Results

- Rate yourself against the best practices in the market – where do you stack?
  - What IDVs should you have access to?
  - What certifications do you need to plan to obtain?
  - Do you need a facility clearance?
  - What agencies should you target?
  - What other capabilities do you need to acquire?
- Decide how your capabilities/resources align with the customer needs, and if there are gaps
- Define the plan to fill the gaps and what is realistic to win in the meantime

What is an Opportunity?

- A future contract that will be put up for bid or awarded as a sole-source, that you found out about in time to prepare for, and bid on

- An opportunity requires a buyer, a need, and available funding

- You may learn about opportunities from:
  - An expiring contract that may be recompeted
  - An announcement, a sources sought notice or a request for information on Sam.gov
  - An agency has published its annual opportunities forecast or announced opportunities at an industry day
  - A government customer or your onsite project team told you about a need
  - A potential teaming partner has contacted you to join a team
  - You searched a paid database and found an opportunity that's been confirmed with a government contact
  - Other?

Use Capture Intelligence Databases Effectively

- Learn about opportunities from online sources and databases

- Do it early to leave time for Capture
  - GovWin IQ
  - BGov
  - DACIS
  - ePipeline, EasyGovOpps, Fedmine, GovTribe, etc.
  - Set Aside Alert
  - SAM*
  - Fedconnect.net*

- Each database is best for different purposes, and using multiple ones helps find opportunities more easily

  *SAM and other agency posting websites are good only if you catch opportunities early at RFI stages, and combine this search method with other methods

How to Find Opportunities Using Various Tools

- Determine Search terms – what are all the possible key words and key phrases that are in your core area of expertise or search by a pre-set market or tags available in some paid platforms

- Set up automatic searches and scan daily

- Use more specific parameters than your search terms to find and qualify opportunities

Exercise: Define Your Key Search Terms

- Key words

- Key phrases

- NAICS

- PSC

- NAICS and PSC combinations (tip – see what your competitors have on their contracts)

- Let's practice finding expiring contracts that are ending 6-9 months away to back out the time from the possible start of procurement to the contract end date

- Ensure that these contracts are for the type of work that recurs

Exercise: Determine Your Search Criteria

- Do you have the capabilities and past performance? Create a past performance library or central repository to do a keyword search.

- Is it work at "Focus Agency" (for which you have past performance)?

- Do you know the customer?
  - **OR** Did you learn about this opportunity far enough in advance to be able to implement a contact plan?

- Is the work in under $X million (and over $X amount)? Specify your perfect range.

- If you are a small business, 8(a), HUBZone, SDVOSB, WOSB, etc.: Is it set aside for your small business category?

- Is it local work, the locations you will work at, or in the continental U.S. because you are okay to work in any state?

GOVERNMENT BUSINESS DEVELOPMENT SPECIALIST

REGISTERED APPRENTICESHIP PROGRAM

Enroll your talented employees to prepare you for the Infrastructure Investment and Jobs Act influx of procurements and grow your government contracting business.

This 1-year earn-while-you-learn program will enable the apprentice to:

- Identify and qualify bid opportunities for your pipeline
- Assist with capturing opportunities

- Write winning proposals.
- Instruction combines job-related coursework (250 hours) with on-the-job training (2000 hours).
- **Nationally recognized U.S. Department of Labor Certificate upon course completion.**

1200+ Clients served • **$23B Won for Clients** • **20 Years of Government BD Experience**

First Step: Verify if the Opportunity Is Real

- Calling the Government is a must to qualify the opportunity

- Alternatively, go to the agency outreach event with a list of opportunities to verify, or visit the OSDBU

- Document your conversation
  - Talked to:
  - Date:
  - Information gathered:
    - Is this a real opportunity?
    - When will the procurement be issued? Has the timeframe been established?
    - Does the customer have funding for this opportunity?
    - What is the NAICS code the government is contemplating?
    - What acquisition strategy will be used?
      - Small business set-aside, 8(a), etc., Indefinite Delivery Vehicle, etc.

Qualification Requires Research and Reading First

- Invest time to research the opportunity

- Check the documents that exist (old RFP, old contract, draft RFP, final RFP, notices)

- Read the RFP carefully

Qualification Questions

- What exactly is the opportunity?
- Why does the company want this opportunity? How does it fit within the strategic BD plan and what is the ROI?
- Do company's past performance and capabilities match the requirements to be able to respond and execute, perhaps with a teaming partner?
- What is the current status – where is it in the procurement cycle?

- What other opportunities would this opportunity position us for?

- What opportunities would it preclude us from bidding on?

- Is this a possible candidate for a MUST WIN opportunity status – and if so, why?
- How does the company stack up per the initial customer and competitive analysis, and could it win?
- Does the company have the required facilities?
- Does the company have the resources to run a capture effort, write a proposal, and execute?

Exercise

- With the instructor, walk through the RFP

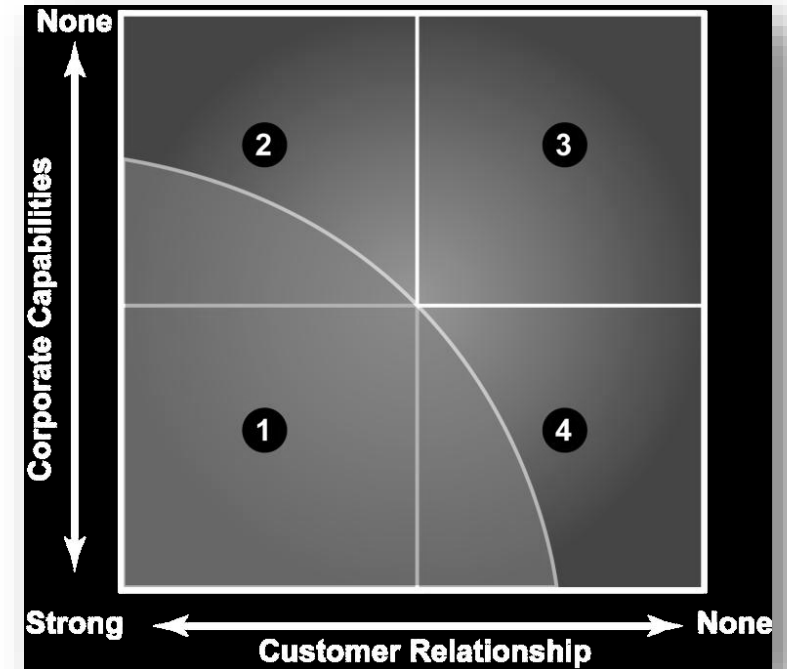- Pay attention to what is important to pay attention to in order to qualify an opportunity

Two Most Important Qualification Factors

- Two most important qualification factors are
  - Past Performance (Corporate capabilities)
  - Customer relationship
- All other factors are secondary, although they are also important

1 – prime; 4 , 2 – should probably sub; 3 – unless joint-venturing, stay away

Typical Slide Review Process

Opportunity Summary

- **Program Name:**
- **Customer:**
- **Total Value:**
- **Value to the Company:** $ TBD
- **Period of Performance:**
- **Contract Type:**
- **Acquisition Strategy:**
- **NAICS/PSC:**
- **Clearance/ Classification:**
- **POP/Work Location:**
- **OCI (Current or Future):**
- **FTEs:**

- **Teaming Role:**
- **Schedule:**
  - Incumbent's Contract Expiration:
  - Pre-solicitation/Draft RFP:
  - RFP Issuance Date:
  - Proposal Due:
  - Orals:
  - Estimated Award:
  - First Task Order:
- **Our History With This Bid:**
- **Other Special Requirements:**
  - OCONUS work
  - ITIL, PMP, ISO, CMMI, etc.

Opportunity Description, Background, History

- Scope summary:

- What services/areas are covered by the contract:

- Are there unique considerations?

- Opportunity history:

Opportunity Verification with the Government

- Talked to:

- Date:

- Information gathered:
  - Is this a real opportunity?
  - When will the procurement be issued? Has the timeframe been established?
  - Does the customer have funding for this opportunity?
  - What acquisition strategy will be used?
    - Small business set-aside, 8(a), etc., Indefinite Delivery Vehicle, etc.

Why Are We Interested?

- How does this opportunity fit with our strategic plan?

- What other opportunities would this opportunity position us for?

- What opportunities would it preclude us from bidding on?

- Is this a possible candidate for a MUST WIN opportunity status – and if so, why?

What Do We Know About the Customer?

- Is this a new or existing customer?

- Who is the customer?

Customer Name, Title, Organization	Who Should Contact, Strategy	Frequency	Contact Date	Message to Convey, Info to Gather	Results, Contact History	Next Steps

Relevant Past Performance Projects

1. Project Title

a. Prime/Sub

b. Period of Performance

c. Value

d. Relevancy: (High, Med, Low)

e. Likelihood customer will give us outstanding reference (High, Med, Low)

2. Project Title

a. Prime/Sub

b. Period of Performance

c. Value

d. Relevancy: (High, Med, Low)

e. Likelihood customer will give us outstanding reference (High, Med, Low)

3. Project Title

a. Prime/Sub

b. Period of Performance

c. Value

d. Relevancy: (High, Med, Low)

e. Likelihood customer will give us outstanding reference (High, Med, Low)

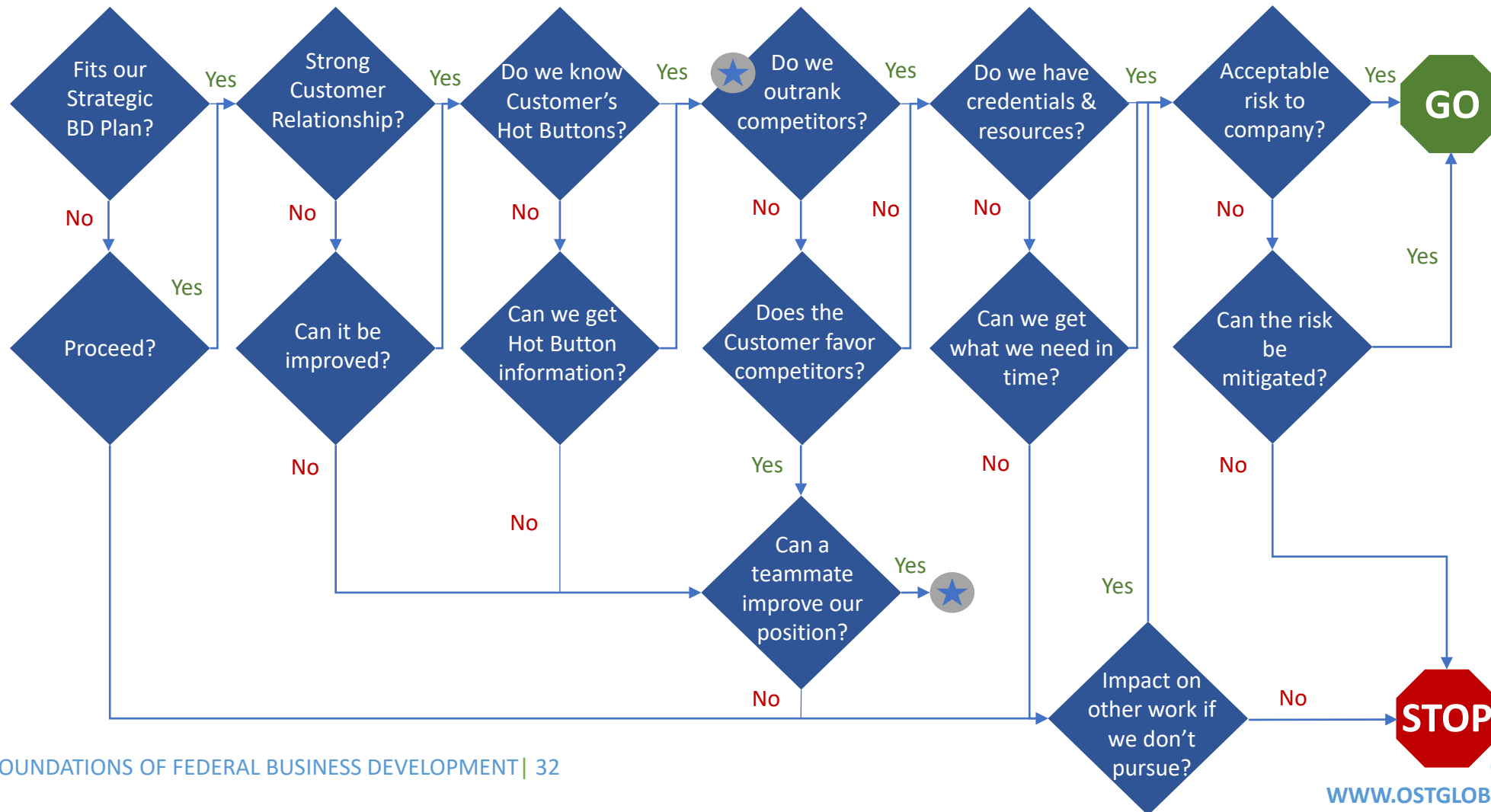# Use a Decision Flowchart or a Win Probability Calculator

Make a Pursuit Decision

- Review the material to this point

- Make the decision whether this opportunity will be Qualified and move into the capture phase.

- Assign a score of 1-3 in the pipeline
  - 1 = Must Win
  - 2= Somewhat Important
  - 3= Nice To Have

- Document the decision here and attach this PowerPoint to the opportunity in the pipeline

Thank You! Continue Taking More Courses to Advance Your Knowledge!

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GovCon Incubator

B&P ACADEMY

7361 Calhoun Place, Suite 560

Rockville, MD 20855

Phone: 301-384-3350

service@ostglobalsolutions.com

www.ostglobalsolutions.com