

# Readiness Checklist

Company Name:

Date:

Completed By:

STATUS	TOPIC OF INTEREST	WHAT IS THE SIGNIFICANCE?
Complete Not Complete	Event Registration	Most federal Matchmaker events have limited capacity. To ensure you are able to connect with an agency Small Business Specialist, be sure to register as early as possible.
Complete Not Complete	Review the Agency	<p><b>Mission and Vision.</b> Go to the Agency website and review their Mission and Vision statements. Also, determine if there are any recent events that have altered their priorities or shifted their focus, and if so, determine if you can contribute in these areas.</p> <p><b>Budget for the Coming Year.</b> Review priorities, goals and the anticipated allocation of funds directly related to the services you sell.</p> <p><b>Upcoming Opportunities.</b> Review the Agency forecast of upcoming opportunities to identify those that are potentially a good match for your organization.</p> <p><b>Doing Business With.</b> Review information provided by the Agency re: best practices for engagement.</p>
Complete Not Complete	SAM Profile Optimization	Ensure your SAM profile includes the appropriate NAICS and PSC Codes based on your event goals.
Complete Not Complete	DSBS Profile Optimization	<p>Ensure your SBA Dynamic Small Business Search profile includes:</p> <ul style="list-style-type: none"> <li>- a well-written, comprehensive fact-based Capabilities Narrative that highlights the best aspects of your organization,</li> <li>- Add relevant keywords that are used and searched by federal buyers,</li> <li>- Add any details about bonding, quality assurance processes, special equipment and/or materials, and any other assets you possess that differentiate your organization, and</li> <li>- Add relevant past performance examples to your profile</li> </ul>
Complete Not Complete	Research	Ensure you've researched the agency spending trends, key stakeholders and contact details to demonstrate that you are targeting your efforts in working with the agency.

# Readiness Checklist (cont.)

STATUS	TOPIC OF INTEREST	WHAT IS THE SIGNIFICANCE?
<p>Complete</p> <p>Not Complete</p>	<p>Capability Statement</p>	<p>The following information is important to include in your company's Capability Statement:</p> <p>Name and company branding, slogan (if any)   Summary description of the company   Core Capabilities Description of major services offered   Federal Small Business Certifications   Contract Vehicles in which you participate (Federal and State)   State Certifications   Local, Quasi, and Non-Government agencies you have served Major Clients (list the most important), Commercial and Government   NAICS Codes   PSC Codes   Partners and authorized resellers   Staff clearances and certifications</p> <p><b>General Company information, including:</b> Registered company name   DBA   Year of incorporation   State of incorporation   Corporation type   D-U-N-S Number   CAGE Code   Contact information</p> <p><b>Tips:</b> Visually appealing   1 page (front and back)   Present information concisely   Use bullets, simple tables, highlighted sections for readability   Have someone from outside your company read your statement and provide feedback, before sharing with customers/potential customers   Be sure to check spelling and grammar</p> <p><a href="https://www.hhs.gov/grants/contracts/get-ready-to-do-business/write-a-capability-statement/index.html">https://www.hhs.gov/grants/contracts/get-ready-to-do-business/write-a-capability-statement/index.html</a></p>
<p>Complete</p> <p>Not Complete</p>	<p>Engagement Strategy</p>	<p>In order to ensure a productive meeting, you need to understand the role, responsibilities and motivation of the party you are meeting with.</p> <p>Develop a comprehensive "Engagement Strategy", including a list of relevant questions to ask.</p>
<p>Complete</p> <p>Not Complete</p>	<p>Post-Event Action Plan</p>	<p><b>Create Contact Maps.</b> If you've met a Small Business Specialist or Contracting Officer for a specific Agency, conduct research and create a map of other contacts and opportunities that are affiliated with your contact.</p> <p><b>Develop a Follow-Up Plan.</b> Your follow-up plan should include referencing your communication from the event and should be planned out from a timing, messaging and duration standpoint.</p> <p><b>Spend Your Time Wisely.</b> Pay attention to which contacts are providing positive feedback and presenting the best opportunities for engagement and focus your time cultivating those relationships.</p>