





SBDG Engagement Strategy

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Engagement Strategy

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Once you've completed Reconnaissance, it's time to convert what you've learned into an effective communication strategy.

To start, we need to first understand each key federal stakeholder "persona" and what is important to them. The primary personas we will focus on are the Small Business Liaison, The Program/Project Manager, and the Contracting Officer.

Federal Stakeholder Persona #1 – The Small Business Liaison.

Alternate titles: Small Business Specialist | OSDBU Representative | SADB Representative | Procurement Center Representative | Commercial Market Representative

Here are the various roles and responsibilities within the "[Small Business Liaison](#)" category:

The Role of SBA Procurement Center Representatives

The SBA may assign one or more procurement center representatives (PCRs) to any contracting activity or contract administration office to implement the SBA's policies and programs. The SBA currently has 46 PCRs located in the SBA's six Area Offices. PCRs are required to comply with the contracting agency's directives governing the conduct of contracting personnel and the release of contract information.

PCR duties include the following:

- Review proposed acquisitions to recommend "the setting aside of selected acquisitions not unilaterally set aside by the contracting officer;" new qualified small business sources; and the feasibility of breaking out components of the contract for competitive acquisitions.
- Review proposed acquisition packages. If the PCR (or, if a PCR is not assigned, the SBA Area Office serving the area in which the procuring activity is located) "believes that the acquisition, as proposed, makes it unlikely that small businesses can compete for the prime contract," the PCR can recommend any alternate contracting method that he or she "reasonably believes will increase small business prime contracting opportunities." The recommendation must be made to the contracting officer within 15 days after the package's receipt.



- Recommend small businesses “for inclusion on a list of concerns to be solicited in a specific acquisition.”
- Appeal to the contracting officer’s chief “any contracting officer’s determination not to solicit a concern recommended by the SBA for a particular acquisition, when not doing so results in no small business being solicited.” This appeal may be further appealed to the agency head.
- Conduct periodic reviews of the agency’s contracting activity, including the agency’s assessment of any required small business subcontracting plan, “to ascertain whether the agency is complying with the small business policies in this regulation.” Sponsor and participate in conferences and training “designed to increase small business participation in the contracting activities of the office.”

The Role of the Office of Small and Disadvantaged Business Utilization

Every federal agency (except the SBA) that has procurement powers is required to have an OSDBU, whose director, by statute, reports directly to the head of the agency and has supervisory authority over agency staff performing certain procurement functions. The OSDBU’s primary responsibility is to ensure that small businesses, SDBs, WOSBs, SDVOSBs, and HUBZone small businesses are treated fairly and that they have an opportunity to compete and be selected for a fair amount of the agency’s contract dollars. Among its statutory responsibilities are the following:

- “Identify proposed solicitations that involve significant bundling of contract requirements, and work with the agency acquisition officials and the Administration to revise the procurement strategies for such proposed solicitations where appropriate to increase the probability of participation by small businesses as prime contractors, or to facilitate small business participation as subcontractors and suppliers, if a solicitation for a bundled contract is to be issued.”
- Assist small businesses “to obtain payments, required late payment interest penalties, or information regarding payments due to the concern from an executive agency or a contractor.”
- Assign “a small business technical adviser to each office to which the SBA has assigned” a PCR. The small business technical advisor “shall be a full-time employee of the procuring activity, well qualified, technically trained and familiar with the supplies or services purchased at the activity; and whose principal duty shall be to assist” the PCR.
- Provide the agency’s “Chief Acquisition Officer and senior procurement executive ... with advice and comments on acquisition strategies, market research, and justifications [related to limitations on the consolidation of contracts as a means to provide small businesses appropriate



opportunities to participate as prime contractors and subcontractors].”

- Provide training to small businesses and contract specialists, provided that the training does not interfere with the director carrying out his or her other responsibilities.
- Ensure that a small business that notifies the PCR prior to a contract’s award that “a solicitation, request for proposal, or request for quotation unduly restricts [its] ability ... to compete for the award ... is aware of other resources and processes available to address unduly restrictive provisions ... even if such resources and processes are provided by such agency, the Administration, the Comptroller General, or a Department of Defense (DOD) procurement technical assistance program [described below].”
- Review all subcontracting plans “to ensure that the plan provides maximum practicable opportunity for small business concerns to participate in the performance of the contract to which the plan applies.”
 - In accordance with P.L. 109-163, the National Defense Authorization Act of 2006, the DOD renamed its OSDBU the Office of Small Business Programs (OSBP). The act also redesignated the Army, Navy, and Air Force’s OSDBUs to OSBPs of the Department of the Army, Navy, and Air Force, respectively.

The Roles of Other Procurement Officers and Offices

At the agency level, procurement department heads (sometimes titled **senior procurement executive**) are responsible for implementing small business programs at their agencies, including achieving program goals. In general, procurement department staff who work on small business issues (often titled **small business specialists**) coordinate with OSDBU directors on their agencies’ small business programs.

Chief acquisition officers provide a focal point for acquisition in agency operations. Their key functions include “monitoring and evaluating agency acquisition activities, increasing the use of full and open competition, increasing performance-based contracting, making acquisition decisions, managing agency acquisition policy, acquisition career management, acquisition resources planning, and conducting acquisition assessments.”



The SBA must assign a **breakout procurement center representative** (breakout PCR) to each major procurement center. A major procurement center is, in the opinion of the SBA Administrator, a procurement center that purchases substantial dollar amounts of other than commercial items, and has the potential to incur significant savings as a result of the placement of a breakout PCR.

The breakout PCR advocates for (1) the appropriate use of full and open competition, and (2) the breakout of items, “when appropriate and while maintaining the integrity of the system in which such items are used.” The breakout PCR is in addition to the PCR.

When a breakout PCR is assigned, the SBA must assign at least two co-located small business technical advisors. SBA breakout PCRs and technical advisors must comply with the contracting agency’s directives governing the conduct of contracting personnel and the release of contract information. The SBA must obtain security clearances for its breakout PCRs and technical advisors as required by the contracting agency.

The SBA has **commercial market representatives** who, among other duties, help prime contractors find small businesses that are capable of performing subcontracts; provide counseling on the contractor’s responsibility to maximize subcontracting opportunities for small businesses; and conduct periodic reviews of contractors awarded contracts requiring an acceptable subcontracting plan that provides small businesses “the maximum practicable opportunity to participate in contract performance consistent with its efficient performance” (generally any solicitation to perform a contract that is expected to exceed \$700,000 (\$1.5 million for construction) and that has subcontracting possibilities).

The SBA’s 140 **business opportunity specialists** provide, among other duties, guidance, counseling, and referrals for assistance with technical, management, financial, or other matters intended to improve the competitive viability of SBA 8(a) program participants. They provide 8(a) program participants comprehensive assessments of the firm’s strengths and weaknesses; monitor and document their compliance with 8(a) program requirements; advise them on compliance with contracting regulations after the award of a 8(a) program contract or subcontract; review and monitor their compliance with mentor-protégé agreements; represent the interests of the SBA Administrator and small businesses in the award, modification, and administration of 8(a) program contracts and subcontracts; and report fraud or abuse involving the 8(a) program.



The Small Business Procurement Advisory Council (SBPAC), whose members are composed of the SBA Administrator (or his or her designee), the director of the Minority Business Development Agency, and the head of each OSDDBU in each federal agency having procurement powers, has the following statutory duties:

1. Develop positions on proposed procurement regulations affecting the small business community.
2. Submit comments reflecting such positions to appropriate regulatory authorities.
3. Conduct reviews of each OSDDBU to determine the office's compliance with its statutory requirements.
4. Identify best practices for maximizing small business utilization in federal contracting that may be implemented by federal agencies having procurement powers.
5. Submit annually, to the House Committee on Small Business and Senate Committee on Small Business and Entrepreneurship, a report describing (1) the comments submitted to appropriate regulatory authorities, including any outcomes related to the comments; (2) the results of its review of each OSDDBU; and (3) best practices identified for maximizing small business contracting.

The Defense Logistic Agency's Procurement Technical Assistance Program (PTAC) helps "businesses pursue and perform under contracts with the Department of Defense, other federal agencies, state and local governments and with government prime contractors. Most of the assistance provided by the 97 PTACs and their more than 300 local offices is free. PTAC support to businesses includes registration in systems such as the System for Award Management (SAM), identification of contract opportunities, and help in understanding requirements and in preparing and submitting bids."

What the Small Business Liaison Cares About:

1. **Helping prepared and responsible small businesses participate with their Agency.**

A Small Business Liaison's primary responsibility is to ensure an Agency is awarding a sufficient number of federal contracts to small businesses based on federal guidelines.

Therefore, their primary interest is in working with businesses that have a legitimate opportunity to win federal work. In other words, they want to maximize the time they spend by only working with businesses that demonstrate a minimum level of competency, professionalism, and preparedness.

2. **Helping their Agency meet its mission goals (not just its small business goals).**

While the small business liaison has a specific interest in small business inclusion within their Agency, their primary responsibility is to help their Agency consider all sources (including small businesses) in finding the best possible solution.

Small Business Liaisons are part of a team, and that team's mission is to find great solutions at good value within the framework of providing competitive opportunities in support of their employees, troops and or the public.

3. **How their recommendations reflect on them.**

Small Business Liaisons are going to advocate for small businesses they believe will provide value for their Agency in both the short and long-term. A small business's performance record reflects on the Small Business Liaison that recommended them. Therefore, the Small Business Liaison is going to be extremely diligent in evaluating a small business before recommending them.

How You Should See the Small Business Liaison:

1. **Gatekeeper.** At the beginning of your engagement with a Small Business Specialist, they will be constantly evaluating you and determining whether you are worth their time.
2. **Coach.** If they determine you are worth their time, they can provide insights into how their Agency does business and what you need to do first (if you have the right demeanor and ask the right questions, that is).
3. **Trusted Referral Source.** In most cases, the other Stakeholder Personas (Program/Project Managers, Contracting Officers) will not respond to your direct inquiries. They rely on the Small Business Liaison to act as a screening agent. Therefore, in most cases the path to a conversation with a Program Manager or Contracting Officer is through the Small Business Liaison.
4. **Super-Connector.** Once a Small Business Liaison understands what your business does and how it fits into their Agency mission, they are able to connect you to various key points of contact throughout the Agency – including some that may not have been on your radar.

Preparing to Engage:

1. **Know the agency.** You should understand the Agency mission, vision, priorities, spending focus by industry sector, etc. You may not know everything about doing business with the Agency yet, but you better have reviewed all the publicly available and easily accessible relevant information online.
2. **Know the relevant spending data.** Know the details about how much the Agency spent within your industry sector (the more refined, the better). Know how they bought (procurement instrument). Know who they bought from (prime awardee). If you have relevant facts on your side, it's much easier to earn the respect and time of the Small Business Liaison.
3. **Know what makes you viable.** Be prepared to discuss how your Value Proposition aligns with the Agency mission, recent challenges they've faced, and/or upcoming opportunities that need to be filled. Articulate why this person should agree to advocate on your behalf.



4. **Ask the right questions.** You should have a checklist of questions and answers for every Agency Small Business Liaison you encounter. Start by answering anything you can online during your pre-engagement preparation. Then, be prepared to ask the questions you couldn't find the answers to online. Here is a standard list of Small Business Liaison questions:

Don't ask questions that have answers already posted at the Agency website. You will lose credibility.

Do you have an internal small business directory or portal our business can register for?

Does your Agency keep Capability Statements on file?

What would be the best way for our firm to make ourselves available for Simplified Acquisitions that don't get posted for public bid?

Do you have any events (live or remote) coming up geared toward helping small businesses engage your Agency?

Do you have any priority initiatives within the Agency that our firm might be able to assist with?

Do you have recommendations for connecting with Program or Contracting Personnel within the Agency?

What would you recommend our next steps would be if we want to work with your Agency?

Is there anything about our company or profile that you recommend we change or update?

Do you think subcontracting would be a viable option for us with your Agency?

What is the most common mistake you see companies like ours make in trying to win federal work with your Agency?

What would be your most important piece of advice for us in pursuing federal work with your organization?

Federal Stakeholder Persona #2 – The Program / Project Manager.

Alternate titles: Contracting Officer Technical Representative (COTR). Many others, varied by Agency, role and industry sector.

Here are the various roles and responsibilities within the “Program / Project Manager” category:

Roles	Responsibilities
Program Manager	Cross-project oversight to achieve a common programmatic goal; allocates funding and prioritizes projects.
Project Manager	Responsible for the project; authors key project documents, assigns resources, and monitors budget and performance.

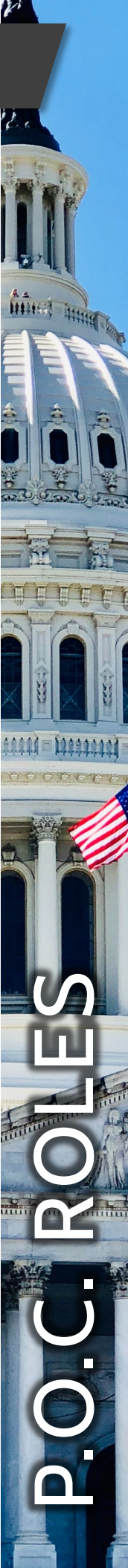
Understand **programs** vs. **projects**.

Programs create **outcomes**, **projects** deliver **outputs**.

Program: A group of related projects, subprograms, and program activities that are managed in a coordinated way to obtain benefits not available from managing them individually. All projects within a program are related by a common goal, often of strategic importance to the sponsoring organization.

Program Management: The application of knowledge, skills, tools, and techniques to a program to meet the program requirements and to obtain benefits and control not available by managing projects individually.

Program Manager: The person authorized by the performing organization to lead the team or teams responsible for achieving program objectives.



Project: A temporary endeavor undertaken to create a unique product, service, or result with a defined beginning and end achieved either by meeting project objectives/goals or by being terminated due to objectives/goals not being met. (Note: While accepting the PMI definition of projects as “temporary,” the Panel emphasizes that projects may extend over long periods of time. What matters is the distinction between ongoing operations related to providing an existing product or service and a time-limited effort to create a new or improved product, service, or result).

Project Management: The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

Project Manager: The person assigned by the performing organization to lead the team that is responsible for achieving the project objectives.

Program Manager (PM) Responsibilities

The PM is accountable for the overall cost, schedule, and performance of a program and reporting to the Milestone Decision Authority (MDA). They exercise leadership, decision-making, and oversight throughout a program and a systems life cycle. They need to be the leader of the program, understand requirements, balance constraints, manage contractors, build support (Social Engineering), and puts to use the basic skills of management:

- Planning: How the program will accomplish its objectives
- Controlling: Setting standards and making sure a program meets those standards
- Organizing & Staffing: Building a team to achieve the program objectives
- Leading: Leading a team to meet a programs vision, objectives & goals
- Communicating: Making sure all project personnel and stakeholders have a clear understanding of the status of the project
- Deliverables: Making sure a program’s deliverables are meeting the objectives of the program in terms of cost, schedule, and performance.
- Managing Documentation: Making sure all documentation is up to date and available.

The PM has the overall authority to develop, manage and execute a program Acquisition Strategy. They also establish and implement a Systems Engineering approach to translate operational needs and capabilities into technically feasible, affordable, and operationally effective and suitable increments.

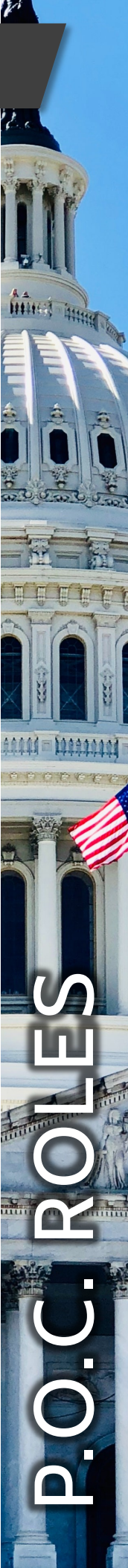


Project Manager Responsibilities

A Project Manager (herein referred to as PM) in the Federal Government must effectively manage three domains to be successful: 1) Requirements; 2) Budgeting and Execution; and 3) Acquisition Governance (these three are often referred to as “Big A”). In the Government, the Federal Triad separates project management and acquisition execution compared to how project management occurs in private industry. It defines the strategic, big-picture approach versus acquisition done solely as a function of the contracting process for specific procurements. In Big A acquisition, the PM must orchestrate and manage all cost, schedule, performance, and project scope risks of a project while simultaneously managing the inputs and outputs of these three strategic decision loops.

Requirements are driven by acquisition needs. Depending on an agency’s core mission and capabilities to perform that mission, agency needs are a reflection of the gaps in those capabilities and are often difficult to forecast. Needs are generated by a myriad of external and internal forces that generate change and affect an agency’s ability to contribute to the overall security posture of the United States and well-being of its citizens. New capabilities are generated out of the necessity to acquire new capital assets and services that make the agency more effective or efficient. Often new capabilities come along to take timely advantage of advances in technology. Typical agency requirements that generate acquisitions include replacement of obsolete or worn-out equipment, upgrades and modification of current assets, countering a threat to National Security, technology advances, industry alignment, workforce demographics, lack of capacity, mission changes, Congressional interest, executive direction, and feedback from customers and users. Of the three decision domains in the Federal Triad, managing requirements is the most dynamic in nature for the PM.

Budgeting and Execution to fund current and future acquisitions are driven by the calendar. All Federal budgets feed into and become part of the President’s annual budget submission, which is presented to Congress no later than the first working Monday of February each year. Congress must then pass appropriations or a Continuing Resolution on or before September 30 each year to fund the Federal Government. PMs must not only acquire the funding authority for the project, but they also must keep their budget from being considered for reprogramming to pay for other obligations not associated with the project.



Acquisition Governance is driven by successful completion of acquisition events or milestones. This decision loop includes two processes: (1) compliance with the Federal Acquisition Regulation (FAR) for contracting; and (2) an agency's process, or sometimes the lack of such a process, for managing the project life-cycle. Successful development of a new system and the decision to go into full quantity buys or production, required dates for reports, or a vendor's manufacturing window are all milestone-type events that are decision gates in the acquisition process.

The PM must manage the cost, schedule, and performance risks of the assigned project within the strategic decision environments of the three domains and their competing drivers. Agency requirements are generated when new capabilities are needed or when existing capabilities need to be more efficient, which by chance may or may not coincide with the budget cycle calendar. Further, unplanned agency needs and the budget calendar have no clear linkage to achieving successful events within the governance framework of the FAR and the project life-cycle. The result can be the ultimate juggling act for the PM. This guide provides tools and techniques to help PMs with this dynamic challenge.

What the Program/Project Manager Cares About:

Program Manager

1. **Progress toward mission accomplishment ("Big Picture").** In many ways, the Program Manager is like the CEO of a corporation. They are responsible for broad, wide-ranging outcomes tied to overall performance, progression and mission accomplishment. Program Managers typically rely on subordinates to handle day-to-day operations, specifics about how a strategy is executed, etc. – allowing them to remain focused on the overall Key Performance Objectives.
2. **Sustainment and progression.** The Program Manager drives for solutions that are sustainable over a minimum period, yet flexible enough to allow for progressive advancement based on enhancements in technology, business and science.
3. **Quality and results.** Program Managers care about results and output that meets minimum quality standards and delivers intended outcomes. They are less concerned with inputs and process, so long as overall mission objectives and quality standards are achieved.



Project Manager

1. **Project and program alignment.** It's the Project Manager's responsibility to ensure the project they oversee aligns with not only the intended outcomes of the project, but also with the overall mission of the program. In certain cases, program and project priorities may clash; the Project Manager must balance these priorities and make best value decisions.
2. **Big picture and little details.** If the Program Manager is the CEO, the Project Manager is a Director. Their job is to manage all aspects of their project. This means they must be equally adept at detail-oriented management as well as effectively managing toward overall project outcomes.
3. **Direct engagement with contracting personnel.** Typically, the Project Manager is considered the "Customer / End-User Representative" for a particular project. They have the most insight and contextual understanding regarding what is specifically needed to achieve project goals. Therefore, they are the most directly engaged with contracting personnel affiliated with the project, and the most directly responsible for evaluating and recommending contractors for the project.

How You Should See the Program/Project Manager:

Program Manager

1. **More CEO than Hiring Manager.** Typically, a Program Manager is going to rely on the Project Manager to make personnel-related decisions (especially at the small business / non-Prime Contractor level).
2. **A Strong Potential "Super-Influencer".** If you happen to be in a position to connect with a Program Manager and you make a good impression, they're recommendation to consider you to other members of the acquisition team will hold significant weight.



Project Manager

1. **They represent the federal customer.** A Project Manager is going to have the same priorities as an end-user or customer. Their job is to make sure the people operating within their project have the right tools, training, support, etc. These people are essentially the customers, and the Project Manager's primary responsibility is to put them in the best position to succeed.
2. **Subject Matter Expert.** The Project Manager is going to be a Subject Matter Expert within the project scope. They will be the most interested in (and capable of) evaluating the specific aspects of your organization that make you capable for this particular endeavor.
3. **Highly influential referral source.** While the Contracting Officer ultimately awards the federal contract, in most cases the Project Manager exerts great influence over which companies the Contracting Officer considers for award. If the Project Manager decides to recommend your organization be considered for an opportunity, your chances of winning that opportunity may increase significantly.

Preparing to Engage:

Program Manager

1. **Stay big picture.** This advice should come as no surprise. If the Program Manager is the CEO, then their focus is on things mission, vision and strategic alignment and fit. They want to know that they can rely on others to handle details, manage processes and take responsibility for outcomes – good and bad.
2. **It's about people.** Program Managers have little direct involvement in day-to-day operations, yet they are directly accountable for overall performance tied to those daily activities. Since they are so reliant on the performance of their subordinates, Program Managers typically evaluate people based on personality attributes over skills, education and/or experience. A Program Manager is more interested in your accountability, integrity and ability to effectively operate within a team environment than they are in your specific skills, education or experience.



3. Ask the right questions.

How happy are you with the incumbent(s) performance in this area?

Are there any areas of contractor support you feel are lacking or need improvement?

What organizational attributes do you value most in a contractor?

What experience do you feel a contractor needs to have in order to effectively execute their responsibilities for this program?

Are there any upcoming changes (funding, policy, etc.) that may impact or disrupt the program?

What do you feel are the keys to operating effectively with the other members of this Program team?

Project Manager

1. **Fit and value.** A Project Manager is going to first evaluate how well your organization will fit within the team that is already present, then determine if adding you to the team adds value. Therefore, make sure you know as much as you can about who is on the team, what they already bring to the table, and what you feel you can add.

2. **What you can do (not what you are).** Project Managers want competent businesses that help them achieve objectives in an optimal way. They don't primarily care about business size or socio-economic factors, so don't focus on these attributes when addressing a Project Manager.

3. Ask the right questions.

How happy are you with the incumbent(s) performance in this area?

Are there any areas of contractor support you feel are lacking or need improvement?

What organizational attributes do you value most in a contractor?

What experience do you feel a contractor needs to have in order to effectively execute their responsibilities for this project?



Are there any upcoming changes (funding, policy, etc.) that may impact or disrupt the project?

What do you feel are the keys to operating effectively with the other members of this Project team?

Federal Stakeholder Persona #3 – The Contracting Officer

Alternate titles: Contract Specialist | Contracting Officer Representative (COR) | Procurement Officer | Contracting Officer Technical Representative (COTR)

The following definitions provided by the Federal Office of Personnel Management (OPM).

Contracting Officer –

A Contracting Officer (CO, also KO) is a person who can bind the Federal Government of the United States to a contract which is greater in value than the federal micro-purchase threshold (\$10,000). This is limited to the scope of authority delegated to the Contracting Officer by the head of the agency. The abbreviation "KO" is frequently used because the abbreviation "CO" is used in a military context for "commanding officer".

Contract Specialist -

- (a) Positions which require a knowledge of pre-award and post-award procedures to plan and conduct the contracting process from the description of the requirements through contract delivery;
- (b) Positions which require a knowledge of two or more contract functions with none predominant or grade-controlling;
- (c) Other contract work not covered by the specializations described below.

Contract Negotiator –

Covers positions which require a specialized knowledge of negotiation techniques to meet and reach agreement through discussion with a proposed contractor on the price and performance terms, and to set forth all these terms in a procurement document.



Contract Administrator –

Covers positions which require a specialized knowledge of post-award contracting procedures to oversee or ensure compliance with the terms of contracts, to determine the reasonableness of and to negotiate claims, to resolve disputes and other problems concerning obligations of either the Government or the contractor, and to negotiate contract modifications. This is the title of choice for positions which perform a combination of post-award functions involving both contract administration and contract termination.

Contract Termination Specialist –

Covers positions which predominately require a specialized knowledge of post-award procedures and negotiation techniques to represent the Government in terminations for convenience or default and in claims and settlements.

Contract Price/Cost Analyst –

Covers positions which require a specialized knowledge of cost and/or price analysis techniques to evaluate cost and/or price proposals, contract changes, repricing actions and final contract pricing; to obtain and review data from auditors and technical specialists; to recommend cost and profit negotiation objectives; to conduct or participate in negotiations on cost and/or price issues; or to develop and advise on policies and procedures relating to these functions.

Procurement Analyst –

Covers positions which require a broad knowledge of procurement policies and procedures to plan, analyze, or evaluate procurement programs; review proposed contractual actions for conformance with regulatory requirements and procurement practices; or develop policies and procedures or provide advice and guidance to subordinate activities concerning a variety of procurement issues.



No titles other than those identified above are authorized in these standards. However, the approved titles do not affect agency use of organizational titles for internal administration, program management, or similar purposes. For example, frequently used titles which denote delegated authority to sign contracts include:

- Contracting Officer
- Procuring Contracting Officer (PCO)
- Administrative Contracting Officer (ACO)
- Corporate Administrative Contracting Officer (CACO)
- Termination Contracting Officer (TCO)

Contracting Officer is used in this standard when describing positions having delegated signatory authority.

What the Contracting Officer Cares About:

1. **Rules (and the FAR).** The Contracting Officer has the sole authority (and responsibility) under the Federal Acquisition Regulation to commit the federal government's money for a contract. Therefore, they are primarily responsible for understanding, applying and following all federal regulations regarding legality, fairness and compliance.

Your understanding of and respect for the federal acquisition process will be a significant factor in determining your ability to effectively communicate with a CO/KO.

2. **Risk (because they are accountable for your performance).** Contracting Officers are risk averse. Especially as it pertains to large federal contracts, Contracting Officers want evidence from you that you can provide the products or services being requested.

Your level of experience within the federal contracting market should weigh heavily as you decide your engagement approach with a Contracting Officer. If you overreach, you'll likely be turned away.

3. **Resources (efficient and effective deployment).** The easier you make it for a Contracting Officer to work with your company, the more likely they are to work with your company. Understand their "Buying DNA" when it comes to your product/service category and take the appropriate steps to make it easy for them to buy through familiar and previously-utilized methods.



How You Should See the Contracting Officer:

1. **Lawyer.** There are a lot of rules that govern federal contracts. The Contracting Officer is ultimately responsible for making sure those rules are followed (and answering for situations when they were not).

For that reason, Contracting Officers are always going to default to the Federal Acquisition Regulation (or federal contracting “rulebook”) as the basis for their decisions.

2. **Referee.** One of the primary purposes of the Federal Acquisition Regulation is to establish rules for competition within the federal market.

Contracting Officers are often at the center of the interpretation and application of those rules.

3. **CFO & Accountant.** In the end, the Contracting Officer is obligating (or in some cases de-obligating) the federal government funds. They are responsible for ensuring the government got the right value, at the right price and at the right level of risk.

It’s not enough for them to follow the rules; they are required to “show their work” – documentation that demonstrates beyond a shadow of a doubt that all applicable procedures were followed, and the right outcome was achieved.

Preparing to Engage:

1. **Don’t waste their time.** Before you reach out to a Contracting Officer, do your research. Make sure you know what they buy, how they buy, who they buy from and any other relevant details about their process.

2. **Demonstrate your knowledge.** Know the important facets of the Federal Acquisition Regulation (particularly relevant subjects such as Simplified Acquisitions, Small Business Programs, and the stages of a typical federal acquisition).

Also, demonstrate your knowledge about their processes, purchasing history, and anything else relevant to your situation and their needs.



3. **Listen and learn.** Once you've established that you've done your research and you know the fundamentals of federal contracting, it's time to switch gears.

4. **Ask the right questions.** Learn everything you can about the office (and buyer's) priorities, mission, challenges and goals. Listen, seek clarification when necessary, and confirm understanding.

What is the best way to make you aware of my firm's capabilities without becoming bothersome?

Based on our research, I believe the most common way(s) your entity purchases my goods/services is _____. Can you help me in any of those areas?

Do you have an internal database where we can register or upload our Capabilities Statement?

Where (online or otherwise) would you recommend my company have a strong presence in order to be considered when you're conducting small business market research – what tools or sources do you most commonly use?

How might I make our company available for smaller micro-purchases or simplified acquisitions?

What questions do you need to have answered before you can consider us for a project, and how can I help you answer them?

If I don't have the type of federal past performance you're looking for, how would I get started without it?

COMMUNICATION STRATEGY

Please find included with this Engagement Strategy document pdf attachments that include email templates and notes explaining the "why" behind each component of the email.

A vertical photograph of a man in a dark suit, white shirt, and dark tie, wearing glasses and talking on a mobile phone. The image is partially cut off on the right side.

COMMUNICATION STRATEGY