



# Federal Contracting Readiness Assessment



<b>Company:</b>	
<b>CAGE Code:</b>	
<b>UEI:</b>	
<b>Primary NAICS:</b>	
<b>Website:</b>	
<b>POC Name:</b>	
<b>POC Email:</b>	



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Go	No Go	Commercial Foundation	Notes
		Company Website	
		Professional Logo/Branding	
		Professional Email Domain	
		Company LinkedIn Profile	
		Google My Business Profile	
		Online Reviews	
Go	No Go	Federal Foundation	Notes
		Active/Visible SAM Registration	
		Optimized SAM Registration	
		Active/Visible Dynamic Small Business Search Profile (DSBS)	
		Optimized Dynamic Small Business Search Profile (DSBS)	
		Do You Have any Federal Past Performance?	
		Do You Have any State/County/City Past Performance?	
		Capability Statement (Format)	
		Capability Statement (Content)	
		Capability Statement (Design)	
Go	No Go	Federal Market Research	Notes
		Do You Know the Top 3 Agencies That Buy What You Sell?	
		Do You Know Their Preferred Buying Method?	
		Do You Know the Top 10 Primes in Your Industry for Sub-Contracting Opportunities?	
		Do You Know the Key POC's At Your Top Agencies?	
		Do You Know the Mission & Vision of Your Top 3 Agencies?	
		Have You Reviewed the Contracting Forecast for Your Top 3 Agencies?	
		Are You Set-Up to Receive Federal Solicitation Alerts That Match Your Capabilities?	
		Have You Reviewed Upcoming Small Business Events Organized by Your Top 3 Agencies?	



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Go	No Go	Engagement Strategy	Notes
		Do You Know How to Market To These POC's in order to schedule a Capabilities Briefing?	
		Do You Understand the Roles of a Contracting Officer, Program & Project Manager, and Small Business Specialist?	
		Do You Have a Way to Track Your Engagement Efforts in Order to Evaluate the Effectiveness of Your Approach?	
Go	No Go	Certifications & Contracting Vehicles	Notes
		Have You Ever Researched How Much of Your Products & Services are Purchased Through a GSA Schedule or FSS?	
		Have You Ever Pre-Qualified Your Company for GSA/FSS?	
		Does Your Company Qualify for WOSB Certification?	
		Does Your Company Qualify for 8(a) Certification?	
		Does Your Company Qualify for HUBZone Certification?	
		Does Your Company Qualify for VOSB/SDVOSB Certification?	

**Additional Notes:**



# Federal Contracting Readiness Assessment



Go	No Go	Company Website Checklist	Notes
		Make sure your SSL Certificate is Active & Functional	Federal Agencies use software that blocks potential threats. Without a working SSL Certificate this software will mark your website as unsecured and will prevent most Federal Contracting Personnel from being able to visit it.
		Make sure you have a Government Landing Page	A Government Landing Page will show a Federal Buyer that you are serious about Government Contracting. It will display things like your CAGE, UEI, NAICS, PSC, Capability Statement & Past Performance.
		Check that your website is optimized for mobile devices (Cell Phones & Tablets)	Over 60% of all web traffic is now mobile. If your website is not optimized for cell phones not only will it effect your government business, but it will lower your ranking in search engines like Google.
		Check that your website is optimized for different Web Browsers	Not everyone uses the same web browser these days. You need to check that your website displays properly on all browsers (Google Chrome, Firefox, Apple Safari, Microsoft Edge, DuckDuckGo)
		Proofread Your Content and Copy for Errors	Many companies have critical errors in the content of their website that hurt their image when being vetted by a Federal Agency for a Contract. Make sure to review your content for relevancy, grammar, and punctuation.
		Properly Search Engine Optimize Your Site	Without proper Search Engine Optimization you might not be found when Federal Buyers are conducting market research.
Go	No Go	Professional Email Domain	Notes
		Your Email should match or be similar to your organization name and match your company website.	<b>Example:</b> JSmith@SmithPlumbing.com
		Your Email should be specific to the name of the user and not generic to a department or role.	<b>Proper Example:</b> JSmith@SmithPlumbing.com <b>Improper Example:</b> Info@SmithPlumbing.com
		You Should NOT use email addresses that come from commercial sources for Federal Contracting	<b>Improper Examples:</b> @gmail.com, @yahoo.com, @hotmail.com, @aol.com, @msn.com, @comcast.net, @live.com, @outlook.com,

## Additional Notes:





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## Google My Business Importance:

Google My Business (GMB) is the most important online listing for any local business. It drives the local business search results on Google search, maps, Google Assistant (voice search) and more. In some ways, your GMB listing is even more important than your website.

## LinkedIn Importance:

Year after year, membership engagement on LinkedIn increases by 50% - this includes federal buyers. As a result, more and more companies are paying attention to their brand presence on the platform. Federal Agencies often use LinkedIn to announce contract awards, contracting vehicle insights, and contracting events that you can attend in order to network with Federal Buyers.

## Online Review Importance:

Reputation management is, of course, a continual effort. We have outlined the groundwork and the tune-up work to keep your reputation in the best possible shape for the long run.

## Google My Business Checklist

- Claim or create a Google My Business Listing
- Verify your listing to prove it's for a legitimate business
- Optimize your business information (Name, Address, Phone #, Hours, Services etc.)
- Add Photos, Videos and Virtual Tours
- Pre-Populate Q&A / FAQ's on your profile
- Set up a "Welcome Offer" and Post on your Google My Business Account Weekly
- Consider adding direct messaging so that customers can reach you with their questions
- Encourage, Monitor, and Respond to Reviews in a Professional Manner regardless of the feedback
- Check and Update your account regularly

## Company LinkedIn Checklist

- Start from LinkedIn.com, Select the type of page you'd like to create
- Input your business name, LinkedIn public URL, and website
- Add your industry, company size, and company type
- Add your final profile details, logo, and tagline
- Preview the results and click "Create Page"
- Complete all page details with in-depth information about your company and customize your "Call to Action"
- Add important page admins
- Share engaging content with your followers at least once per week
- Engage with your audience when they comment on your posts
- Involve your employees

## Online Review Management

- Actively ask your customers for reviews when they express their satisfaction with your company
- Google is the #1 platform for reviews. Start here.
- Respond to ALL reviews, good & bad. Stay professional, your future customers will be judging you based on your response to a negative review as much as your positive reviews
- Yelp is another review platform for local business. The algorithm for Yelp is a lot more strict than other platforms. Yelp sometimes suppresses reviews from accounts without a history of other reviews.
- Facebook/Meta has changed their reviews into "Recommendations" but these will still show up in online searches for your company if you have a Company Facebook/Meta profile.
- Better Business Bureau. Most companies do not receive positive reviews with the BBB. If someone visits your BBB Profile it is usually to check to see if you have any negative complaints. Try to resolve ALL complaints with BBB and get those removed in order to have a "clean A+" profile.

## Accountability: Goals & Deadlines

Goal	Date To Complete	Who Will Be Responsible?
Complete GMB, LinkedIn, Online Review Mgmt.		



# Federal Contracting Readiness Assessment



## System for Award Management (SAM)

Your organization's SAM profile is considered your federal accounting record. In order to get paid (in most cases), your company needs to have an active and accurate SAM registration.

## DSBS Importance:

Commonly overlooked by organizations looking to move into the world of federal contracting, your SBA DSBS Profile (Small Business Association Dynamic Small Business Search) is absolutely essential in marketing your business to contracting officers at the various governmental agencies.

## Capability Statement

In its simplest form, a capability statement is a promotional or marketing statement about your business and its capabilities and skills that advertises who you are and what you do. However, Capability Statements must be tailored to your audience: the government buyer or prime contractor.

## System for Award Management (SAM)

- Renew every 6 months
- Include your website address
- Make sure to choose "I accept credit cards" when prompted
- List more than one point of contact
- Include direct, professional email domains (no gmail, yahoo, aol etc)
- If applicable, sign up for FEMA disaster recovery contracts
- Have 2-5 NAICS codes listed, preferably in the same or similar industry sectors
- Have 2-5 PSC codes listed, preferably in the same or similar industry sectors (segmented between products and services)

## Dynamic Small Business Search (DSBS)

- Research competitors to understand what keywords they are using to be found
- Research contract awards to understand the language the government uses to purchase your services/products. Use the same language in your keywords
- Craft a fact-based differentiator guided Capabilities Narrative that describes your company using 4-5 sentences
- If Applicable, Enter your bonding levels
- If Applicable, Enter any special equipment and/or materials that you use
- If Applicable, Enter the countries that you are able to export to
- List your past performance: Federal Agencies 1st, State/Local Agencies 2nd, Commercial Clients 3rd

## Capability Statement

- Make sure it is visually appealing enough to stand out from the crowd
- Use relevant, high quality images
- Use bullets instead of long descriptions
- Craft a fact-based differentiator guided Capabilities Narrative that describes your company using 4-5 sentences (or use the one from your DSBS if you've already completed that step)
- Create a bulleted list of your products/services in your Core Competencies section
- Create a bulleted list of reasons why a contracting officer should choose you over a competitor in the "Differentiators" section
- Instead of only listing the names of agencies/organizations you have worked with in your past performance section; get more in-depth and list the dates you worked for them, the value of the contract, and details of what you did for them
- Use logo's next to each company you choose to list in your past performance to visually draw in the reader
- Make sure to list your: CAGE, UEI, NAICS, PSC, Name, Phone, Email, Website, Certifications

## Accountability: Goals & Deadlines

Goal	Date To Complete	Who Will Be Responsible?
Complete SAM, DSBS, & Capability Statement		



# Federal Contracting Readiness Assessment



## Targeting Your Top 3 Agencies

Most small businesses have limited time and resources. Therefore, you will increase your odds for success by identifying and targeting the top 3 federal agencies that provide your company the best odds to compete for and win federal work.

## Preferred Buying Method

Federal buyers have a myriad of choices when it comes to buying products and services from commercial contractors. Know how your target agency buys, and determine whether your business profile fits their preferred buying method(s).

## Top Primes for Subcontracting

Unlike prime contractors, subcontractors do not work directly with the government, but instead work for other contractors.

Some government contracts (greater than \$750k) require large companies to subcontract with a small business. This creates more opportunities for small businesses to get involved in federal contracting.

## Federal Market Research: Top 3 Agencies

- Conduct research using USASpending.gov to understand who your top agencies are
- How much did your top agencies spend on your products/services last fiscal year?
- What percentage of their awards went to small businesses in your industry?
- Do your top agencies utilize small business set-asides and do your certifications match?
- Who are your top competitors winning these contracts with your top agencies?
- How does your business compare against these competitors?
- How often does the agency work with first-time contractors?
- Are there sub-contracting opportunities available from these competitors?
- How often does the agency utilize Simplified Acquisition Procedures (SAP)?
- What are these agencies preferred methods of engagement?
- What are these agencies Mission & Vision?
- Who are the key Points of Contact for each agency?

## Preferred Buying Method

**Agency 1 Preferred Method:**

**Agency 2 Preferred Method:**

**Agency 3 Preferred Method:**

**Buying Method List:** Micro-purchase/Credit Card, Purchase Order, Sealed Bidding, Contract by Negotiation, Firm Fixed Price (FFP), Cost Reimbursement, Cost Plus Fixed Fee, Time & Materials, Labor Hours, Federal Supply Schedule, Blanket Purchase Agreement, Indefinite-Delivery Indefinite-Quantity (IDIQ)

## Subcontracting Research

- Research the Prime Contractors that have contracts requiring them to hire sub-contractors
- Register with these companies through their individual vendor portals
- Develop professional (legal) agreements for: Teaming, Subcontracting, and Joint Ventures
- Find the correct Points of Contact for these Prime Contractors
- Develop an effective Prime Contractor Engagement Strategy
- Begin engaging with the prime contractors

## Agency Point of Contact Research

**Conduct research to find the following list of points of contact within your top 3 Agencies:**

- Small Business Specialist(s)
- Contract Specialist(s)

Continued on the next page...



# Federal Contracting Readiness Assessment



## Key Points of Contact Research

There are many different types of contacts in the federal market, and each has a role to play in ensuring the federal acquisition process is executed fairly and with maximum effectiveness.

## Agency Reconnaissance

In order to effectively engage your target agency, you should first conduct in-depth reconnaissance about how the agency conducts business, and what they look for in a prospective contractor.

## Agency SWOT Analysis

SWOT stands for: Strengths, Weaknesses, Opportunities & Threats. The primary goal of SWOT analysis is to increase awareness of the factors that go into making a business decision or establishing a business strategy. You should conduct this exercise for each agency you plan on engaging with to give you the best chance of success.

## Agency Point of Contact Research (Continued)

**Conduct research to find the following list of points of contact within your top 3 Agencies:**

Program Manager(s)

Project Manager(s)

Contracting Officer Technical Representative(s)

Contracting Officer(s)

Procurement Technical Assistance Center Representative (PTAC Rep) \*

SBA Procurement Center Representatives\*

Office of Small and Disadvantaged Business Utilization Representatives \*

## Agency Reconnaissance

Read the “How to do business with us” guide published by each of your Top 3 Agencies

Identify and attend Matchmaking Events, Industry Day Events, and Small Business Outreach Events put on by your Top 3 Agencies

Set up alerts to receive Sources Sought and Request for Information (RFI) notices for your Top 3 Agencies that match your products/services

Follow your Top 3 Agencies on Social Media (Especially LinkedIn)

Attend any Webinars, Seminars, or Online Events that they post on their Social Media platforms

Find and regularly review the forecasting portals for each of your Top 3 Agencies. When you find upcoming opportunities that match your capabilities, set up a “Capability Briefing” with the Small Business Specialist at that Agency/Office to discuss the opportunity

## Agency SWOT Analysis

In reviewing the Agency’s online collateral, what are their three biggest areas of focus?

In reviewing the Agency’s online collateral, what are their three biggest challenges?

In reviewing the Agency’s online collateral, what are their three most important goals?

What are the Agency’s top priorities listed in their most recent annual budget?

What are the dominant characteristics the Agency is seeking in a federal contracting partner?

Construct a Value Proposition based on your analysis that you can use during a Capabilities Briefing

**\* This is not an agency specific role, but is still a very helpful POC**

## Accountability: Goals & Deadlines

**Goal**

**Date To Complete**

**Who Will Be Responsible?**

Complete Total Agency Research & Recon.





# Federal Contracting Readiness Assessment



## Engagement Strategy

Your target federal customer should feel confident that you understand their mission, goals and priorities and that your solution uniquely and directly addresses these areas.

You should be constantly monitoring and evaluating your engagement strategy to ensure it's effectiveness and Return on Investment.

## Federal Engagement Strategy

**Using the reconnaissance you compiled in the previous section, you now should plan how you will engage with the key points of contact at each of your Top 3 Agencies**

How will you engage with these POC's? (Email, Phone, Social Media, In-Person):

Why will this strategy be effective? How will you measure it's effectiveness?

What are the biggest challenges you will face in trying to successfully execute this strategy?

How will you overcome these challenges?

How will you measure the cost of your strategy?

How will you measure the Return on Investment (ROI) of your strategy?

How long will you utilize this strategy before evaluating its effectiveness and either continuing or pivoting?

## Accountability: Goals & Deadlines

**Goal**

**Date To Complete**

**Who Will Be Responsible?**

Complete Your Federal Engagement Strategy



# Federal Contracting Readiness Assessment



## GSA/Federal Supply Schedules

The GSA Schedule, also known as Federal Supply Schedule, and Multiple Award Schedule (MAS), is a long-term governmentwide contract with commercial companies that provide access to millions of commercial products and services at fair and reasonable prices to the government.

## GSA Schedule/Federal Supply Schedule Research

How much have your Top 3 Agencies purchased of your products/services through a GSA Schedule/Federal Supply Schedule?

\$ \_\_\_\_\_

How many contracts from your Top 3 Agencies were awarded through a GSA Schedule/Federal Supply Schedule?

# \_\_\_\_\_

What percentage of dollars awarded by your Top 3 Agencies for your products/services went through a GSA Schedule/Federal Supply Schedule?

% \_\_\_\_\_

What percentage contracts awarded by your Top 3 Agencies for your products/services went through a GSA Schedule/Federal Supply Schedule?

% \_\_\_\_\_

How many different companies in your respective industry won contracts through their GSA Schedule/Federal Supply Schedule with your Top 3 Agencies?

# \_\_\_\_\_

What is the average price that your competitors charge through their GSA Schedule, and how do your prices compare? (product based OR hourly rates for similar roles)

Does your company meet the qualifications to acquire a GSA Schedule?

## Socio-Economic Certifications

As the largest purchaser of goods and services in the world, the U.S. federal government receives vital support from small disadvantaged businesses. Each year agencies assign goals for each type of certification. They are then held to those goals by congress and oversight committees.

## Socio-Economic Certification Research

Does your company meet the qualifications to acquire a Certification?

Should your company consider becoming certified before engaging with Federal Buyers?

Do you have the abilities, knowledge, and time to process the certifications yourself?

How many small business contracts from your Top 3 Agencies were awarded through the socio-economic certification/set-aside you are considering becoming certified for?

# \_\_\_\_\_

What percentage of dollars awarded by your Top 3 Agencies were awarded through the socio-economic certification/set-aside you are considering becoming certified for?

% \_\_\_\_\_

How much have your Top 3 Agencies purchased of your products/services through the socio-economic certification/set-aside you are considering becoming certified for?

\$ \_\_\_\_\_

### Certification programs:

- 8(a)
- HUBZone
- WOSB
- EDWOSB
- VOSB
- SDVOSB



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## Indefinite Delivery Vehicles

There are many types of Indefinite Delivery Vehicles and many agencies rely on these vehicle types to conduct business. This happens for various reasons but overall it creates a more streamlined way for an agency to purchase repetitively from trusted vendors.

### IDV Types:

- **BOA:** Basic Ordering Agreement
- **BPA:** Blanket Purchase Agreement
- **GWAC:** Government Wide Acquisition Contract
- **IDC:** Indefinite Delivery Contract

## Indefinite Delivery Vehicle Research

How much have your Top 3 Agencies purchased of your products/services through an Indefinite Delivery Vehicle?

**BOA** \$ \_\_\_\_\_ **BPA** \$ \_\_\_\_\_ **GWAC** \$ \_\_\_\_\_ **IDC** \$ \_\_\_\_\_

How many contracts from your Top 3 Agencies were awarded through an Indefinite Delivery Vehicle?

**BOA** # \_\_\_\_\_ **BPA** # \_\_\_\_\_ **GWAC** # \_\_\_\_\_ **IDC** # \_\_\_\_\_

What percentage of dollars awarded by your Top 3 Agencies for your products/services went through an Indefinite Delivery Vehicle?

**BOA** % \_\_\_\_\_ **BPA** % \_\_\_\_\_ **GWAC** % \_\_\_\_\_ **IDC** % \_\_\_\_\_

What percentage contracts awarded by your Top 3 Agencies for your products/services went through an Indefinite Delivery Vehicle?

**BOA** % \_\_\_\_\_ **BPA** % \_\_\_\_\_ **GWAC** % \_\_\_\_\_ **IDC** % \_\_\_\_\_

## Accountability: Goals & Deadlines

Goal	Date To Complete	Who Will Be Responsible?
Complete Contracting Vehicle & Cert. Research		

## Additional Notes: