



9th Annual PTAC Procurement Symposium

Winning Strategies For Prospecting and Teaming A Primer For Entrepreneurs and Small Business Owners

Presenter
Joshua Frank
RSM Federal

Brilliant. Highly Effective. A Trusted Partner.

“ *Tel-Tec has been trying to find the right consultant and leadership group that clearly understood the GSA process and working with the Government. After three years, we found them! We were introduced to Joshua Frank at RSM Federal. As a result of our work with RSM, we have already won nine (9) GSA contracts.* ”

Morgan Clayton, President
Tel-Tec Security Systems
Bakersfield, CA

A Master Strategist Who Delivers

“ *Until recently we struggled to connect the dots across the landscape of government contracting. For years, we had the foundation, the tools and the people, yet continued to find difficulty in leveraging our assets to make a real difference in our bottom line. We've now had RSM Federal on retainer for almost two years - they are that good!* ”

Claye Green, Managing Director
Technology Blue
Pittsburgh, PA

Joshua P. Frank MIS, MBA

- RSM Federal, Principal and Founder
- 25 years in the government market
- Former military intelligence officer
- Board of Directors, Veterans Business Resource Center (VBRC)
- Expertise
 - Small Business Acceleration Strategies
 - Techniques & strategies for market entry and acceleration
 - Federal marketing, prospecting, sales, and capture management
 - Education, Training, Consulting

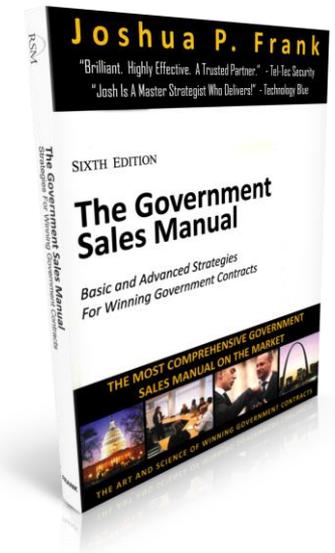
Let's Get Started

● Session Expectations

- Basic To Intermediate Content and Concepts
- Techniques and strategies
- A lot of information . . . in 45 minutes
- If you have questions, available until 2pm
- **Free Download After Session**
- **Drawing For Government Sales Manual**

● Agenda

- Federal Budget
- Government Opportunities & Small Business Challenges
- Propensity - Who Buys. . . How Often. . . How Much?
- Prospecting Methods – What Works?
- Teaming Techniques and Strategies



The Federal Budget

(In billions of dollars)

| Outlays | 2012 Actual | 2013 Actual | 2014 Approved | 2015 Proposed | 2016 Proposed |
|----------------------|------------------------|------------------------|--------------------------|--------------------------|--------------------------|
| Appropriations | \$1,285 | \$1,264 | \$1,174 | \$1,186 | \$1,153 |
| Defense | 671 | 652 | 612 | 623 | 584 |
| Federal Agencies | 614 | 611 | 562 | 563 | 569 |
| Mandatory Programs | 2,032 | 2,193 | 2,251 | 2,458 | 2,621 |
| Total Outlays | 3,317 | 3,457 | 3,425 | 3,644 | 3,774 |

**Government Fiscal Year
 Started October 1st**

Federal Spending FY2012 – FY2016

| Federal Budget | 2012 Actual | 2013 Actual | 2014 Approved | 2015 Proposed | 2016 Proposed |
|-------------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| DoD Appropriations | \$671,000,000,000 | \$652,000,000,000 | \$612,000,000,000 | \$623,000,000,000 | \$584,000,000,000 |
| Federal Agency Appropriations | \$614,000,000,000 | \$611,000,000,000 | \$562,000,000,000 | \$563,000,000,000 | \$569,000,000,000 |
| Total Appropriations | \$1,285,000,000,000 | \$1,263,000,000,000 | \$1,174,000,000,000 | \$1,186,000,000,000 | \$1,153,000,000,000 |
| Mandatory Programs | \$2,032,000,000,000 | \$2,193,000,000,000 | \$2,251,000,000,000 | \$2,458,000,000,000 | \$2,621,000,000,000 |
| Total Outlays | \$3,317,000,000,000 | \$3,456,000,000,000 | \$3,425,000,000,000 | \$3,644,000,000,000 | \$3,774,000,000,000 |

Sequestration Impact (\$1 trillion over 10 Years)

| | |
|--|-------------------------|
| DoD Sequestration Impact | \$500,000,000,000 |
| Federal Agency Sequestration Impact | \$500,000,000,000 |
| Total Sequestration | \$1,000,000,000,000 |
| Annual Cuts DoD & Agencies (respectively) | \$50,000,000,000 |

| | | | | | |
|--|------------|----------------------------|----------------------------|----------------------------|----------------------------|
| DoD Appropriations w/ Sequestration | n/a | \$602,000,000,000 | \$562,000,000,000 | \$573,000,000,000 | \$534,000,000,000 |
| Federal Agency Appropriations w/ Sequestration | n/a | \$561,000,000,000 | \$512,000,000,000 | \$513,000,000,000 | \$519,000,000,000 |
| Federal Budget w/ Sequestration | n/a | \$1,163,000,000,000 | \$1,074,000,000,000 | \$1,086,000,000,000 | \$1,053,000,000,000 |

23% Statutory SB Goals - Appropriated Funds

(Does not take into account mandatory programs)

| | | | | | |
|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| DoD 23% | \$154,330,000,000 | \$138,460,000,000 | \$129,260,000,000 | \$131,790,000,000 | \$122,820,000,000 |
| Federal 23% | \$141,220,000,000 | \$129,030,000,000 | \$117,760,000,000 | \$117,990,000,000 | \$119,370,000,000 |
| Total Statutory Goal | \$295,550,000,000 | \$267,490,000,000 | \$247,020,000,000 | \$249,780,000,000 | \$242,190,000,000 |

So What?

- **Billions in Federal Funding for Small Business FY2015**
- **Small Business Regulations – Most Advantageous In 25 Years**
 - Competition Requirements
 - GSA eBuy
- **Your Top Priority – How To Properly Engage The Federal Market**
 - Don't listen to colleagues that constantly complain about not winning
 - Budget cuts and sequestration are a big deal – *to uneducated companies*
 - Companies that educate themselves and perform the right activities – win contracts

Government Opportunities

How Do You Focus?





6 Common Challenges For Small Business



- How to identify who buys what you sell and how to contact them
- Not every prospect is qualified to be a customer
- Bidding without information or intelligence (beyond FBO / FedBizOpps)
- Bidding without knowing the customer (talking to them)
- Bidding without knowing the competition
- Bidding without having done the up-front work
- Believing your own press releases

Don't Simply Search For Opportunities – Understand Them

*“The Government does not want you to sell to them. . .
They want to buy something from you . . . When they need it and
when you've proven the **value** of your products and services*

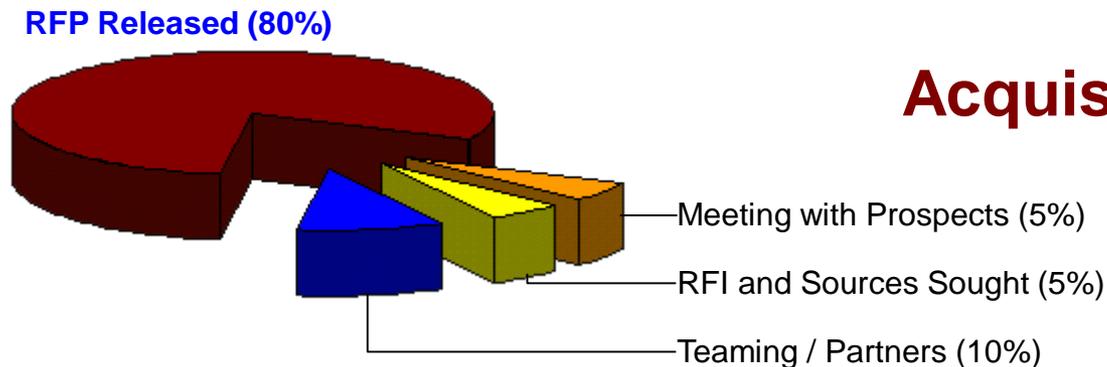
- Information enables you to map capabilities to **value**
- People buy from people they know – relationship management
- Develop your own approach – what works and what does not
- Get in the “Gossip Chain”

80% of Businesses Focus on Unqualified Opportunities

- **Target opportunities which align with your strongest offerings**
 - Where you clearly understand or plan to understand the prospect's needs
- **Target agencies which are likely buyers of your solutions**
 - Propensity – Who buys what you sell ... how often ... how much ...?
 - Discard all others – “Shotgun Sales” are rarely successful

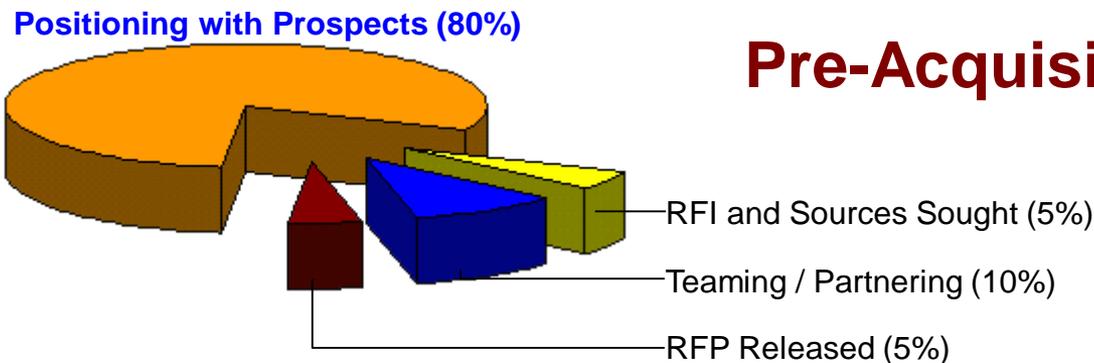
Typical Small Business Focus

Where do most Entrepreneurs and Small Businesses Focus?



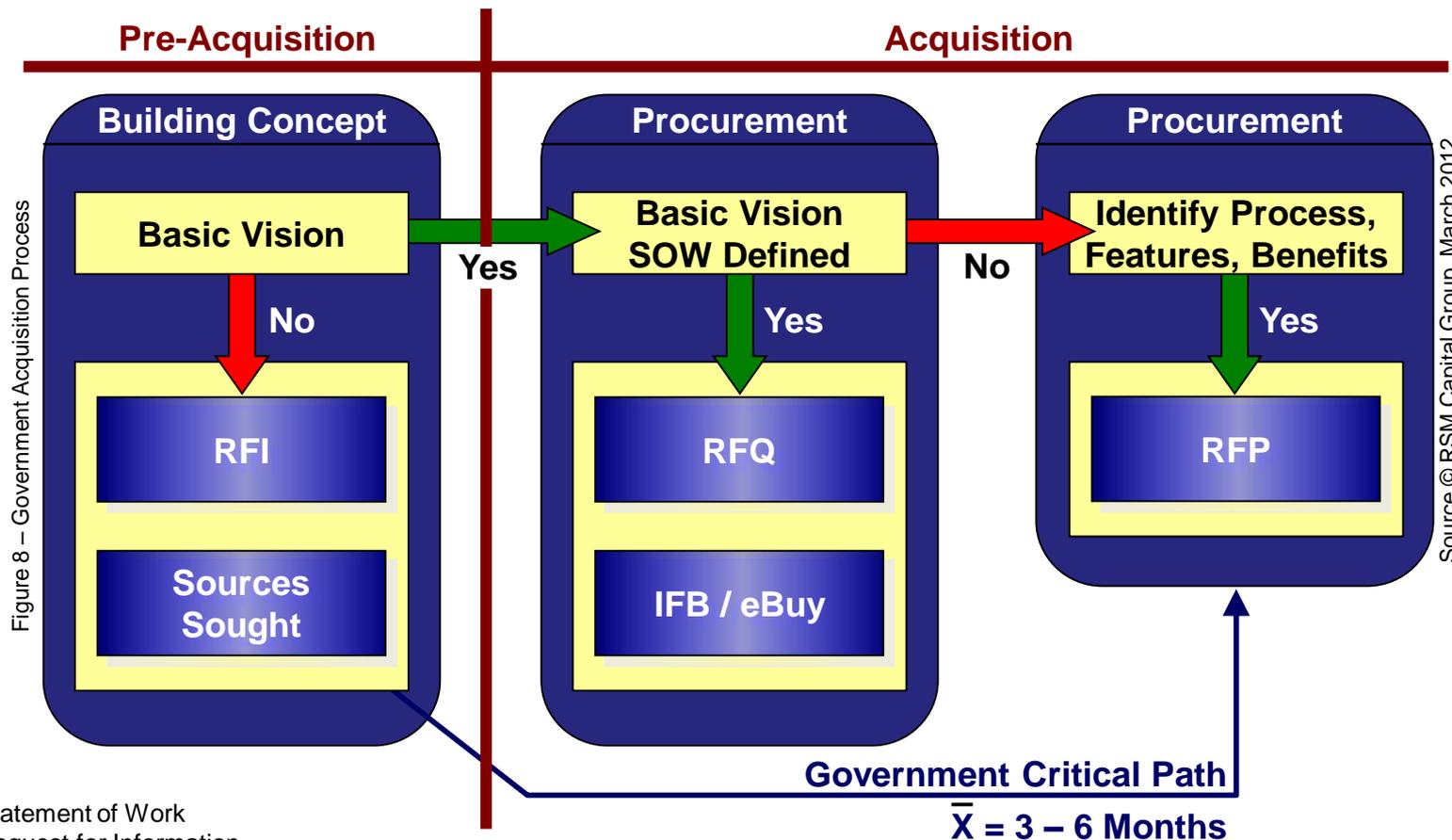
Acquisition Phase

Where should Entrepreneurs and Small Business Focus?



Pre-Acquisition Phase

Government Acquisition Cycle

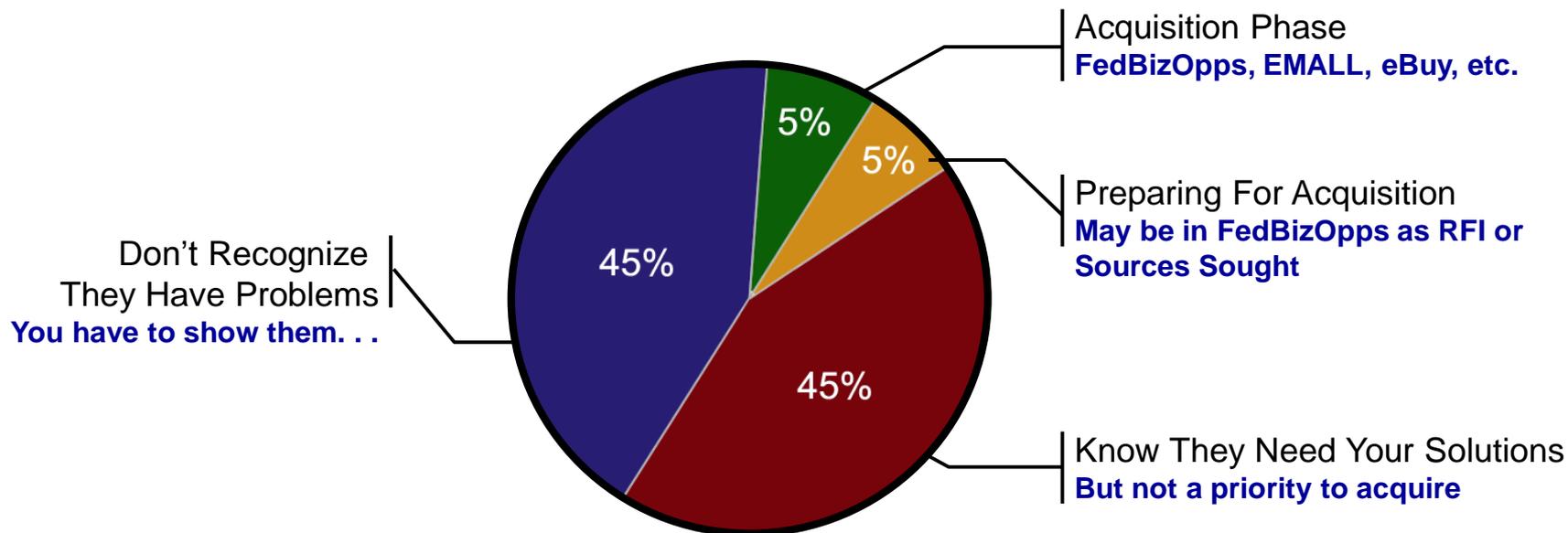


Source © RSM Capital Group, March 2012

- SOW Statement of Work
- RFI Request for Information
- RFQ Request for Quote
- IFB Invitation for Bid
- RFP Request for Proposal

FedBizOpps (FBO) Only 10% of All Opportunities

Most opportunities listed in FedBizOpps are already in acquisition phase.



Source: © RSM Capital Group, March 2012
Figure 113 – FedBizOpps is Acquisition Phase

FBO – Single Government Point of Entry (GPE) for >\$25,000

Who Buys What You Sell? (How Much, How Often)



Measuring Propensity - Agency Score Cards For Small Business

| Agency | SB | 8(a) | VOSB | SDVOSB | WOSB | HUBZone |
|-----------------|------------|-----------|-----------|-----------|-----------|-----------|
| SBA Goal | 23% | 5% | 0% | 3% | 5% | 3% |
| DHS | 36.91% | 7.82% | 7.74% | 5.81% | 8.98% | 4.22% |
| DOC | 41.35% | 5.88% | 8.82% | 7.21% | 12.01% | 1.07% |
| DOD | 24.80% | 5.04% | 4.76% | 3.04% | 4.22% | 2.35% |
| DOI | 54.70% | 13.16% | 6.52% | 3.77% | 10.49% | 7.06% |
| DOJ | 25.04% | 3.45% | 3.90% | 2.99% | 6.82% | 0.70% |
| DOL | 38.65% | 7.98% | 5.22% | 4.06% | 8.73% | 1.25% |
| DOT | 41.43% | 12.71% | 9.68% | 3.53% | 11.34% | 4.48% |
| Education | 27.47% | 1.51% | 0.58% | 0.45% | 9.06% | 0.13% |
| Energy | 3.76% | 0.61% | 0.53% | 0.21% | 0.98% | 0.26% |
| EPA | 44.03% | 7.38% | 5.06% | 4.34% | 5.91% | 2.60% |
| GSA | 41.69% | 9.90% | 5.65% | 3.57% | 9.48% | 3.41% |
| HHS | 23.90% | 5.07% | 2.58% | 1.14% | 7.57% | 0.69% |
| HUD | 14.95% | 12.42% | 3.96% | 0.71% | 15.30% | 1.09% |
| NASA | 15.90% | 3.74% | 1.41% | 0.64% | 2.58% | 0.58% |
| NRC | 35.16% | 11.76% | 3.23% | 2.69% | 12.80% | 1.79% |
| NSF | 19.15% | 5.38% | 3.24% | 3.08% | 5.63% | 0.98% |
| OPM | 20.54% | 4.90% | 1.71% | 0.84% | 7.10% | 1.64% |
| SBA | 79.07% | 28.73% | 9.85% | 7.35% | 20.10% | 6.01% |
| SSA | 37.45% | 3.74% | 4.44% | 2.84% | 14.99% | 1.54% |
| State | 30.39% | 9.70% | 6.28% | 4.08% | 6.50% | 1.51% |
| Treasury | 39.99% | 9.32% | 5.50% | 2.43% | 12.51% | 2.45% |
| USAID | 100.00% | 0.40% | 99.60% | 99.60% | 0.40% | 0.00% |
| USDA | 52.01% | 7.58% | 5.18% | 3.36% | 7.96% | 2.96% |
| VA | 39.75% | 0.28% | 24.86% | 22.09% | 3.29% | 1.48% |

| | |
|---------------|--|
| Legend | Met or Exceeded SBA Goals (Regardless of Agency Goals) |
| | Failed to achieve SBA Goals |

| | | | | | | |
|-------------|-----------|-------------|-------------|---------------|-------------|----------------|
| 2013 | SB | 8(a) | VOSB | SDVOSB | WOSB | HUBZone |
| # Agencies | 19 | 16 | 19 | 14 | 19 | 5 |
| Percentage | 79% | 67% | 79% | 58% | 79% | 21% |

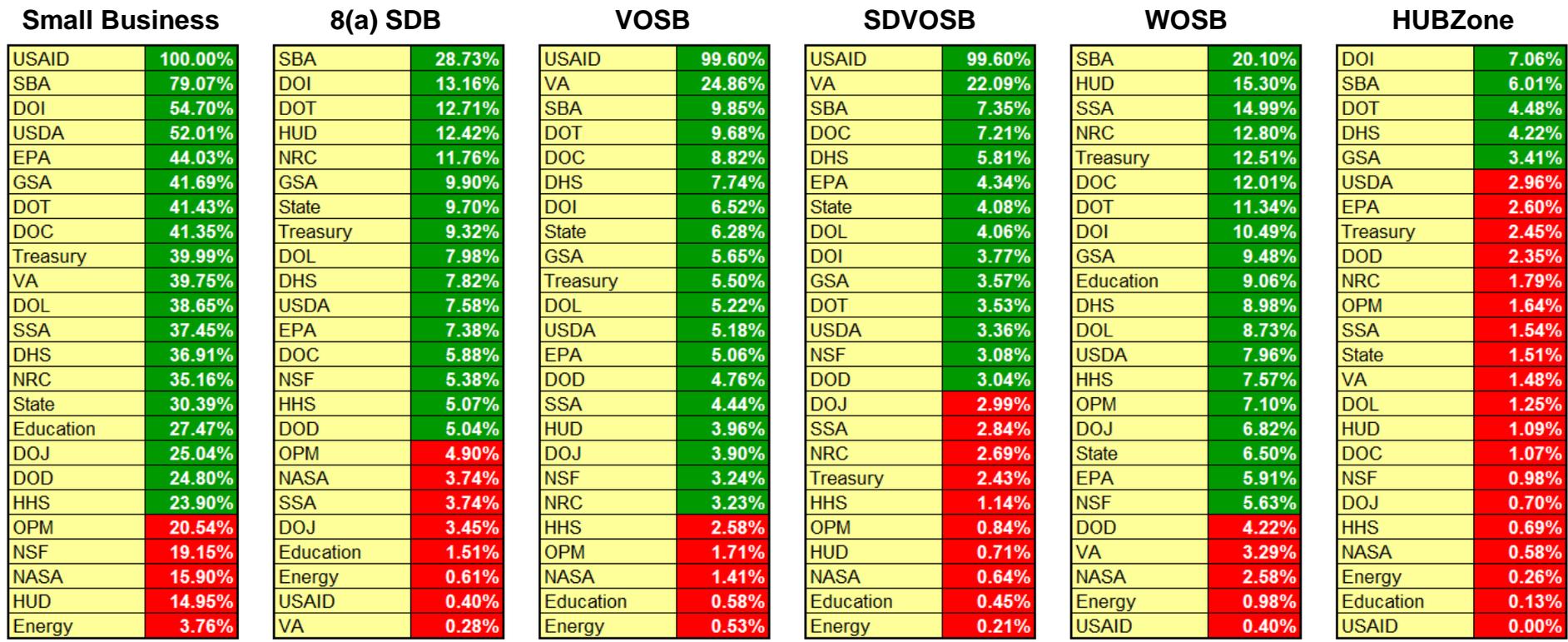
FY 2012 Results

- Small Business ↓ 67%
- SDB and 8(a) ↑ 96%
- WOSB ↑ 79%
- HUBZone 33%
- SDVOSB ↑ 54%

FY 2013 Results

- Small Business ↑ 79%
- SDB and 8(a) ↓ 67%
- WOSB 79%
- HUBZone ↓ 21%
- SDVOSB ↑ 58%

Measuring An Agency's Propensity For Small Business



Source: Source: Small Business Administration and Federal Procurement Next Generation

Figure 59 – Small Business Score Cards by Status

2013

Measuring An Agency's Propensity For YOUR Solutions



Federal Procurement Data System (FPDS)

Measuring An Agency's Propensity For YOUR Solutions

Real Company: Anti-Microbial Cleaning Solutions

Product or Service

Report Name:

1 Select metrics

- Base and Exercised Options Value
- Action Obligation
- Base and All Options Value
- Actions
- Number of Records

Prompt values

2 Select attributes

- Principal Place of Performance City Name
- Principal Place of Performance State Code

Prompt values

3 Select time, filters and rankings

Time
all available
2 filter(s)

Attributes

- Award - IDV Information
 - Department And Agency Information
 - Contract Identification
 - Contract Dates
 - Funding Source
 - Contract Marketing Data
 - Contract Information
 - Legislative Mandates
 - Product or Service Information
 - Principal Place of Performance
 - Product Origin
 - Competition Information

| Attribute Name | D | Add |
|--|---|-----|
| Congressional District-Place of Performance | | Add |
| Place of Performance Zip Code | | Add |
| Principal Place of Performance City Name | | Add |
| Principal Place of Performance Country Code | | Add |
| Principal Place of Performance Country Name | | Add |
| Principal Place of Performance County Code | | Add |
| Principal Place of Performance County Name | | Add |
| Principal Place of Performance Location Code | | Add |
| Principal Place of Performance State Code | | Add |

Federal Procurement Data System

Prospecting Methods

Which Methods Are Right For You?



Prospecting Methods

Viable

Strong

Weak

PTAC



OSBP / OSDBU
 (Impact Acquisition?)

FPDS-NG

Trade Shows

Agency Forecasts
 (Internet / Websites)

Professional Associations

Meeting With Incumbent
 (Provide Competitive Advantage)

Professional Network

Teaming / Partners
 (90% for First Contract)

Government Meeting
 (Program Mgr / Contract Officer)

Existing Clients

CUSTOMER

RFIs / Sources Sought
 (Critical for SB)

Source: © RSM Federal, 2013

Government Acquisition Systems



FedBizOpps
 eBuy DLA DIBBS NECO
 FedBid ASFI DOD EMALL



Bid-Matching Services



RFQ | RFP | IFB

Marketing | Advertising

Government Job Openings

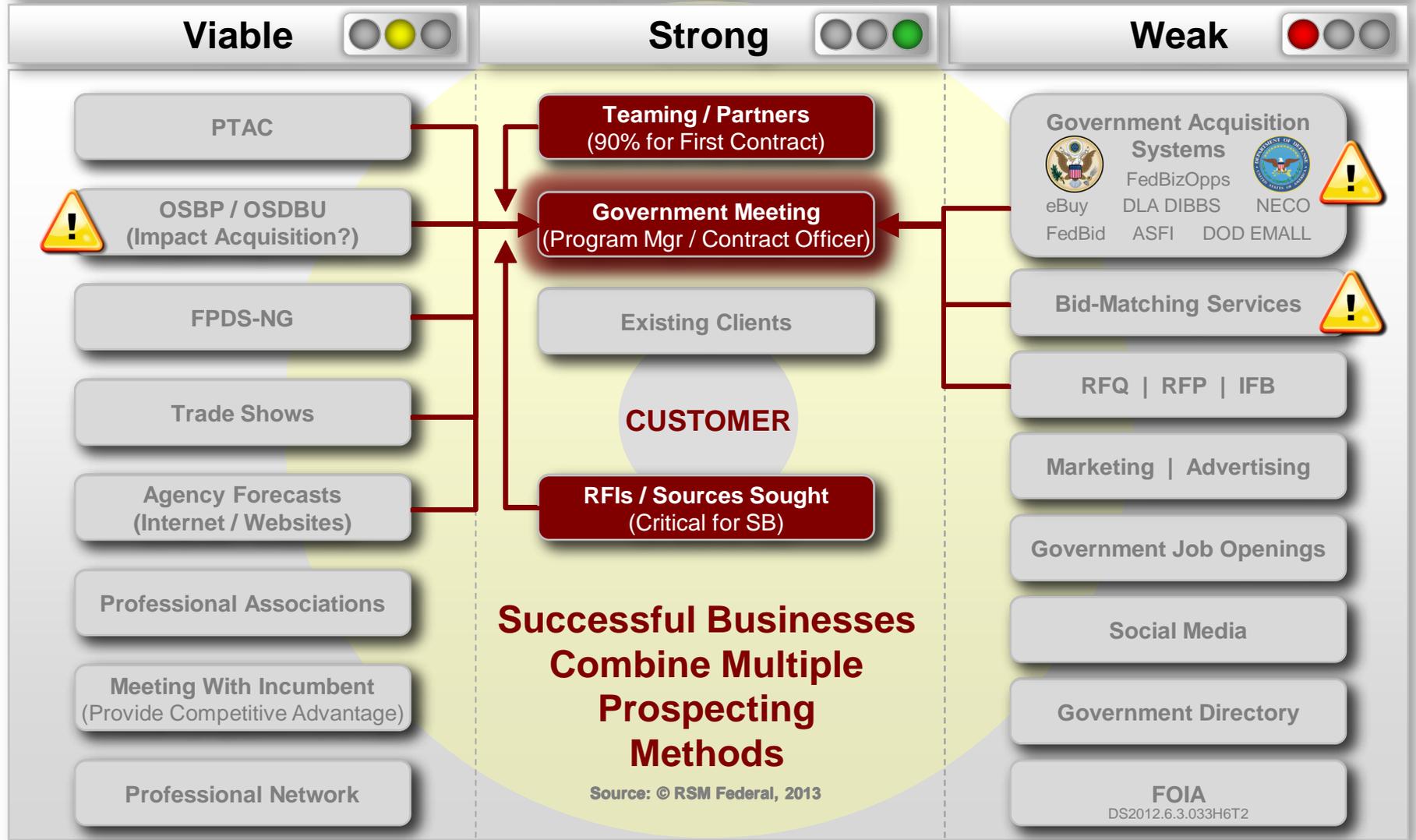
Social Media

Government Directory

FOIA

DS2012.6.3.033H6T2

Prospecting Methods



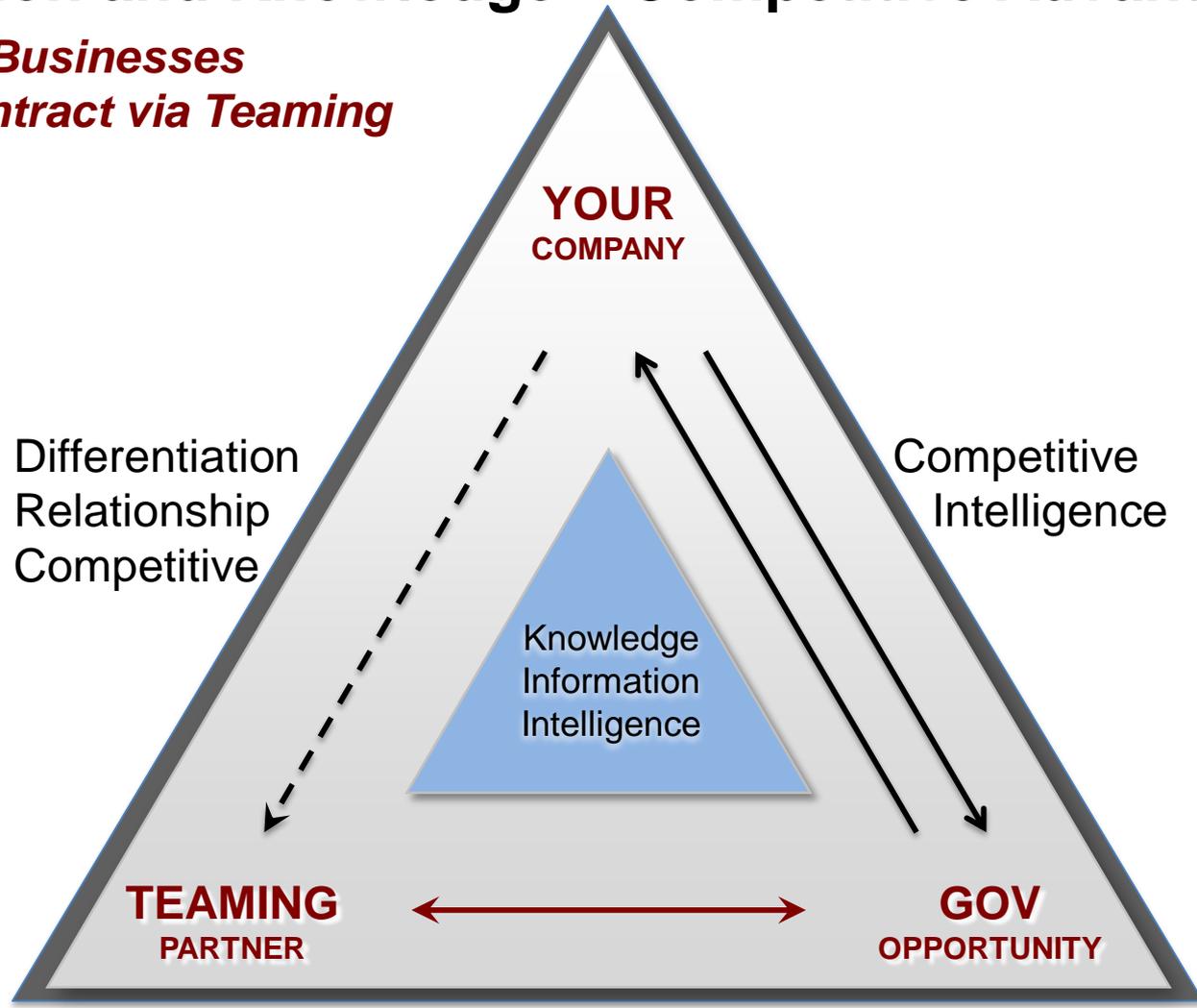
Business Intelligence

The Foundation For Teaming



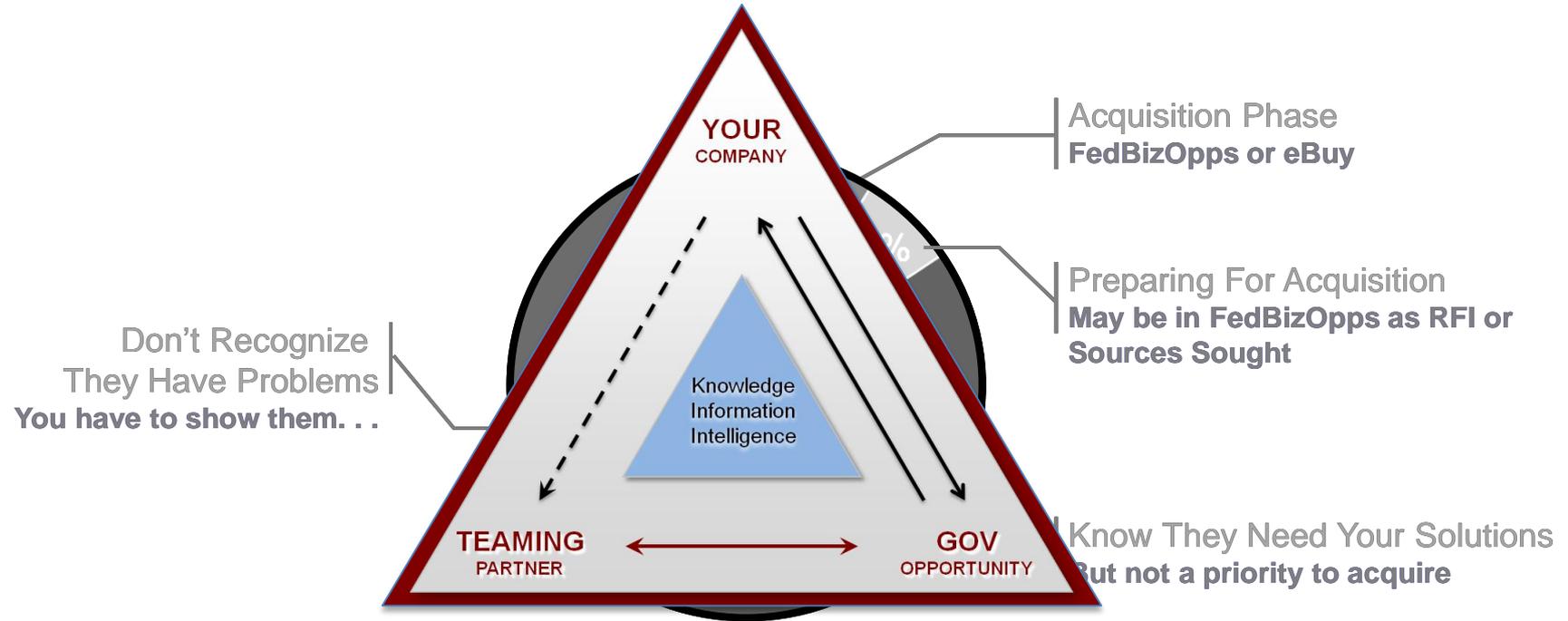
Information and Knowledge = Competitive Advantage

**90% Small Businesses
First Contract via Teaming**



FedBizOpps (FBO) Only 10% of All Opportunities

90% of opportunities listed in FedBizOpps are already in acquisition phase.



Source: © RSM Capital Group, March 2012
Figure 113 – FedBizOpps is Acquisition Phase

FBO – Single Government Point of Entry (GPE) for >\$25,000

Common Challenges

Teaming With Other Companies



Building A Relationship With Larger Companies

- Your focus is mapping the value of your products and services and past performance to the government opportunity

- ▶ ● The first meeting should be YOU bringing an opportunity to THEM

- Should be a Small Business Opportunity, one which they can not prime themselves
- *This is common practice and expected by larger companies*
- There is no stronger way to build a relationship with another company

- ▶ - **Sometimes team even if you can do 100% of the work on your own**

Teaming Agreements Between Large and Small Business

● Guarantee of Work?

- Standard for large System Integrators (SI) to mandate % for other large companies
- Unusual for Small Business to leverage specific percentages with large companies
- Common between Small Businesses

● How To Position

- Instead of “Guaranteed Dollars” – Negotiate specific “Task Areas” (TA)

● Teaming Agreement

- How to position with larger companies – **Free download after session**

How Large Companies Evaluate Small Business

5 Functional Areas

● Market Acumen

- You Know the Customer
- Geographical Location

● Back-Office Maturity

- Business Developers – Strong Interpersonal Skills
- Investment Potential (Time?) (They will ask around)
- Teaming Maturity
- Proactive versus Reactive
- Follow-Up What is Promised
- Program Management
- NAICS Codes – Back them up
- Beneficial Agreements
- Company Reputation
- Competitive Pricing

“You may have superior capability, great products and past performance, but a strong back-office is equally important to a teaming decision.”

How Large Companies Evaluate Small Business

5 Functional Areas

● **Competencies**

- Complimentary Capabilities
- Niche Capability?
- Capabilities Brief is “Reality”
- Past Performance (Mix Commercial & Government)

● **Quid-Pro-Quo**

- Common Interests
- Bring Them Business First

● **Acquisition Differentiators**

- Socio Economic Status
- Size Standard (How many years left?)
- NAICS Code Coverage

You're Just Another Small Business



Never differentiate until the prospect or teaming partner perceives that you are equal to your competition

- **When you walk in the door, you're just another small business**
 - No immediate trust with the prospect or teaming partner
 - Perception that you are just like the other 50 small businesses that have called



“Our website indicates we perform approximately a dozen types of services . . .

*But the **three** we specialize in.”*

Capability Statement

- Your Baseline
- On your website (download)
- Download Free Template




Corporate Overview

25 years of industry expertise advising hundreds of businesses on starting or accelerating federal sales - cost-effectively with exceptional results. We work with small and large businesses to accelerate corporate strategy, win contracts, and increase revenue. We are not just an adviser - we are a trusted partner.

RSM Federal develops and executes, in concert with our clients, an aggregated education, sales, marketing, and teaming strategy to achieve revenue objectives. We support small, mid-tier, and large clients throughout the nation with comprehensive services to better understand and exploit government opportunities.

RSM delivers proven techniques, strategies and best practices for companies that currently operate or plan to operate in the Government market. Since 2003, our techniques and strategies have helped companies win hundreds of Government contracts.

For more information and specifics on how we have helped businesses like yours, please visit us at www.rsmfederal.com

Our Approach

We don't simply educate clients on how to accelerate, we tailor every technique and strategy to your specific products and services. Every client is different. Our approach is designed to accelerate the maturity of your business by 3 to 5 years.

Government Contracts



Commercial Contracts



Areas of Expertise

B2B / B2G Consulting Services

- ✓ Capture Management Strategies
- ✓ Go To Market Strategies
- ✓ Legislative Strategies
- ✓ Programmatic Teaming Strategies
- ✓ Marketing and Positioning
- ✓ Market Intelligence
- ✓ Mentoring and Coaching
- ✓ Workshops and Training

B2G Government Services

- ✓ Patron Engagement Strategies
- ✓ Veterans Business Programs
- ✓ Military Community Engagement
- ✓ Strategic Marketing ~ Engagement
- ✓ Business Case Analysis (BCA)
- ✓ Research and Analysis
- ✓ Sponsorship / Advertising
- ✓ Contract Acquisition Support Svcs

Certifications

Small Business VOSB, SDVOSB 

Company Data

DUNS: 829431191
 Cage Code: 5G2B0
 NAICS Codes: 541611 541613
 541910 531820
 561410 611430

Manual ISBN: 978-0-615-41348-8

More Information

- ✓ [Consulting Services](#)
- ✓ [Government Services](#)
- ✓ [Case Studies & Testimonials](#)
- ✓ [LinkedIn Company Page](#)
- ✓ [The Government Sales Manual](#)

RSM Federal
 Educate. Accelerate. Maximize Revenue.
 POC: Joshua Frank | contact@rsmfederal.com | www.rsmfederal.com | (703) 677-1700

Newberry / IBM Case Study

***IDIQ Strategy To
Guarantee \$10 Million Contract***

So What Did We Learn?

- **Propensity - How to research who buys, how much, how often**
- **Spend 80% of your time positioning – not responding to RFPs**
- **Government Prospecting:**
 - Which methods you should utilize
 - Multiple methods help you understand, position, differentiate, win
- **Successful Teaming = Information and Intelligence**
- **How to position with a Prime**
- **How small businesses are evaluated**
- **Differentiation**

THANK YOU

Free Session Download Today's Presentation

- Free - Manual Drawing**
- Free - Federal Access Program**
- Free - Government Templates**
- Free - Access To RSM Federal Adviser Team**



rsmfederal.com/success

code: **PTACWIN**

Code expires in 48 hours