

# Getting in Front of the Buying Cycle

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# About the SBDC

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- ❑ Business Advisors provide free and confidential one-on-one business counseling
- ❑ Funded by U.S. Small Business Administration and New York State
- ❑ Started serving start-up and existing small businesses since 1985
- ❑ To date: SBDC has assisted **33,960 businesses**, helping them to **invest \$492,300,287** in the area's economy, and helped to **create or save 19,006 jobs**.
  - ❑ Since March 2020, Farmingdale SBDC has assisted over **2200** businesses with accessing grants or loans for COVID19 relief totaling **\$44.6** million
- ❑ 23 Centers in New York State
- ❑ SBDC is **free** and helps with: **business plans, start-up questions, government procurement, MWBE certification, new product development, cost analysis, loan information, export services, disaster planning, marketing plans.**

# At the End of this Workshop...

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- Businesses will better understand how to communicate their value to the government
- Businesses will be able to create marketing strategies for the government
- Businesses will understand when and how to market to the government
- Businesses will understand how to create a capability statement

# What is Marketing?

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Marketing is the process of communicating the **value** of a product or service to customers

How do we communicate this?

**Create a strategy**

# Core Marketing Strategy

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1. Identify core company capabilities
2. Determine company capacity
3. Develop a marketing plan
  - Review the market
  - Overview of your target customer
  - Business goals
  - Strategies and tactics
  - Budget – 80/20 rule
4. Identify targets of opportunity
5. Make the calls

To create a marketing strategy, we need to understand:

- How the government decides to purchase
- When it decides to purchase
- Who do they purchase from

# General Acquisition Process – How Contracts are Created

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## First Phase

- Mission Review
- Needs Determination
- Requirements Determination
- Define/Describe Requirements (Scope)

## Second Phase

- Acquisition Planning
- Solicitation Phase
- Evaluation
- Negotiation
- Contract Award
- Contract Administration
- Contract Close Out

# How do we get in front of the buying cycle?

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## First Phase

- Mission Review
- Needs Determination
- Requirements Determination
- Define/Describe Requirements (Scope)

**Try to get into that first phase!**



# Get in front of the buying cycle

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## 1. Do your own market research!

### Research

Who's buying

How they're buying

How much they're buying

Who they're buying from

# Get in front of the buying cycle

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## 1. Do your own market research!

- Conduct market research to identify who's buying what you're selling
- Research the past:
  - Federal: [www.fpds.gov](http://www.fpds.gov) or [www.usaspending.gov](http://www.usaspending.gov)
  - State: [www.openbookny.com](http://www.openbookny.com)
  - City: [www.checkbooknyc.com](http://www.checkbooknyc.com)
- Research the present:
  - Federal: [www.beta.sam.gov](http://www.beta.sam.gov)
  - State: [www.nyscr.ny.gov](http://www.nyscr.ny.gov)
  - City: <https://a856-cityrecord.nyc.gov/Search/Advanced>
- Research the future:
  - Federal: [www.acquisition.gov](http://www.acquisition.gov)
  - State: [www.nyscr.ny.gov](http://www.nyscr.ny.gov)
  - City: Per each agency

# From this research, make a plan:

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- Pick 3-5 agencies that are the top purchasers
  - How does the agency buy?
    - Bigger purchases, smaller purchases?
    - Set-asides, certified businesses?
    - Buying cycle
  - Who do they buy from?
    - Ability to be competitive?
    - Opportunities to capture the market or to sub-contract?
- Do they have a list of vendors for smaller purchases?
  - Register for any vendor portals the agency may have
- Make a list of decision makers in that agency
- Look for ways to engage agency

# Getting in Front of Decision Makers

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How do you reach your top agencies and decision makers?

## 2. Network!

- Visit your top 5 agencies' websites
  - Go to their doing business page and MWBE/small business pages
    - Look for opportunities to develop relationships
      - Attend virtual meetings/industry days/webinars
      - Look to see who are the small business/MWBE specialists and reach out to them with your capability statement and pitch
      - Ask for a capability briefing
- Attend pre-bid conferences

# Why is getting in front of the decision makers important?

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- Intelligence gathering to help you get into the first phase of procurement
  - Discretionary spending – these opportunities do not have to be publicly advertised or open to bidding
    - Federal - \$25,000 or less
    - State - \$50,000 or less
    - City - \$500,000 or less
  - Federal government has set-asides for anything under \$250,000 for small businesses
    - If they can identify 2 small businesses to do the work, they can set it aside

A Contracting Officer cannot select you if they are not aware of you!

# 4 Types of Government Customers

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## 1) Contracting Officer

- Gate keepers to the end users
- They are responsible for all aspects of the solicitation process – releasing the solicitation, answering questions about the process and ultimately help decide who should be awarded a contract

## 2) Program managers/high level decision makers

- They are the “influencers” – they generate the contracting requirement and are responsible for executing the requirement
- They make the buying decisions

## 3) End User

- The end user is the person actually using the product or service.
- They are far removed from the contracting process – but they often have input into who is chosen

## 4) Small Business Liaison/MWBE Liaison

- These are the people that are responsible for meeting small businesses and connecting them to opportunities
- They do not have any say in the buying process, but can introduce small businesses to program managers or send small businesses opportunities that fit them

# Who are you talking to?

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- ❑ It is important to know who you are speaking to, and create a pitch that speaks to that person's position
  - ❑ Contracting Officer – **focus on the capacity to deliver**
    - ❑ Every contract is an act of trust
  - ❑ Program manager – **Big Ideas**
    - ❑ “We know what your problems are and can help you solve them”
    - ❑ Can introduce innovative products
    - ❑ They are interested in how to better achieve their agency's mission
  - ❑ End User – **market to their pain points**
    - ❑ They are the ones that are actually going to use your product or service, so their buy-in can be powerful in the procurement process
  - ❑ Small Business Liaison – **focused on diversity and capability**
    - ❑ They want to refer diverse but skilled businesses to Contracting Officers
    - ❑ They do not make the procurement decisions

# Getting in Front of Decision Makers

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## 3. Respond to Requests for Information, Request for Comments, or Sources Sought

- These help the agency determine if the industry can provide them with the required service or product
- Request for Information (RFI)** – agency advertises that it is seeking to learn about the options available to it when addressing a specific need
- Request for Comment (RFC)** – agency needs input on a solicitation’s structure and language
- Sources Sought** – From the Federal government specifically, these are notices that seek to collect and analyze information about the market to satisfy agency needs

**Vendors respond with their capabilities, similar projects they have conducted, and certifications**



# Getting in Front of Decision Makers

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- ❑ Savvy businesses use these notices to:
  - Create set-aside contracts
  - Start agency-focused marketing campaigns
  - Create single-source awards
  
- ❑ Gives you a heads-up that the agency is thinking about a procurement in your industry
  - Gives you time to market to them
  
- ❑ Sometimes only respondents receive the RFP

# Marketing Materials You Should Have

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## Website

- Updated with contact information, pictures, services
- Domain should be your business name, or as close as you can get it
- Have a dedicated “government” section

## Social media

- Use social media to showcase your work and obtain reviews
  - Google, Facebook, Houzz, Home Advisor

## Newsletters/targeted campaigns

- Update government customers on the type of work you are doing
- Expansion of services
- Certification

## Capability Statement

# Capability Statement

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Whenever you contact an agency, you need a

## Capability Statement

- ❑ A Capability Statement is a one page document that highlights a company's areas of expertise
- ❑ It tells potential customers who you are, what you do, and what sets you apart from your competitors
- ❑ A Capability Statement is a door opener – it is used to begin or refresh a relationship
  - ❑ Used to obtain a decision-maker meeting
  - ❑ Tool used during meetings
  - ❑ Used at meet-and-greets
  - ❑ Used as follow up to an introduction

# Capability Statement

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- ❑ Must be tailored to the target
  - Each agency has its own mission and focus and the statement should speak directly to that
  
- ❑ Must be clear and easy to understand
  
- ❑ This is a marketing document, so it should be visually interesting
  - Branding
  - Pictures
  - Colors
  
- Must be one page

# Capability Statement

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- The Capability Statement should DEMONSTRATE your CAPABILITY
- Ability to manage
  - What kind of projects have you manage before?
- Your technical ability
  - Education/training level
  - Staffing
  - Core Competencies
- Your capacity
  - Equipment, staffing, facilities

# Capability Statement

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## □ 5 elements of a capability statement

1. Title – call it what it is!

2. Core Competencies

3. Past Performance

4. Differentiators

5. Company Data/Certification/Codes

# Capability Statement

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## Capability Statement



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### Core Competencies



- Call it a capability statement
  - This is a term known throughout government contracting decision makers and indicates you have knowledge of the contracting process
  
- Branding: logos, color, style
  
- Include your contact information!
  - Need a POC
  
- Sentences should be short, use bullets as well

# Core Competencies

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- Section title should read – core competencies
- Create a short introductory statement
  - Identify what your company does best
  - May include your mission statement
- Laser focused on the agency's requirements and needs
- Relate the company's core competencies to the agency's specific needs
- Key-word heavy bullet points



# Core Competencies

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- Supply chain management, order management, logistics management, optimization and visibility
- Creative, global 3PL solutions that address needs ranging from single transactions to some of the largest and most complex supply chain challenges
- Open and scalable technology that is readily integrated into existing operations, and extended as needs evolve
- Lean logistics focusing on reducing waste and inventory, standardized work and mistake proofing



# Core Competencies

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## Core Competencies

Our core competencies include the focused service of working with our clients to successfully integrate the project's construction phases of planning, budgeting and design, while meeting all quality, cost, and schedule requirements.

- Roofing
- General Contracting
- Liquid Applied Roofing
- Waterproofing
- Additions and Alterations
- Flooring
- Carpentry
- Interior Build-Out
- Drywall & Insulation
- Painting
- Renovations
- Roofing & Siding

# Past Performance

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- Section Title: Past Performance
- List past customers for whom similar work was performed
- Show the benefit to the agency
- Does not have to be with the government!
- List 3-4 with a short description of work

# Past Performance

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## Sample Past Performance (Short)

*The following examples are for a potential client seeking custom widget manufacturing capabilities*

- **NASA**

Contract to manufacture custom widgets for the Mars landing mission

- **Howard Motor Company**

Manufacture custom widgets for the company's new truck design platform

- **Solar Panels USA**

Designed and manufactured widgets for home solar panel systems

# Past Performance

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## Sample Past Performance (Long)

NASA | \$50 million contract

MWI won a contract from NASA to design, test and manufacture custom widgets for the Mars landing mission. The widgets we designed exceeded the specifications required by NASA and, as a result, MWI received a multi-year extension to design, test and manufacture widgets for all NASA space exploration missions.

# Differentiators

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- What sets you apart?
  - Location
  - Training
  - Relationships
  - Experience
  - Technology
  - Quality Assurance Program
  - Industry certifications
  - Socio-economic certifications – **sometimes!**
- Relate how this benefits the agency, prime, or team
- Separates you from the competition
- List 2-3 strong differentiators rather than list mediocre examples

# Differentiators

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- Why do your best customers use you?
- What is it about your staff that gives you the advantage over your competitors?
- How and why is your company the best choice for the needs of this opportunity or agency?
- Why are your solutions better than others that are available?
- Is your business located near the agency?

# Company Data

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- Brief company history
  - Mission statement
  - When your company started, where you are HQ'ed/operate

## Sample Company Background

Meridian Widgets, Inc., is dedicated to manufacturing the highest quality widgets in North American through exceptional design, quality workmanship and by providing a supportive sales and service team for our customers.

Founded in 2015 by John Doe, Meridian Widgets, Inc., (MWI) is headquartered in Springfield, USA. MWI manufactures widgets for industrial, commercial, residential and custom applications. MWI manufactures its widgets in Springfield, USA and has distribution facilities in Louisiana, New York, Michigan and Springfield, USA.



# Company Data

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- DUNS
- Cage Code
- NAICS, PSC, and NIGP Codes – depends on who you are marketing to
- Accepts credit cards?
- Certifications
- Permits/licenses
- Contact information
  - POC, address, phone number, website, email
- Social media

# Capability Dos and Don'ts

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- DO focus on your customer!
- Be Brief – one page, to the point
- Do use bullets
- Do create several tailored statements
- Make it visually interesting
- Convert it to a PDF

# Final Thoughts

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- Research is the first step to understanding how to engage with the government
  
- Meet (virtually) with your local SBDC to understand how to market your business to the government
  - Bidlinx

# Thank You!

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