WELCOME TO THE
2015 SAME Small Business Conference
for Federal Engineering, Construction & Environmental Programs

Nov. 4-6 New Orleans, La.

Hosted by the Society of American Military Engineers
Advanced Teaming Strategies
To Accelerate Small Business Government Revenue

Joshua Frank
Managing Partner
RSM Federal
Advanced Teaming Strategies
To Accelerate Small Business Government Revenue


“Tel-Tec has been trying to find the right consultant and leadership group that clearly understood the federal 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 thirteen (13) government 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 three years - they are that good!”

Claye Green, Managing Director
Technology Blue
Pittsburgh, PA

Presenter
Joshua Frank
RSM Federal
Joshua P. Frank  MIS, MBA

- RSM Federal, Managing Partner
- 25 years in federal market
- Former military intelligence officer
- Veterans Business Resource Center, Board of Directors

Expertise
- Author and National Speaker on Small Business Acceleration Strategies
- Specialize in techniques & strategies to accelerate market entry
- Federal marketing, prospecting, sales, and capture management
- Coaching, Training, Consulting
Teaming
Building a Winning Team with Subs and Primes
Teaming Requires Strategy
Requires Effective Capture / Sales / Business Development Strategies

80% most Companies
Focus on Unqualified Opportunities

UNQUALIFIED
Q: Why do most businesses waste 80% of their time on Unqualified Opportunities?
#1 Answer: Because they don’t have the data (intelligence) they need to properly execute a sales or teaming strategy!
Let’s Get Started

**Session Expectations**
- Basic To Advanced Content, Concepts, Techniques, and Strategies
- A lot of information . . . in 1 Hour
- 45 minutes presentation – 15 minutes Q&A
- Download presentation after session

**Agenda**
- Business intelligence
- Common challenges
- How your company is evaluated by other companies
- Differentiating your company, products, services
- Federal Access Program
- Q&A
Business Intelligence
The Foundation For Teaming
Typical Business Focus

Where do most businesses focus?

- RFP Released (80%)
- Meeting with Prospects (5%)
- RFI and Sources Sought (5%)
- Teaming / Partners (10%)

Acquisition Phase

Where should you focus?

- Positioning with Prospects (80%)
- RFI and Sources Sought (5%)
- Teaming / Partnering (10%)
- RFP Released (5%)

Pre-Acquisition Phase
Government Acquisition Cycle

**Pre-Acquisition**

- Building Concept
  - Basic Vision
  - RFI
  - Sources Sought

**Acquisition**

- Procurement
  - Basic Vision
    - SOW Defined
    - RFQ
  - IFB / eBuy

- Procurement
  - Identify Process, Features, Benefits
  - RFP

**Government Critical Path**

\[ X = 3 \text{ – } 6 \text{ Months} \]

**Abbreviations**

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

**Source**

Source © RSM Federal, March 2012

**Figure 8 – Government Acquisition Process**

Hosted by the Society of American Military Engineers

@SAME_HQ | #SAMESBC
Business Intelligence For Teaming

Department of Defense
Federal Agencies & Commands
Competitors ● Teaming Partners
Sales Data ● Contract Data
Contracting Officers
Pricing Data ● NAICS Codes
Buyer Contact Information
Winner Contractor Data
Place of Performance
DUNS Numbers
Set Asides
# of Bids
Information and Knowledge = Competitive Advantage

90% Small Businesses
First Contract via Teaming

Differentiation
Relationship
Competitive

YOUR COMPANY

Competitive Intelligence

Knowledge Information Intelligence

TEAMING PARTNER

GOVT OPPORTUNITY

© RSM Federal
FedBizOpps (FBO) Only 10\% of All Opportunities

FBO – Single Government Point of Entry (GPE) for >$25,000
Common Challenges
Teaming With Other Companies
Common Challenges – Teaming

- They won’t call me back
- We don’t have time to dedicate a resource to the proposal team
- The big boys take care of themselves
- We are just as good as the other small co’s who received work

Don’t Make Common Mistakes

- No begging or looking for handouts
- Do not steal the work after an agreement is reached (If you are Prime)
- Not having intelligence on the opportunity (“The Triangle”)
- Focus on the relationship, not joining the team
Building A Relationship With Larger Companies

Your focus is mapping the value of your products and services and past performance to client opportunity.

The first meeting should be YOU bringing an opportunity to THEM:
- Bring them an opportunity they can not prime on their own (small business set-aside) or an opportunity they do not have intelligence on (and you do).
- Bringing a Small Business Opportunity to a large company, one which they can not prime themselves, is a 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 companies to mandate % work 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)

 Exclusivity?
 - Standard with few exceptions
 - Includes complimentary contracts

 Teaming Agreement
 - How to position with larger companies

Free Download
After Session
First vs Second Tier Sub-Contracting

The Second-Tier Domino Effect – 5% Average Loss In Bill Rate

<table>
<thead>
<tr>
<th>Prime</th>
<th>$73.50 Your Standard Bill Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>$70.00 First Tier / Discounted Rate</td>
<td></td>
</tr>
<tr>
<td>$66.50 Mandated Second Tier Rate</td>
<td></td>
</tr>
<tr>
<td>1920 Annual Billable Hours</td>
<td></td>
</tr>
</tbody>
</table>

1st Tier Sub

<table>
<thead>
<tr>
<th>First Tier Sub</th>
<th>$70.00 x 1920 = $134,400</th>
</tr>
</thead>
<tbody>
<tr>
<td>Second Tier Sub</td>
<td>$66.50 x 1920 = $127,680</td>
</tr>
</tbody>
</table>

Source: © RSM Capital Group, March 2012

Figure 109 – Effects of Tiered Contracting

Much more than Money!
- Only 5%? The above example is $6,720 annually!
- Impacts salary decisions
- Difference between a 9 to 5 employee and one that calls you with new opportunities!
- Impacts Future Business
A Winning Team and No Work

Common statements made by Small Business:
- Not Fair
- Unprofessional
- Unethical
- We just can’t figure out how to convince the Prime to give us work!

The reason you don’t have work is because you failed to:

“Sell The Prime”
As a member of a team, you must position your value with the Prime before the RFP is released, during proposal phase, during source selection, after award, and if an IDIQ contract, for every task order.

Your teammates are now your competition . . .
How Companies Evaluate You
Not Just Your Products & Services
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
Differentiation

It’s Not What You Sell – It’s How You Position
You’re Just Another Small Business

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

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

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

But the three we specialize in. . . . . . . .”
Categories of Differentiation

**Direct**
- Easily Qualifiable and Quantifiable
- Fairly easy to communicate and position
- Communicate Value

**Indirect**
- Difficult to position
- Trust is the most important
- Position by “Telling a Story”

**Balancing**
- Socio-Economic Status
- Corporate Certifications
- Recognized certification, perhaps not yet mandated by government

**Direct Differentiators**
- Value versus Capability or Service
- Competencies and Past Performance
- Perceived / Actual Niche
- Key Personnel, Your Staff, SMEs
- Current Customers
- Staffing / Management Approach
- Teaming Partners
- Certifications
- CPARS / PPIRS Ratings
- Facility Clearance

**Indirect Differentiators**
- Trust → You Can Do What You Say
- Agility, Flexibility, Innovation
- Hyper-Responsiveness
- Reputation

**Balancing Differentiators**
- Socio-Economic Status
- CMMI, PMO

Source: © RSM Federal, 2009
Capability Statement

- Your Baseline
- On your website (download)
- Tailor for opportunity
- Tailor for teaming partners

Free Download After Session
Introduction & Capability Statement (ICS) – (Advanced)

What Is It?
- Mini-Proposal, 5 - 7 pages
- Successfully get on team of your choice
- 90% success rate
- Critical for Small Businesses

Objective
Succinctly and clearly map, cross-walk, and weave the value of your capabilities into the requirements / task areas required by the prospect and the requirements of the company you want to team with
Introduction & Capability Statement (ICS) – (Advanced)
Introduction & Capability Statement (ICS) – (Advanced)

Paragraphs

- Introduction and Summary
- Company Overview
- High-Level Benefits to Teaming
- Prime and Subcontracting Strategy
- Opportunity or Agency Requirements or Task Areas
- Corporate Competencies and Capabilities
- Past Performance Mapped to Government Opportunity
- Past Performance Mapped to Teammate
- Standard Company Data (NAICS Codes, Cage Code, etc.)
- List of Contracts / Past Performance
Newberry Group / IBM Case Study

IDIQ Strategy To Facilitate a $10 Million Contract
Federal Access Program
$1.5 Billion In Government Contracts Since 2011

Federal Access
Powered by RSM Federal

Hosted by the Society of American Military Engineers

www.rsmfederal.com
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Federal Access Program
A Unique Solution

- Different from EVERY other program you’re familiar with
- Industry Standard – high start-up costs and NEVER get updated
- Federal Access – most cost-effective program on the market

Where this business program really excels:
- Monthly Updates – templates, best practices, videos, and forum
- Monthly Advanced-Level webinars
- Access to top people and SMEs
FA Program Overview
Exclusive Cloud-Based Member’s Portal 24/7
FA Program Overview
Hundreds of Templates, Documents, Videos, & Resources

- Digital Template Library
- Proposal Library
- Video Training Library
- Monthly Webcasts & Events
- Member’s Forum & FAQ
- Advisor Support Email / Phone
- Government Sales Manual
- Advisor Session
Let’s Review – What We Learned

- Successful Teaming = Information and Intelligence
- Common teaming challenges
- How your company is evaluated by other companies
- Differentiating your company, products, services
- Industry, market, prospect, & partner agnostic

These techniques & strategies → Federal Access Program

✓ SAME 14 Day Free Access
THANK YOU

Link Expires Friday Evening 5:00pm

- Download Presentation
- Download Marketing, Sales, Teaming Templates
- Free 14 Day Access to FA

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