

**The Federal Sales Game: How to Play to Win  
Supplemental Notes**

**KEY TAKE-AWAY:**

**Right here, you have the insight into what each level of contact in a federal agency cares most about, and the key things to say to start to develop trust with each of them from the very first conversation – from contact to contract.**

We want to give you tools to make it easier to bring new partners up to speed, especially about contract vehicles. We'll be talking about the different types of people you'll be talking to at each level. We'll be talking about the people involved in buying: what they're interested in, what they're afraid of, and how to talk to them. You'll be able to speak a new language, and be able to communicate more strongly with each other about the federal market. We'll be talking a little about rules, relationships, contracting officers. On the second half of the call, we'll be talking about GSA Schedules, IDIQ's, other contract vehicles, and set asides, and what they mean to you.

You're going to get the benefit of what's taken us years to learn. You will save a whole year of stumbling around – a year that costs typically over \$100,000 of sweat equity and expenses – with no sales. We're giving you a top level understanding of the relationships, then the data will tell us what we need to do, and we will build a sales plan around that.

**Slide 2:**

Selling to the federal government is a relationship game.

You can expect to spend time building relationships before the requirements come out. Usually when they invite you in to talk, they're unhappy. There is PAIN, and we have to find out what that is.

A lot of people think that if you write a fabulous proposal in response to an RFP on FedBizOpps, you have a chance of winning. They think that with federal buyers you have to wait for a bid notice or chance to submit a proposal to someone they've never met, after the RFP hits the street. In fact 80% of those solicitations are won by incumbents.

There's a process of wooing them. Customers feel dedicated to their current vendors. They'll be a little bit nervous until they get to know us, so they're willing to tell us their thoughts and fears, and share info about their needs and how that fits our expertise. They need to know who we are and look at our services, so that when they choose us they can defend that choice.

It will take a lot of dating...and sometimes they'll say no. Some are easier to convince than others. With security, in particular, they really need to know and like and TRUST you. Other people will want to protest when you win!

Listen for when they say, "Why don't you come into my office and talk to me?" Why would they do that? Sure, they want to feel you out...and share issues with you. But why? Lack of performance by a current vendor, or wanting to find out more about what you do. More often, people "cheat" on their current vendors to visit with you because they're not happy. There is something wrong.

In your subtle, relaxed way, you'll find out what they're not happy about. To do that, you have to build trust. You have to be ready take 6-8-10-12 months to develop a relationship and have them feel comfortable with you.

Many of the deals that go on the street are based on long term relationships. We'll have to go out and meet as many people as possible. You do have some ways to close business quickly. But you'll also have to get in there way ahead of time. It may take a year or more to woo them from others – presentations, subcontracts, get in there in small portions, carve out your niche and grow.

Sometimes, be open to being clear about the reasons why you might be getting pushback. Sometimes, the chemistry is better with one of your team members than another. No problem! Bring the person they love most when you come on calls, every time.

In order to go after this market, you have to hit the field and do outreach...no less than you already do in the private sector. Some people – many of the 650,000 registrants in SAM, and thousands on GSA Schedule -- think the feds will find them, or aren't allowed to talk to customers, or they can wait for the calls, because they're registered, or they have a set aside or contract vehicle. But, in fact, they usually only use it to make sure you're registered to do business.

Once an incumbent is in, their contract can last for years, and have options to extend. But you know how long it takes to land a client. You've got wonderful examples of your work to woo them. When they

meet you for the first time, they already have someone they're married to. Even if they don't like them, they may feel uncomfortable, almost like they're cheating on their incumbent.

To woo them away from their incumbent...can involve conversations, webinars, training, touch base, touch base, maybe an idea, maybe you formulate something...take up to a year. Maybe not that different from commercial...but expect more outreach than you've ever done before.

While they're waiting, they might ask you to do a small project, "dating" you, to give you a shot. That's what you want them to do: have some great experience with past performance. Be willing to go through those steps.

They need to like you, and feel safe; even if they don't like what they have, it's an effort to leave their current vendor. Developing relationships take time and activity, and meet a lot of contact. Sometimes when you win, losers may protest; your buyer will have to fight for you. Federal business is for the courageous! By the time you see an opportunity online, it's already wired for someone else. You need to get there first. You need to be helping them write the specs.

You've got to be willing to get on the phone, talk to people, find out about competition, and woo your prospects! What's your willingness to get in there 6 months to a year to develop relationships one on one? It's challenging.

### **Are you willing to put yourself out there?**

"I don't have a problem with that!" The fact that you're even willing to do that makes you more competitive than most! We'll be giving you information you can have at your fingertips. The willingness is what matter.

After all, how can you be in sales, if you don't? 😊 People naturally feel nervous. But if you're not shy about that, then we'll help you with the rules and what to talk about. Super! We're going to be doing a data dip to see who's buying from whom and see when contracts are coming to an end, so you can chat with them before then, and eventually write a proposal.

This is the basis for success. The desire to do this is 90% of it. You need to meet as many people as possible and get to know them, and what they care about. Once they really want you, they'll be behind closed doors defending you, and asking the others to vote for you. They need to be totally convinced and in love with you.

The competitive analysis will not only find the people who buy what you sell, but how to develop relationships at every level. You've had some pain along the way, so you really get what we're talking about.

By the end of our third call, the plan will give you a specific plan that will provide guidance to anyone you bring on to make such calls. You can share this recording and these notes with any new team members, too!

### Slide 3: Rules of Engagement = The Federal Acquisition Regulations

**How familiar are you with the Federal Acquisition Regulations?** In short, it's the rule book that buyers must follow to prove that fair and open competition occurred. How often does that really, truly happen? Maybe about five percent of the time. How perfect do the files look? VERY. How often do protesters win on a recompetete? Not very.

It's a law book, a bible of protocol that federal employees must follow to work with you. It's THEIR job to know it. And it's there to protect THEM.

It tells them how to ensure that fair and open competition has happened when they purchase things. Over 1,800 eye-crossing, painful pages. Now, it's on [www.acquisition.gov](http://www.acquisition.gov). Many of them have *master's* degrees in the FAR...to learn how to work with it. It looks SO overwhelming. But when you pick it apart, there is huge room for interpretation. You could drive a truck through the rules. Buyers need to know how to use the rules and the work-arounds.

There are probably 80,000 contracting officers who are considered experts in the FAR. And 80,000 interpretations! We need to be able to come to them and understand THEIR personal understanding and interpretation. Each one reads it differently. They might take the FARs and add even more protocols, just to stay extra safe. Often they'll add MORE rules or processes just to be extra safe! We need to follow their rules and mirror whatever they need. Any time we can sit down and talk to the contracting officer about their rules is good!

Remember this phrase: I just want to follow proper protocol: what's yours?

They will want to put in the file, "This company is our sole source choice for this reason." They might say, "We need someone who's in a HUBZone and has these qualifications..." The rules might only require them to get two or three bids, but their office might routinely get six or seven offers just to be safe.

- EXAMPLE: when USA first entered IRAQ, a contracting officer we know had his Master's degree in acquisition. He was one of the first buying officers on the ground. No buying was happening, for the water, fuel, supplies, they needed. CO's were saying, "Here, the tribal leaders take a 20% cut on everything. Isn't that against the law? We don't know what to do." "Well," he said, "why not look at the tribal leaders as owners in the company? Just build in that mark-up as their profit margin?" That's what they did. Only then could they move forward.

And she may also just throw rules at you to make you go away.

For example, there's a myth that they're not allowed to talk to you. In fact, FAR 15.201 says the government is encouraged to talk to vendors about innovation prior to bidding! It helps us be BRAVE; we don't wave that rule in front of them. IF they're grouchy, just move on. Someone else will talk to us!

One of the top complaints vendors make is "Government buyers aren't allowed to talk to us."

That's not true.

Not only are Contracting staff and Federal buyers allowed to talk to you, but the highest level of Administration officials continues to actively *encourage* them to have those conversations!

Federal Acquisition Regulation (FAR) 15.201 says the government is encouraged to talk to vendors prior to bidding!

**15.201 Exchanges with industry before receipt of proposals.**

(a) Exchanges of information among all interested parties, from the earliest identification of a requirement through receipt of proposals, are encouraged. Any exchange of information must be consistent with procurement integrity requirements (see [3.104](#)). Interested parties include potential offerors, end users, Government acquisition and supporting personnel, and others involved in the conduct or outcome of the acquisition.

Remember, this regulation isn't a vendor's bill-of-rights. You can't wave it front of a Contracting Offer and tell them they have to talk to you (in fact, you basically don't ever want to tell a Contracting Officer how to do their job). If they're grouchy, just move on. Someone else will talk to you!

Let's look at the details:

**15.201 Exchanges with industry before receipt of proposals.**

(b) The purpose of exchanging information is to improve the understanding of Government requirements and industry capabilities, thereby allowing potential offerors to judge whether or how they can satisfy the Government's requirements, and enhancing the Government's ability to obtain quality supplies and services, including construction, at reasonable prices, and increase efficiency in proposal preparation, proposal evaluation, negotiation, and contract award.

(c) Agencies are encouraged to promote early exchanges of information about future acquisitions. An early exchange of information among industry and the program manager, contracting officer, and other participants in the acquisition process can identify and resolve concerns regarding the acquisition strategy, including proposed contract type, terms and conditions, and acquisition planning schedules; the feasibility of the requirement, including performance requirements, statements of work, and data requirements; the suitability of the proposal instructions and evaluation criteria, including the approach for assessing past performance information; the availability of reference documents; and any other industry concerns or questions.

## How might those exchanges take place?

### 15.201 Exchanges with industry before receipt of proposals.

(c) Cont'd

Some techniques to promote early exchanges of information are—

- (1) Industry or small business conferences;
- (2) Public hearings;
- (3) Market research, as described in [Part 10](#);
- (4) One-on-one meetings with potential offerors (any that are substantially involved with potential contract terms and conditions should include the contracting officer; also see paragraph (f) of this section regarding restrictions on disclosure of information);
- (5) Presolicitation notices;
- (6) Draft RFPs;
- (7) RFIs;
- (8) Presolicitation or preproposal conferences; and
- (9) Site visits.

(d) The special notices of procurement matters at [5.205\(c\)](#), or electronic notices, may be used to publicize the Government's requirement or solicit information from industry.

(e) RFIs may be used when the Government does not presently intend to award a contract, but wants to obtain price, delivery, other market information, or capabilities for planning purposes. Responses to these notices are not offers and cannot be accepted by the Government to form a binding contract. There is no required format for RFIs.

## Want a one-on-one call or meeting?

While what you might want most is a one-on-one meeting, you may need to show some good faith effort of your own by going to a few of the public events first, to demonstrate to the agency's representatives that you're willing to invest time and effort to get to know them. Be persistent and patient. Playing the long game is easier when you are *focused* on a few target agencies.

## Are there innovations in the way you do what you do?

Let that be your conversation opener: to talk with them about innovation and new ideas for *future* acquisitions, not the one that's on the street right now.

**Why and when might they be reluctant to talk to you?**

See Section (f), below.

**15.201 Exchanges with industry before receipt of proposals.**

(f) General information about agency mission needs and future requirements may be disclosed at any time. After release of the solicitation, the contracting officer must be the focal point of any exchange with potential offerors. When specific information about a proposed acquisition that would be necessary for the preparation of proposals is disclosed to one or more potential offerors, that information must be made available to the public as soon as practicable, but no later than the next general release of information, in order to avoid creating an unfair competitive advantage. Information provided to a potential offeror in response to its request must not be disclosed if doing so would reveal the potential offeror's confidential business strategy, and is protected under [3.104](#) or [Subpart 24.2](#). When conducting a presolicitation or preproposal conference, materials distributed at the conference should be made available to all potential offerors, upon request.

***When an RFP is on the street, they're pretty much in blackout mode.***

Even if what you want to talk to them about isn't the solicitation they're working on, they are super-cautious! Expect that any communications with buyers and contracting officials will be somewhere between formal, limited, or conducted according to prescribed rules and process.

But you CAN catch them between bids. If they handle the kind of service or product you purchase, odds are good that they or a colleague near them will do more of it in the future.

***Fiscal year-end*** is not a great time to call people who've never heard of you. Even ***OUTSIDE*** of fiscal year end, you may still run into some people that want to make you go away. Just call on the next one.



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MAR - 2 2018

MEMORANDUM FOR SECRETARIES OF THE MILITARY DEPARTMENTS  
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UNDER SECRETARIES OF DEFENSE  
CHIEF MANAGEMENT OFFICER  
COMMANDERS OF THE COMBATANT COMMANDS  
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DIRECTOR OF NET ASSESSMENT  
DIRECTORS OF DEFENSE AGENCIES  
DIRECTORS OF DOD FIELD ACTIVITIES

SUBJECT: Engaging with Industry

Our National Defense Strategy (NDS) directs our intentional engagement with industry to harness and protect the National Security Innovation Base as well as modernize key capabilities. Cultivating a competitive mindset requires that we optimize our relationships with industry to drive higher performance while always remaining within the letter and spirit of ethics and procurement regulations. This policy updates Deputy Secretary of Defense memorandum, Subject: Policy for Communications with Industry, dated June 21, 2010, to achieve the objectives of the NDS and reiterates the guidance in the Secretary of Defense memorandum, Subject: Dialogue with Industry, dated April 24, 2017.

The Department relies upon thousands of contractors spanning a wide array of industry segments and supporting a multitude of mission requirements. Industry is often the best source of information concerning market conditions and technological capabilities. This information is crucial to determining whether and how industry can support the Department's mission and goals. Conducting effective, responsible, and efficient procurement of supplies and services while properly managing the resultant contracts requires Department personnel to engage in early, frequent, and clear communications with suppliers. As the NDS makes clear, dialogue helps industry make informed investment and business decisions necessary to meet near- and long-term requirements of the Department. Proactive engagement will maximize support to the

Warfighter; set realistic expectations and technologically achievable requirements; enhance the ability of organizations to meet cost, schedule, and performance objectives; and establish policies and business practices that promote the long-term viability and competitiveness of the industrial base supporting defense.

We must always comply with the ethics and procurement laws and rules governing interactions with industry. They should not, however, cause officials to be reluctant to engage in exchanges with industry. While we must always be mindful of our legal obligations, they do not prevent us from carrying out our critical responsibility to engage with industry. There is a broad range of opportunities for communications with industry in a fair, impartial, and transparent manner that fall well within the parameters of the ethics and procurement laws. For example, events hosted by industry associations may provide opportunities to efficiently, effectively, and ethically connect the DoD with leaders from across a particular industry or segment.

The Department's policy continues to be that representatives at all levels of the Department have frequent, fair, even, and transparent dialogue with industry on matters of mutual interest, as appropriate, in a manner that protects sensitive information, operations, sources, methods, and technologies. Leaders must talk with personnel about the importance of having dialogue with industry and help them understand the parameters for doing so. To assist personnel, attached are DoD Myth-Busters on Communications with Industry, which are intended to update and supplement the "Myth-Busting" memoranda previously issued by the Office of Federal Procurement Policy. Also attached is a synopsis prepared by the DoD Standards of Conduct Office of applicable ethics and procurement laws that form the boundaries within which personnel must operate in their communications with industry.



Attachments:  
As stated

## ATTACHMENT A

## DoD Myth-Busters - Communications with Industry

1	Myth: DoD officials should never hold individual meetings with a defense contractor.
	Fact: DoD officials may hold individual meetings with a defense contractor. However, officials should take into account several factors, including the topic(s) to be discussed, whether the official is willing and able to hold such meetings with all similarly situated entities, any pending matters involving the contractor (procurements, claims, audits, etc.), and any other factors that might give rise to an appearance of impropriety. In fact, there may be situations where an individual meeting with a contractor is to DoD's advantage or necessary to further DoD's mission, such as where a discussion of a company's proprietary information is necessary to an overall understanding of industry status and capabilities. Of course, group meetings, such as "industry days" are always a safe bet if you don't need to have an individual meeting.
2	Myth: Outside of communications required as part of the procurement process or contract administration matters, only senior leaders should meet with members of industry.
	Fact: While there certainly may be occasions where a senior leader needs to meet with industry representatives, it is always best to ensure that meetings are held at the lowest appropriate level relative to the topic and purpose of the meeting. This helps to avoid any appearance of "special access" or "favoritism," as well as negating any perception that the boss favors a particular entity. Additionally, when senior leaders meet with industry, they should consider having appropriate members of their staff present, particularly if there is an ongoing procurement or other sensitive matter. Staff can provide valuable input and backup to assist in mitigating procurement integrity, litigation or other risks.
3	Myth: Industry does not have ethics rules of their own.
	Fact: Many companies not only have their own ethics policies, but may actually have more stringent restrictions with significant penalties. While Government ethics rules are applicable only to Government personnel, contractors may have their own set of ethics rules that govern their interactions with customers, to include their Government clients. Additionally, since many industry personnel are "at will" employees, they may be subject to immediate termination for violations.
4	Myth: Industry's interests are diametrically opposed to the Government's interests.
	Fact: While this may be true at times (for example, where the Government is engaged in litigation with a contractor), it is not universally true. Generally, both parties have an interest in successful contract execution. Appropriate communications that are frequent and meaningful are key to reaching that mutual goal and can significantly reduce the misunderstandings and miscommunications that lead to adversarial relationships and proceedings.

5	<p>Myth: Industry is more risk tolerant than the Government.</p>
	<p>Fact: Companies do not want negative media or Congressional attention any more than Government agencies do. Publicly traded companies are particularly sensitive to the potential for negative coverage to impact stock prices and must answer to shareholders and boards of directors when mishaps occur. Of course, for both industry and the Government, there may be individual personnel who intentionally or inadvertently cause issues. However, the impact that these individuals have can be mitigated, or even eliminated, with proper training and clear communication of expectations (both internally from leadership and externally between Government and industry personnel/leaders). By keeping appropriate lines of communication open, we can facilitate our mutual interests in avoiding potential issues and maintaining public trust.</p>
6	<p>Myth: I'm just meeting with my old buddy "MG (ret.) Smith" who happens to work for a major defense contractor so I don't need to worry about ethics or procurement integrity issues.</p>
	<p>Fact: This one can cut both ways, and it's all about the details. Of course, you may meet with your old friends, even if they work for defense contractors. But, depending on your position/participation in relation to the work performed by the contractor, there may be appearance or impartiality issues. Obtaining information about the intent of the meeting beforehand is important. The first step is to consider whether the meeting really is purely social:</p>
	<p>* What will you be discussing? If, for example, it's the kids and grandkids - no problem. If it's his company's contract or capabilities, then it's probably not a personal meeting.</p>
	<p>*Where are you meeting? If it's at the office on official time, probably not a personal meeting. If it's at a home or social establishment on personal time, then more likely a personal meeting.</p>
	<p>*If you are going out, who is paying? If his company is paying or reimbursing, then it's not personal.</p>
	<p>Conversely, what about the retired GO/FO who used to be your boss, not your buddy? What if he calls and wants to meet now that he works for a major defense contractor? Depending on his post-employment restrictions, this may be a problem. You should contact your ethics office to determine what restrictions may be in effect.</p>
7	<p>Myth: The Secretary's message to "play the ethical midfield" restricts my ability to engage in frequent communication with industry.</p>
	<p>Fact: DoD policy is that personnel can and should engage in communication with industry. However, the policy also clearly states that such communications should be fair, even, and transparent and conducted in an appropriate manner, taking into consideration applicable ethics and procurement laws and regulations. This requires that personnel maintain awareness of what is and is not appropriate to ensure that lack of knowledge is not causing them to unnecessarily restrict communications, on the one hand, or to engage in inappropriate communications, on the other hand. In other words, personnel should find that midfield between not communicating due to fear of a misstep and inappropriately communicating due to lack of knowledge.</p>

## ATTACHMENT B Applicable Laws

The following are statutory and regulatory limitations on communicating with any nonfederal entity, to include members of the defense industrial base:

- Conflicts of Interest (18 U.S.C. § 208)
  - Law - Government officials may not participate personally and substantially in a particular matter that will have a direct and predictable effect on their financial interests or those of their spouses, minor children, general business partners, or prospective employers.
  - Communications Impact – Personnel should not participate in meetings or other exchanges where the topics include matters that will impact the finances of a company in which they have an actual or imputed financial interest.
  - Allowed – participation in general discussions about policies, programs, and capabilities, particularly where multiple vendors are present.
  - Prohibited – participation in discussions about a specific contract involving the entity whose interests are imputed to the employee or matters having a financial impact on a narrow class of entities, of which the conflicting entity is one.
  
- Procurement Integrity (41 U.S.C. § 2102 and 48 C.F.R. § 3.104-4)
  - Law - Government officials shall not knowingly disclose contractor bid or proposal information or source selection information.
  - Communications Impact – Personnel should not discuss matters relating to ongoing procurements without proper authority and should never discuss offeror bid/proposal data or source selection information with anyone outside of the procurement team.
  - Allowed – Any communications permitted or required by the FAR, such as clarifications, discussions, negotiations, and debriefing information, when conducted under the oversight of a contracting officer. Discussion of public information, such as information contained in any solicitation or other posted documents, information provided to the media, or information announced in relation to prior contract awards.
  - Prohibited – Sharing a bidder/offeror’s proposed approach, proprietary data or other nonpublic information about methodology or business.
  
- Trade Secrets Act (18 U.S.C. §1905)
  - Government officials may not disclose trade secrets or other proprietary information (which includes processes, operations, style of work, or apparatus, as well as the identity, confidential statistical data, amount or source of any income, profits, losses, or expenditures) unless authorized to do so by law. Such legal authority is rare.

➤ Federal Advisory Committee Act (5 U.S.C. App.2) “FACA”

- Law – Government officials must comply with the Federal Advisory Committee Act when seeking collective advice or recommendations from a group that includes persons who are not on active military duty, full-time or permanent part-time Federal officers or employees.
- Communications Impact - This does not apply to any group that meets with a Federal official(s), including a public meeting, where advice is sought from the attendees on an individual basis and not from the group as a whole. It also does not apply to any group that meets with a Federal official(s) for the purpose of exchanging facts or information.
- Allowed – FACA does not apply to meetings or discussions held for purposes of obtaining individual recommendations from the attendees (e.g., the group is not providing collective advice or recommendations). It also would not apply where the Government is seeking to exchange or obtain factual information (e.g., an industry day discussing capabilities or new initiatives).
- Prohibited – FACA would apply to a meeting or discussion where the assembled non-federal participants are requested to develop and provide advice or recommendations as a group.

➤ Impartiality (5 C.F.R. § 2635.101 and § 2635.501-503)

- Law - Employees shall act impartially and not give preferential treatment to any private organization or individual. Employees should not participate in particular matters where the circumstances would cause a reasonable person with knowledge of the relevant facts to question the employee’s impartiality.
- Communications Impact – In deciding whether to meet with industry, officials should consider whether they are able and willing to meet with all similarly situated parties in the same manner. Officials should also consider whether the circumstances and their own personal and business relationships would cause the public to question their impartiality.
  - Allowed – Meeting with suppliers of a particular product type to determine whether industry has the production capability to meet anticipated requirements, but limiting the invitees to those with existing high volume production lines.
  - Not Recommended – Meeting with only a single supplier in an industry where there are 3 or 4 suppliers of equivalent capability and experience to discuss that same production capability.
  - Prohibited – Meeting only with the incumbent contractor, to discuss requirements for the follow-on contract.

➤ Use of Nonpublic Information (5 C.F.R. § 2635.501-703)

- Employees shall not use or allow the use of nonpublic information to further any private interest, whether through advice or recommendation, or by knowing unauthorized disclosure.

Myth-Busting tips 1 – 8 are adapted from a memorandum *Addressing Misconceptions and Further Improving Communication During the Acquisition Process*, issued May 12<sup>th</sup>, 2012, by Lesley A. Field, Acting Administrator for Federal Procurement Policy

**Vendor Misconceptions about Communications with the Federal Government**

<b>1.</b>	<p><b>Misconception – “The best way to present my company’s capabilities is to market directly to Contracting Officers and/or sign them up for my mailing list.”</b></p>
	<p><b>Fact – Contracting officers and program managers are often inundated with general marketing material that doesn’t reach the right people at the right time.</b></p> <p><b>Instead:</b></p> <ul style="list-style-type: none"> <li>• <b>attend industry outreach sessions that agencies host to introduce contracting officers and program managers to vendors; and</b></li> <li>• <b>research officials involved in specific projects that you can help with, and focus your e-mails and phone queries on how your past performance and capabilities relate to those requirement or needs.</b></li> </ul>

Vendors often send marketing materials – especially unsolicited collateral – to contracting and program offices. If the materials don’t include the information that the individual recipients most need, the recipients aren’t likely to pay much attention.

Vendors can often meet program managers and contracting officials at industry outreach sessions and briefings that agencies hold to provide information on how to do business with that agency, and the nature of future requirements, and discuss how their capabilities relate to items in the annual procurement plans. Vendors can also develop relationships with buyers by attending pre-proposal conferences that provide detailed information about specific agency requirements.

***When and where are those events?***

The FedBizOpps home page, [www.fbo.gov](http://www.fbo.gov), links to a [Vendor Collaboration Central Event Listing](#) of agency-vendor engagement opportunities including industry days, pre-RFP conferences, and vendor forums, and a [Small Business Central Event Listing](#) of agencies’ business events intended to help vendors contact key buying officials within an agency.

The more you research publicly-available information about the agency you want to do business with, and its requirements and practices, before your calls, emails or visits, the more productive your conversations will be.

***Where can you research current contracts and pending projects?***

- [www.usaspending.gov](http://www.usaspending.gov) publishes data on current and past Federal contracts, including those that may be expiring soon;
- Agency websites often have their advanced acquisition forecasts posted,<sup>1</sup>
- Congressional Appropriations Acts include agencies' future acquisition plans
- The Government Printing Office's (GPO's) Federal Digital System (FDSYS), available at <http://www.gpo.gov/fdsys/> provides electronic copies information including the U.S. Government Budget and Code of Federal Regulations
- In 2014, the Government Accountability Office<sup>2</sup> found that agencies can tend to do less market research on lower-dollar-value acquisitions, and encouraged several Federal departments to improve the documentation they provide their acquisition staff on how to do such research.
- The Department of Homeland Security's 2009 Market Research Guide<sup>3</sup> provides some insight into how and why market research is conducted.

<b>2.</b>	<p><b>Misconception – “You only need to bring business development and marketing people to meetings with the agency’s technical staff.”</b></p>
	<p><b>Fact – Government technical personnel want to meet your subject matter experts rather than get a sales pitch.</b></p>

Agency personnel are keen to better understand the marketplace, advances in technology, and your firm's capabilities – in short, technical issues – more than business development issues.

Vendors build trust and show respect for agency officials' time by arriving well-informed of the agency's published activities, organization, personnel, missions, acquisition forecasts, budget, and

<sup>1</sup> A list of Federal agencies with links to their websites is available at <http://www.usa.gov/directory/federal/index.shtml>.

<sup>2</sup> MARKET RESEARCH Better Documentation Needed to Inform Future Procurements at Selected Agencies <https://www.gao.gov/assets/670/666447.pdf>

<sup>3</sup> Appendix I to the Department of Homeland Security Acquisition Manual, available at [http://www.dhs.gov/xlibrary/assets/opnbiz/cpo\\_hsam.pdf](http://www.dhs.gov/xlibrary/assets/opnbiz/cpo_hsam.pdf)

current contracts as well as up-to-the-minute press releases, and tailor your presentation and questions to agency officials accordingly.

Your technical team may be in the best position to provide the information that the agency needs, so be sure to invite them to these meetings. Their knowledge of advances in technology and your firm’s capabilities are much more helpful to agencies than generic sales presentations.

<b>3.</b>	<p><b>Misconception – “Attending industry days and outreach events is not valuable because the agency doesn’t provide new information.”</b></p>
	<p><b>Fact – Industry days and outreach events can be a valuable source of information for potential vendors and are increasingly being used to leverage scarce staff resources.</b></p>

The purpose of industry days and outreach events is to communicate the agency mission and upcoming requirements to industry. Vendors may have the opportunity to hear from and speak to agency representatives about requirements, and can often meet one-on-one with agency personnel before or after the event.

Many times, agencies hold sessions designed to help new vendors do business with them and answer vendors’ questions

This information can help vendors decide whether to invest resources in a bid or proposal in response to the government’s solicitation requirement, how to more effectively target your marketing and outreach, and help you respond to solicitations more successfully.

Industry days are also a great way to meet potential partners and subcontractors.

<b>4.</b>	<p><b>Misconception – “Agencies generally have already determined their requirements and acquisition approach so our impact during the pre-RFP phase is limited.”</b></p>
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**Fact – Early and specific industry input is valuable. Agencies generally spend a great deal of effort collecting and analyzing information about capabilities within the marketplace. The more specific you can be about what works, what doesn't, and how it can be improved, the better.**

Agencies want and need industry's input into their acquisition strategies and solicitation packages because it may result in a better solution to their requirements.

*In trying to get the best value for their agency and for the taxpayers, contracting and program professionals want to know when products or services are available in the marketplace that can save money or provide a better solution or both. Vendors can help most by providing such information early in the procurement cycle.*

Vendors can provide suggestions and comments prior to formal requirements development without creating an organizational conflict of interest so long as that vendor is not then hired to develop the requirements. Agency officials also value vendors' suggestions of detailed solutions to your concerns. Got a concern? *Be specific and clear in your feedback. For example, if an agency is considering a performance-based contract for services but, in your firm's view, has not adequately defined the performance standards, provide the agency with specific suggestions for how the work should be evaluated based on your experience and expertise.*

Take advantage of pre-solicitation opportunities like these to offer specific suggestions you'd like to see made to the final solicitation:

- Agencies may issue a Request for Information (RFI) as part of market research to investigate the industry and marketplace in accordance with Federal Acquisition Regulation (FAR) Part 10, to determine if commercial items are available, to determine if small businesses are capable of meeting the agency's needs, and for many other planning purposes.

*For instance, the General Services Administration's Central Contracting Office sought input on the procurement of the next generation of the agency's enterprise IT services and support. Through RFIs, the agency first sought input on the current challenges and strategic technology initiatives, asking industry how it would recommend the agency approach those challenges. A subsequent RFI was issued to seek more specific input to the draft solicitation. A pre-proposal conference, attended by over 50 vendors, helped to further refine agency requirements.*

- Agencies may issue a draft RFP to request comments and suggestions from potential vendors on how to improve the solicitation.
- Agencies may hold pre-solicitation or pre-proposal conferences or webinars, or post wikis to explain the requirements, solicitation process, and evaluation factors<sup>4</sup> and invite vendor questions and feedback.

Here's the big one:

FAR 15.201 encourages exchanges with all interested parties, beginning at the earliest identification of a requirement through receipt of proposals.

After release of a solicitation, the contracting officer is the focal point of any communications with the government to ensure a fair competition is conducted. Many times, the contracting officer includes a question and answer period in the acquisition process for potential offerors to review the solicitation and submit questions.

Otherwise, vendors may still ask the contracting officer any questions that you have, in a timely manner, in order to ensure you understand the solicitation. Contracting officers generally prefer questions via e-mail so that they can ensure they understand the question and so they can facilitate obtaining an answer. Should the contracting officer decide to make any changes to the solicitation, it will be done via an amendment to the solicitation and posted for public viewing.

<b>5</b>	<b>Misconception – “If I meet one-on-one with agency personnel, they may share my proprietary data with my competition.”</b>

**Fact<sup>5</sup> – Agency personnel have a responsibility to protect proprietary information from disclosure outside the Government and will not share it with other companies.**

Agency personnel have a responsibility to protect any information that was received in confidence from an offeror. During source selection, the Procurement Integrity Act and its implementing provisions in the FAR<sup>7</sup> prohibit Federal procurement officials from disclosing – prior to award of the relevant contract – contractor bid, proposal information or source selection information to any person other than a person authorized to receive such information. Procurement officials take this prohibition very seriously; if a violation occurs, there may be criminal and civil penalties.

While the protections of the Procurement Integrity Act do not apply prior to source selection, other protections remain. In many cases, the Trade Secrets Act<sup>6</sup> will prohibit Federal employees from divulging protected information, including confidential commercial or financial data, trade secrets, operations, processes, or style of work.

The Freedom of Information Act (FOIA) allows agencies to protect commercial or financial information that is privileged or confidential.<sup>7</sup> In cases where a vendor is concerned that existing protections are insufficient and engaging in pre-solicitation communication will be beneficial, agencies should consider the use of appropriate non-disclosure agreements (NDAs) to ensure that proprietary information will be kept from potential competitors.

6.

**Misconception – “Agencies have an obligation not to share information about their contracts, such as prices, with other agencies, similar to the obligation they have not to disclose proprietary information to the public.”**

**Fact – There are no general limitations on the disclosure of information regarding existing contracts between agencies within the Government. In fact, agencies are encouraged to share pricing information to ensure that we are getting the best value for our taxpayers.**

<sup>5</sup> C.F.R. § 3.104-1-11, [https://www.ecfr.gov/cgi-bin/text-idx?rgn=div5;node=48%3A1.0.1.1.3#se48.1.3\\_1104\\_64](https://www.ecfr.gov/cgi-bin/text-idx?rgn=div5;node=48%3A1.0.1.1.3#se48.1.3_1104_64)

<sup>6</sup> 18 U.S.C. § 1905, <https://www.gpo.gov/fdsys/granule/USCODE-2011-title18/USCODE-2011-title18-partI-chap93-sec1905>

<sup>7</sup> 5 U.S.C. § 552(b)(4), available at <http://www.gpo.gov/fdsys/pkg/USCODE-2010-title5/pdf/USCODE-2010-title5partI-chap5-subchapII-sec552.pdf>

As explained above, agencies have a responsibility to protect proprietary information from disclosure outside the Executive Branch. Restrictions on such outside disclosure prevent harm both to the competitive position of the contractor amongst its competitors and to the interest of the Government in being able to maintain a robust and competitive marketplace.

By contrast, the flow of information among and between agencies within the Executive Branch does not cause such harm. Moreover, such sharing among and between agencies can enable the Federal Government to root out wasteful duplication and negotiate better deals for the taxpayer.

Therefore, while there might be occasional circumstances where an agency could benefit from signing an NDA that would restrict its sharing of information with another agency, agencies should generally avoid NDAs that prohibit sharing of information – particularly pricing information – within the Government. Price visibility is critical to ensuring that the Government gets the best prices and that agencies are not paying more for the same products or services being bought under the same circumstances. As agencies face increasingly constrained budgets, it is critical that they share more pricing information with their Federal colleagues to ensure that the Federal Government is obtaining the best prices for the taxpayer.

<b>7.</b>	<p><b>Misconception – “To develop my new proposal, I don’t really need to tailor my solution to the specific solicitation since the government won’t read my proposal that closely anyway.”</b></p>
	<p><b>Fact – Offerors should tailor each proposal to the evaluation criteria, proposal instructions, and specific requirements of the solicitation to which they are responding. Contracting Officers and evaluation team members read proposals closely for compliance with the proposal instructions and must evaluate them against the evaluation factors and the statement of work in the solicitation.</b></p>

Tailor each proposal to respond specifically to the final solicitation, which lists the requirements, instructions to offerors on how to propose, and evaluation factors. Government evaluators determine the strengths and weaknesses of your proposal and also your firm’s ability to perform the prospective contract successfully based on your responses to what the solicitation requests.

- *Develop a checklist of solicitation requirements to ensure that a response is provided for each requirement and that it is in the format requested in the solicitation. If you follow the solicitation instructions, it will facilitate evaluation of your proposal.*

*Proposals in which vendors simply cut and paste from the RFP or use the same language from a previous proposal often miss important evaluation factors or misunderstand the nuances of the requirements are rarely selected for award. If you cut and paste responses from previous*

proposals, your proposal may fail to explain what you’re proposing in *this* offer. Offers that do not respond to the solicitation risk being eliminated from the competition, which means the vendors has wasted valuable time and resources to prepare the proposal.

- *Vendors should be fully responsive to all evaluation factors, including past performance information. Some vendors incorrectly assume they will get credit for good performance since the government was aware of its work, even if the vendor doesn’t mention it in its proposal.*

Vendors who attend a pre-solicitation or pre-proposal conference offered by the agency are likely to get a better understanding of the procurement and what is required in the proposal, and develop a more comprehensive proposal addressing the requirements.

For assistance in how to respond to government solicitations, there are several resources available to assist you:

- **Procurement Technical Assistance Program:** 98 Procurement Technical Assistance Centers nationwide help businesses compete successfully in Federal, state and local government contracting by providing one-on-one counseling sessions, classes, seminars and matchmaking events at little or no cost.<sup>8</sup>
- **Offices of Small and Disadvantaged Business Utilization (OSDBU):** OSDBUs are the primary advocate within each Federal executive agency responsible for promoting the maximum practicable use of all designated small business categories within the Federal acquisition process. You can find a listing of agency OSDBUs at <http://www.osdbu.gov/members.html>.
- **Veterans Contracting Program:** The Department of Veterans Affairs has created the Center Verification and Evaluation (CVE), which is solely dedicated to assisting veterans in starting and building businesses. CVE’s web portal for veteran-owned businesses is <http://www.vetbiz.gov>.

<b>8.</b>	<p><b>Misconception – “If I lose the competition, I shouldn’t bother to ask for a debriefing. The Contracting Officer won’t share any helpful information with me.”</b></p>
	<p><b>Fact – ALL offerors should ask for a debriefing to understand the award decision and to improve future proposals.</b></p>

<sup>8</sup> More information is available at <http://www.aptac-us.org>

In a formal procurement, the process by which offerors request and receive an explanation of the award decision is the debriefing. Asking for a debriefing is the best way to find out why you were not awarded the contract or order.

In accordance with FAR 15.505 and 15.506, agencies must provide debriefings to unsuccessful offerors in negotiated procurements upon written request either when excluded from the competitive range prior to award, or upon notification of award.

*Agencies actually appreciate when unsuccessful vendors request debriefings because it gives contracting professionals an opportunity to point out weaknesses in the vendor's proposal and, provide them with the rationale for award, and mentor the vendor to be more competitive on future proposals.*

These debriefings can be provided in person or in writing, depending on the agency's preference. When conducting competitions under FAR Part 8, agencies must provide a brief explanation to unsuccessful offerors on awards that are based on factors other than price alone. You can use the information provided to adjust your proposal strategy in future procurements to be more competitive.

**Are there innovations in the way you do what you do?**

Let that be your conversation opener: to talk with them about innovation and new ideas for FUTURE acquisitions, not the one that's on the street right now.

**P.S.: When an RFP is on the street, they're pretty much in blackout mode.**

They're not allowed to talk to you when there's a bid on the street. But you CAN catch them between bids. If they handle this kind of work, they'll do more of it in the future. Right now, at the change of a new administration, buying is slower.

Also, fiscal year end is not a great time to call people who've never heard of you. Even OUTSIDE of fiscal year end, you may still run into some people that want to make you go away. Just call on the next one.



So the CO has to put a bid out on a public web site. Picture her in the middle of the FAR as a minefield of bubbles, and the CO surrounded by that minefield of bubbles. Just by breathing, she could break one.

Now picture the contracting officer as a cartoon character: A porcupine surrounded by bubbles.

When a bid is on the street, are her quills in or out? Out. She's afraid of popping the bubbles, breaking rules. She's only going to respond in writing, to be sure she doesn't pop rules.



Now, turn ourselves into porcupines. Just by walking into her office, you can break a bubble. CONTRACTORS can be nervous, too, and say things like "I'm 8(a), you have to do business with me!"

Just by breathing, either of you can pop bubbles. She can come up with just about any FAR rule to make you go away.

She's used to vendors popping bubbles. SO...start by **calming your own quills down**. Never mind the idea that, "They're supposed to do THIS, and they did THAT."



Instead, show her you understand by changing what you look like to her. Change your demeanor into something like a sponge. Sponges get through bubbles without popping any! Get her to calm her quills down. Talk to her when there's not a bid on the street.

Say "I am here to learn." "I'm just here to follow protocol." "Sure, you're working with someone else. But there might be a new bid out in a year or two. I just want to learn how you do things here. I want to know work with vendors. Of course if we want to help you, we need to get to know you, and how to learn what's coming down the pipeline, and how you want proposals to look."

You're going to go in very gently, respectfully, and take copious notes, and follow her interpretations the way she wants things. Sponges feel good,

they're comfortable, and they're nice. In other words, if you take a soft approach, she'll be a lot more receptive. Catch them in between bids, when they have time to tell you how to be a better vendor to them, rather than starting out selling and challenging them.

The minute YOU calm down, they calm down. And they calm YOU down, too! When they realize you get it, they'll guide you through their FAR wall of bubbles, and they'll want to help you. As long as you approach them when a bid is NOT on the street, they'll be more relaxed.

Choose your timing about when to call her. When the bid is on the street isn't a good time to make sales calls. You need to catch her between bids.

If there is a bid on the street, the gates are closed: blackout period. They can't talk to you. Often, you can only submit questions in writing. Understand she's pricklier then. Otherwise, things are more relaxed, she will smooth out and talk to you. Understand when she's extra cold to you, there might be a bid on the street.

- January and February can be a great slower time to get in there and chat with them, while they are more relaxed. Ask a couple of questions that are pointed but simple. "I'm trying to understand how to do business with you. I'm not expecting you to award me business today. I know I can expect to write a couple of loser bids."
- July-Sept is the busy time. So we're not likely to get much of that relaxed time during those months.
- After October 1<sup>st</sup> – really, between mid-October and the end of December, after fiscal-year-end mop up, things will calm down. After the crazy buying season, they'll be planning the buys for the next year. They can sit down and talk to people. She'll have a better time talking to you, between bids. Approach her in a softer manner, and they'll say, "AHHH, you get me." If you go pushing people around, it's going to pop bubbles. She's going to throw a FAR at you to make you go away.

As long as you keep being like a sponge, show her that you're learning, they'll understand that you get it. You want to show her you're safe and easy to work with, you understand her rules, and want guidance. You want her to know that you're in it for the long haul.

Your goal is to be one of her three most-loved vendors. She's going to round-robin the contracts, and her file will look fabulous. She starts to let them into her world. She trusts them, they're easy to work with, they deliver. That happens to YOU when you show her you understand, that you might need to partner, or be a backup, that you won't win every time. This calms everybody down.

There will be times when they'll ask you to bid...but they only need a second or third offer to put in the file. You don't want to get everybody all spun up in GROT unless you're sure you have a shot. Don't get all excited when they call you on no notice and they've never heard of you, nor you of them. Be prepared to lose a few.

It's perfectly fine to ask your prospect, "Hey, do you just need a file filler bid? No problem." Prepare yourself for those last minute calls, like the ones due on Monday. Say, "I hope we have a shot to meet

with your buyers next time.” Guess what happens down the road? “Those guys have been good to us. Let’s throw them a bone and give them a shot.”

Every so often, expect to be the designated loser. You know that’s going to happen. The CO, once she sees you really are ready to be like a sponge, may ask you to write a couple of loser proposals, because she has one for you in a few months. In fact, she may really like you, and you just need to take your turn.

There are three classic responses: didn’t understand the scope, you were only marginally qualified, or your price point was too high. Those are all buyer-speak for “We don’t know you.”

One CO might tell you her rules and be all prickly, and another one overhears you who really wants you! If a different CO has easier processes, be very gentle in inquiring about whether the first one can use those processes.

If you talk to her with an appreciation for how hard her job is, to comply with all those rules, and she sees you get it, she’ll guide you through her processes and protocols.

- “I’m not expecting you to teach me everything today”
- “Tell me how you do things. Show me, teach me.”
- “I’m not selling you today. I just want to learn how you do things.”
- You’re not in sales mode. You’re just trying to figure this out.
- “I don’t know if you’re the right person. I’m hoping you could point me in the right direction.”
- I’d like to understand how you do things, so if you ever need things, I know how it works.”
- Take notes, follow their protocols to the letter.
- Contracting officers make sure the rules are followed; that fair and open competition occurred.

People start to figure out what the client wants and they see we understand what they need. But they don’t know what to expect from us on the first contact.

## Building Trust From The First Contact

The first time you call a government contact, Contracting Officers have no idea whether or not you know what you’re doing when you call. Think about when you call tech support. What’s the first thing they always ask you to do? They ask, “Did you reboot?”

Similarly, every day, she hears from new vendors. So, the first CO isn’t sure whether you’re one of the companies who will protest or cause problems for her. Be smooth. They don’t know how long you’ve been in the business. They’ll throw a couple questions at you to see if you get it. They want to know, “Are you safe to work with? Do you know me?” They will ask a litany of absolutely basic questions. Most vendors have no idea what they’re doing.

The first question she’ll probably ask: “Do you have a DUNS number?”

**You say “Yes.”**

She will then ask “Are you registered with the federal government?”

**The answer you always give is very specific:**  
**“Active in SAM.gov through (your renewal date)? Yes.”**

SO many vendors call her up and they haven't even taken these basic steps! So that's why she asks these screener questions.

**Then she'll throw you a curveball.** She might ask, “Are you registered with our agency?”

How does that feel to you? Annoying, challenging? THIS IS A TEST, to see whether you change from a sponge to a porcupine! Some vendors go ballistic, and say, “What do you mean? I just went through all this work to register in SAM! Are you kidding me?”

Don't do that.

Here's what's going on:

The agency – including Small Business Specialists -- has to prove to the Small Business Administration (SBA) that they're considering small business. So many agencies create an online form or system just to prove efforts to SBA. You're doing their work for them, to show their good faith effort. So many vendors stumble away and never come back at that point.

Their job is to make sure small businesses get contracts, and that large businesses subcontract to them. But Small Business Specialists are NOT your buyers. They need it for their own reports.

The small business officers have to report to SBA how many large and small and WOSB and 8a businesses they are talking to. In effect, you're filling out their paperwork so they can report their good faith efforts to SBA.

So, to make the agency's job easier, they often want you to go to link on their web site or fill out a form for them. At many agencies, they have their own portals. Sometimes, local offices have their own sites. Just keep asking for clarification. E.G. if you're going after the VA, they have offices at every hospital as well as regional offices. They are using that roadblock to see how you behave. “I'm registered at the VISN; do I need to register with your hospital, too?”

This is their way of seeing if you're for real, if you GET them. Don't melt down! It's just another hurdle. She will listen to your tone. Do not go off on her! When you ask, “Why do we have to do that?” it says you don't get it.

This is your opportunity to dance with them.

**She's just given you YOUR FIRST OPPORTUNITY TO BUILD TRUST (not a hassle.)**  
**This is your chance to shine. This is the wooing moment. EMBRACE IT WITH BOTH HANDS.**

This is your first opportunity to begin to BUILD TRUST. Don't be frustrated. Be happy to do this. The way you're going to handle that?

“No, but I’d love to be! Would you send me the link, and I’ll do it right away!”

Do it quickly, do it right, and follow tomorrow! Get it done, and get back to them right away, and say, “I’m back! I want to follow your protocol! I’m a sponge! I’m here to learn!”

QUESTION: Do you have to be registered in every single agency AND sub-agency’s site **before** you call them? What about those companies who offer a service to do all those registrations for us?

ANSWER: Don’t do that! Do it yourself, one at a time. Otherwise, you’re losing the opportunity to be invited to “dance”, to start a conversation. USE EVERY OPPORTUNITY to have a first conversation, and a second one. Show them you follow instructions and are cheerful and easy to do business with.

This gives you the opportunity to shine, how you get them, to call them back, show you follow instructions and respond quickly. It shows you’re persistent, fast, smart, responsive, and keep coming back no matter what hurdles they give you. **It shows them you’re on top of things, you follow directions. You’re trustworthy.** You’re being patient about their world. You’re showing them you have time for them. You care about keeping them safe.

Then ask when to follow up, and then DO follow up then. **That shows you’re RELIABLE – that you do what you say you’re going to do.**

Just by your confidence in approaching them, in making clear that you do know their rules.

AND you can ask them for feedback on your capability statement, ask how you could improve it...and, guess what? They’re going to READ IT. And you can then come back to them and say, “See? I customized it for you!”

Registering on the agency’s portal or system, after you’re in SAM, is one more way to engage, show you get it, and a reason to call them back when you HAVE done that. Be willing to jump over the hurdle enthusiastically. It opens the door for a couple days of conversation and back and forth.

There are companies that will take your money to register in these places for you. Don’t do that. It robs you of those opportunities for conversation and relationship-building. The FARS make them nervous. If they break rules, they can get in trouble. You need to be very gentle when approaching them, because this is law.

It’s all about making sure fair and open competition really occurred. But how fair and open do we really thing competition is? When the buyer posts an opportunity, do you believe they’ll read every bid cover to cover and everyone has an equal chance? NO.

But how do you think the FILE will look? The file will probably look pretty good. Every single time, her files will look perfect. The industry standard about how often fair and open is happening is that it’s all in the file. But in practice, maybe about 5% of the time. Don’t you think buyers have someone in mind already?

**Vendors who get it, get it.**

**The Federal Sales Game: How To Play To Win**

**Summit Insight (703) 627 1074 Judy.Bradt@SummitInsight.com**

**2019 Edition**

The next thing she's thinking, but not saying, is, "Do you understand us, our processes, and our language in our agency? Our titles? Our departments? Our pains? Do you know what we call things?" At each agency, their titles and terminologies are different.

This is another opportunity show that you're a vendor who gets it...and build trust. Smooth, consistent. Make a list of what they call things.

In some agencies, you might be asking about audit or compliance or risk management. Certainly you can use the language in the RFP, but you need to get in there BEFORE the bid is issued, with conversations in the field! "Facilities" in the Public Building Service is "installation support" or "DPW" on a military base, or "engineering" at Veterans Affairs. VA also has designers, who work on the interior and exterior design of public areas. "Moving" might mean the same as "restacking." E.G.: Air Force has bases. Army has installations and forts and proving grounds. Navy has Yards and Stations or Academies. Marines have Bases and Camps.

They use a lot of terms and acronyms. Take lots of notes. ***If you don't understand a term, never apologize*** for asking, "Would you clarify that please? I don't want to assume what that is. I want to get it right." Clarify it RIGHT AWAY. If you write a proposal, you want to use the right terms and acronyms. Don't guess; many of the acronyms seem similar. You have to get it right.

**You're going to have to start creating a running list of the terms they use.** The words for what you do map differently in different agencies. When you start writing proposals, you need to use the language they use. Guessing will get you in trouble. Never be afraid, or apologize, for asking, what terms mean.

#### **Slide 4: What's it like to work for government?**

Have you ever served in the military or worked inside government?

What does the media say about government employees? There is not a love in the media for non-military government employees that they hear about themselves, their work ethic, and their interest in innovation. Any thoughts or impressions, in your own experience or from friends, or from media? What do they hear about themselves every day?

It's not positive, unless they're veterans. It's not a loving dialogue about federal employees. And that can make them really defensive. They get beat up a lot. It's unfair...and not realistic, either.

Eileen came from a family of nine kids. Her father, Bill Kent, was a veteran of three wars. He led a band, Bill Kent and the Stardust Orchestra. His draft number was 17 in WWII. He was an artist. At 21, their whole jazz band signed up together and formed the first Army Air Corps marching band at Wright Patterson AFB. He served stateside and didn't see overseas action. He became a test pilot at Wright Patterson. His brothers and all his friends served overseas. He felt so guilty about that; he felt when the war was over that he still owed service to his country. He decided to give his whole life to service and joined the Air Force for his entire life. He served in three wars. Out of nine children, six signed up to work for government. They lived in Saudi Arabia, Eielson AFB in Alaska, San Antonio, and he was the Commander at Maxwell Air Force Base, including through protests in Selma, and the Cuban Missile

#### **The Federal Sales Game: How To Play To Win**

Crisis. The pictures of Cuban missiles were developed at his base. He was a recruiting officer, a commander. Every day, Dad looked at his nine kids at dinner and asked them, “How are you going to serve your country, to make a difference, to take care of people?” Motivated them to be in service.

Out of nine kids, six served. The other three were in medicine or technology or the ministry. One brother, Bill helped developed the Stealth fighter and built a company, Mission Research that started with three guys with doctorates in Aerospace, and built to over 600 employees and eventually was sold to ATK/Morton Thiokol. Another brother just retired, and was in the Senior Executive Service with USAF. He used radar systems, rather than just video, to get the shuttle flying again by tracking the pieces that might fly off the spacecraft.

A sister was a colonel in the Army Reserve; another brother was a 2IC commander in Bosnia on 9/11. Another was a municipal building inspector in Detroit. Those who didn't work for government ended up in service profession like medicine. Eileen served as a public information officer.

Many government employees are children of government employees.

First and foremost, many government employees, especially military or law enforcement, are second or third generation public servants and hold service in high value. Sometimes there are daughters, mothers and grandmothers working in the General Services Administration! You get whole families whose multiple generations work for police or fire departments. If you get someone who's the first generation of their family working for the military, this is often their shot at a college education, their way up and out for success. In their upbringing is a sense of mission: “You were put here to serve other people.”

Most government employees sign up young, right out of college or high school. They are WIRED to serve, whether in public service or some other way. They often recruit their kids, because there's a sense of service in the family. You might find mothers, daughters, granddaughters, working in the same office. They may be very young...or they may have been there for over 35 years. There are young people with a lot of decision making skills...and people over 45 who are trying to get to senior executive service. They want to make sure their kids are going to be okay.

What was their motivation, signing up so early, right after high school or college? Those who stay want the security of a job, and are enticed by the **long term benefits of retirement** particularly, and (time off, vacation, **pension**), stable job, represent their country. It's one of the few remaining places you can still get it. The level of pension depends on the level of salary at which they finish their career. Retirement is everything to them. Remember that. Parents want their kids to be okay at the end of the day. That security is a long game.

Unlike in commercial companies, in government the glass ceiling isn't about minorities or gender or disability. It's about making a mistake. You make a mistake, you never get promoted. It sits on your record forever. You might be able to stay there for forty years, but you'll never get to the level you hope for. In sales, you're only as good as last month's sale, but in government, failure is around forever.

Eileen's father didn't get to be a colonel because of a disagreement with his commanding officer near Selma, Alabama early in his career, fifteen years before he retired on 6/6/66, at Maxwell Air Force Base. Because of lack of promotion, after all those years, he only retired as a Major at \$17,000 a year with nine kids to support.

Eileen's brother, who was the lead investigator when the space shuttle crashed. He developed a radar system that could track how pieces that fly off the shuttle stay in its orbit. He had a spotless exemplary career, started at 20, and retired after 37 years of government service, with a ceremony at the National Air and Space Museum! There was a band, and a choir! He had five letters of commendation from five Presidents, and a general spoke for an hour at his retirement. There was a plaque with his name on it. Ten minutes of that was all about his father's contribution; ten more minutes of that was all about his relationships with industry! HE didn't get the shuttle flying. His CONTRACTORS did.

Government employees love to help people. Most, especially in program management and contracts, have that desire to serve, and to solve problems.

If you go in, hat in hand, and say, "I need some help. I know how we did it at the Army. How do you do it here?" or "If you don't buy what we do, could you point me in the right direction?" They'll want to help you. Go to them seeking assistance in understanding, and showing a desire to learn, in the first instance. They have a natural desire to help. By asking for help, you are tugging on their heartstrings. They want to help you.

They also think that no other person in government is going to help you. So any time a person helps you, respond as though no one has ever been so nice to you!

They have a sense of pride of being in service, of giving back, of giving to the community. They inculcate in their kids the obligation to serve, because it's the right thing to do. They are part of nonprofit volunteer corps, or in their schools. When you're talking to a government employee, you're talking to someone who has a sense of service. You can appeal to that when you talk to them. They might be leaving at 4:30 pm but they are off to serve the community.

Who affects their retirement? Their vendors. Think they don't care? When they pick you, they have to live with the consequences. They are very risk averse. When you say they're worried about change, they're afraid to change vendors. They might have been in a bad relationship for a while, but they don't know if you'll make it worse and cause trouble. They'll be nervous. Their retirement is on the line.

Their family has told them, "Take a safe job. Keep your head down." They can retire comfortably, if they don't hit a glass ceiling, based on whether or not they messed up. Most of your customers are very well educated and know each other well, help each other, and compete against each other for promotions.

They work very hard, invest in their education, and try to never make a mistake. In the commercial sector, business forgives your mistake with the next win. In government, mistakes stick with you forever. We as vendors affect their careers.

If two people have each served for 35 years, master's degree, lots of projects...and both of you are up for a Director's job. They look at each person's file. But oh, dear, a disagreement with commanding officer! No promotion for that person, even when something happened 15 years ago. One bad delivery with a vendor, one little mishap, can derail their ability to be promoted. And they won't be able to move up the ladder. Even small mistakes can get in the way of accomplishment. And back at home they have to tell their families they didn't get the promotion. Projects going well help them. Project not going well affect their permanent file.

Most government employees don't want to choose someone new. They are putting their retirement on the line when they pick you. Lives are at stake, the project is at stake. When they find vendors they like, they will take them with them wherever they go. Great vendors raise them up. "There's definitely a little bit of caution by CO's and commanders. Vendors can make your career, or send you down the wrong path."

They are long term dedicated employees who are in that position for 20-40 years. They're not thinking, "What did I sell today" but "How will today's decision affect my future?"

If the contracting officer says to the end user or the prime, "I really want to work with them. I really trust them," and they hire you and you do a good job, they're doing to keep you. ***When they choose you, they are betting their pension. It's not business. It's personal.***

They want you to prove: "We are the safe bet. We've been around the longest. Look at the customers who use us. We are proven. We deliver on time, every time."

#### Slide 5:

##### ***As contractors, our job is this:***

- Make their job easy.
- Follow the rules.
- Make them look good.

"We do the work, you get the credit."

We as vendors do the work. They get the credit. You want to be able to say, "We have expertise, we can help you. Tell us more about what you're struggling with."

Many of these people are really young, often highly educated, handling millions of dollars of budgets. Many have doctorates or advanced degrees in e.g. engineering. But she might not be an expert in LED lighting. That's why she's talking to YOU. She might be looking at the exit; she might be in for the long haul. We don't know. You might have all kinds of strengths she wants to know about: like the fact that you've been in business for decades, have strong past performance, have great contract vehicles are terrific. You just need to communicate that.

Don't be shocked: maybe she's got a contractor supporting her, or managing the entire process. They might have a second card, for their own business, as well as for the agency. And some cards provide almost no info. And then some staff. Some other contractors or staffing companies might be doing hiring, too.

"We're here to help you take your great ideas, and bring them to your boss and make you look good. We do all the work, you get the credit." Your message is always wrapped around these three things.

When Eileen worked in public affairs in Sterling Heights. Her job was to evacuate an entire city in the case of a nuclear attack on a tank facility in Warren, Michigan!

She had lots of new ideas, like, "How about a cell phone?" Her boss would say, "Slow down, Hopalong. Wait 'til you're running this place." Eileen had to dictate press releases because the secretarial union wouldn't let her type. When Eileen was told, "You'll never make it in the outside world," she rose to the challenge and left. The new innovations young people want, the ones who want to be your advocates, will want to make change. They will need to take risks for you. SO you need to truly perform so that you are delivering for them, delivering on that trust.

Even if you're sitting with a competitor, you're here to make them look good if they're part of the team. Whatever you do, you need to engage them and catch their attention with your ideas and expertise so they'd be willing to give you a try...begin to be willing to trust you a little.

When they are asking you the tough questions, they are really opening up to you and they like you. Example: when Eileen was giving a presentation on behalf of her client, a solar roofing company, to the GSA public building service region 1. Right at the start, the senior person stood up and said, "Here's my problem. You hire people who are drug addicts and convicts. How are you going to handle security clearances?" and she addressed that.

Example by analogy: When Eileen first sold rental furniture, e.g. for apartment or new offices for FBI or DHS moving into the Navy space...it was very much needed. BUT often the facility managers would say, "Only 1% of furniture is rental!" She would go to the agency and talk to facility manager, and say, "May I teach your team, in 30 minutes, when does rental make sense? When should you call, and not?" Did it as a roadshow. They started saying, "Eileen FURNITURE FAST Kent." So they'd call her first, even if they needed to purchase. She would send business to partners.

So, think about many ways to educate their subject matter experts. Not a sell. Sharing info on innovation. And they'll pull you aside and want to talk to you.

Vendors have a big influence on whether you make end users look good. Their reputation is everything.

*"We follow rules. I'm here to help you look good. You're going to save money, save time."*

They'll take their trusted vendors wherever they go. It's a long term commitment. If incumbent not doing a good job, that's an opportunity. You write a letter to their bosses and tell them how great they are. Ice breaker: "tell me about your service/career." If they love you and can't work with you, they'll still walk you down the hall as a great idea for their buddies.

#### Slide 6: **What are they saying behind closed doors?**

During a class Eileen was teaching, her students included Leslie, who had been with the Air Force for 35 years and had just retired, after having written sections of the DFARs, spoke up in class: "Unless they know you, love you, trust you, they ain't going to use you."

*“Even in the government and especially in the government, people buy from people they know and trust.”*

This woman, two weeks after the class, won the contract to oversee fraud in Iraq and Afghanistan after she retired. She wrote the FARs, so of course she was going to win the contract keep them safe. They picked one of their own.

We need to become like those people they know, trust and love.

EXAMPLE: At the GOVENERGY trade show, Eileen went to hear the program manager speak about \$100M procurement for an energy audit, a feasibility study on solar energy for all the rooftops for the Department of Veteran Affairs to find out about how to get in on the opportunity. This was in the wake of a lot of Recovery money being released for these giant projects. The speaker was going to be the project manager on the feasibility proposal.

Waiting for the speech to begin, she overheard two contracting officers taking about the bid! She took her brochure from the show and strategically positioned it to bounce the sound of their conversation. And she heard one say to the other:

*“I don’t plan to put that procurement out on Fedbizops.gov. It’ll create too much noise.”*  
–VA Acquisition Contracting Specialist

What’s “noise” to contracting officers?

They’ll get swamped! Too much interest, too many questions. Many responses, a million phone calls. They’ve already identified a couple vendors they want to work with. Big news item. Paperwork. Work. Emails. FBO = Noise = Internal pressure. Zillions of dimwit vendors calling. And then when they award it, angry, prickly hammerhead losers protesting.

#### **Slide 7:**

At the same event, at end of the speech, Eileen waited for a private conversation with the keynote speaker, who was project manager of this acquisition, “I just heard that the feasibility study won’t be on FBO. Where will it be?”

He replied, “Oh, it’s already been awarded”

What? She asked, “Who won?”

He said, “I don’t know remember; it was some service-disabled vet.”

Eileen had cornered him in public, and he wasn’t going to give her the precise answer.

Really? He doesn’t KNOW? Every single solar rooftop needed to be measured? On a hundred million dollar contract? And now it’s not going to be on FBO? And it’s already been awarded to a SDVOSB?

Pay attention to govvie secret-sidebar-speak! Who really won that big contract?

**The Federal Sales Game: How To Play To Win**

**Summit Insight (703) 627 1074 Judy.Bradt@SummitInsight.com**

**2019 Edition**

Here was the clue he gave her: “Service disabled vet.” So...instead of walking away defeated, Eileen started doing detective work!

She went around at the event and asked everyone there, “Do you know who won this feasibility study? Which service disabled vet?”

Three or four hours later, someone slipped the name to her, and she had her answer: J.R. Conkie. “See those guys in the circle there?” someone said to her. They were at the show, didn’t even have a booth. When she found them, she introduced herself, and explained that her client had 48 locations. Within two weeks, she had started working with them as a partner. Eileen’s client, the roofing company captured \$65 million as a result, over 18 months, through that partnership!

QUESTION: How do you get in the game when they already have someone they love as a contractor?

ANSWER: you’ve got to re-woo them, maybe hire a different employee they might like better... and start conversations. You might have to move onto another office or organization for a while. You might need to find a way to partner. Competitors can make very strange bedfellows. You want to know who they are. How do you cut through that? The project manager IS using someone they know, and trust, and love. Would they give out that information in public?

They’ll say: “I’m not allowed to tell you”; “I don’t know”; “I don’t remember”

But those are kernels of intelligence they slip you.

Ever see adults or parents speaking in front of your kids, and spell things to disguise what they’re talking about? And then you figure out too late that they’ve learned how to spell? It’s a bit like that. Some of this work takes detective work to interpret the clues your customers give you. You already understand the layers of government. You might also need relationships with the primes. You’ll at least be talking to the primes who might need you for some of the work.

We’ll challenge you to ask probing questions. You naturally ask those questions! You want answers. Those little tiny elements and clues you get will open doors for you. Here’s how.

When you’re at the event, and you ask a very forward question, the govvie might push back. You’ll ask a lot of questions. End users who don’t want to, or can’t, answer your question will often give you clues. Debrief each other. They might have liked you but might not have been able to tell you.

They like to talk to each other in front of you, and answer your questions in code. Pay extra attention! It’s our job to hear those clues, take them back to the office, and decode that clue.

You’ll discover small businesses who win big contracts and need a teaming partner like you. You can say, “I heard you won that contract. Do you need some partners to cover all those locations?” Maybe they don’t need you on this project, but they can use you on other ones.

When a govvie says “No” or “I can’t tell you” or “I won’t tell you,” don’t get discouraged and turn your attention inside your head. Sometimes in sales, our “self-speak” attacks us. We are so frustrated! We’re afraid, when we get rejected, “Oh, I crossed the line! I did the wrong thing!”

INSTEAD: when they say, “No, I can’t tell you/can’t remember...” rather than being in the “shame” space, which freezes your brain, because all we can think is “I’m a mistake”, turn up the listening!

Use your investigative ear to be alert for that aside remark. Re-wire your brain and tune your ear, when you’re in these meetings and ask questions about who they’re working with or what they like.

Listen to the next sentence, the sidebar, the inside joke, the person next to them. They’re answering your questions right in front of you. Do they know they’re doing that? It’s totally inside joke. Sometimes when they like you, they will fling that bone to the person next to them. That’s their way of having fun.

Because they like you, even when you’re a sub, and they can’t tell you. PAY ATTENTION. Take that back to the office. Consider writing it down and decoding it...and run it by other people. They do that for sponges...not porcupines.

If you sat down with the small business officer, and you asked which companies are doing the best work, she might pull out her list, and say, “I can’t tell you that,” AND THEN point to a company on her list. If they like you, they’ll give you some hints. You don’t need to act on each tiny piece of information. But write it down, and pay attention to the patterns.

You’re in a great position to listen. When you ask them how else you can help, pay attention to what they’re saying about what they don’t like about the incumbent.

If people are saying, “They didn’t answer my question,” then ask, “What did you really hear?” Consider going on calls in tag teams. Think of yourselves as reporters gathering facts at different levels that add up to the facts you need to get the business. It will take multiple meetings.

They love to answer questions among each other! E.g....”I forget who they are, but they drink a lot of booze...” might be a sly reference to BOOZ-ALLEN. They might slip a joke to someone next to them. When they say, “I can’t tell you that...” or “I won’t tell you that...” pay attention to the next thing they say.

EXAMPLE: Eileen’s solar roofing client asked her to find out who are the general contractors are on base at Wright Patterson AFB. She asked her brother, who at the time was a radar expert on that base, while he was cutting the Christmas turkey, “Are you gonna tell your little sister who the general contractors are on base?” He looked at her as though she were insane, and replied, “Eileen, are you even kidding me? Now? You know I can’t tell you that! But [in an aside to his wife] they’re the butt-head of every joke!” And he and his wife giggled.

Eileen was angry. She was so upset. She mulled that over a six hour drive from Dayton to Chicago and for the next three days she was frustrated. She was ruminating, and percolating. She couldn’t get the info out of her own brother.

The Butt Head of every joke....

And then it hit her! He had answered her question after all! The primes were BUTT Construction and HEAD Construction, both out of Chicago. Butt was the 8(a) front for Walsh; HEAD is a local Dayton firm. Then she went in to get the data about their past contracts.

Ever been in a situation where it seemed like they aren't telling you things, but then they open up a little, and then a bit more?

Government employees' fun every day can come from using govvie-speak to answer your questions right in front of you and say it like a joke to a co-worker right in front of you and watch it go right over your head! When we hear the negative response, we go right back into our heads and generate the self-talk of rejection...which, if we do that, means we don't hear what follows...when they actually like us and want to help us.

After a while, they come around and are more candid when they realize they can trust you.

So, when you come back all frustrated, come back and break down the conversation. Don't get frustrated. Maybe they slipped you info! Sit around and debrief. Help each other. Maybe they put down the phone while you were on the line, and told your answer to someone else in the room.

**Slide 8:**

Another thing they're saying:

*"We like to take care of our own."*

--Military Contracting Officer

Sometimes they hire retirees or former agency employees with whom you might partner. If their people retire, or if there is veteran-owned business they have worked with before, you may need to partner. But if there is no qualified company in those categories, then they'll be able to give you a try.

That has special meaning in the Department of Veterans Affairs, which has been directed by the Supreme Court to give first consideration to Veteran-owned or Service-Disabled Veteran-Owned.
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Something else they'll say: "A known devil is better than an unknown angel." Maybe your prospect is being treated horribly, but they don't know what you can offer because they haven't tried you. Be a constant conduit of information on issues related to what you do. Show you're generous, and want to help. Become an unknown angel.

Eileen had a colleague who used to wear his dad's air force tie, to strike up a conversation and show his affiliation.

You can work up to a conversation on ideas or insight into what their current vendor is already doing. You could ask them how they're doing their invoicing. Even if you lose, you can ask for a walk-through. Ask, "Can I come over and learn how they're doing it right?" To do that can be like creating the heaving line, with the "monkey's fist", the small knotted, weighted ball, attached to a bigger and bigger line that can eventually draw in the ropes that tie up the ship to the hawser.

You might want to come up with a small, affordable assessment or report. E.g. a report of what's going on in their location, or risks they might expect, or notes on what else they might be asking of their current vendors. A small sample, an opportunity to check out how their vendor is doing something. White papers. Consider small opportunities, which can open the door to a big one. Find a way to create the "monkey's fist."

Become a subject matter expert, a thought leader...

Give them a service or report that will encourage them to ask their current vendor to step up! And if they don't, then the buyer may be willing to make a change.

One of Eileen's clients says, "If my competitor beats me, I'll clean all the spots on your carpets six months from now for free." The government buyer was happy to take up that offer...and her client had the chance to identify all the flaws, and offer to fix them. Always look at losses as a chance to walk through.

Another time, Eileen lost the deal. She asked if she could come over and take a look. The buyer was happy to take her on a tour. For example, Eileen had been invited to tour an installation done by a current vendor. On one post-installation walk-through, Eileen saw lots of frayed fabric, and went around the workstations, and tucked in the frayed threads. She said, "Wow, why didn't your vendor do this?" What is that project manager going to think next time? "Gee, Eileen knows the details!"

You'll see problems. And they might ask, "Why didn't your current vendor fix this?" or write thought leadership or teach them something new. The known devil is not paying attention to pain, not asking them such questions.

Another time, Eileen offered training on sustainable roofing; another time, a training for moving coordinators on "When does Rental Furniture make sense?" and then what does it take to rent, what to ask your vendor... These trainings start to make you the known angel.

You can have a heart-to-heart talk with them about their problems with their current vendors, but know that they'd rather work with the known devil, because they don't know you. They're afraid of risk and change. They might be used to being treated badly but are too afraid to change. You might start by doing really small projects.

These little unknown angel activities...are places to build trust.

Reach out to help the government employees with small tasks, help them with their careers, help them become thought leaders; offer a review of a statement of work for a troubled task. You're facing the "cemented" relationship with the other vendor. How do you break up cement? Well, you can jackhammer, like noisy protesters. What else can break up concrete? You get in the cracks of a troubled relationship...and, drip, drip, drip, it starts to crumble. You can get in.

“What do you not like about your current vendor?” Whatever the pain is, offer your expertise...including offering tips to that current vendor, if invited! You want them to have your mobile phone, able to call you on weekends. Find ways to become the known angel on tiny projects.

Anytime they ASK you to visit...there's pain. They're thinking, “I want to see what's out there.” You have great past performance. You can say, “We've been through that.” Find out their fears, and fix them.

You may find a lot of emphasis on deadlines...but also see deadlines move. Does that mean they're not getting enough offers? Maybe the vendor they want isn't ready! Maybe that vendor asked for the project to be delayed. Maybe MANY offerors were complaining about the deadline. If it's gone onto FBO, it can be criticized by anyone for anything. There might be a federal budget delay.

STORY: A little former 8(a) contractor flew his Learjet to a training. What was his claim to fame? Two things! “No project is too small.” And he started by saying, “Go through your files. Give me the work nobody else wants, so we can get those things done fast.” One of those projects was to move a mountain quietly – move a hill at Camp Pendleton without explosives. He did it in two weeks!

Of course you're going to make money. Being willing to do the dirty work. The late night. The backup. The backup to the backup. To prove yourselves. You start to grow and grow, and kick out the incumbent.

Ask them what's on your mind right now? Help them address their most immediate concerns.

Another time, Eileen was calling on the PBS manager for region 4, who was really recalcitrant. As he started to trust her, he started to drop the names of the 8(a) vendors he intended to drop. Finally, she asked what his biggest problem was with roofing. “Moisture!” he said. And his five 8(a) contractors didn't have all roofers they needed...so Eileen was able to approach them for subcontracting.

Be a bit like a doctor would be: offer yourself in the role of a GP. You wouldn't make a presentation of all the procedures you do. Find out where it hurts and talk about that.

They're people. They love music and sports. Many of them are creative, have families, and are involved in non-profits. They love to travel. They have pets. Sometimes they'll talk about their families.

Things they love, and hate...and are horribly afraid of. That are they most afraid of in their jobs? They have project deadlines and fear. They have a lot of fear. In hiring a new vendor, what do you think they're most afraid of in your niche?

It will take time to understand their real fears, and then address them and show that you're the safe bet. They think that being in business is risky. But they're also afraid of things in their own job. In roofing, it's moisture. In furniture, it might be whether the furniture arrives on time and is set up right.

They want to know whether your company can address their fears. Find out what they're struggling with. Your goal is to help them sleep at night.

Ask them, “Tell me more about yourself, your federal service, how you got to your position in the agency.” “Tell me about what you're concerned about, where the gaps are, so we can help you fill them, whether or not you hire me.”

“We’d like to tell you more about this special thing you might need, in a pinch...” With every one of these conversations, “We’re like a doctor. We need to understand your role, likes, dislikes, struggles.” “Tell me about what’s on your mind right now.”

Then when a particular situation comes up, you’ll need a solution. “I’m here to understand your role and what you need and what you’re worried about. Let’s focus on that.” Most of your meeting is re-interviewing them about THEIR situation!

So you’ll want to coolly ask, “You’re working with these guys? I’m here to learn. What is your current vendor really good at?” They’ll tell you ten or twelve things they like, and those are important. Then wait for the pause. They’re likely to add, “But this one thing bugs me...” If they don’t, then ask, “What one thing could they do better?”

If the vendor isn’t performing on time, for instance, that’s lost time and money. You can suggest how they can fix it with their current vendor – develop trust – or say, “This is how we would do it.”

#### **Slide 9:**

The Contracting Officer cares a great deal about making the file look perfect.

**Contracting officer:** That’s the person who signs the contract. That is ONE of the people you will need to deal with. Like “purchasing” in the commercial world. They might be called a “CO” in civilian agencies, or “KO” in the military; sometimes they’ll be called a “Warrant”, short for “Warranted Contracting Officer.”

If something does wrong, what’s the worst thing that can happen to them?

**Ultimate fear: If she breaks the FAR, she can go to prison.** This looms over 88,000 contracting officers every day, every file. Under constant review and pressure by auditors and uber-auditor tiger teams. Plus paperwork, and end users who want things NOW. IF they don’t spend money by September 30<sup>th</sup>, they lose the money.

How often do they REALLY go to jail? Not so much.

Not least because they are making sure their files look perfect. So, to support them, you want to make sure that EVERYTHING in your proposal follows the rules perfectly and fills the files perfectly, so they get what they need and they look like they shop for the number of vendors they need, no protests, no hold ups.

Every day, they have auditors, tiger teams, end users screaming for what they want. Navy project manager: “At our agency, we call it ‘Execute or be executed.’ “They have to execute the purchase or the money will be lost. Imagine being in a workplace surrounded by that kind of negative language! They are working late to get project managers what they want. It feels like life and death all the time: everyone is watching me.

So they want to know we get it. She’s going to be hesitant at first to talk to you. You have this really calming voice. Say, “We’re here to get it perfect. Just tell us what you need.”

“What do you need? A loser bid? I get it.” And sometimes, you win! Sometimes, the Contracting Officer will mark up your losing proposal and give you a lot of feedback so you can be more successful next time.

Another one of our clients was concerned about whether or not to protest. He decided not to, and just to take a walk with the contracting officer, and find out what was really going on. It turned out the contracting officer said, “I know there was a problem with this bid, and I’ve got a lot of other work I’d like to award to you. I had to spread the awards around this time.”

Remember to say, "I'm just hoping you can point me in the right direction, trying to understand how you're organized, so I get you what you need." If we go in and approach them relaxed, when there is not a bid on the street, they're more likely to talk to you. If it's close to a slow time of the year, they might be more helpful.

So ask.

**They are making sure the buy goes smoothly and making the file look perfect**, including with lots of competition. You need to follow the rules and help them follow the rules and look good. SO you need to say, "We're here to help you." Put the Unique Source / Best Value up front so she can glean that info easily to build the sole source justification.

The Contracting Officer's underlings are contracting specialists. They are gathering bids and market research. That's often the person who is listed on the RFP. They are entirely focused on following the contracting officer's protocols and making sure everything is in the file and is perfect. The right number of pages, and format. They might have to gather the bids, make sure they were gathered, had the right number of pages, were stamped on time. Their names are on the file. They don't decide who wins. They are making sure that offers follow the checklist the CO set up to follow the FARS as she understands.

Are the contractors paying people properly and providing the correct level of benefits? Ask them who you can talk to, to get it just perfect. They make sure the process is right. Their job is to make sure they are following the FARS.

In some offices, contracting officers specialize in buying one type of products. In others, EVERYBODY handles all types of purchases. You'll have to figure out how that works in each of the offices you're calling on.

Some CO's specialize in types of buying; others just hand out bids from the top of the pile and each one processes acquisition for a full range. Keep track of what range of products/services each one does. Assignments vary by contracting office. Sometimes, you'll have just one point of contact; in other offices you must meet everybody. Sometimes they all need to know who you are; other offices, there's just ONE GUY who handles what you do. Sometimes the data shows a lot of that to you, and you can build a conversation around confirming/verifying what you've discovered.

For example, sometimes, ONE PERSON will get handed all the IT contracts. **Ask, "How do you buy? Do you specialize in something or do you just pick from the top?" You might need to talk to the whole team...other times, just one person.**

You might get a story from a jack-of-all-trades like Mike, whose day included buying medicine, farm animals, and hiring an organist for the Sault Ste Marie VA Chapel, or you might be pointed to Jody, who's THE person who buys what you do in that office. Asking them who does what is a relationship-building conversation, too!

Remember, sometimes you'll be asked for a "loser bid." Don't be afraid to help out with that; they may be letting you help them out with their file so they can award you work later.

Many times, if the buyers don't want to deal with us, they'll push us over to...**Small Business Specialists in the Offices of Small and Disadvantaged Business Utilization (OSDBU).**

If you can't find your end users, the Small Business Specialists know who they are.

Most agencies have these, in their Small and Disadvantaged Utilization (SADBU) or OSDBU. Some have been in these jobs 30 years. Others might be very new. They are trying to meet SBA's goals. They are largely gatekeepers or skipping/stepping stones. This person's job is to send reports to SBA that they are helping small business. To say, "Here are all the big businesses I'm managing and making sure they do business with small business, and here are all the small businesses I talked to."

They spend a lot of time with the primes, too, making sure that the primes are meeting THEIR goals.

"I understand you're working with \*\*\*\*. Have you thought about going HUBZone next time?"

Or

Maybe the OSDBU is making sure that large businesses are doing business with small business subcontractors. That's YOUR angle, as a large business.

You might think they are your friends. But they are not your buyers. They will be an advocate for you once you start to win. Getting them to advocate for you might be tough. You need to skip over them fast, and lean in and ask to meet the program managers and CO's. Don't spend your time going from one OSDBU to another, you're handing them info for their good faith effort file. Their job is to help you...but is also to help them fill their good faith effort file.

There's a FAR rule that gives them a pass if they don't meet their goals. It's called "Good Faith Effort. As long as they can demonstrate a "Good Faith Effort," spoke at lots of events, went to lots of meetings, and show that they tried...they're fine. IF they don't make the contract awards, then it's not their fault. IF they can provide a report of all the people they've met considered, put all the capability statements in the file, they'll get a pass.

What happens to them if they don't meet their small business goals? Nothing. So long as she can show good faith efforts, they don't have trouble with the Small Business Administration You might meet them in a conference room or at an event. They'll say, "Give us your capability statement. We'll pass it along." And then nothing happens. They take your information and say they'll pass it along, and give you lists of other small business specialists. "We talked to them, we did outreach. It's not our fault they didn't win." As long as she can prove she tried, she had events, gathered cards, asked you to register on their web site...then it doesn't matter whether they fail to meet the goal.

**Honor that request, but then get back over the end user.**

Don't spend too much effort dropping off your data. They might want to be briefed on what you do. They are gate-keepers. They'll give you lists of all the events and small business offices. You'll get contacts for them, and you'll go to their annual event. But get past them. We call that "Reverse Trick-or-treating" – dropping off your capability statements -- just helps them meet their small business activity and outreach goals.

There are a very few rockstar small business specialists who will make an introduction, or bring a group together for a capability briefing, but often they'll say, "Don't tell them I sent you." (If you DO get a briefing set up, don't start til you've gotten everyone to sign in!)

Don't fight them or complain why they're not doing more. You need to dig deeper, and ask them for help, to get in with the end users, win something, and come back and tell them about it. Don't expect anything to get passed along. Don't just make a presentation to them.

Your plan will include links to small business specialists, but they're not going to pass along your information. They are basically trained gatekeepers. Some are great...but most if you're looking for partners.

WHAT TO SAY: show them, "I've done some research, and I see these people are the ones you do business with. Who's doing the best work? Which of these might be ending soon"?

So, lean on them! Your plan will include links to them, but every time, seek an introduction to the end user or facility manager or incumbent prime. If you show them you're utilizing what they publish, they are more likely to open doors for you, possibly including introducing you to the end user.

They might call you on no notice, and ask for a bid. One way you can help them, every so often you're going to write a "loser" bid when the solicitation is clearly written for someone else. She likes you, and if she's asking you, she trusts you and wants you to be one of the three she is considering. Shows that you GET IT. Say, "I'm happy to get this to you for your file, but I'd like to get an intro to the end user."

Some vendors find it frustrating that a bid is wired for someone else. SO...you figure out the minimum amount of work that you need to do to get a bid into her file...and bargain with her for an appointment with someone else. Or if it's a huge, inconvenient bad-fit... just say no.

You need to know scope and budget, and competitor's costing.

When they award to a business by a tiny cost margin, it's a sign that someone else has a relationship. They can also use reverse auctions, with a set scope, and then just do it on cost. You have to decide if you want to play.

If they go Low-Price, Technically-Acceptable (LPTA), they may use reverse auction if they're under pressure to show they really pushed the contractors hard for best price. They can develop a scope, short list those with the best price, and then have conversations with the finalists. They will let you, over a period of time, bid each other down.

GSA and FedBid have competing systems of reverse auctions.

When they tell you, "you didn't understand the scope of work"  
Once they love you, they will say, "We want these guys, their training, their systems, their experts."  
When they say, "you weren't technically acceptable" it might have been that you didn't have the trainer they wanted, you have to get in there earlier.

Then you're only going to be responding to opportunities where they know you.

**You can show them your competitive analysis. Ask questions like these:**

- I would like to make a capability briefing to the program manager; who do I need to be talking to?
- Get to the end users, find out who their primes are.
- “Who In this Agency Uses Products Like Mine or Needs Additional Services Like Mine?”
- “Who is Performing My Type of Work? Who’s doing background checks here? Using internal team? I want to meet those people, not just drop off my paperwork. We’d like to introduce them to a world view.”
- “Who might need me as a sub?”
- “Who is the Top Performer? Who’s the best? We only want to team with the best.” They might say, “I’m not allowed to tell you,” and then point at the name on a list.
- “Can you give me a list of the primes?” You want to find out who the partners might be.

After that conversation is done, navigate to the decision makers.

You might end up subcontracting. But you need to find the person who needs what you do. Otherwise, you’re really still sitting at the reception desk.

Sometimes they’ll say, “Oh, the usual suspects.”

If you reply, “I know you’re working with A, B and C companies,” she’s going to be impressed.

Again, even if they start to look uncomfortable because you’re asking so many questions:

- “I just want to follow proper protocol.”
- “Can you help me? I’m new here. Tell me how things work for you.”
- “I’m just trying to learn.”
- “Can you direct me to the right point of contact for who evaluates software?”
- Once you get to the training or human resources person, “I’m hoping you can point me in the right direction to the person who needs...”

Gets you out of the uncomfortable position. Use that to disarm their defenses.

One person may be open, and someone else might not want to talk to you. Move on.

If you say you’ll call next week, call when you say you will.

You’re going to start seeking TOP partners. SO that’s why you’re asking your clients, “Who are your best of the best? Who are you really happy with?” You’ve got to keep track of that. And you’ll end up partnering with people you might otherwise be competing with.

Their answers will be vague until they can see you have done your homework.

Your goal is to find out how they can help you meet the right end users.

Story: Eileen heard a group of speakers talking, before a panel, about how they did business. They talked about IDIQ’s and BPA’s and lots of other contracting vehicles. On the dais, they all said, “We use GSA Schedules.” But when she asked the question during the session, “Would you tell us a little more about the contracts you use?” then they opened up with actual details.

**Slide 11 -- End Users and/or Project Managers**

If you read past bids, you're looking for the name of the end user, Contracting Officer's Technical Representative (COTR) or Contracting Officer Rep (COR). They are usually working with the project officer. They can't buy, but they are the person you need to talk to. They are looking to see if the statement of work is fulfilled. This person probably works closely with the CIO. They'll use those past performance stories and best values to direct the opportunity to you.

Sam: They need to talk, 80% of the first meeting. Focus on them and their business. Often you don't need even ONE of the slides you prepared.

What are the job titles of YOUR end users who would need you? Who makes decisions about buying what you sell?

It takes digging to find out. You need to start tracking these titles, and telling each other. Who met you there? What were their titles? Who are their counterparts in other locations? Start mapping who their peers are, at similar levels, and ask, "Who would you be calling on if you were me?"

Stay engaged with them, ask them what they think is coming down the pipeline.

Sometimes they might invite you to a walk-through...that's your new best buddy.

OVER 1.5 Million government employees are on LinkedIn! They are watching like voyeurs. If you have good articles or thought leadership on innovation, they might connect with you. Once they do that, you can also connect with their friends and contacts. This is their way to get in touch with the outside world without getting into trouble. You can say, "Here's how I've solved these problems in the commercial world."

You have to understand what level they are at. If the service is under \$3,500, they might be able to come and pay on a credit card. That level is going to rise to \$5,000 in DoD later this year.

At a bigger level of spend, they have to go to contracting. But they will be evaluating your proposal. They will be the ones doing marketing analysis.

Even if we don't see them listed on the bid, THEY will be grading your technical proposal.

28% of facility managers have to know Information Technology. Find out where their fears are, what they're worried about.

If you don't know who they are, it will be very hard to give them what they want.

STORY: Eileen had to go to Andrews AFB right after 9/11. She had an appointment and flew in arriving at 10 am, and had to rush to thrifty to rent a car. They only had one car: A purple PT Cruiser. And it

matched the purple suit she was wearing. When she arrived at Andrews, she had to get out of the car for vehicle security inspection...and they laughed at her for her funny colored car and matching outfit. But they were friendly and helpful. If you look like you know what you're doing, once you arrive with the appointment, you have fairly large mobility on base.

STORY: the roofing company kept meeting with people in Atlanta, and not moving forward. So they said, "Our national team member wants to join us and would love to meet you." When Eileen got there, she said, "Is handling rooftops your job? What's your role?" "No, my job is to manage federal buildings and make sure they're safe." "What's your top concern about roofs? What keeps you up at night?" "Moisture." "Who do you rely on?" "I have five 8a companies." "What if you need more?" "That keeps me up at night." "Who are you working with?" ... eventually, found out which one he loved, which three he wanted to kick out, and which other 8(a)'s he was considering. It took half an hour of relaxed conversation.

**Buyers don't care you're a small business. They want to know you're the best.**

They work with VENDORS to write the specifications! When you're talking to SMALL BUSINESS officer, say, "I want to know the names. Don't intro me to them, just tell me their names."

Making conversation...Some of them have security clearances, and can't share information. They can go personal quickly. Once you break the barrier, people will talk to you fast because they can't talk about work. But you can talk to them about their family, movies, church, travel, trying to get a mortgage, hobbies, community, and nonprofits. They'll start to leak you what they wish they could do better, what they're not happy about.

So, if you start feeling like a psychiatrist for them...that's good. Talk to them about their careers, how impressive their work is. Tell them, even if you're struggling to find things, call me. "Besides these things, call me any time."

Eileen: RIGHT ON! We never turn our backs on our customer, but ask, "What else can we do to keep you healthy?"

**Slide 12:**

Be willing to say, “I’m here to support you.” Be a conduit of information they need, including repurposing information about other needs they have even if it’s not about you, demos and current info.

Keep a database of ideas or articles that your clients may value, and share those.

Remember when Eileen’s boss said, “You’ll never make it in the outside world,”? Someone in the outside world said, “Come on over and see the latest equipment.” A year later, when the agency bought new equipment, she could say, “I already know how to use it.”

You’ll train them to understand, “I’m here to make sure you get precisely what you need.” Share articles you find in other places. Expand their minds about innovations in your industry. It shows you care about them and their careers. You’re from the outside world bringing them new ideas. They love white papers, they love to tour your locations and to show you theirs. Share case studies, articles....Are you doing some projects you can show them? They don’t buy things, but they write the specs!

“I’m here to watch out for you. We know what it’s like to be you. We’ll keep sending you the latest.” Show them you care about them. “Anything I hear about new technologies, you can count on me!”

**Slide 13:**

**Most facility managers love to take you on a tour!**

Many times, end users are self-conscious and concerned that when you look at their work, you’ll giggle at them or scoff or laugh. Sometimes what they are using is awful. What we need to do as vendors is to stay cool. They might feel like they’re working with the smallest budgets, the oldest stuff. They are proud of the history of their buildings but embarrassed about the state things are in.

They often feel very exposed. They’ll think we’re being really critical of them. The first thing we can do is, “Tell me about your government service...” and then validate them, “You’re doing the best you have with the resources/tools you have.”

“You’re so good at this. Let me show you some new stuff...” Come up with simple solutions for what seems like hard problems. Then, Oh, that’s a bigger problem. Let’s sketch this out. You want to become their go-to person. That may take 3-4 visits. When they keep meeting with you and asking questions, either they really ARE your person, or they’ll walk you over to the right person. When you come up with a new solution, and you’re in the idea phase, let THEM take all the credit.

“I’m here to support your efforts and make you look good. “I Get It” Or reach out and say, “What are you struggling with? Oh, let us tell you what we did for (...someone like you.)

Start by validating them, then start educating them; get stories, white papers, offer training.

You're the outside world. Show that you care about them and their career. Tell them what you do, and things that are interesting. Plant ideas in their heads. They know they don't have the latest, greatest stuff. You might be horrified by the way they are doing things. Keep it to yourself!

Why would they meet with you? They have pain. If you have their attention, something is WRONG with their current vendor. You need to make them feel validated and comfortable enough to talk about it. Maybe you can help them work better with their current vendor...and better understand how THEY SHOULD expect to be served.

Wow, this must be such a hard job. You've been doing a super job. Educate them on the new innovations, top industry trends, risk management programs...then they'll start talking about their pains. Then YOU can develop a solution, and the opportunity might even be defined so that it never even hits the street!

They often want to take you on a walk, show you what they've got, and talk to you. End users can be apprehensive about their operation, or the contractors they are using. The equivalent of dirt floors, bare light bulbs...They can be easily embarrassed. Ask them about their service and their role. Don't criticize what they have. Instead of being shocked, say, "Yeah, that was the BEST way to go and save money back in e.g. 1995..."

They want to know you won't come in, sell, and disappear. You'll need to woo first. They want to know you care about THEM. If you make them look good this time, they'll want to keep you for their whole careers, wherever they go – higher in their agency, or into another agency.

"I know you don't have a budget right now, but I'll keep you in the loop with ideas." That builds trust too.

- **Validate FIRST:** e.g. "You've deal with this for now to save money, do your best. You might see all kinds of lost opportunity when you look at how they are managing projects. You may see some shocking stuff...or great stuff. Look neutral! They are nervous of criticism. Instead of wanting to compete with them. "That was a great way to do it five years ago...those products/processes were the best in their day. Now let me show you what people are doing today to keep information safe and predict problems...." You'll then uncover what they wish they could do.
- **EDUCATE SECOND:** "Now let me know you the new stuff" Listen for "I wish I...I hope I...I should have...my boss won't let me..." and turn it into "Now you can...and we're going to show you how." "While you're doing your best here, we'd love to keep you well informed about what other federal agencies are doing..."

They know things aren't what they'd like. Because then they'll start to complain. Then they'll start telling you what they'd like to change. And if you can't enlighten and engage them, move on.

Then talk about innovation.

**UNCOVER PAIN:** Take in their pain, listen, and say "would you mind if I follow up in a week with a couple of ideas". Give them a white paper...no logos or contact info. Say, "I have some ideas, Can we talk about them" then they can take that to their boss and it will look like they did it.

*Guess who wins? Come up with solution and make it look like their idea....if you don't get this one you will get the next one.*

If they love you, they will take you where they go...and if they can't work with you, they will intro you to their friends. *They'll share what they want to fix. First, they'll talk about personal things. Then they may move to talking about their struggles.*

Eileen won furniture rental work at DHS business after a year of visiting TSA facility managers telling her, "Washington Won't Let Me." Finally was pointed to Mylon Tapscott. So, went to visit her and said, "I'd like to interview you." Went there...and had a LOBBY meeting. She asked, "Where were you?" "Not on schedule yet." "Do you apply rental to purchase?" "Yes." "Well, all 490 offices weren't able to do that. The vendor is in my office, and I can't change that, but I'm really frustrated!"

BUT she said, "I'm going to call DHS while you're here and tell them to do business with you." And she called them personally and said, "Don't use my vendor, use Eileen," and Eileen's company won future work.

When you call on them, ask them how things are going with their current vendor. Listen for the pain.

Come Up With A Solution: Deliver on time, every time. With this customer, it has to be perfect. "I know you haven't hired me. We have some ideas, got some time to talk?" Relationship to pain to solution to sources sought that has you in mind. Under the radar opportunities turn into a "cake that's baked for you" – a solicitation that has you in mind.

Then you'll start writing those letters of thanks for assistance, and, when projects go well, letters of commendation to their bosses! Those are great ways to build trust. Those go into their permanent record. Ask, while work work with them, who's your manager We can't buy them lunch or trinkets, but we can write those letters.

E.g. Eileen read a press release post 9/11 about the Capitol. Found "William Pasagno Saved the Capitol" ...from what? Termites! Who really saved the Capitol? Contractors! But they gave HIM the credit. Then, 31 years old, Superintendent of the Capitol, and now down in history. Who will get the extermination work for the rest of his career? Called the press officer and said, "I'm reading your release...I want to meet William Pasagno" "Oh, Billy? Here's his cell phone..." Eileen called him up, met him at a metro station, and got the Facility Manager's tour. It was that easy!

### Slide 14: Finding End Users

We'll be helping you get as close as possible to people who can point you to end users. We will save you lots of time doing that in the federal sales action plan session. That is how you grow organically in an agency, and ask them "who else do you know? We will help you do that, and provide links to the most current directories in your federal sales action plan.

Key social networks: register / link on, read, watch for names.

- **LinkedIn.** 1.5 million Government employees are on LinkedIn. Their connection with industry helps their professional visibility. Lots of Contracting Officers and end users and PR people are on LinkedIn. Start to link with them. Once they KNOW you, they will connect with you.

Just type e.g. "Cyber" and "federal"

If you went to LinkedIn and typed in "building" or "facilities" or "Contracting", once you start connecting with them, LinkedIn starts suggesting more connections.

Once you connect with the ones you know, their buddies connect with you. They want to be connected to the outside world. They will read your articles, even if they can't "like" or comment on them. They will be watching you. Eileen just connected with three CO's at federal agencies with whom she had over 100 common contacts! They get it.

- o Connect with Judy and Eileen and look at what we do.
  - o You can consider starting a group...
  - o Ask your govbies if they are on LinkedIn and connect.
  - o Start linking with people, and their contacts link with you!
  - o Publish posts / articles on info security
  - o **You will see who your end users are in LinkedIn and can connect with them as you begin to build relationships with them, share articles and info with them.**
- **GovExec.com** is the gov't internal newsmagazine. It's a daily free publication This is how they talk to each other. Who got hired, who got money, who solved problems...who didn't? Lots of names, lots of pain profiled. See the archives. When there is a disaster, particularly, agencies use this to communicate with one another about moves and projects. Internal CNN...you can also get a daily newsletter and monthly magazine. TMZ for govbies.
  - <http://www.govcon.com/> GovCon is the one-stop shop for government contractors! This exceptional site features government bid opportunities, teaming partners, products, services, educational resources, career services, industry news, and more.
  - **GovLoop.com** is like Facebook for govbies – state, local and federal. It's free. Over 100,000 members, lots of IT people. Trains federal, state and local people. Free to join. Lots of middle managers. Your future customers are here. Features a Daily Awesome, usually an IT person. **Get on GovLoop**
  - [www.RouteFifty.com](http://www.RouteFifty.com) is published by GovExec for state and local markets.

- **NextGov.com** is the IT version of GovExec. Full of pain and names. Information about changes, office moves. It's a news network in near-real-time. If they are releasing pain, opportunities and names are there. Those stories can catapult you in to the CIO. They put things there because they don't think there's a solution out there. Grab the names and follow up. Pay extra attention to articles there that you want to share with your customers. Use those as a conversation-starter.
- **Twitter:** follow their agency accounts

If you're headed for a conference, those are great places to look for partners. NETWORK! You definitely don't have to exhibit. Research in advance who's going to be there, connect beforehand, book time with them, and follow up on site.

### Slide 15:

#### Stakeholders:

They are the base commanders and regional directors, or the property manager, who cares about the mission. They care about how much, how fast, keep us out of the news. Keep our message positive, on point, mission accomplished.

When Homeland Security was being set up, DHS was kicking the Navy out of spaces in Crystal City. Eileen got an introduction from one middle manager in Navy to a middle manager in DHS. That was better than in intro through a stakeholder. These guys call each other for recommendations. Ask, "Where else would you go if you were me?" The recommendation makes THEM look good to their friends.

The Public will burn your Stakeholder at the stake if things go wrong. What they fear is public humiliation. At Walter Reed former Army Medical Center, Veterans were recovering from traumatic brain injuries in a shamefully-maintained facility. When that fact became public, the facility manager didn't lose his job. The COMMANDER did. When a VA facility in Tucson was falsifying reporting times, that led in part to the resignation of the Secretary of the agency!

The first person you meet might be a low level contract specialist. Her name is on the bid, but she's pushing paper. Her client is the contracting officer. HER client is the end user. HER client is the Stakeholder.

Sometimes they are appointees; others came up through the ranks. If there is an error, they take the hit. They don't care very much if you get picked.

Like you, they are visionary. They want to know you are working well with their team. They like to talk to industry about innovations. They are most afraid of not meeting the mission, and of public humiliation. They don't want to know the minutiae of any contract. They are expecting end users to make it right.

Sometimes they have favorite vendors, or will have their person represented in source selection. You need to know who they are.

### The Federal Sales Game: How To Play To Win

Summit Insight (703) 627 1074 Judy.Bradt@SummitInsight.com

2019 Edition

Just talk to them in bottom line terms. When you talk to them, do **recognize their end users**. When you see a stakeholder, tell them how brilliant their end users are. Eileen ran into a situation in roofing and said, "I need you to help me understand this nuance." The contracting officer took five minutes and explained it. Eileen called the regional director and said, "I'd like to write a letter of commendation. Who should I send it to?" He said, "Send it to me, make it flat, and I'll present it to her and frame it!" They want to hear how you're going to SOLVE the problem.

At a networking event, when you're talking to the brass, you address them with their title, and the first thing they do is to invite you to address them with their first name. Then converse with them about their family. Most of them just relocated from somewhere else. They're happy about that...or they're not. Ask how they're doing, how they like it here. They will ASK you to stand next to them because you're not asking them for a piece of them. Save the geeking out for the end user. Go from middle up, not top down. If they ask what you do, keep it simple. You probably don't even want to ask them which of their team members or training managers you should be talking to. Because if the general walks you into Human Capital and leaves you there...it's not going to go well. And their conversations can get personal really fast.

STORY works the other way around, too: When Eileen was touring the Pentagon, she said, "Wow, the company owner I work for would love this," and her contacts said, "Sure, we can set that up!" and they did. Everybody looked good!

#### **Slide 16: PR & Freedom of Information Act (FOIA)**

There are always going to be press releases of a military base about new facilities or renovation openings. This is another place to say, "I'm hoping you can point me in the right direction..." There is someone at every installation and agency responsible for responding to FOIA. A formal FOIA request *might* reveal something, but it might also take a long time and not make you any friends.

The FOIA/Media relations person, handles phone numbers, phone books, and is also part of the communications team. She knows the security team because she's part of the continuity of operations team.

They get three kinds of calls:

- A journalist who wanted a question answered. If the info isn't classified, then that can get them things like arrest records. Citizens can also ask for public information.
- An angry loser, saying "I want a copy of the winning bid" and
- A vendor who want to talk to someone inside, and says who. "I was just reading your press release about how you're working with Captain John Doe about \*\*\*\*\*. I'm not sure if you're working on that, but I'd love to talk to them about it." And she has a law – FOIA – that allows her to bring you into the conversation.

She also manages the web site or knows the person who does that for the agency. She's promoting good news, including great projects about security.

She has the phone book for the agency! They know who everyone is and is supposed to share info under the Freedom of Information Act. PR people often open doors. She will often be much more interested in helping you than the small business specialist. End users might not be happy about referrals from the Small Business Office. But the FOIA officer is SUPPOSED to pass along that information.

If you're offering innovation, that's a good news story for her.

Most FOIA officers are journalism wanna-be's! They write a LOT of press releases, and those are on the web site. Press releases at the agency reveal a lot of names. Read them and see if there's a connection she writes about that could be useful. If you come in after reading her press releases, she'll be thrilled. That's a total ego stroke for them! You know how many people read their press releases? Nobody. There might be a training story in the article! Check it out. "I see the name xxx. Are they still with the organization?"

**The FOIA or PR officer is part of or manages the Continuity of Operations Plan (COOP plan).** Every agency must be up and running within 24 hours of a disaster. During exercises and training, they talk to IT, HR, Facilities, PR. If/when the small business office or contracting officer won't help you, the PR person will. And so they know the top level people who need what you do.

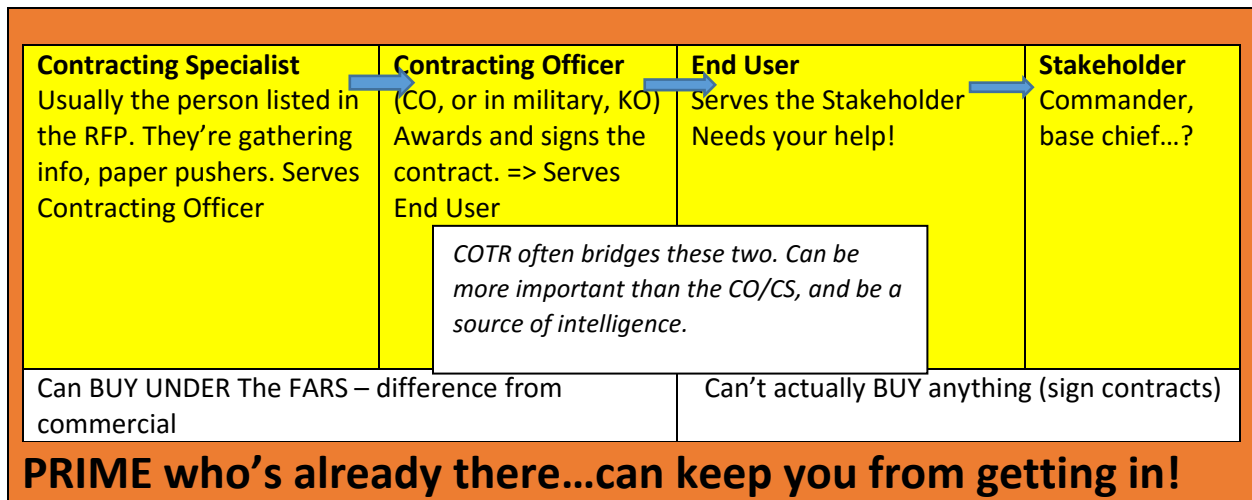
PR and facilities absolutely know each other. She can often connect you a lot faster than the small business specialist might. You can say, "I'm doing some innovative things with mobile apps. I'd love to tell you more about it. Who should I be talking to?"

There's a rule that say, "If it's not SECRET, then taxpayers have a right to know." Journalists use it a lot. And most offices have a former journalism major in place to manager those callers. And is responsible for the manager's speeches. Every single web site has a PR person who cares about the data that goes up there. They often got there through journalism degrees and are star struck by the media.

They can be much more interested in pointing you in the right direction than the contracting office might be. She knows everybody. Her job is to connect people, and everyone knows that, even if they're not happy about it. We'll give you links to them in your plan. It just takes a little tenacity.

Some agencies have a phone book online, others don't.

**Slide 17: Prime Contractors: that's someone who has a relationship with them.**  
**There are FOUR layers to every opportunity**



CS, CO/KO, End User, Stakeholder...these are your golden clients.

Small business specialists are NOT YOUR BUYERS. Notice they're not in this relationship map.

Never forget, there will always be a layer of people who think they have all their requirements covered via the prime.

There are often multiple layers of primes and relationships, and you need to figure out those, too!

***Most of this is like the commercial market! The biggest difference from the commercial market is the need to work with the federal acquisition regulations. Otherwise, you have relationships and layers very much like this in the private sector.***

So you know you're looking for contracting people, sustainability managers, environmental managers and the prime. You might have to partner with the prime, or unseat them.

They might have TWO business cards, one for the agency, and another under the name of their company.

A lot of our time will be spent getting to know the Prime Contractors. They might be listed on the contract, but have done NO task orders on their contract. Either we connect the primes...or unseat them. We can become competitors...or competitors. You might need to know "who are you working with, who's doing a good job for you, who are your primes? Can you introduce me?"

There might be primes on site, as contractors. They can get you in...or block you. They work for the contractor but can be CIO or head of contracting at the agency. Tens of thousands of them are on site at the agencies. We need to know that layer. Need to find out who they are, what the customer thinks, and whether they are partners or backup suppliers, or competitors or both: "Competimates"

We always need to know where the person we're talking to fits, so we know who all the players are. We also pay attention to who we don't know.

**The Federal Sales Game: How To Play To Win**

**Summit Insight (703) 627 1074 Judy.Bradt@SummitInsight.com**

**2019 Edition**

What happens if federal agencies cut budgets?

- Projects might get cancelled in some agencies, like the Environmental Protection Agency, but increased in others, like Customs and Border Protection.
- They might cut staff in some agencies. They might also hire some contractors.
- We're seeing more application of the A-76 circular: if the contractor can do the job at a lower price, the contractor can compete with federal employees to do the work.
- Look at getting one or two seats in an account, and grow from there. If they have a good experience with you, they'll turn to you next.

In Laguna Nigal, Eileen's team was managing the rooftop contract. When the bid came out, it said, "you must have done solar within 5 miles of this building" in the evaluation criteria. Her team with the country's largest solar rooftop company, but a small WOSB sneaked in, showed all their past performance, and won the client over, despite a protest, and a decision on price.

If they really want you, they'll put hooks in the evaluation criteria to make it easy to choose you. When they want to meet with you, you'll show your past performance. Ask your buyers, "Can I give you past performance from commercial, state and local, same size and scope?"

What if you get voicemail? Hi, I'm \_\_\_\_ and I'm from Fermat Software and I've got some innovative new things to talk to you about. I'm sorry I missed you, but I'm going to call you tomorrow at 2 if I didn't hear from you before then.

Then call back, and say, "I didn't hear from you, and I'm calling back. I'm hoping you can point me in the right direction. I'd like to get in touch with the person who handles \*\*\*\*\* ... I'm going to call you back tomorrow..."

By call number three, they're getting apologetic.

STORY: Eileen had been leaving messages for Romeo Alis, and stopped by the building. The guard wants to help her, even though nobody gets in without appointments.

He say, "May I help you?"

Eileen: "I'm looking for Romeo."

Guard: "Oh Romi? Do you know Romi? Let me call up for him." Didn't reach him. She was leaving... And then the security guard said, "Wait, he's coming down."

Romeo came down and said, "It's 4 pm, and I'm leaving for the day. I'll be at an event tomorrow, and I'll introduce you." And he was as good as his word: "This is Eileen, she left me three messages, here's her story..."

Feel uncomfortable with leaving messages? This advice will change that experience forever.

**The Federal Sales Game: How To Play To Win**

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**2019 Edition**

Didn't reach your prospect on the first call? Fine. Just leave a message to say, "Hi, I don't know if you're the right person, maybe you can point me in the right direction. If you ARE the right person, I'd love to tell you about innovation.....If I don't hear from you, I'll call you back on Tuesday at 2."

Then call back Tuesday at 2. You're showing that you do what you say you'll do. You're building trust.

Be positive, asked to be pointed in the right direction, "Who would you call if you were me?" Go in with humor, charm, and no expectations. You know they have no budget and are working with someone else. "I want us to be friends because I want to keep you up to date on the latest stuff." You want them to call you up and talk ideas. "We're here to make you look like a rock star. We're the safe bet."

By the time you reach them, they might very well feel badly because they haven't called you back. At the very least, they'll want to help you and move you along to the right person. It might take time for them to start to get comfortable with you. Be patient.

You want to have a conversation like a doctor. "How are you feeling?" "We want to make you feel better." "How are you doing? What's going on?" "Let's focus on what's happening with you today."

You're almost like a medical general practitioner who has specialists back at the office. Would your MD give you a chart of all the procedures they performed that week? No. You be the same way. Focus on the person. Ease into who they are, what their role is, how things are going with their current vendor, what they like, what they'd change.

Forget your powerpoint. Go in with your business card.

"Gee, you're doing business with \*\*\*\*\*. How's that going?"

"what is your role? How's life going?"

"I have so many ways I can help you. I'd rather zoom in on what's going on for you now, and what you're looking for. If I'm not the expert, I know someone else who is."

"Is it appropriate for you to introduce me to your star in contracting?"

Why do they invite you in?

- They have PAIN.
- There is a problem with the known devil.
- So, you need to not just be in presentation mode.
- You need to find their pain point.
- For the next six months, you're doing to tap on the pain.
- As they start to trust you. There it is. When you get it, you will watch them light up and melt down (in a good way)!

**Slide 18: Keep this image in your brain – See FedBizOpps as the Raging River of Rules.**

Now that we have a solid grounding in who's who, and who we're building relationships with, we're going to save you 5-6 years of effort in the field.

If your buyers are awarding purchase orders or other sole source 8(a) contracts to you, you're going to now also consider a broader way of doing business: the IDIQ's or task order contracts.

Let's say a federal buyer finally wants to work with you. If the buyer needed a quick pop-up purchase, they can spend up to \$3,500 immediately, with no competition. But if they wanted TEN orders, that's \$35,000. They can't just do one buy a day, for ten days in a row. That's order splitting. They might get questioned about it. It's shaky.

She really wants to avoid FBO. FedBizOpps.gov (FBO): public web site where federal solicitations are posted on opportunities worth more than \$25,000, if they have no other choice. (Remember the "Noise" we talked about?)

If a bid goes out on FBO.gov, how long do you think it takes a CO to award a project and get it going?

**FBO pre-solicitation to award, 269 days on average.** Once they put it on there, it's big drama. All those hammerhead losers. And for over \$25,000? Can you imagine: a firefighting emergency and they need to get a contractor to drop fire retardant? Or disaster response when they need ice and generators and diapers and first aid kits? They don't have that kind of time.

Think of contract vehicles as bridges across the raging river of rules. You're on one side. They want to work with you but they're on the other side. They need it now. If it's over \$25,000, she has to put it out on FBO. They want to avoid that river. They want to use a contract vehicle, or "Bridge" that lets them reach you without going in that river.

Enter the **General Services Administration, GSA**. GSA was created in the early 1950's to pre-shop and pre-negotiate from the commercial market and get really good pricing for products; added services in the early 1990's, and grew to a \$50 Billion contracting agency. But it's only about 10% of all federal purchasing. You might also see these called Multiple Award Contracts (MAC) Multiple Award Schedules (MAS) or Federal Supply Service (FSS) contracts.

Getting a GSA Schedule is like building a bridge: it takes a long time to do and it's expensive to do. But once it's done and open?

**The second big FAR is FAR 8.4.**

Authorizes government buyers to use GSA Schedules, Congress, the World Bank, even the Boy Scouts, and including some state and local. All federal agencies, military.

- If under \$25,000 and it's a product, they can go to GSAAAdvantage and buy click and buy immediately.
- If it's over \$25K and on GSA Schedule, they can put it through Acquisition Gateway or eBuy, but they don't even have to use that. All they need are three written bids from three GSA Schedule holders on the same GSA schedule and SIN. **They put out a task, and get three bids, and they're done. The average time to purchase on GSA Schedule is only 14 days.**

- If it's a service under \$25K, and they know a GSA Schedule contractor they want to buy from, they have to "review" the price list of two others – that's their market analysis -- but can buy from the vendor they want. Every so often, they need someone to add a bid to their file.

**Think of contract vehicles as bridges** across the raging river of rules (rather than a "vehicle" that's going to drive business to you). You're on one side. All your buyers and stakeholders and people who want to work with you are on the other side. They'd much rather use a bridge they already have. *Think of it like a bridge because it sits there: YOU have to drive traffic across it.*

There are 19,000 GSA vendors; only half of them are actually selling anything through those schedules because they don't know what they're doing. If you partner with one, you want to only work with winners. The bridge sits there. It costs you an investment to get that contract. Now you must be driving, coaxing, traffic across it. GSA is a bridge they can use. It was built to make it easy for buyers to buy from you. You have to tell everyone your bridge is open, and invite them to cross it.

It also takes time to build, and you have to maintain it, be up to date on pricing, and sell \$25K each year after the first two years...or GSA will dismantle it. It sits there and does nothing unless you get your buyer to come across.

The day you get on SAM.gov, dozens of companies will solicit you to get a GSA Schedule. Ignore them. The data shows you very clearly whether or not your buyers are using a GSA Schedule. That shows you know whether or not it's important and what role, if any, GSA Schedules need to play in your strategy.

**Some buyers will say, "We don't want to use GSA Schedules. "**

Why not? Sometimes they don't want to pay the industrial funding fee, or they have an impression that the prices are too high; they forget they can negotiate from there. SO then you ask "What are YOUR protocols? What works for you?"

Sometimes they want to work with the bridges owned by their current contractors, or by their own agency. Sometimes they'll ask companies to compete against each other for a different "bridge," called...

### **Bridge 2: IDIQ's**

But agencies might want to use or create a different bridge: **an Indefinite Delivery, Indefinite Quantity (IDIQ)**. It's not a Schedule.

It might be an established, longstanding government- or agency-wide contract (aka GWACs. In IT, you hear about contracts like Alliant, STARS, VETS, SEWP, or EAGLE II, or CIO-SP3, Seaport-e, for example)!

OR an individual agency or base might set up a totally separate IDIQ contract.

They do that perhaps once every five years, and make award to a small number of vendors, and then they place orders across that bridge to those two or three vendors for the next three or five years. It might be 3-6 months for the proposal. YOU might need to either team with the current prime today, OR eventually come in with your own bridge. If they're NOT coming to an end, maybe you have a specialty

they don't have. They may direct you to that prime for that one task. They'll let you use their bridge if the client asks for you, but not otherwise.

### **Bridge 3: BPA's – Blanket Purchase Agreement.**

These are usually for smaller orders. Those have money behind them. Sometimes, the buyer might want to put together a really small Blanket Purchase Agreement (BPA) and list you as a backup just in case they want to use you. Those are like a little bridge. They'll put funding into it when they need you. You still have to drive traffic across it.

For example, you might have a \$1,000 study or assessment. They might create a \$25,000 BPA against it, and draw down those funds and just refill them as they pay you for each time they engage you to deliver your assessment.

They can take all the terms and conditions of a GSA Schedule, if you have one, and create a Blanket Purchase Agreement based on those terms, and put money in it just for that agency to draw down!

Many contracts in your industry are IDIQ's. Who has them, who do they love, who do they want to boot? When the IDIQs come out for recompetete, you know who you want to compete with and team with.

They might not do a GSA Schedule. When they foresee large volumes of contracting, they might set up an IDIQ instead. They will publish a solicitation on FBO, and then award contracts to a small number of companies. It's a separate contract from GSA Schedule. Then all subsequent work will be competed just among those few selected contractors for the next, e.g., five years. It's like they build a bridge and then run traffic across that bridge. They might DIRECT you to team with the bigger company. You might need to borrow their bridge. If the customer wants you, they'll tell you who to approach.

They might purchase through one of their current primes that already have a contract, so you'd team with them, and "borrow their bridge." Partners will have bridges you may need borrow; you can expect to pay them a toll (e.g. pay some margin) for that.

Before you bid an IDIQ, is your sales team prepared to back that contract with sales activity.

Maybe they don't know how much they'll need. They'll create a purchase agreement. Put some money in it, and when they need you, they'll call you up. If you had a GSA Schedule with your prices set, the agency can take your prices and create a BPA. (In fact, they don't even NEED a GSA Schedule to do that.)

- If you have a GSA Schedule, and the agency expects to make many small awards to you, an agency can award you a Blanket Purchase Agreement. The public sees a contract for \$25,000, but the buyers can add money over and over, and it can add up to millions. The buyers can take your GSA Schedule and immediately award business to you. They anticipate a need, add funding. Many agencies like the convenience of doing that in your industry.
- Agencies like FEMA build BPA's with e.g. three vendors for each kind of thing they expect to need to handle an emergency at the start of the year. When there's a disaster, they just call up

the first one on the list. You already know what they want.

- BPA's can be created immediately from GSA Schedules. If you have a GSA Schedule, then they can immediately award you a BPA based on your GSA Schedule prices. We will see whether/how they buy using BPA's in the competitive analysis.
- Sometimes you compete for BPA on eBay. Other times, you might say, "We will give you 3% off our GSA price if you set up a BPA." Another great bridge! Often for small orders, like \$25K, and they keep refilling the funding bucket. "We like it, and we want to buy a lot in smaller quantities." They can fund it and each facility can order from that BPA. If you have a GSA, your prices are considered reasonable. Agency can award a BPA, fund it, and you can then sell to end users who can order from that BPA. Stay in front of the funded BPA! Make sure they spend it all on you at the end of the fiscal year.

Companies that aren't in the 8(a) program often do well to seek out companies -- compete-mates -- that hold prime contracts on major IDIQ's, or 8(a) tribal in your niche. But to start a conversation about teaming, you also need to bring work.

When there is a federal customer who doesn't want to use your GSA schedule, but wants to use a different vehicle, then you find out which "bridge" she wants to use, find a partner with that bridge, and you'll pay a "toll" (margin) to borrow it and bring the business. The more access to bridges as well as opportunities, the better you'll do.

**Bridge 4:** Small Business Set aside programs can permit SOLE SOURCE.

You need to make friends in all categories so you always have a partner.

- 8(a) – Minority-owned small disadvantaged business: can be awarded up to \$4M services; \$5m Mfg. sole source. Partner with them. They invite you to bring business and sub to them.
- Service-Disabled Veteran-Owned Small Business (SDVOSB): Up to \$5M sole source.
- [HUBZone](#): some agencies are having a hard time meeting those goals. If the client really WANTS you, and is saying, before the bid hits the street, that they want a HUBZone company, and you don't qualify, you will want to have a trusted partner all ready to go.
- [WOSB/edWOSB](#): contracts covered by the program are eligible for sole source contract awards.

**Bridge 5: Covered bridge**

- The "covered bridge" can include Alaskan Native Corporations & Tribal 8(a). Uncontested, unlimited sole source contracts are possible. Extra review for over \$20M, and so these make good partners. When you walk into a base, a tribal company might be running an entire facility. You might think you're talking to a govvie, but you'll actually be talking to a contractor. The tribes are really happy when you bring business to them. It takes relationship building. They LOVE to help people whose 8(a)'s are expiring, because they keep rolling over their 8(a)'s.

**If you don't qualify for a "bridge" as a prime, then we're going to show you how to build relationships with the people who DO have those bridges.**

**Slides 19:**

Project over \$25,000...Ideally sole source. The buyer want to know how to work with you.

**Slide 20:**

You want to offer her a choice of contract vehicles. Can do micropurchase...but you don't want to do multiple \$3,500 purchases (or in DoD, up to \$5,000) on the credit card. They want to use a bridge they're comfortable with GSA Schedule might be safer...but might not work for her. Your job is to find out which one she wants to use the most, or the one she wants to use, this time. Maybe she wants to use her current prime...so you might need to find out who she's most comfortable with.

**Slide 21:**

Think of all the choices you have to cross the Chicago river. You're going to choose your bridge depending on where you're going and how.

Even if you have a GSA Schedule, or other contract vehicle or other small business program, they might not want to use it. She'll use a bridge you can't get to if she doesn't want to use you. Tell her what bridge you've got, find out what bridge she prefers. Get the story, bring it back, and decide what to do with the intelligence. Even if you don't own the "Bridge" she wants to use, you can team with the bridge owner.

The prime owns the bridge, and so you can go to them, and offer them some margin – the toll – to use their bridge. If you ARE a prime, and HAVE bridges – the many vehicles you're on – then YOU can lend your bridge and charge a toll to someone else, someone you're subcontracting to.

The competitive analysis data shows you which "bridges" they prefer, and helps you identify the partners who have the bridges they prefer! You don't have to own the bridge. You want to find as many partners as you can to help each other out. Goal is to have as many bridges available as you can. Different regions of the same agency can buy different ways. You learn from your experience. If they want to use a vendor, they will find a way to sole source. You need to get in front of them first. They have choices.

Bridges make it easy, quiet, and within the rules. Just like when you're traveling through Chicago, you're going to pick the bridge that works best for what you want to do and where you want to go and the experience you want to have.

STORY: Eileen was working with a roofing company that had 48 locations. Out of \$65M, \$2M was on GSA Schedule. The rest was via partners, especially 8(a)' and veterans. GSA in Chicago, region 5, said, "We do GSA Schedules." Atlanta said, "We use an IDIQ with four 8a's but plan to kick off two." "Who do you work with?" and they point, and she teams with them. In California, they say, "We like to work with SDVOSB's." "Which ones do you like to work with?" and goes and teams with them.

You can subcontract to these companies if the buyer likes you. When they say, "Our primes are on IDIQ's," you can say, "When are those coming up for recompetes?" How can we be a backup?" When an opportunity is issued as an IDIQ, remember that you will need to invest in both the proposal AND then in marketing and sales to win tasks after award, if you win.

STORY: TSA lead said, “Hey, IRS is working with Cort. Call this guy.” Eileen, representing Brook Furniture Rental, called him, and he said, “Sure, visit.” The first thing she saw in his office was a huge trophy for “Best facility manager of the year”, and he was doing \$3M a year with Cort.

Her heart didn’t sink. Instead, she asked, “What are they doing right?” “Oh, they gave me a book with a schematic and all the pricing for every piece of furniture of all my floors.” Eileen asked, “can I see it? Can I borrow it? Can I make one like this for you?” He said, “I thought you’d never ask!”

It’s our job to find out how they want to do business. You want as many “bridge” opportunities as you can set up. Teaming, even as a sub, can work for you.

When Eileen was selling to PBC in Region 5 they used Schedule 56 to buy roofing, In California, PBS borrowed the Army Corps’ MATOC.

In Michigan PBS, Eileen needed partnerships with NINE different primes to do business.

You might be able to say, “I see you’re using Schedule 56 for electronics,” and she may say, “I don’t want to use schedules.” You can ask who’s on a “bridge” or vehicle that she DOES like, and approach them.

You want to focus on bidding opportunities with your target agencies. You don’t want to bid on opportunities that you don’t know anything about the end users, the stakeholders, the project. You need to do a strong bid/nobid decision. **You WOULD look at e-Buy because once you build relationships, your buyers will tell you where they will post the bid.**

Otherwise, the only thing you need to capture from these “blind” opportunities is the contact information from the buyers, so you can build relationships with them.

But remember that federal proposals will take you weeks of non-billable time to write.

#### Slide 22:

You’ll have the market data, to give you insight for your conversations. But start out by being willing to ask for help. All you need are one or two opportunities to show how great you are so you can lure them away from their current vendors. Kinds of things you can say to approach people / things to ask:

- *I’m new to your region. I need help. I was hoping you could point me in the right direction.*
- *Is there someone in your department who needs a little help with \_\_\_\_\_...?*
- *We’ve seen some trends that might interest you*
- *Take me through a typical procurement...*
- *Would you work with a particular company? Do you have a contract vehicle you prefer?*
- *Show me, teach me, and guide me. I’m easy to work with, patient, gonna learn, going to help you*
- *How are you doing it now?*
- *How would you go about buying this? Are You Using GSA Schedules or Another type of contract vehicle – BPA, IDIQ, Prime?*
- *I know you might need a loser bid from time to time, but send me a bone, an order sometime, too!*

Get as much of their story as you can, put it into the action plan, and capture it way beforehand. It may take multiple conversations. Find who they're working with, who they love, put it in the action plan, and start developing relationships.

### **Slide 23:**

Once you find the person who needs your services, if they actually invited you in...why are they making time for you? They don't need to fill a file. What's their motivation to sit with you? They're not happy. They have problems. Your primary goal isn't to make a capability presentation.

- I'm here to understand your needs. I want to focus on YOU.
- "How's it going?" Let them brag about their current vendor. EVENTUALLY, they'll start talking about what they DON'T like.
- Tell me the *Story*. .If you were to *Change One Thing*...what would it be?
- How can I *help you with your career*?
- Are they doing a good job? Who's performing well? I only partner with the best...
- Find out What the Incumbent is NOT Doing. Try to sell against that.
- Are you going to the \_\_\_\_\_ Association Meeting? See you there!
- Share articles, links, keep touching base.
- Keep following up with new idea and new innovations
- What's keeping you up at night?
- Tell me about your service...
- When can I call you next?

Some people may say, "Oh, the vendor has a concrete relationship with the buyer." What breaks up concrete? You could jackhammer, but you don't want to do that. CONDENSATION will turn concrete to dust. Remember it's going to take anywhere from 8-12-20 contacts, even with the same person, let alone an officer or agency, to develop the relationship and eventually close business. You're going to touch base. When times are slow, you're still going to touch base.

You definitely want to have a way to routinely recognize when someone on your team picks up and shares significant marketing intelligence!

### **Slide 24:**

You'll be spending most of your time developing connections, not writing proposals to people you don't know. You'll be looking at some of the bid sites **for the NAMES** of points of contact. And where our prospects are posting things, and how they are buying.

- You'll be asking about opportunities coming down the pipeline
- You'll be looking at the data for potential teaming partners, when you have expertise that complements what they do, even if much of what you do overlap.

You'll be courting VIABLE teaming partners, ones that are winning at our target agencies, from the data.

- You'll ask about competitors, and how they feel about them. Let the field tell you what's going on.
- You'll do some outreach for sales, creating relationships with teaming partners

- You'll bring subject matter expertise...Follow-up, help, call, email, visit, etc.
- When can I call you next?

**Slide 25: Best Value**

So, what's unique about your company, and that justify the buyer choosing you at a higher price?

Past performance, project managers, specific experience, processes, quantifiable, provable facts, certifications, location, speed to deploy?

You need to lead with your best values. Those need to be quantifiable, specific to your key staff and team partners.

Keep working on that! Why you over the competition? Things besides price? Just choose 2-3

These position you. Be constantly talking about what's unique about you. The feds ASSUME you have quality, commitment and integrity.

QUANTIFY these unique things to strengthen your best values. **Share your best values everywhere: Looking for federal business and teaming partners. Think about why you're special...** What's unique about you? These things will make you a unique source: why you, and at a higher price. They need to be quantifiable, provable. Your quals need to be top of mind and you're always talking about them. What do people pay top dollar for when they work with you? Unique?

The circumstances of the need, location, and time to deliver...might be different for different customers. Make it easy for them to justify you.

Example: Eileen's brother's company started his company, Mission Research, saying, "75% of our employees have doctorates in aerospace" when they were a three-person company with a receptionist, and maintained that ratio as they grew to 600 people! They grabbed every qualified doctoral student they could as they grew! Even Boeing and Lockheed knew when those deals were going to Mission Research: the client would say, "Contractor must have minimum 75% of their employees with doctorates in aerospace." These best values can turn into ingredients the client puts into the RFP as requirements that are very specific to you. You want price to be off the table.

You want to get that "best value" hook set to make it easy for them to choose you.

**Slide 26: Capability Statement, & Briefing**

Show why you're different. We know you tailor that for what the buyer needs. Also sharpen it to focus on what's special about what you offer.

Getting a briefing is the big goal; show your case studies and why they keep bringing you back! You need to interview who's in the room. Have them all sign in. Name, title, email, phone #  
When it's over and they mull, they may take you aside because they have a project for you. Go through your capability statement. Make your best values quantifiable.

**Slide 27:**

You'll have your best values to talk about. At networking events, capability first, then best value, then set asides

***Here's the sample to practice:***

Hi, I'm \_\_\_\_\_, with (COMPANY). Our expertise is (PROBLEM YOU SOLVE), with (BEST VALUES). We've been in business \*\*\* years. We're a small (and/or any other set aside categories)/ large business on (VEHICLES). We're looking to serve federal buyers direct and with teaming partners."

Once you decide what the strongest things are, you can list those on the back of your business card. Example: "Can't find it? Call 1-800-RICHARD." What's your really simple catchphrase?

**Slide 28: Gatekeepers**

Classic ones are the small business specialist. Sometimes they will throw us to a business manager or industry expert. Once you show them the research you've done, they tend to open up.

Our job is to ask strong questions so that they will open up the manila folder they have with details. You want your customers and the evaluation committee fighting for you. You want to give them what they want, in writing. You're the only one who has the add-ons.

Once you get to the top three,

- If you are lowest price with top grade or tech, you'll win.
- If you're high price with top grade or tech, they need best values top justify you. They might ask you for a best and final offer. You'll have to know if you need to push the price a little. Other people just say, "I always give you my best price the first time." Be brave enough to hold your price!

Get them to give you names of project managers, but NOT make a call on your behalf. You know the evaluation committees are sprinkled with end users. Unless they know, trust, like you...your chances are under 5%. If they DO know you, you can get into the top three. You want them to be saying, "We know these guys, they're great!"

They might decide to try reverse auctions, and force you to bid each other down. You have to decide if you want to participate in that kind of opportunity. The buyers have to pay a service fee to use the service.

At an event, pay attention to the wallflowers, the shadow-people.

**Slide 29:**

Have your Capability Statement and Best Values ready. 1-2 pages, tops.

Email it to yourself, and then you can forward it to anyone you meet there who needs it.

When small business specialists are there, make clear that your goal in attending is to learn or confirm the facility manager's contact info.

Ask "If you can't use me, where would you go if you were me?"

If you get calls from people via E-buy who want things that don't fit what you offer:

"Sorry I can't help you but let me tell you what we DO..."

Peel out the contacts from other bids on eBay you don't want to respond to.

Those people may still be buying what you do.

COTR, end user...now you'll know who they are.

Always call them to get clarification on the request. What do you really want?

If it's not a fit, say thanks for inviting me, can we send our capability statement?

Or..."can we connect you with someone who can do this?"

Networking events will be part of call 3, your action plan.

Make it easy. Right now, they have no bridges to work with you

Help them follow rules. Help them look good: connect with them. Make them look like rock stars.

They will say that price is a big factor...but in the end, they will work with the vendor they know and trust! They'll say "We only have \$250,000". They'll publish "\$500 to \$1M". You'll know how to price. They have to look like they shopped, but they grade best value first.

**Slide 30:**

As long as we're hitting these issues, we keep the quills down. Tell them, "I'm here to learn your protocols. I'm here to follow rules, make it easy, and make you look good."

Ask, "Where else would you go if you were me?"

If you do that every day, they'll come to you with everything.

You're an angel to them. They're going to be an angel to you.

**Frequently-Asked Questions:**

1. Talking to Small Business Specialist, you want to quickly get beyond them. Don't stop there when they say, "You don't have to do anything more," work the base behind her and then tell her about the business you closed.
2. Your sweet spot relationships are the end users.
3. The best strategy to get the end users on the phone:
  - a. Let's say we uncover that GSA PBS is who you want to talk to. They have a phone book. Lackland might or might not have a phone book. So maybe your current customers can point you in the right direction. Other facility managers on base, you can ask, "Where would you go if you were me?" They'd love to go on a walk with you.
  - b. With your current customers, what you can do today:  
"Hey, while I'm here, who else should I drop off my card to? I'm already on base with my badge." They might call ahead or intro you or give you three names. They're proud of you! Leverage those relationships. You're not begging for it.
  - c. Vendors who are already inside can relax.

STORY: one of our clients was a sign vendor but he was anxious about asking around among his current clients. He did signs inside the PENTAGON! So he got Eileen into the Pentagon, just after 9/11. She had a list of facility managers she called the day before and just left messages, "I'm going to be in the building, I hope it's okay to walk by." The first lady was Sue, who designed the wedge of the Pentagon that got hit, and the new chapel that was put in that place. She asked, "Tell me how you're doing." Sue said, "We're less afraid. We always thought something might happen. Now it has. Come look at the chapel I built." They went from designer to designer, and then suddenly the fire alarms go off. When that happens, they don't send you out of the building, they send you to the middle, a park called "Ground Zero." Eileen was nervous and started laughing out of nervousness. A general came over and scolded her for laughing. She explained, "I'm at Ground Zero. If I go down, I'm going down laughing."