

Appalachian PTAC ***Marketing Guide***

A workbook for selling to the U.S. Government

Appalachian Procurement Technical Assistance Center

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Table of Contents

Guide To Marketing To The U.S. Government

Part 1

GOALS:

- 1) Understand how the government procures products and services.
- 2) Understand what qualifications and resources are needed to become a successful government contractor.
- 3) Learn how to classify your products and services according to the government coding system.
- 4) Learn how to locate your government customer.
- 5) Learn how to identify upcoming bid opportunities with the government.

WHAT TO LOOK FOR IN THIS SECTION:

- 1) Checklist to help determine if your company has the capabilities needed to compete and win government contracts.
- 2) Web addresses that provide information about government classification systems.
- 3) Tools to use when conducting market research.
- 4) Information needed to understand your government customer.
- 5) List of activities needed to prepare for your first contact with an agency.

HELPFUL RESOURCES:

- 1) Federal Procurement Data Center (www.fpdc.gov)
- 2) Internet Access
- 3) Federal Government Forecasts
- 4) Federal Yellow Pages
- 5) Government Publications

Step One: Understanding the Purchasing Process

1) What is the need of the agency?

2) Is the procurement authorized/appropriated?

Yes No

3) Is the procurement a new buy or existing?

Yes No

4) How does the agency procure its items?

IFB, RFP, RFQ GSA Schedule
Delivery Order GWAC
Other

5) How does the agency advertise its procurements?

Mailing list Federal Biz Opps
Internal Electronic Bulletin Other

6) Who is the purchasing point of contact?

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

E-mail: _____

Web: _____

Step Two: Assessing Your Business Capabilities

BUSINESS CAPABILITY ASSESSMENT CHECKLIST

General

- Are you a legal business entity?
- Do you generate sales from clients?
- Are listed in the Central Contractor Registration?
- Are you a broker?
- Have you been in business for at least one year?

Personnel/Organization

- Do you employ the required personnel to compete?
- Do you maintain standard resume formats on current personnel and subcontractors?
- Do you have on file a detailed company organizational chart explaining lines of authority?
- Do you have a listing of all contracts personnel have performed to date?
- Do you distribute to every employee an employee manual?

Past Performance

- Do you maintain records of contracts performed within the past five years?
- Do you maintain a works in process spreadsheet?
- Do you file letters of reference from past customers?
- Do you keep copies of performance reports?

Financial

- Do you maintain three year financial statements?
- Do you determine cash flow needs?
- Do you determine bonding needs?
- Do you keep copies of letters of credit commitment from banks?

Quality Control

- Do you have quality and inventory control programs?
- Do you maintain a Company Policy and Procedure Manual?
- Are you ISO Certified?

Facility

- Do you know the benefits of your location?
- Do you know your current capacity and capabilities to expand?
- Do you know your utility costs?
- Do you know your computer capabilities?

Step Three: Classifying Goods and Services Using Government Codes

1) What are my company's North American Industry Classification (NAIC) codes?
(<http://www.naics.com>)

Code	Size Requirement	Description
_____	_____	_____
_____	_____	_____
_____	_____	_____

2) What are my Federal Supply Classification categories?
(http://www4.osc.army.mil/padds_web/fsc_list.htm)

3) What are the National Stock Numbers for my products?

4) How does the government describe my products/services?

5) Other data or codes:

Step Four: Who buys what?

1) What government agencies purchase my company's products/services?

2) How much do they buy of my products and services?

3) Where do they purchase the product/service?

4) Who has the government been buying the products/services from in the past?

5) What does the government pay for my products/services?

6) Who is the incumbent contractor?

7) What is value added about my particular product/service as compared to the incumbent?

Step Four: Who buys what?

8) What dollar value does the government expect to spend over the next fiscal year?

9) What quarter(s) does the government project to procure my particular products/services?

10) What is currently important to my government customer?

Step Five: Understanding my Federal Customer

1) What is the web address for my target federal customer(s)?

2) What is the purpose/mission of my target government customer(s)?

3) What office procures my products/services? Where are they located?

4) What company has the government been using for my particular product/service?

5) The program managers/end users of my products/services are?

6) I need a FOIA request for the following:

- | | | | |
|---------------------|--------------------------|--------------------------|--------------------------|
| Procurement History | <input type="checkbox"/> | Copy of current contract | <input type="checkbox"/> |
| Telephone Directory | <input type="checkbox"/> | Incumbent scope of work | <input type="checkbox"/> |

Preparing Your Marketing Strategy

Part 2

GOALS:

- 1) Provide the necessary data to begin preparing a marketing strategy
- 2) Learn how to contact your government customer.
- 3) Learn how to develop a corporate profile.
- 4) Establish a checklist of marketing activities.

WHAT TO LOOK FOR IN THIS SECTION:

- 1) Skills needed to develop a sample letter of introduction.
- 2) Data needed to develop a strategic marketing plan.
- 3) Information needed to analyze incumbent contractor(s).
- 4) Activities to consider when setting up marketing meetings.
- 5) Checklist of marketing activities.

RESOURCES REQUIRED:

- 1) Marketing strategy worksheet.
- 2) Data from Part 1 of this workbook.
- 3) Federal government forecasts.
- 4) Government telephone directories.
- 5) Government publications.

Step Six: Preparing For Your First Contact With The Agency

1) Have I completed Central Contractor Registration? (<http://www.ccr.gov/>)

Yes No

2) My trading partner identification number is? My CAGE code is?

3) My ProNet user ID number and password are? (<http://pro-net.sba.gov/>)

ProNet ID: _____ Password: _____

4) I will make contact with the following government customers:

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

Step Six: Preparing For Your First Contact With The Agency

5) Does my target customer currently use a SF 129 Mailing List application?

Agency _____ Yes No Am I registered with this agency? Yes No

Agency _____ Yes No Am I registered with this agency? Yes No

Agency _____ Yes No Am I registered with this agency? Yes No

6) Have I a Capabilities Statement for my company?

Yes No

Step Six: Preparing For Your First Contact With The Agency

1) How do I prepare a Capabilities Statement?

The capability statement is designed to outline your company's overall experience, expertise, resources and specific products or services you offer. The statement should inform the reader about who you are, what you do and why a client should choose you. The statement should be a factual presentation of your company and should not exceed two pages in length.

The capability statement should include the following information, as a minimum, in this order:

- I. Introduction – Just one or two sentences introducing your company and the type of work you perform to the client.
- II. Capabilities – Using bullet statements or short sentences, list your company's areas of expertise. In addition, identify areas of specialization and competitive strengths. This should not be a long narrative about your capabilities, but rather a concise list.
- III. Facilities and Equipment – List all facilities, equipment and resources used to manufacture the product(s) or provide service(s). Include unique qualifications, techniques and approaches used to perform the work, including any state-of-the-art equipment that may separate your company from its competitors.
- IV. Professional Experience – Provide a brief background of the expertise of you and your staff. Highlight their educational and technical experience as it relates to your business.
- V. Customers – List three or four of your key customers. These need not be present customers and may include former customers of note. Company names and address are sufficient.

The capability statement should be prepared using your business stationary or letterhead. Title the document "Capability Statement" or "Statement of Capabilities" and staple the pages together in the upper left-hand corner. This can be used as a stand-alone document to market your business, or can be attached to any pertinent literature you may already have. Accompanying the capabilities statement should be a letter of introduction.

Remember, keep it simple, but tell the reader what makes your business special and why they should choose to do business with you.

Step Seven: First Contact with a Government Agency

1) My target government Small Business Specialists are:

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____
 E-mail: _____

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____
 E-mail: _____

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____
 E-mail: _____

Name: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____
 E-mail: _____

2) I have developed a database of target government customers?

Yes No

3) I will take the following promotional materials to my first meeting with these agencies:

Capability Statement Corporate Profile
 Product Catalog Statement of Qualifications

Step Eight: Preparing A Letter of Introduction

Your Name
 Position
 Company
 Address
 City State Zip

Date

Mr./Ms. SADBUDirector
 Agency
 Address
 City State Zip

Dear Mr./Ms. SADBUD:

My Great Company, Inc. is a small, minority, veteran and woman owned business that is interested in doing business with your agency. Our business provides automation information technology support services. I have included a copy of our Capability Statement along with my business card for review and distribution within your agency. Please add my business name to your agency's mailing list to receive bid opportunities under the following Federal Supply Categories:

R345
 R346
 R347

or by NAICS codes:

123455/size	Description
123456/size	Description
123457/size	Description

We are registered with CCR and Pro-Net. We are interested in both small and large purchase opportunities. Please send your agency's Fiscal Year 2003 forecast or Long Range Acquisition Plan. We understand that this information can be viewed online, however, we would prefer to keep a hard copy for our reference. In addition, please send any hard copy publications you may have about doing business with your agency. Please forward the telephone number, address and e-mail address for the Information Technology Managers and Project Mangers that works primarily with my service area.

I will follow-up with you within two weeks. If you should have any questions, please contact my office at (740) 123-4567 or e-mail me at greatcompany@itc.com.

I appreciate all your time and assistance in this matter.

Sincerely,

[Sign here]

Me

Step Nine: Developing a Strategic Plan of Action

1) My company's government markets include the following:

2) The agencies that purchase the majority of my products and services are:

3) The agencies buying habits are:

Monthly Quarterly Semiannual Annual As Needed

4) The government has been purchasing these products/services from these companies:

5) The agencies that have bid opportunities with my products/services are:

Step Nine: Developing a Strategic Plan of Action

6) My company's unique selling position is?

7) How can I compete with the incumbent?

8) My company can subcontract or team with the following companies:

9) I am willing to commit the following staff time toward marketing:

5-10 hours per week 11-20 hours per week 30+ hours per week

10) My company will use the following marketing methods:

Capabilities Statement Letter of Introduction

Marketing visits E-mail

Telephone Mailing Lists

11) How many years is my company willing to commit to marketing to the U.S. Government?

1-3 years 3-5 years 5+ years

Step Ten: Marketing Meetings With Program People

1) The program managers within my target government customers are:

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

Name: _____
Address: _____
City: _____ State: _____ Zip: _____
Phone: _____ Fax: _____
E-mail: _____

2) The following capabilities are important to the program manager:

Step Ten: Marketing Meetings With Program People

3) I have prepared a powerpoint presentation that is targeted to each agencies needs?

Yes No

4) I have coordinated my marketing meetings with the Small Business/SADBU Office?

Yes No

5) I offer the following value added services? (Benefits vs. Features)

6) I have completed a meeting agenda?

Yes No

Step Eleven: Checklist of Follow-up Activities

Annually

- Review the agency's web pages to learn how they do business.
- Review and request a hard copy of the agency's forecast/long range acquisitions.
- Update SABDU Contact information.
- Send a Capabilities Statement to the agency.
- Meet with the SABDU Office.
- Update Central Contractor Registration (CCR).

Semi-Annually

- Update Capabilities Statement.
- Develop and update corporate profile based on agency needs.
- Marketing meetings with contracting officers and Small Business Specialist.
- Attend Seminars/Workshops on selling to the U.S. Government.
- Gather information on incumbent contractors and review pricing data.

Quarterly

- Contact your target customer via telephone and e-mail
- Update your customer database with contact information.
- Send promotional material to your government customer.
- Identify upcoming opportunities quarterly.
- Conduct marketing meetings based on upcoming procurements.
- Update ProNet profile.

Step Eleven: Checklist of Follow-up Activities

Monthly/Daily

- Monitor posted bid opportunities.
- Read government newsletters and publications.
- Respond to government bid synopsis.
- Meet with your local PTAC office.
- Look at who is winning the contracts.

Additional Materials And Examples

Part 2

GOALS:

- 1) Understand elements of a marketing guide and how they are used.
- 2) Understand how to develop a marketing guide.
- 3) Learn how to organize a marketing guide.

WHAT TO LOOK FOR IN THIS SECTION:

- 1) Elements of a marketing guide.
- 2) Examples of marketing guide pages.

RESOURCES REQUIRED:

- 1) Executive's resumes.
- 2) Company organizational structure.
- 3) Capabilities statement.
- 4) Technical data about your facility.

Elements of a Marketing Guide

- Table of Contents
- Introduction
- Capabilities Statement
- Mission Statement
- Company Fact Sheet
- Executive Profiles
- Certifications and licenses
- Statement of Capabilities
- Organizational Structure
- Work History
- Endorsements
- Appendices

Sample Marketing Guide

[Company Logo]

Corporate Profile

Company X
1234 Ohio Street
Columbus, OH 12345
PH: (123) 1234567
Fax: (234) 2345678

Revision X

Date

Sample Marketing Guide

	Company Name
Table of Contents	
Introduction	1
Statement of Capabilities	2
Mission Statement	3
Organizational Structure	3
Executive Profiles	4
Appendices	5
Executive Resumes	6
Certifications and Licenses	XX
Letters of Endorsement	XX
Company Brochures and Other Marketing Resources	XX

i

Sample Marketing Guide

Company Name

Introduction

Company X has a commitment to providing its clients with exceptional customer service, quality and rapid turn around time. We have provided consulting services to local government for over 10 years. As a full service environmental consultancy, we utilize state-of-the art instrumentation for analyzing soil, air water and waste.

We are certified in California, Ohio and West Virginia in accordance with Environmental Protection Agency standards. Our procedures comply with SW-123, RCRA, BUSTR, NPDES and OSHA requirements.

- We are a results-oriented consulting company
- We offer over 10 years of expertise
- We have state-of-the-art facilities for the most accurate analysis
- We are HUBZone Certified.
- We are classified as small business.
- We are 8(a) certified
- We are have MBE certification

Sample Marketing Guide

Company Name

Statement of Capabilities

Company X was created in 1990 in response to a growing need for specialized environmental services as mandated by federal, state and local regulations. Company X specializes in the analysis of water, soil, air and waste and provides solutions for improving quality of these resources. Through our strong network of subcontractors and support service providers, Company X can also deliver a variety of other environmental consulting and remediation services.

Company X's management team is composed of environmentalists, former public health officials and trained scientists with proven track records in both the public and private sectors. Our experience and diversity allow us to accommodate a wide range of customer specifications and design cost-effective strategies capable of meeting the requirements of nearly any residential, commercial, or industrial project. Moreover, our technical and regulatory expertise, coupled with our interactive approach to doing business, allows us to keep operating expenses at a minimum so we can pass more savings on to our customers. Company X's primary business activities include:

- * Environmental Program Management
- * Environmental Research and Analysis
- * Environmental Project Design and Cost Estimation
- * Lead Paint Inspection and Abatement
- * Land Assessment, Excavation and Remediation
- * Air Quality Monitoring
- * Regulatory Compliance Consulting
- * Historic Preservation Consulting and Renovation

Company X is committed to the philosophy of providing total customer satisfaction at all times. Our services are delivered by certified professionals and performed in keeping with all applicable federal, state and local regulations. Company X emphasizes the protection of public health and the environment during the performance of all contracted activities.

Sample Marketing Guide

Company Name

Mission Statement

Company X, will provide a variety of environmental consulting and remediation services designed to meet the growing needs of a wide range of concerned stakeholders. While our number one priority is to provide outstanding service to our existing and potential customers, we are committed to the philosophy of developing strategies that work in harmony with the environment and promote the preservation of human health. We will use our scientific and technical expertise to promote environmental awareness and facilitate balance between the business needs of our customers and the requirements set forth by any applicable rules, regulations and other prescribed mandates. In addition, we are committed to the idea of promoting job creation and economic development throughout all sectors of the community.

Organizational Structure

```

graph TD
    President --> GM[General Manager]
    GM --- Administrative
    GM --- Operations
    Administrative --> Accounting
    Accounting --> Billing
    Billing --> Payroll
    Payroll --> OfficeSupport[Office Support]
    Operations --> Estimating
    Estimating --> Purchasing
    Purchasing --> Warehouse
    Warehouse --> Distribution
    Operations --> PM[Project Management]
    PM --> PS[Project Supervisor]
    PS --> FieldInstallation[Field Installation]
    
```

3

Sample Marketing Guide

Company Name

Executive Profiles

John Smith - President

With 25 years of experience in environmental sciences, John has set high standards for Company X. With his knowledge and expertise, he has established detailed cost accounting procedures for accurate estimating, set high quality control measures and connected with Company X's clients. (For Resume see Appendix A)

Sam Jones - General Manager

Establishing an efficient, results orientated company, dedicated to customer satisfaction, can only come when leadership understands the importance of doing work right the first time. With 19 years of experience in the field, Sam has helped Company X develop a culture aimed at providing quality for its clients. Sam's efforts have created a detailed inter-office control system, integrating information technology with operations to provide optimal performance. Sam's efforts have resulted in efficient office management procedures to ensure customer satisfaction while controlling expenditures. (For Resume see Appendix A)

Work History

Company X's Clients Include:

Ohio Department of Health - Provided consulting services

Ohio Environmental Protection Agency- Provided test results and analysis

Ohio Water Environment Association- Provided consulting services

State of Kentucky, Environmental Protection Division- Provided consulting services

City of Parkersburg -Provided consulting services

City of North Canton -Provided consulting services

GreenLink - Provided test results and analysis

Sample Marketing Guide

Company Name

Appendices

5

Sample Marketing Guide

Company Name

Appendix - A
Executive Resumes

6

Sample Marketing Guide

[Insert Executive Resumes]
[Note: number pages accordingly]

Sample Marketing Guide

Company Name

Appendix - B
Certifications and Licenses

Sample Marketing Guide

[Insert Copies of Certifications and Licenses]
[Note: number pages accordingly]

Sample Marketing Guide

Company Name

Appendix - C
Letters of Endorsement

10

Sample Marketing Guide

[Insert Copies of Letters of Endorsement]
[Note: number pages accordingly]

Sample Marketing Guide

Company Name

Appendix - D
Company Brochures and Marketing Materials

12

Sample Marketing Guide

[Insert Copies of Marketing Materials]
[Note: number pages accordingly]