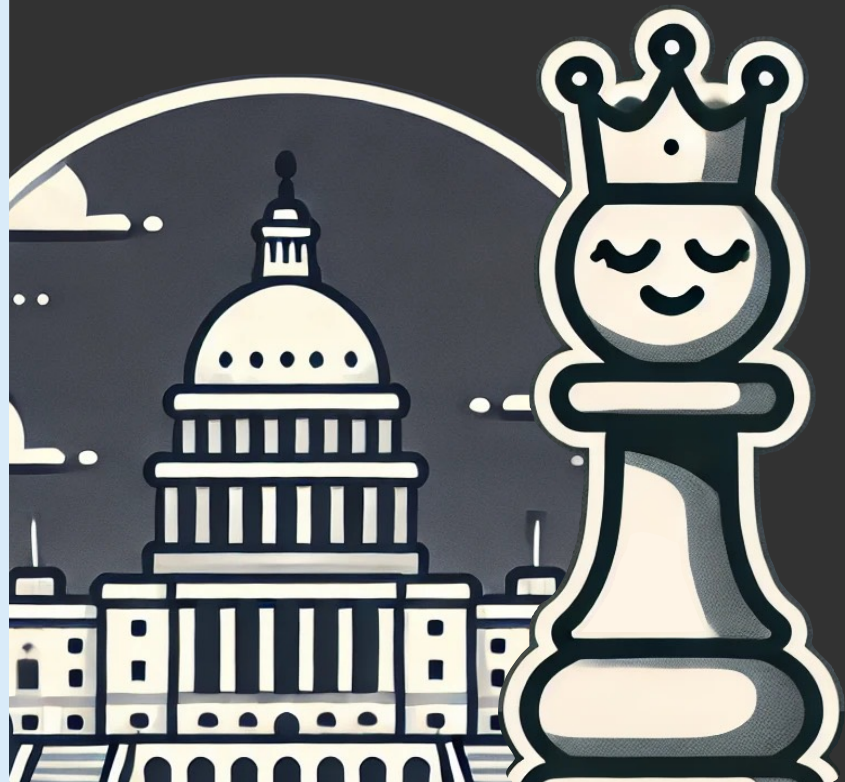


The TOBI Method

trust ... organize ... bid ... improve

6-steps to build your
federal sales funnel

GSA FOCUS



Download the free guide
...and win more government contracts

the TOBI method

An actionable system to consistently win government contracts.

trust ... organize ... bid ... improve

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INTRODUCTION

Why did I write this book?

There are several reasons, but they all originate from my family history. I am a fourth-generation Small Business Owner.

So, I celebrate when Small Businesses like you win.

I founded GSA Focus in 2006 and have helped nearly 1,000 Small Businesses with their GSA Contracts (truth be told, I have also helped a few large businesses).

About ten years into my journey, I noticed a small group emerge among my hundreds of Customers. They were the ones who just killed it in the federal market. Winners.

I grow long-term relationships with all customers and tend to know them on a personal level too.

Occasionally, a customer with impressive GSA sales would let me in on a secret.

WHAT MAKES THEM “FEDERAL WINNERS”

The “Winners” are defined as Those who win.

Simple, right?

It is purely based on the quick and impressive Federal Sales results that they have been able to achieve.

There are four noticeable traits of the “Winners” among my customer base:

1. TIME: They dedicate Time to winning in the Federal market.
2. PATIENCE: When dealing with the Government
3. DECISIVE: They’re ready to go after opportunities.
4. LEARN: Always expanding knowledge to succeed

I call these “High-Level Indicators.” Is this you? It soon will be, when you learn and implement the tactical actions below.

Tactical Actions

In the periodic Customer conversation, I would ask these “Winners” questions and dig into their approach to winning Government Contracts. The tactics I’ve learned and observed are now compiled in this book.

Do you know the difference between a Tactic and a Strategy?

I was very careful to stay tactical, rather than strategic.

Tactics are the specific actions or steps that detail the "how" of accomplishing those goals.
Strategy is the plan that defines the "what" and "why" of achieving something.

There are hundreds of possible actions, but only a few are high-leverage actions. Once you read this, you should have a much deeper understanding of the levers you should pull for the highest return.

And... This system can be set up in just about a week. Think about it, you could have a handful of Proposals under review in about a week and a half
...potentially winning some government contracts this month!

The overall system that unifies the 7 high-value levers is what I call the **“Federal Sales Pipeline.”**

You’ll learn how to set up a “pipeline” that will deliver fresh opportunities to your inbox daily. You will also learn how to improve your processes, branding, and revenue continuously.

WHAT IS A FEDERAL PIPELINE?

Here is the basic diagram. Don't worry, it will make more sense later.

Bottom-up:

Bid Tracking > Selection (Go/No-Go) > Proposal Writing > Close Out

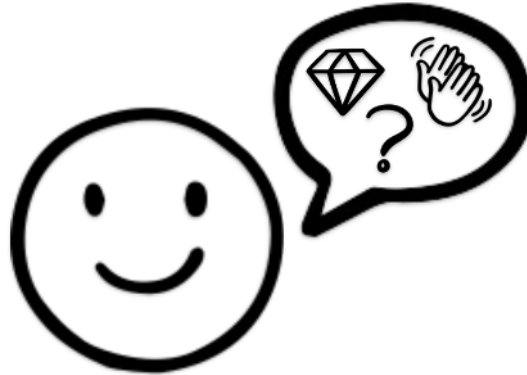
Top-Down:

Brand Audit > Market Research > Outbound Marketing > Relationship Management

Now let's get you started on your journey to become a "Federal Winner."

CHAPTER 1

Getting Inside the Mind of the Federal Buyer



I bet you didn't think I would start with all of this, but we are going to begin with basic sales psychology.

You must understand the evaluation criteria that shape the decisions of U.S. government buyers, also known as Contracting Officers (KOs). This will put you in their shoes and help you understand their motivations & constraints.

Evaluation of Contracting Officers

Contracting Officers are evaluated on 5 categories of performance metrics:



Regulations

Contracting Officers must strictly follow the Federal Acquisition Regulations (FAR) and any specific agency policies.



Socioeconomic Goals

They must meet targets for contracts with small, minority, women, veteran-owned, and other disadvantaged businesses.



Cost Savings

Contracting Officers must ensure cost-effective procurement by negotiating favorable terms and prices while maintaining quality.



Timeliness

Timely execution of procurement tasks is crucial to avoid inefficiencies and extra costs.



Quality

Ensuring procured products and services meet or exceed quality standards through thorough market research and vendor management.

Always keep these factors in mind when you engage with a KO. These are the top 5 ways they are evaluated on their job performance.

If you help them get good grades, they'll buy from you repeatedly and even talk you up to other buyers. Reputation is everything.

Common Behaviors in Federal Buying

Several common perceptions and rumors surround federal buying practices:

1. Always Choosing the Cheapest Option: While cost savings are important, federal buyers don't always pick the lowest bid if it doesn't meet quality and compliance standards.
2. Preference for the Middle Bid: Contracting Officers often choose the middle bid to balance cost and quality, avoiding the extremes of the cheapest and most expensive options.
3. Risk Aversion: Federal buyers prefer vendors with a proven track record to minimize risks and ensure reliability.
4. Lengthy Processes: Federal procurement is complicated. Between the selection process and securing funding, buying decisions can sometimes take a ridiculous amount of time.

Understanding the federal buyer's mindset and motivating factors is crucial for navigating the complexities of government procurement. You must adapt to their protocols, and cannot approach Government KO's the same way you work with Commercial buyers.

establish a strong rapport with federal buyers to foster long-term business relationships within the federal market. So, here are 3 basic rules:

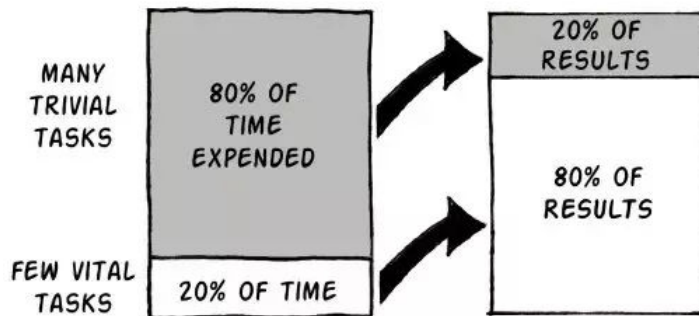
1. Be nice and treat KOs respectfully
2. Pay your dues to establish relationships
3. Overdeliver with high-level performance

CHAPTER 2

Market Research: Who Is Winning, And How?

Now, Market Research can be a paralyzing exercise. You could spend days digging and digging ...building long and illustrious reports and charts.

But there are only a few things you need to know to move the needle. It's the 80/20 rule.



So, what is the 20% of work that yields 80% of the important data?

It is keeping a laser focus on answering 2 questions:

**What Agencies are buying
your goods/services?**



**What Competitors are winning,
and how are they winning?**



All else is just noise. Other important details may surface from these two, but you must start here.

Let's get tactical and get some answers right now. Go to your computer and let's get started...

The Tactical Process:

- (1) Go to www.USASending.gov

- (2) Click “Search Award Data” in the Header
- (3) Filters:
 - a. Keywords: Enter related keywords to your offerings, Comma Separated
 - b. Time Period: past 5 Fiscal Years
 - c. Award Type: Contracts
 - d. North American Industry Classification System (NAICS): Enter yours (google if you don’t know) – Skip if you have a good keyword list.
- (4) Press “Submit Button”

You will find several Datasets featured on the results page to the right:

- Results by Geography - map of spending by state
- Results by Category - list of the top buying agencies
- Results Over Time - timeline of spending
- Prime Award Results - complete list of contracts

Now, you dig into this data and pull anything relevant and important into a document. Take screenshots and put them in there, too. It doesn’t need to be very orderly, just a bunch of data to lead you to the answers to the 2 important questions.

What Agencies are buying your goods/services?

The second Graph (Results by Category) shows you this.

The top 2 or 3 will usually cover over 90% of federal spending in your category. Maybe you only need to focus on one Agency.

What Competitors are winning, and how are they winning?

The fourth graph (Prime Award Results) shows you this.

Click the down arrow beside “Obligations.” Then, change the “Rows per page” to 100 to give you a better scroll through the data.

There will be some obvious winners at the top, they are winning big contracts.

PRO TIP: Download the data (top right) into a spreadsheet and playing around with it according to your Excel wizardry abilities. You can use sorting in excel to find the top Small

Businesses, which will likely be a better group for you to study because they are winning big with similar resources as you.

Once you find a group of about 25 to 50 top winners in your search, you will want to refine them to only direct competitors. You may notice some of them immediately, but it's still worth the time to visit each one's website and look through their services to see if they are a direct competitor.

After you have refined the list of the top "Winners" in your space to 5-10 companies, you need to figure out how they are winning. Use this list below to evaluate each company.

You will have so much to work with after this data is compiled. Find commonalities and logical actions you should take to guide you towards becoming an equal to these companies (then you can rocket past them).

Contract and Procurement Data



Here is a nearly complete list of the details you will want to gather on these companies.

1. Contract Vehicles and Usage: Identify the specific contract vehicles (e.g., GSA Schedules, GWACs, IDIQs) frequently used by competitors.
2. Awarding Agencies: Map out which federal agencies are awarding contracts to your competitors.
3. Contract Types and Structures: Note the types of contracts (fixed-price, time-and-materials, etc.)
4. Contract Values: Gather data on the monetary value of contracts awarded, like the average contract size.
5. Contract Durations: Examine the duration of contracts your competitors have won, including short-term vs. long-term engagements and any renewal patterns.

6. Scope of Work: This is never posted with much detail, but note any Project Description and NAICS Code selected.

Pricing and Bid Strategies



Most of your competitors will be secretive with their price Lists. However, their GSA Pricing will be available if they are on GSA. Here are the steps for that:

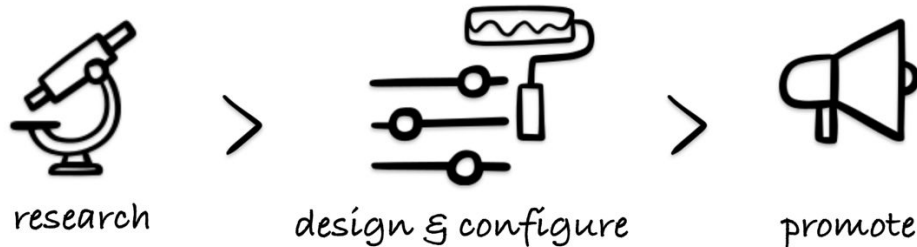
1. Go to <https://www.gsaelibrary.gsa.gov/>
2. Enter the company name (exactly as found in USA Spending) in the search bar and hit “Search”
3. If there is a result under “Contractors,” then click the business name.
4. Locate the button titled “Terms & Conditions + Price List” and click it.
5. This will download the Catalog File, which should have their pricing data.

These actions will provide a great foundation for conducting a competitive analysis in the federal contracting space, enabling you to gain a deep understanding of your competitors' strategies, strengths, and market positioning.

CHAPTER 3:

Branding. The Secret to Impressing Buyers

No one thinks of branding specifically to federal buyers, but an effort in this area will have massive benefits for your overall Federal Sales System.



Your federal webpage and your Capability Statement are two ways to offer amazing federal branding.

Do you use the web to investigate a company you are possibly going to do business with?
Why wouldn't federal buyers do the same?

Imagine there are three companies in the final running for a \$1 million government contract. Their pricing and solutions are similar.

The winner will come down to the company that the buyer trusts the most, and putting effort into messaging and branding is where this happens. You will win more if...

...your federal webpage has all the expected federal data, but also a short Value Proposition with your mission and how aligns with federal agencies. You also have good visuals across the webpage, as well as links to download case studies from other federal projects. Your Capability Statement is visually appealing, and information is easily found.

It takes effort to build trust, and that effort will set you apart.

Now... let's get tactical with this.

What is a Capability Statement?

Contracting officers are inundated with options, a strong capability statement can help you stand out. A capability statement serves as a crucial marketing tool that can make or break your chances of securing government contracts.

A well-prepared capability statement should serve two purposes:

- (1) Offer all key company details to a buyer, and
- (2) Demonstrate that your company is trustworthy

Below you will build out the list of important details, then showcase how your company is uniquely positioned to meet the government's needs, and in only ONE PAGE.



research

Company Details of Capability Statement

Let's start with the low-hanging fruit, and just gather all of your general company details into one place.

Pull all this information into a Word document, don't plug anything into the Capability Statement yet. You'll want all the details filled in before you worry about formatting and design.

Simply gather these key elements for your Capability Statement and plug them into a spreadsheet.

- Company Name and Logo - Ensure your company name and logo are prominently displayed at the top of the document.
- Contact Information – Include key contact details such as:
 - Point of Contact (Name, Title)
 - Phone Number

- Email Address
- Company Website
- Office Address Company Data - Provide essential company details like:
 - Legal Business Name
 - SAM UEI Number (Unique Entity Identifier)
 - CAGE Code (Commercial and Government Entity Code)
 - NAICS Codes (North American Industry Classification System)
 - Business Size (Small, Large, 8(a), Woman-Owned, etc.)
 - Certifications (ISO, SBA, Industry-specific, etc.)
- Company Overview - A concise summary of your company, including years in business, key industries served, and overall mission.
- Value Proposition (guidance below)
- Core Competencies (guidance below)
- Past Performance (guidance below)

Your Capability Statement should only be ONE PAGE, and the above items will take up $\frac{3}{4}$ of the space. Use any of the elements below that will build the most trust.

- GSA Schedule Information – GSA number and the applicable SINs (Special Item Numbers).
- Other Contract Vehicles - such as IDIQs, GWACs, and BPAs.
- Technical Capabilities - Specific technical skills, tools, or technologies.
- Geographic Coverage - Areas or regions where your company operates or delivers services.
- Key Partnerships or Alliances - Strategic partnerships that enhance your company's capabilities or credibility.
- Professional Associations - Relevant memberships in industry associations or organizations that add to your credibility.
- Awards and Recognitions
- Team Bios or Key Personnel
- Sustainability or Social Responsibility
- Quality Assurance Program

Written Sections of Capability Statement (Plug-in Templates)

Now, let's gather the details and build out the four trust-building areas of the Capability Statement:

1. Company Overview
2. Core Competencies
3. Past Performance
4. Value Proposition

Below you will find a template for each. Simply gather the details and plug them in.

(1) Building your Company Overview

The company overview is the opening section of your capability statement, giving government decision-makers a quick but deep understanding of who you are and what you do.

Here are the components:

- A brief introduction to your company's mission, vision, and core values
- A brief history of your company
- Years of experience in the industry
- Major projects completed
- Underscore your company's reliability and capability

Using the Market Research from the last chapter, research the Mission Statements of the top 2 or 3 Agencies that buy your offerings. Try to weave the same language from their Mission Statements into the Company Overview.

(2) Building your Core Competencies list

Step-by-Step Guidance to Fill in the Blanks:

a) **Technical Skills or Expertise 1, 2, and 3:**

Identify the top three technical skills, services, or areas of expertise that your company excels in, areas where you have a proven track record.

b) **Industry-Specific Strengths or Capabilities:**

Highlight any strengths or capabilities that are particularly valued in the federal industry or the specific sector you are targeting. Reflect on what sets your company apart within your industry.

c) **Process Optimization/Innovation:**

Describe your ability to improve processes, innovate, or deliver efficiencies that are critical in federal contracting. Think about methodologies or practices your company uses to streamline operations, reduce costs, or enhance quality.

d) **Compliance and Risk Management:**

Emphasize your competencies in adhering to federal compliance standards and managing project risks. Consider your experience with federal regulations such as FAR, DFARS, ITAR, or other standards. Include your approach to managing risks, such as having strong internal controls, a focus on security, or a robust quality assurance process.

e) **Relevant Projects or Contracts:**

Reference specific projects or contracts that showcase your competencies in action. Use examples from past federal contracts or projects that are similar in scope or complexity to what you are targeting. Provide brief details on the outcomes and the role your competencies played in the project's success.

f) **Certifications, Accreditations, and Qualifications:**

List any certifications, accreditations, or special qualifications that reinforce your competencies.

Core Competencies List Template:

"Our core competencies include [Technical Skills or Expertise 1], [Technical Skills or Expertise 2], and [Technical Skills or Expertise 3], with a strong focus on [Industry-Specific Strengths or Capabilities], [Process Optimization/Innovation], and [Compliance and Risk Management]. These competencies are demonstrated by our successful execution of [Relevant Projects or Contracts] and are supported by our [Certifications, Accreditations, or Specialized Team Qualifications]."

Example:

"Our core competencies include advanced cybersecurity solutions, custom software development, and IT infrastructure management, with a strong focus on defense sector expertise, Agile project management, and strict adherence to NIST and DFARS compliance standards. These competencies are demonstrated by our successful execution of multiple Department of Defense contracts and are supported by our ISO 9001 certification and team members holding CISSP and PMP certifications."

(3) Building your Past Performance List

Select the top 2-3 federal projects you have completed in the past 5 years or ongoing. Use other projects if no federal experience.

Then gather the details from items A through G below, showcasing your experience, expertise, and alignment with their needs and objectives.

Finally, input the details into the template below to build the Past Performance write-ups.

Step-by-Step Guidance to Fill in the Blanks:

a) **Project or Contract Title:**

Use the title provided in the contract documentation, or create a descriptive title that reflects the nature of the work.

b) **Federal Agency or Department:**

The full name of the federal agency or department you worked with.

c) **Key Achievements or Deliverables:**

Major achievements or key deliverables completed during the project (meeting or exceeding deadlines, under-budget performance, technical innovations, etc.)

d) Actions Taken or Strategies Used:

Describe the specific actions, methodologies, or strategies your company employed to achieve success (processes, tools, technology, techniques, best practices, etc.).

e) Measurable Outcomes or Benefits:

Quantifiable results, metrics or benefits that your work delivered for the agency (cost savings, efficiency improvements, increased security, or customer satisfaction ratings)

f) Core Competency or Strength:

Identify the core competency or strength demonstrated through this project.

g) Mission Alignment or Customer Satisfaction:

Explain how this project aligns with the agency's mission or highlights your commitment to customer satisfaction. Mention any positive feedback or satisfaction ratings from the agency.

Past Performance List Template:

"Our past performance includes [Project or Contract Title] for [Federal Agency or Department], where we successfully [Key Achievements or Deliverables] by [Actions Taken or Strategies Used], resulting in [Measurable Outcomes or Benefits]. This project demonstrates our ability to [Core Competency or Strength] and our commitment to [Mission Alignment or Customer Satisfaction]."

Example:

1. Project or Contract Title: Cybersecurity Infrastructure Enhancement

Federal Agency or Department: U.S. Department of Defense

Key Achievements or Deliverables: Successfully deployed advanced cybersecurity measures across 15 critical defense installations.

Actions Taken or Strategies Used: Utilized a combination of real-time threat monitoring and AI-based anomaly detection systems.

Measurable Outcomes or Benefits: Achieved a 35% reduction in security incidents and enhanced threat response time by 50%.

Core Competency or Strength: Cybersecurity and risk management.

Mission Alignment or Customer Satisfaction: Aligned with the DoD’s mission to protect national security assets, receiving an exceptional CPARS rating.

(4) Building your Value Proposition

Step-by-Step Guidance to Fill in the Blanks:

(a) **Company Name:**

Your company's name as it appears in SAM.gov.

(b) **Unique Solution or Service:**

Describe your product, service, or solution in a way that differentiates you from competitors (innovation, proprietary technologies, specialized skills, or methodologies).

(c) **Agency's Mission:**

Research the federal agency's mission, goal, or priority.

(d) **Key Benefits or Outcomes:**

The primary advantages or results your solution will deliver for the agency.

Focus on measurable outcomes like cost savings, increased efficiency, enhanced security, or improved compliance.

(e) **Compliance /Risk Mitigation:**

Assurance that your solution meets federal compliance requirements and mitigates risks.

(f) **Relevant Past Performance or Federal Experience:**

Reference previous successful projects or contracts that demonstrate your capability and reliability in the federal space.

How to Determine: Highlight past contracts with similar agencies or in similar scopes, using metrics or case studies to underscore your expertise and successful outcomes.

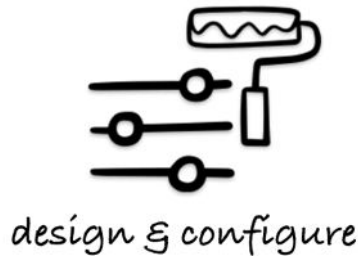
Value Proposition Template Sentence:

"[Company Name] offers [Unique Solution or Service] that directly supports [Agency's Mission or Objective] by [Key Benefits or Outcomes], ensuring [Compliance/Regulatory Adherence/Risk Mitigation] and leveraging our proven experience in [Relevant Past Performance or Federal Experience]."

Example:

"XYZ Corporation offers cutting-edge data analytics and machine learning solutions that directly support the U.S. Department of Homeland Security's mission to enhance national security by providing real-time threat detection and predictive analytics. This ensures compliance with federal data security standards and mitigates risks associated with emerging threats while leveraging our proven experience in successfully delivering advanced analytics solutions to the Department of Defense."

By plugging in the details specific to your company and the federal agency, you'll craft a value proposition that is not only clear and compelling but also deeply aligned with the mission and needs of your target federal buyer.



Design and Presentation

The design and layout of your capability statement is not as important as the content it contains. However, you can showcase your company's consistent devotion to excellence with an impressive design.

A well-designed document not only captures attention but also enhances readability, making it easier for decision-makers to quickly grasp the value your company offers.

This short list of guidance should lead you well regarding design elements:

- Ensure the capability statement is visually appealing with a clean, professional layout that includes clear headers and bullet points.
- Incorporate branding elements like logos and color schemes but avoid clutter and excessive graphics to maintain readability.
- Keep the document concise, ideally one page, focusing on essential information that addresses the needs of target agencies.
- Use straightforward language, avoiding jargon, to ensure clarity and accessibility for a wide range of readers.
- Organize content logically, starting with core competencies and differentiators, followed by supporting details.
- Proofread thoroughly for grammar, spelling, and formatting consistency to reflect professionalism.
- Optimize the document for both print and digital viewing to ensure readability in all formats.

Your “Federal” Webpage

Your Capability Statement prepares you for the Federal Webpage.

Now that you have all these details together, simply hand them over to your web designer and tell them to build a Federal Webpage around them. Instruct them on good visuals relating to the key missions of your target agencies.

Make sure to include a call-to-action to make sure any visitor knows how to start contact with you.

CHAPTER 4:

Your Federal Bidding System –

Build > Optimize > Track > Repeat ...

I am going to stress two things in this chapter:

- (1) The importance of a structured federal bidding system
- (2) Continuous improvement in managing bids

Everything else when it comes to bidding is noise, and a distraction that tempts you away from successful bidding.

The better your systems are, the higher the *quality* and *quantity* of bids you can produce. And there can be a compounding effect of this over time.

So, here are **the 6 basic steps**, and below we will dive deeper into all of them:



- (1) Locate Opportunities (Bid Delivery)
- (2) Filtering & Go/No-Go Decisions
- (3) Proposal Project / Bid Management
- (4) Deliver or Debrief (Win/Lose)
- (5) Repeat and improve

Now, let's dive in.



bid delivery

Part 1: Locate Opportunities

The goal of this step is to help you identify potential federal opportunities that align with your offerings, geography, SBA set-asides, etc. Use platforms like GSA eBuy and SAM.gov to explore a wide array of federal opportunities.

(<https://gsafocus.fedbidspeed.com> – set up your free account)

To improve your systems even better, use federal bidding software that automatically identifies relevant opportunities based on pre-set filters, which is the next step.



Filter

Part 2: Filtering & Go/No-Go Decisions

This step is designed to help you narrow down the hundreds of federal opportunities released every day. By filtering out those that don't meet your criteria, you will save time and resources.

Define Your Filtering Criteria by pulling together the following details:

- Keywords
- NAICS Codes
- States
- SBA Certifications
- GSA/GWAC/BPA requirements

Insert the parameters into the software to automatically filter out opportunities that do not meet your basic criteria. There's nothing worse than pouring hours of your precious time into building a proposal that you were ineligible to win in the first place.

Next, you'll want to manually review the filtered opportunities to ensure they align with your long-term goals and capabilities. This is called the Go/No-Go Decision.

This step helps you decide whether you'll pursue an opportunity based on scope match, resource availability, competitive analysis, and risk assessment.



Proposal

Part 3: Proposal Project / Bid Management

Now you'll focus on organizing and managing the proposal process to ensure a cohesive, well-structured bid that meets all requirements.

This process begins with assigning a Proposal Manager. If you're a small business, then that's probably an easy decision. It's you.

The Proposal Manager will oversee the entire bid process, ensuring deadlines are met and all components are cohesive. They are the responsible party within your company.

Here are the basic steps a Proposal Manager must take to ensure they deliver a winnable proposal on time.

- **Develop a Proposal Plan** - Create a detailed proposal plan that outlines key milestones, responsibilities, and timelines.
- **Gather Required Information** - Collect all necessary documentation, including past performance examples, pricing data, and technical specifications.

- **Engage Subject Matter Experts (SMEs)** - Involve SMEs to provide input on technical aspects of the proposal, ensuring accuracy and relevance.
- **Write and Review the Proposal** - Draft the proposal with a focus on clarity, compliance with RFP requirements, and alignment with the agency's needs.
- **Quality Control** - Conducting multiple reviews across the team is always a good idea to catch mistakes and surface areas of improvement. Before submission, the Proposal Manager will take those notes and strengthen the proposal accordingly.
- **Quality Control (again)** – The Proposal Manager must go through the checklist one more time and ensure nothing has been missed. As many things in government go, one small mistake and all is lost. Proposals go right into the waste bin because of the wrong font size – those stories are true.
- **Submit the Proposal** - Ensure all submission requirements are met, and submit the proposal before the deadline, confirming receipt by the agency.



Win/Lose

Part 4: Deliver or Debrief

You will either win or you'll lose...

If you win, great. Go start the project.

If you Lose, you must learn from the process and improve for next time. And a Debrief is the best way to learn from your mistakes.

If the bid is not successful, request a debrief from the agency to understand where your proposal fell short. Ask questions to try to surface why you were not selected.

It is usually one of these 3 areas:

- (1) Your price was not Competitive

- (2) Your Solution fell short of their needs
- (3) Your Proposal was missing details or prepared with errors

Remember that Contracting Officers (KO's) are busy. Try to just do this by email if they are OK with that, or tell them that you have 3 questions and would be grateful for 5 minutes to get the details of their losing bid.



Repeat

Part 5: Repeat and improve

This step emphasizes continuous improvement by learning from each bid and refining your processes for better future outcomes.

Step 1: Review and Reflect

After each bid, whether successful or not, review the entire process to identify strengths and weaknesses. Try to answer these questions:

- Why did we lose?
- What areas of the Proposal process were difficult
- Are there resources we need to invest in to improve our future bids?

Step 2: Implement Improvements

Incorporate improvements into your next bid cycle, ensuring your approach evolves and becomes more effective over time. Also, provide ongoing training to your team on federal bidding best practices, tools, and strategies. This will foster a Culture of Continuous Improvement, and encourage a mindset of learning and adaptation, ensuring your team is always striving to improve the federal bidding process.

Conclusion

Establishing a structured and optimized federal bidding system is crucial for consistently delivering high-quality bids. By continuously refining your processes, you can enhance both the efficiency and success rate, leading to compounded growth over time. Remember, a disciplined approach to bidding is the foundation for long-term success in the federal marketplace.

CHAPTER 5:

Proposal Writing to Increase Your Batting Average



Quality



Quantity

Proposal Writing is very specific to every company, industry, sector, Agency, etc. So, one chapter is not going to significantly affect such a vast topic.

So...I am just going to give you some “Hacks” that I know work for the winners to produce higher quality and quantity and win more.

1: Build a Reusable Proposal Library - Saves time by not starting from scratch for every proposal. Create templates for common sections (e.g., past performance, technical approach). Regularly update the library with new versions of content and lessons learned.

2: Follow the RFP Instructions Exactly - Ensures compliance and avoids disqualification. Thoroughly read and understand the RFP. Create a checklist of all requirements and follow it meticulously.

3: Know Your Customer - Tailors the proposal to the specific needs and culture of the agency. Research the agency’s mission, recent initiatives, and decision-makers. Use language and examples that resonate with the agency’s goals.

4: Engage Subject Matter Experts (SMEs) Early - Enhances the technical accuracy and credibility of your proposal. Identify and involve SMEs from the beginning to provide input on technical sections.

5: Develop a Strong Executive Summary - Captures the evaluator's attention and summarizes the value proposition. Keep it concise and focused on the key points that differentiate your proposal.

6: Use Graphics and Visuals - Enhances understanding and retention of complex information. Incorporate charts, diagrams, and other visuals to break up text and clarify points.

7: Focus on Past Performance - Demonstrates your experience and builds trust with potential Agency Customers.

8: Edit Ruthlessly - Improves clarity, coherence, and professionalism. Perform multiple rounds of editing, focusing on removing jargon, redundancies, and errors. Use peer reviews and possibly third-party editors to ensure objectivity.

9: Meet Every Deadline - Maintains credibility and avoids disqualification.

Set internal deadlines well in advance of the official deadline to allow for reviews and adjustments.

Use project management tools to track progress and ensure all tasks are completed on time.

10: Request a Debrief, Win or Lose - Provides valuable feedback for future proposals.

After submission, formally request a debrief from the agency regardless of the outcome. Analyze the feedback to identify areas of improvement and adjust accordingly.

This set of practical strategies can significantly improve both the quality and quantity of your proposals. Continual improvement through feedback and disciplined editing will further enhance your chances of winning more proposals in the future.

CHAPTER 6:

Outreach – Modern Approach to Federal Outreach



Find Target
Audience



Messaging
Strategy



Test & Repeat

The most difficult part of Government Contracting is not winning Proposals, it's making connections with buyers and establishing long-term relationships.

This usually consists of (1) somehow meeting decision-makers, and (2) making the effort to maintain a long-term professional relationship.

I know what you're thinking...

"Ain't nobody got time for that."

But, this is where the really big federal contracts are won.

And the good news is... There's a way to optimize the effort you put in to meet these decision-makers. Below you will find the 2 major processes.

(1) High-Value Networking

There are so many trade shows, conferences, networking events, etc. that you could fill every day of the year with them. But, that will grind your business to a halt and make your customers hate you.

The top reason to attend events is not to add to your tote bag collection. The main reason is to meet those hard-to-reach government decision-makers.

The secret is to only attend 2 to 4 events (Conferences, etc.) annually that are High-Value. This means they have the following factors:

- Industry Specific – There are “generic” Government Contracting conferences, but it is helpful if they are industry-related (Info. Technology, Aerospace, Scientific, etc.)
- Government buying community – you can view the website for the event to see the attendees and sponsors. You will want a lot of agencies showing here, especially the ones that surfaced as your top buyers in the Market Research we went through earlier.
- Break-outs – Review the panels for the breakout sessions on the Conference website. You may find that some include key decision-makers. You can ask some good questions and stay after to get in a brief conversation to break the ice.
- Matchmaking – Scheduling time to talk to a key decision-maker is a no-brainer. This is where trust is built. But make sure you come prepared to impress.
See below...

So, it is extremely important that you come prepared for these matchmaking sessions.

Think of this as a high-stakes pitch that the future success of your business depends on. If you ramp up the stakes, you will prepare accordingly.

To prepare you will want to:

- Stalk the decision-makers on social media.
 - LinkedIn – Where did they go to college? Are they wearing a RedSox hat in the picture? What groups are they in? What have they posted or commented on? This will all be found right on their page.
 - SAM.gov – if you have access to a system that stores Bidding history, then look through and note any recent bids they were a part of and see who won.
(<https://gsafocus.fedbidspeed.com> free account)
 - Google – Were they mentioned in the news recently? Is there a nice bio on them on a government site? Google will surface these and more to help you understand what

makes them tick.

- Organize the topics to discuss – Sure, these decision-makers have a sizable group of projects in their pipeline. And several are probably a great fit for your company.

But you must focus on establishing trust. Don't make this meeting about squeezing them for information. There is a secret way to establish trust WHILE getting information:

- Begin with a very brief pitch: “Hello XX, I am YY and I work for ZZ. We perform AA, and have contracts with Agencies BB and CC.
- Ask “value-adding” questions:
 - What are some of the challenges you’re facing with purchasing solutions like ours?
 - Are there any new and important directives happening in your department or agency?
 - Ask specific questions about how specific changes to your industry are impacting their department.

The conversation will surface where you intersect with them in interests, values, and opinions. You will distinguish yourself as a thoughtful partner, rather than a salivating Contractor asking for budget dollars. Just make sure to keep it professional and don't talk too much about personal topics.

A great supplement to Conferences is industry associations. You can of course connect with potential partners here, but many offer free memberships to public servants because their presence at networking events makes them high value for Contractors like you.

(2) Email Outreach to Government Buyers – A Step-by-Step Process

Email marketing has been around for decades now, and some are very closed off to the idea of using it in the Government Contract setting.

That is because 99.999% of email marketers put no thought into their approach, and they email every single person they can find.

Do the opposite.

- (1) Put extreme care and consideration into the overall messaging, write engaging copy, and offer value.
- (2) Gather and email only high-potential connections. This means you will likely keep the list to under 500 people. It also may mean that you spend a few hours researching the decision-makers you need to talk to instead of the KOs.

I could write a book on this subject, and these two guiding principles above would be the Sections.

CHAPTER 7:

Rehabbing” your Federal Pipeline



Read and listen to these words.

THE MAJORITY OF YOUR PROPOSALS WILL BE LOSERS.

Even with the greatest effort you can muster,
...putting in 12-hour days under a tight deadline,
...meeting with your team and building an amazing solution,
...building a detailed analysis to offer competitive prices.

You will still lose a lot of bids. Especially in the beginning.

It's just how this game is played.

In Government Contracting, you are actually killing it if you win 4 out of 10. That's batting .400, which isn't too bad in baseball.

This is because other Contractors are out there putting in the same effort. And, Agency buyers are almost always required to receive at least 3 bids.

So, why go through all of that?

Because *it's worth it*, and if you have an improvement mindset then your batting average will go up, and so will the dollar values.

Government Contracts are LUCRATIVE.
A micro-purchase is \$250,000.

In the Commercial world, that's a massive contract, but the government says, "oh how cute."

This simple process outlined in earlier chapters will get you started on building your winning system.

I think you get the point by now: You won't win them all, but the victories are big. So let's talk about continuously improving your system, or what I call "rehabbing."

The "Rehab" Process

I suggest performing an autopsy of every Proposal (win or lose) and keeping your notes in one place. Keep these notes with your Debrief notes.

Then set a quarterly meeting with your team to dig into each note. I call this meeting the "Health Check" - Here are the questions you should ask:

- Have we seen an improvement in the total number of contracts won? Have dollar-values increased?
 - Review the data. Take a moment to celebrate (or grieve) the results of the past quarter.
 - Are you pursuing Bids that are out of your league right now?
 - Should you evaluate the RFQ history and re-set your go/no-go criteria to fall better in line with the projects you tend to win?
- Has your Project Management evolved?
 - Stepping back to review the process step-by-step will surface some redundancies or bottlenecks that you will need to address.
- Where are the bottlenecks in the Proposal Writing process?
 - What takes the longest, or most effort?
 - Can an investment in technology fix this?
 - Can a specialist or coach help guide us toward improvements?
- What are the weakest areas in the processes or team's abilities currently?
 - Should a 1099 or new hire be utilized to fill any knowledge gaps?
 - What patterns are emerging in the debriefs? How can you improve those areas?
- Is your Proposal Library staying organized while growing?
 - Is there a better and quicker way to organize the details in the current state?
 - Is there a new technology that could help here?

Remember that efficiencies allow you to build more bids and win more bids. So, some major innovations could 10X your federal sales.

In Government Contracting you can never fall into complacent and lazy habits. There are always larger contracts to go after, and new adjacent sectors to emerge into.

CHAPTER 8:

Goodbye



You've made it to the end, great job!

I told you in the Introduction my motivations for writing this book.

Another motivation was my deep sorrow when recessions hit. These tough times occur every 10 years on average (Dotcom bubble, Real Estate bubble, Covid, ...).

Despite all the economic intellect in Washington, D.C., the U.S. government has only one tool when recessions hit: the “money press,” which they use to inject billions into the economy ...predictably, every time.

And...This infusion of crispy new money is spent through Government Contracts. So, getting into government contracting is a survival technique.

And...getting a GSA Contract is the way to truly lock-in the access to government bids. It offers too many benefits to name, but here are some of the big ones:

- Systems that allow Agency Buyers to find and buy from you – GSA Advantage, GSA eBuy, GSA eLibrary.
- A massive \$45 billion of spending through the GSA Program in exclusive contracts.
- Pre-negotiated pricing & terms, which streamlines the contracting process for you and the buyer.

And, GSA Focus is the premiere specialist to get you into the GSA Schedule program.

- Our customers make 87x ROI. This means for every dollar you spend; you get back \$87.
- Most of our Customers only spend around 4 hours on the project total (we put in the hundreds of hours for you).
- Your GSA Contract will last 20 years, which means you will gain access to exclusive opportunities for two decades.

To learn more, simply set a time to talk with Karlos on my team here: <https://bit.ly/GetGSA>

It is 100% free and you will learn a ton of helpful details about the GSA program and how your company can win Government Contracts.

Thank You!