



# WILLIAMSBURG 2018

REAL QUESTIONS  
CANDID ANSWERS

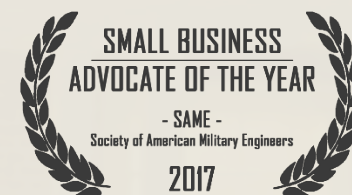
# Competitively Respond to Sources Sought

## How To Successfully Influence the Acquisition

### The Most Valuable Training We've Ever Received For Government Acquisitions

“WOW – we should have done this . . . ten years ago! A better term would be “**Total Solution!**” We learned more in two days with RSM Federal than years with other well-respected and well-known experts. RSM Federal’s approach and strategies are a **true paradigm-shift**. Not only did we receive the most valuable training we’ve ever received, we were given access to hundreds of business templates, resources, and strategies **which allow us to successfully execute what we’ve learned**.

We won a \$600,000 with DOL; \$1 Million with NAVSUP, and an IDIQ with the State of Maryland! Joshua and his team at RSM Federal are the real deal!



## Joshua P. Frank MIS, MBA



- **RSM Federal**, Managing Partner
- **New Strategic Partner of the NVSBC**
- **25 years in federal market**
- **Former military intelligence officer**
- **Small Business Advocate**
  - Chairman, Board of Directors, Veterans Business Resource Center (VBRC)
  - Emerging Leaders Program, SBA
  - Judge for Arch Grants (Entrepreneurial Competition)
- **Expertise**
  - Education, training, and business coach
  - Specialize in techniques & strategies to accelerate contract wins



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RSM Federal

 [RSM Federal](#)


# RSM FEDERAL

Every Template. Every Strategy. Step-By-Step.


A Strategic partner of the National Veteran Small Business Coalition (NVSBC). As an NVSBC member, you have immediate and direct access to the following resources. All of these resources are provided at no cost to current NVSBC members.



**The Government Sales Manual**  
450 Pages – 1,000 Techniques & Strategies  
Foundation for more than \$2 Billion awarded in government contracts.



**The Federal Access Platform**  
Hundreds of Templates, techniques, strategies, videos, and monthly webinars. This is NOT a bid-matching tool. NVSBC Members receive free access at Professional Level (Manual, Webinars, Podcasts)



**Game Changers for Government Contractors – Podcast**  
An awesome podcast where the top industry experts in government contracting are interviewed and provide game changing concepts and recommendations for helping you accelerate your revenue.

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**Free Resources  
NVSBC Members**

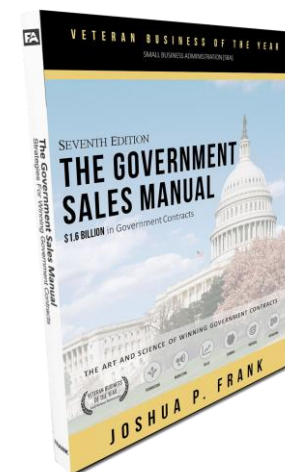
# Let's Get Started

## ● Session Expectations

- Basic to advanced concepts, techniques, and strategies
- Download presentation and templates after session
- 50 minute session | 10 minutes Q&A
- Materials in this session are from Federal Access Program

## ● Agenda

- The Basics and the Acquisition Process
- What They Ask For
- Ghosting and Influencing Acquisition
- Q&A



## Your Objectives

- 1) Differentiate your company
- 2) Marginalize / Bar Entry to competition
- 3) Influence the acquisition

***Most companies simply respond to the questions in the sources sought  
(Don't do this!)***

# A Refresh On The Basics

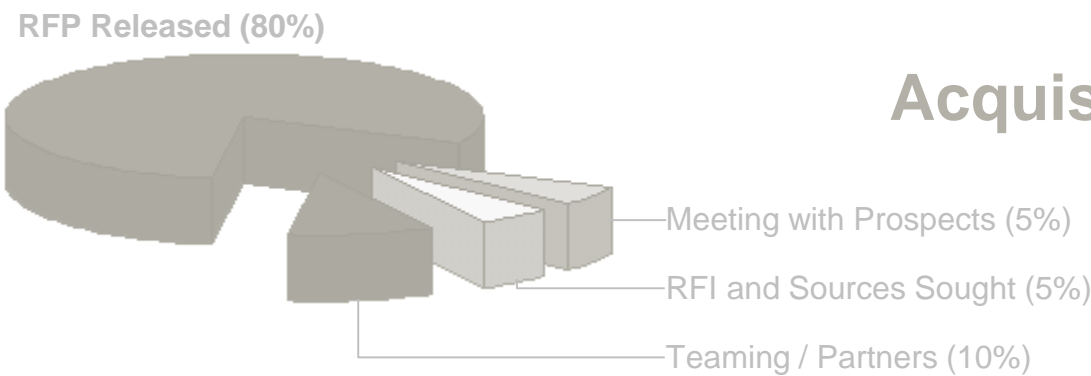
## Acquisition vs Pre-Acquisition





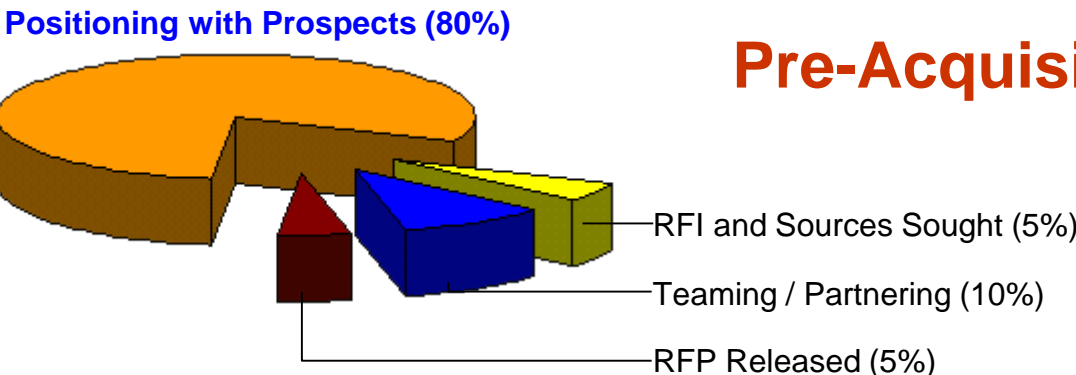
# Typical Small Business Focus

Where do most businesses focus?



## Acquisition Phase

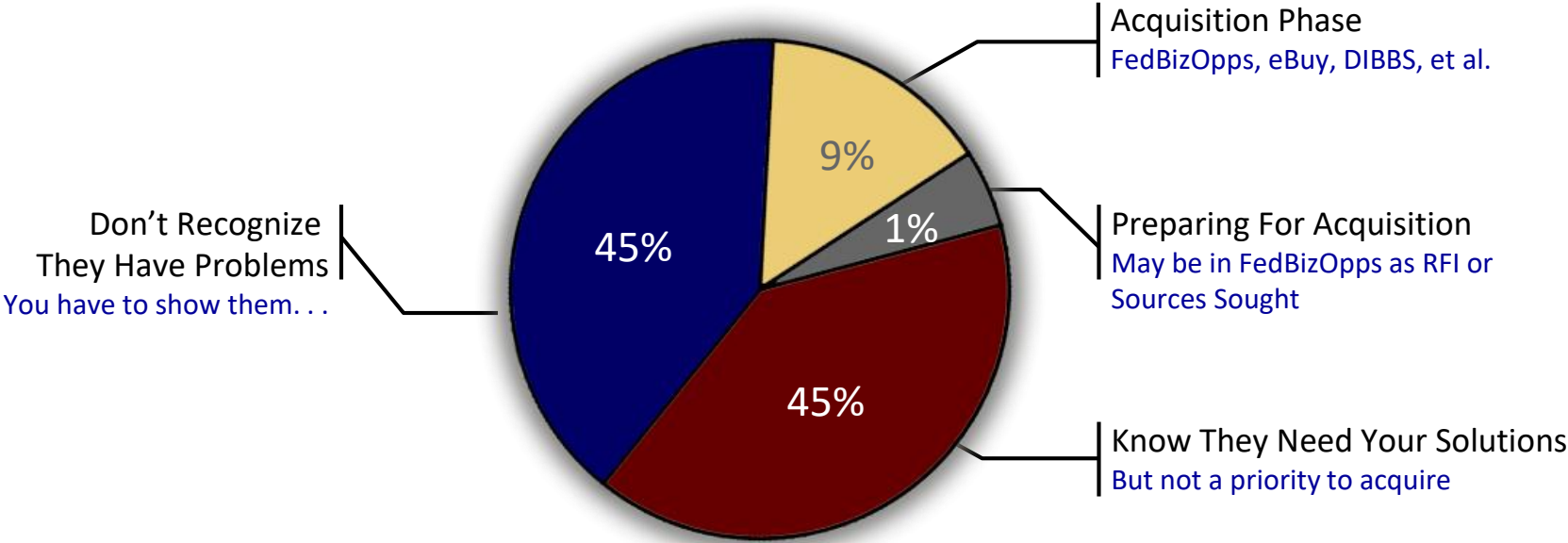
Where should you focus?



## Pre-Acquisition Phase

# FedBizOpps Only 10% of Opportunities

Most opportunities already in acquisition phase (90%)  
Sources Sought and RFIs Have Increased to 10% of all FBO Opportunities



Source: © RSM Federal, March 2012  
Figure 113 – FedBizOpps is Acquisition Phase

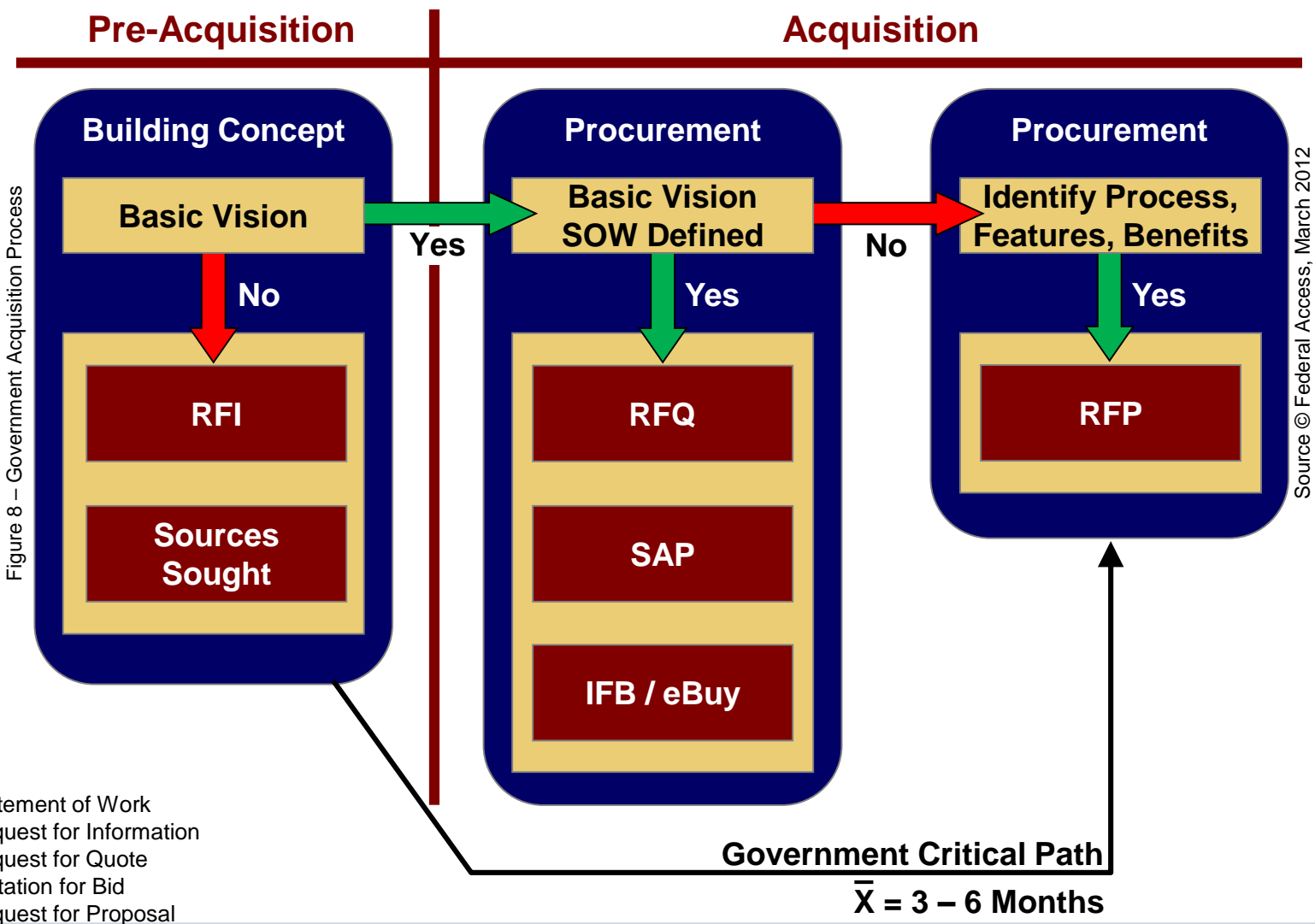
FBO – Single Government Point of Entry (GPE) for >\$25,000

# Acquisition Process

## When You Can Influence



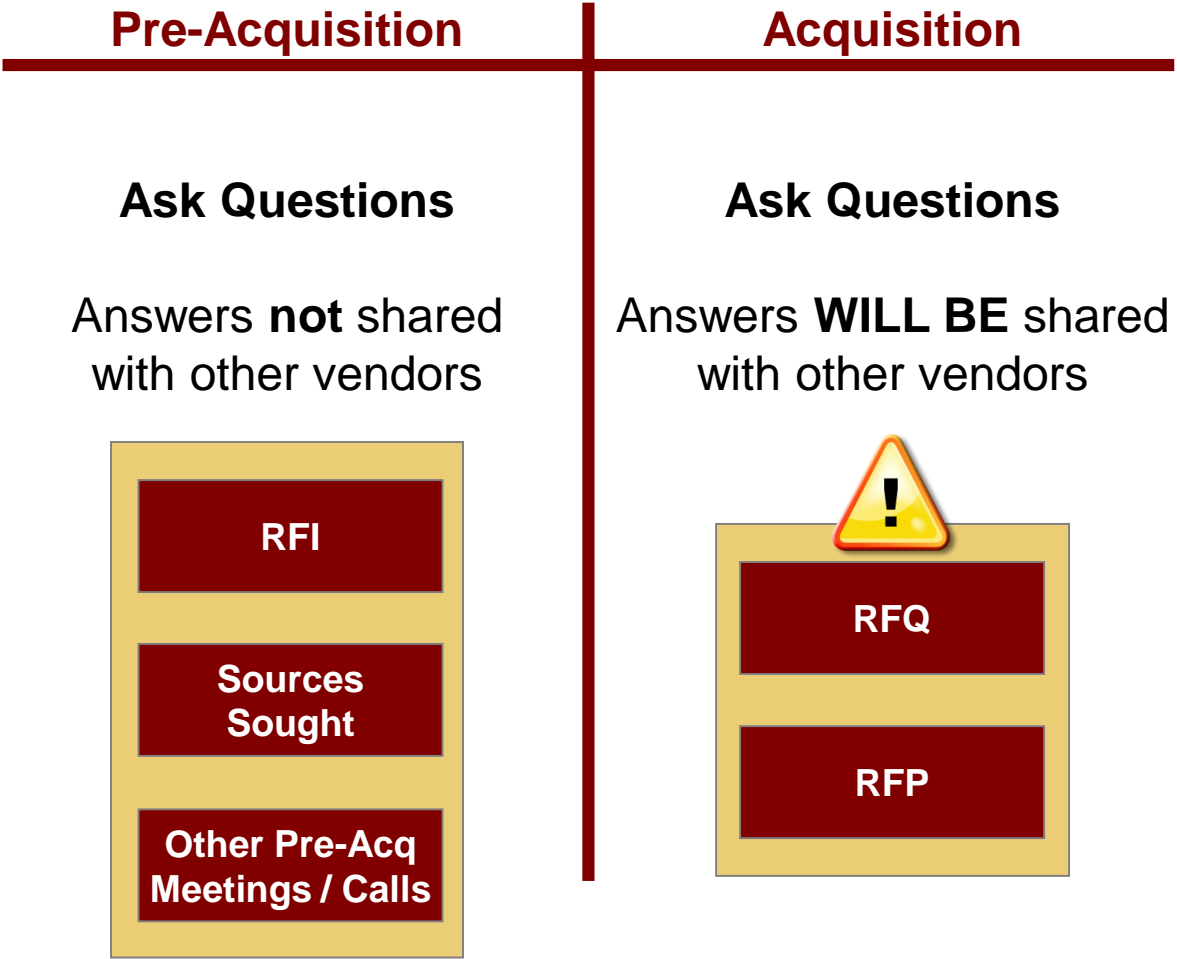
# Government Acquisition Cycle



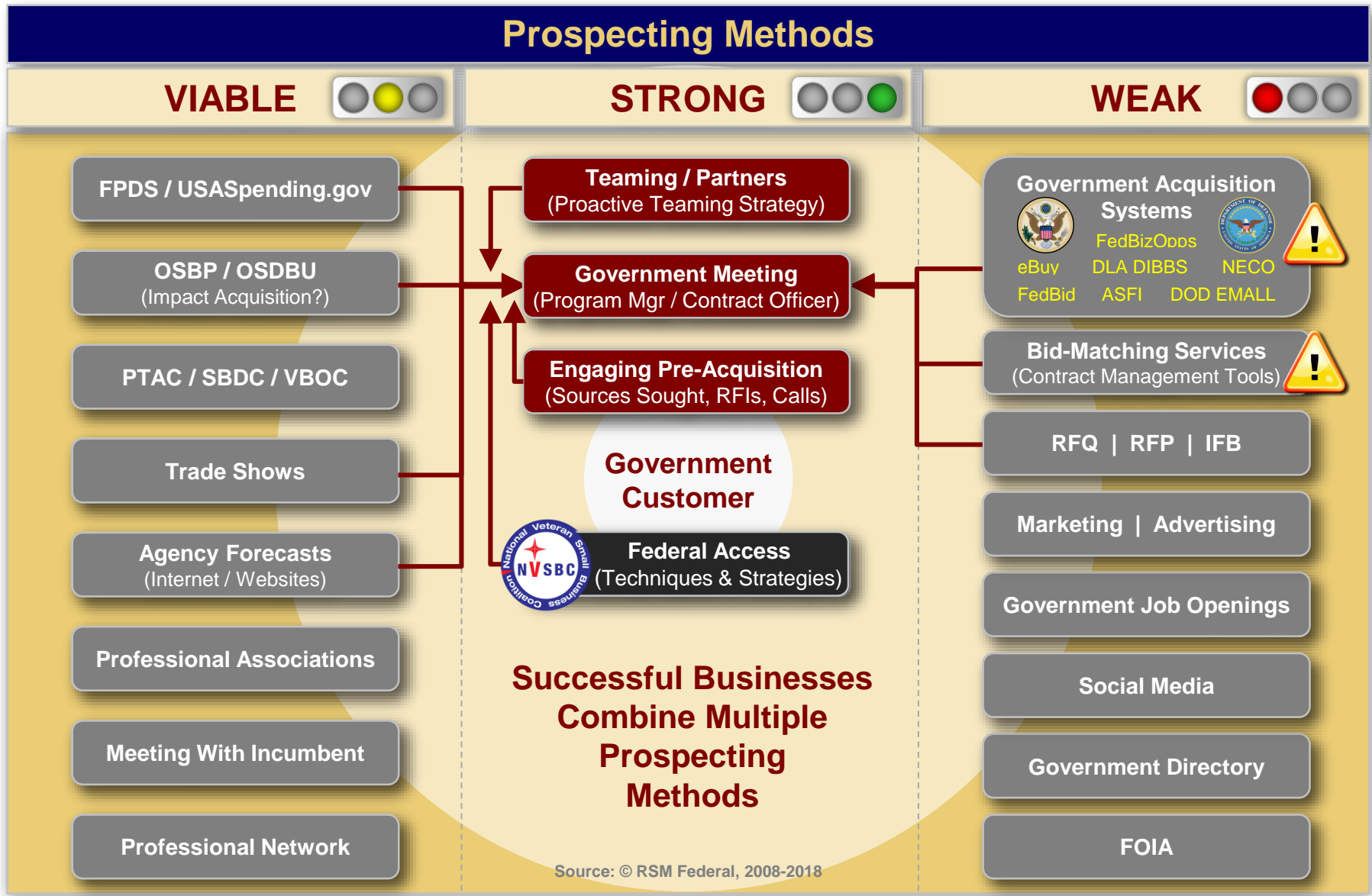
Source © Federal Access, March 2012

# Reminder

Don't ask questions to solidify your strategy during acquisition phase







## **Government Performs Market Research To Obtain:**

- **Technical capability from vendor with relevant experience**
- **Corporate background with similar experience**
- **Applicable industry certifications**
- **Investments in quality / process**

# Government Pre-Acquisition Tools

## ● Request For Information (RFI)

- Used to gain information or to learn about market capabilities
- Not an invitation to bid

## ● Sources Sought (SS)

- FAR Part 10 Market Research
- Assess market's ability to support government's requirements
- Determine acquisition strategy
- Determine if Small Business Set-Aside is Appropriate
- Determine if acquisition will fall under FAR Part 13 (Simplified Acquisition)

## ● Pre-Solicitation / Draft RFP

- Pre-Acquisition Tools
- Know what they want and how they want it. . . but still looking for feedback
- Review and treat like a SS in terms of providing recommendations and ghosting

## Sources Sought

- **Very important that you take advantage of these!**
- **Used by government to facilitate acquisition strategy**
  - Should they release as full and open, small business, Veteran-owned, etc?
  - Will RFP be released under NAICS code 541112 or 541119?
- **Excellent opportunity to position before the RFP is released**
  - What requirements would you like to see in the RFP? (Even if they don't ask)
  - What competition weaknesses would you like to ghost into the RFP?
- **The Contracting Officer is *not obligated nor authorized* to share your response(s) with other companies.**
- **Released for new opportunities or refining existing opportunity**

# Business Intelligence Goes Both Ways!

- 1) **How You Normally Think of Competitive Intelligence**
  - Collecting information from the prospect / government to differentiate
  
- 2) **Learn to “Ghost” Requirements**
  - Be strategically sneaky without being obvious about it
  - Inject requirements into the acquisition





# General Comments

## ● Sources Sought

- Best time to shape and ghost requirements
- Initiate Teaming Agreements (TA) (Your competition will wait for the RFP)

## ● Industry Comments on Draft RFP

- Another opportunity to shape and ghost requirements
- CO may be looking for feedback to decide on acquisition strategy

## ● Pre-Proposal Conference / Industry Day

- You talk to the customer, perform site survey, hear questions from competition
- Obtain Information that will NOT be in the RFP (competitive advantage)
- You will better understand the status of the Incumbent (indirectly)
- If one is scheduled – you or a teammate should attend
- If you plan to Prime – you must attend

## ● Post RFP Q&As

- Questions to clarify RFP intent and language
- Remember that government will share your questions with all bidders

***Would you buy a car without a test drive?***

***So why would you bid on an RFP and  
purposely skip responding  
to the sources sought?***

*It's either a partially qualified opportunity or it's not.  
Make the time to respond to SS / RFIs.  
You can influence the acquisition and be more competitive.*

***I'm too busy.  
Other companies will respond.  
I'll deal with this when the RFP drops.***

*Contracting Officer's Decision Process  
"I'm going to release full and open, on GSA Schedule,  
under NAICS 238210. . . because my market research  
indicated there are no interested or capable small  
businesses interested in this acquisition.*

*You don't have past performance under NAICS 238210  
You don't have a GSA Schedule and even if you have a GSA  
Schedule - now you have to compete with large business*

# What They Ask For

## How You Approach A Sources Sought



# Overview

- **Most companies simply answer the questions**
- **Companies that want to influence acquisition:**
  - Comments regarding government's contemplated acquisition strategy
  - Comments about currently selected NAICS codes
  - Comments on acquisition strategy for small or large business
- **Baseline**
  - Very little guidance or a massive data request (normally one or the other)
  - No more than five to ten pages and 5Mb
  - Mark "business sensitive" to ensure government does not share your data
  - Responses will not be returned and government doesn't confirm receipt
  - Potential offerer's responsibility to monitor for release of solicitation
  - Read the fine print! May say that RFP will only go to companies that respond to SS



QUESTIONS AND CRITICAL CONSIDERATIONS FOR INTERESTED CONTRACTORS

Responses are solely treated as information for the Government to consider. Direct or Indirect costs incurred in response to this RFI are at the expense of the vendor, not the Government. In accordance with the Federal Acquisition Regulations, responses to this notice are not offers and cannot be accepted by the Government to form a binding contract. Any contract that may be awarded will not be based on information received or derived from this RFI, but rather on the outcome of a subsequent competitive process.

It is requested that all vendors interested in participating in this effort note their interest by responding to the areas identified in the "Company Details", "Capabilities Statement", and "General Questions" sections below.

Company Details

The page limit for responses to this section is 1 page.

1. Provide company point(s) of contact information (name, email address, address, telephone, and fax numbers).

2. Identify if your company are any of the following business concern statuses (include all that apply): Small Business (SB); Certified Small Business Administration (SBA) 8(a) firm; Small Disadvantaged Business (SDB); Service-Disabled, Veteran-Owned Small Business (SDVOSB); Veteran-Owned Small Business (VOSB); Economically Disadvantage Women-Owned Small Business (EDWOSB); Woman-Owned Small Business (WOSB); Historically Underutilized Business Zone (HubZone) Small Business; Large Business

3. Provide contracting vehicles your company holds, such as GSA schedules.

Capabilities Statement

The page limit for responses to this section is 5 pages.

INTERESTED PARTIES SHALL SUBMIT ONLY THE INFORMATION AS REQUESTED BY THE FOLLOWING MARKET RESEARCH QUESTIONNAIRE.

COMPANY INFORMATION	
Company Name:	
CAGE Code:	
DUNS Number:	
Company Address:	
Point of Contact (POC):	
POC Title:	
POC Email Address:	
POC Phone Number:	

MARKET RESEARCH QUESTIONS					
#	QUESTION	ANSWER			
1	Has your company been awarded previous Government contracts as a small business?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
2	Have you provided similar items to those referenced herein for either the private industry or the Government?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
3	Please identify your company's socio-economic small business size status or indicate if your company is a large business.	<input type="checkbox"/> 8 (a) <input type="checkbox"/> SDB <input type="checkbox"/> WOSB <input type="checkbox"/> VOSB <input type="checkbox"/> SDVOSB <input type="checkbox"/> HUBZone <input type="checkbox"/> Large Business <input type="checkbox"/> Other: _____			
4	Does your company regularly engage in the business of providing the supply items described herein?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
5	How long has your company provided these, or highly similar, supply items?	____ Yr(s) ____ Mo(s)			
6	Please indicate the percentage of the actual work requirements for these items that you would intend to perform as the Prime Contractor.	_____ %			
7	Please identify a Raw Order of Magnitude (ROM) and/or estimated unit price for the required item.	\$ _____ . _____			
8	Please list all contracts that your company is currently performing with the same/similar work requirements as those identified herein and indicate item similarity (high/low). For all references, include the contract number, description of items, and name and phone number of associated POCs. Information may be provided below or as a separate document.				
	Contract Number	Agency/ POC Info	Item Description	Similarity (high/low)	Prime/Sub (%Contract)

# What The Government Likes To Ask For

- May be asked for a brief or extensive narrative summary
- Organization's potential capacity to perform these contract services?
- Corporate Info
- Tailored capability statement
- Anticipated teaming arrangements
  - Provide breakdown expected delineation of work
  - Are you going to need to extensively subcontract
- How long have you provided these products / services
- Similar services (commercial / federal) last three years
  - Comparable size, complexity, scope
- Proposed acquisition strategy including
  - NAICS Code, large or small, open or contract vehicle
- **Please identify a raw order of magnitude (ROM) and / or estimated unit price for the required item or service.**

# Understanding How They Use Your Response



**You don't have to answer every question**

- **You either confirm their acquisition strategy or you change it**
- **It's a sources sought. . . That's it!**
  - You don't win anything
  - Government can't hold you to anything
  - If they ask for ROM, your pricing can be wrong. . . You won't be held to it!
- **Rough Order of Magnitude (ROM) – Cautionary Tale**
  - If they plan to use estimated ROM to validate small business set-aside, they may say “No small businesses can provide this at a competitive value so we'll release full and open. . .”

# Think of a Sources Sought as a **Negotiation**

- **They want everything you have**
- **What if it's not in your best interest to answer a question?**
  - Then don't
  - Don't explain. Just don't answer the question.
- **A sources sought is a market research tool.**
- **You want to inject yourself into their decision cycle**
- **I missed the response date!**
  - You may find a sources sought from a week ago and wish you had responded
  - It's not a proposal that falls under the Federal Acquisition Regulation (FAR)
  - There is no regulation that says they can't review your response after the date
  - **You can still respond!** (No guarantee they'll read it – but they often do)

# They Ask For You To List Your Past Performance

- **You're going to list it anyway, even if they don't ask**
  - Confirms without a shadow of a doubt that you can perform
  - Helps ensure they don't eliminate an acquisition strategy you recommend
- **“They want what?” POCs? Phone numbers? Contract Numbers?**
  - Teaming Partner Responding – **Do you provide this information for a SS?**
  - Yes, provide if responding directly to the Government



# Ghosting

**Never** respond to a sources sought without it.



# What is Ghosting?

*Process of influencing requirements in the RFP which are your strengths and your competition's weaknesses*

## ● The Value of Ghosting

- Positioning your capabilities and differentiators to **marginalize your competition**
- Performed in order to **bar-entry or decrease perceived effectiveness** of your competition
- Process of taking your competition's weaknesses, tailoring your competencies to compensate, and positioning your strengths to **build competitive advantage**.
- **Recommending information / value** to the prospect that you hope will get included in a future RFP in order to provide you with competitive advantage during source selection

## So What Can You Ghost?

- **Acquisition Size** – Large or Small Business
- **Socio-Economic Status** – SB, WOSB, 8a, ANC, VOSB, SDVOSB, HUBZone . . .
- **Acquisition Codes** – NAICS (Influences small business thresholds)
- **Acquisition Vehicle** – Open Market or a Contract Vehicle (e.g. GSA Schedule)
- **Your Strengths & Differentiators**
- **Weaknesses of Your Competition**

***ANYTHING that differentiates you, your people, your solutions***

# Ghosting Examples

Capability / Value	Ghost
TS Facility Clearance	We would recommend that the government change the facility clearance to top secret. While this project is based on supporting a secret network, the potential touch-points with the agency’s TS networks will more than likely be required from a data integration perspective. This would also ensure that the government is not required to expend internal resources or be forced to acquire additional contractor resources when this situation occurs.

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Certification	We would recommend that the government incorporate CMMI level 2 or 3 to ensure maturity of vendors and their ability to operate on complex projects.

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Certification	We would recommend that the government incorporate CMMI level 2 or 3 to ensure maturity of vendors and their ability to operate on complex projects.
Security Systems For a major university campus	We would recommend that you release the acquisition as a small business set-aside. In the federal space, there are several hundred small businesses that can successfully meet and accomplish the scope of this project. However, as this acquisition is to revamp security for three different buildings, supporting more than 5,000 government employees, we recommend that the government consider asking for a past performance that involves the complexity required by this acquisition. Absent asking for a past performance that supports at least two interconnected buildings with integrated intrusion detection systems (IDS), the government is likely to incur additional costs within the following 24 months.

# Ghosting Examples

Capability / Value	Ghost
<p><b>Strong QA Process</b></p> <ul style="list-style-type: none"><li>• Extensive graphics with proven metrics</li><li>• Competitor had this issue</li><li>• Most companies have a bland QA section</li></ul>	<p>We would recommend that the government add / strengthen the section on quality assurance and control. In our industry, the most common mistake made in the development of these products is a failure to check for cracks on the chassis, which are not visible to the naked eye and a failure to carefully communicate with the packers and shippers at the distribution point. This issue happened two months ago at another agency and it increased time and resources. Recommend that the RFP require that vendors explain how their QA/QC process mitigates this issue.</p>

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<p><b>GSA Schedule</b></p> <ul style="list-style-type: none"><li>• You have one</li></ul>	<p>We would recommend that you maintain this acquisition through GSA Schedule - or - We would recommend you modify the acquisition to release via GSA Schedule 00Corp. With more than 500 vendors, with proven track records, releasing via schedule will simplify acquisition and guarantee government negotiated rates.</p>



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<b>GSA Schedule</b> <ul style="list-style-type: none"> <li>• <b>You don't have one</b></li> </ul>	<p>We recommend that the acquisition be released open-market to provide an opportunity to obtain industry leadership from companies with extensive Fortune 500 and 1000 past performance. While there are several hundred companies on schedule that can support this requirement, the industry has made a major shift in the last 15 months and industry best practices have shifted. In that this acquisition is potentially a foundation for future add-ons, the government is likely to increase their spend on subsequent projects if these new baselines are not anticipated and planned for.</p>

Capability / Value	Ghost
<p><b>Full Ghosting Bundling Strengths</b></p> <ul style="list-style-type: none"><li>• No GSA Schedule</li><li>• Want a different NAICS</li><li>• Strong QA Process</li></ul>	<p>In addition to responding to this sources sought, we also wanted to provide feedback on what is happening in the industry today. The <b>industry has made a major shift in the last 15 months</b> and industry best practices have shifted. These changes were briefed at the National ABC Conference last July and ratified by the national governing body this past October.</p> <p>Specifically for this acquisition, with the currently outlined requirements, releasing under <b>GSA Schedule will not necessarily guarantee</b> that the agency is positioning for the follow-on acquisition as only a small subset of Schedule holders have incorporated these shifts in best practices. These shifts have, on average, have helped similar organizations <b>save upwards of 35%</b> on follow-on acquisitions, <b>decreased headcount by 8%</b>, and increased productivity and <b>ease of access by more than 20%</b>. If you'd like to learn more about this, please feel free to reach out and we'll provide additional information.</p> <p>We also recommend the government <b>switch acquisition from 541512 to 541490</b> due to more potential bidders operating under this NAICS and will facilitate increased responses to the subsequent RFP.</p> <p>Last, we also <b>recommend that the government require</b> that bidders outline and explain, in detail, how their <b>QA / QC</b> process will mitigate what has become endemic over the last 18 months – failures to capture potential issues during the design process. This issue caused DOE, the Army, and the FDA to lose time, money, and resources because vendors failed to incorporate strong QA processes and / or explain them during pre-acquisition and during bid response.</p>

# Ghosting Shaping Requirements

John Breeze                      Sent: November 14, 20xx 10:15am

Pre-RFP Phase

To: rjones@dhs.gov  
Subject: Follow-Up

Your Differentiators
Manage Multiple Sites
Performance Based Contracts
Earned Value Management
Top Secret Facility Clearance

Dear Mr Jones,

I wanted to thank you again for discussing the future acquisition for the DHS Network Operations Center. You were very helpful in outlining each of the anticipated task areas. Based on our meeting, we would like to confirm the four task area groups (TAGs) envisioned for the RFP:

- Planned
- Task Area Group 1: Enterprise Network Service Desk
  - Task Area Group 2: Desktop Remote Administration
  - Task Area Group 3: Software Support
  - Task Area Group 4: Network Connectivity

Based on our understanding of DHS’ requirements, we also recommend three additional capabilities:

- Recommendation 1: Recommend that one or two of the past performances require that the prime have experience managing multiple sites under a performance based contract. Having managed multiple sites will ensure less down-time and improve DHS’s current problems with communication.
- Recommendation 2: From the standpoint of a dispersed network management team, providing best value to DHS can be measured and tracked via Earned Value Management (EVM). The ability to capture these metrics will mitigate DHS’ current problems with scope creep and related expenditures.
- Recommendation 3: You indicated a Secret Facility Clearance would be necessary to mange this contract. However, several of your networks outside this effort are Top Secret. From our experience with DoD, being able to communicate with other network administrators would provide immense value for current and future challenges and upgrades. In 2008, you experienced two outages as a result of this communication silo.

Sincerely,  
John

## Add Section for Acquisition Options

- **Make it easy for the government to buy from you!**
- *“When working with other Federal agencies, the following acquisition strategies have been used to simplify procurements:*
  - 1) 8a Sole Source
  - 2) WOSB Sole Source
  - 3) Blanket Purchase Agreements (BPA)
  - 4) VOSB or SDVOSB Set-Aside
  - 5) HUBZone Set-Aside
  - 6) GSA Schedule (as 8a or WOSB Sole Source)
  - 7) Purchase Card (credit card)
  - 8) Simplified Acquisition

# Your Response

## Combining all the pieces



April 1, 2015

Mr. Jeffrey Donovan

Contracting Officer  
Office of Veterans Business Development (OVBD)  
Small Business Administration  
123 Pennsylvania Avenue  
Washington, District of Columbia 20416  
United States

RE: Request For Information (RFI)  
Solicitation Number: SBA-335-RT6756-7811  
SBA Business Marketing program support

Dear Mr. Donovan,

We are pleased to submit this response to your RFI. MSR Services is a service disabled veteran-owned small business (SDVOSB) certified by the Department of Veterans Affairs Center for Veterans Enterprise (CVE). All information is up-to-date in the System for Award Management (SAM).

Company Name: MSR Services  
DBA: MSR Services  
Corporation: Subchapter S Corporation  
Status: Small Business and Service Disabled Veteran Owned Small Business (SDVOSB)  
Tax ID: 25-3867879  
DUNS: 822369191  
CAGE: 5B3C1  
NAICS: 541611  
POC: Charles Findley, Principal  
Charles@msrservices.com  
703.456.9587



Members of our team have worked in marketing and advertising to generate awareness for several different organizations in various industries and categories, including the federal government.











We are experts at taking existing programs, accelerating them and making them stronger. Our experience and knowledge of marketing and advertising along with best practices assures MSR Services will deliver high impact strategy, communications, and outreach that will be of the most value to SBA's Business Marketing program. With our knowledge and experience, we will be able to deliver tailored messages, on point, that engages the your target market.

**1. MSR Services**  
MSR Services is a strategic marketing and business acceleration firm that is acutely familiar with the services covered in this project including Veteran services and the Business Marketing program.

MSR Services' active participation in the veteran community, combined with subject matter expertise in communication and outreach strategies and Veteran program management services would provide the SBA with a trusted and exceptional understanding of the target market and the applicable business, communication, marketing and engagement strategies to accelerate knowledge, awareness, and registration for the Business Marketing program.

Over the last three years, MSR Services has provided subject matter expertise (SME) supporting Veteran initiatives at the Department of Veterans Affairs, supported contracts with Army and Air Force Morale, Welfare, and Recreation (MWR) programs, and is currently supporting two contracts with the Office of the Secretary of Defense (OSD).

**2. Capabilities**  
MSR Services is very excited about this opportunity and we've built a team that not only understands the requirements outlined in this RFI, but has a core and deep understanding of the Business Marketing program. As the Prime, the following highlights MSR Services' capabilities that are relevant to the Business Marketing program requirements supporting Veteran outreach, communication, and other patron engagement strategies, as presented in the RFI solicitation.



RSM Federal Government Contracts in 2011 - 2014

- ▶ MSR Services, currently supports Program and Digital Strategy for two National Coalitions in Washington DC supporting Veterans, retirees, service members and their families. Mr. Findley, Principal of MSR Services, serves as the Director of Program and Digital Strategies for outreach and communication.
- ▶ MSR Services, a subcontractor to Marstrats LLC, currently provides subject matter expertise and outreach strategies to the program team in support of the VA Gamification Contract. This contract is focused on engaging the Veteran market to educate Veterans on their benefits and how to utilize the VA's MyHealthyVet website – the primary portal for all Veteran health benefits.
- ▶ Mr. Findley serves on the Board of Directors for a regional Veterans Business Resource Center (VBRC), supporting the Executive Director with oversight and operational strategy which includes advisory support for marketing and execution of the Business Marketing program in Missouri, Kansas, Iowa, and Nebraska.
- ▶ Mr. Findley supports the SBA's Emerging Leaders Program in St. Louis as a panel expert on how to do business with the government.
- ▶ MSR Services developed the business cases for the US Army and US Air Force Morale, Welfare, and Recreation (MWR) offices for the integration of technology, marketing / social media, and patron engagement strategies to educate 13 million service members and their families on available services and benefits.

- ▶ MSR Services developed the business case and acquisition strategy (RFP Development) for US Army IMCOM Family and MWR and US Air Force Services next-generation online patron engagement strategies to "Engage, Educate, and Excite." Specifically, bringing all existing MWR services to the internet and engaging a patron base of more than 15 million.

### 3. Our Team

We've built a lean, agile organization of key professionals, all with big agency experience. Our business model will allow us to bring the SBA and Office of Veterans Business Development (OVBD) "best in class" resources in a cost efficient and effective manner. To bring maximum value to this project, we have put together a team that not only has excellent past performance in outreach strategies, audience analysis, video and graphics support, and program management, but the expertise to understand our Veteran community, entrepreneurial activities, and specifically the Business Marketing program.

Our firm has extensive experience in developing and managing outreach strategies and the program management to minimize costs, maintain schedule, and accelerate patron engagement.

We have already built a team, with big agency past performance that specializes in marketing, advertising, public relations, branding/creative, web/online, video, audience analysis, social media, mobile marketing, and program management.

Although this solicitation is pre-acquisition, we have already initiated teaming to maximize our capabilities. We've already formally engaged the following organizations to augment the MSR Services team and to provide the SBA with the "best in class" support that this contract will require. There are one or two additional subject matter experts that will be subcontracted and will be provided as part of our formal RFP response.



**MSR Services | Role: Prime**

MSR Services, an SDVOSB, is located in St. Louis, Missouri. Charles Findley, owner and principal, has more than 20 years experience supporting military and Veteran initiatives. A former intelligence officer with the United States Army, a service disabled Veteran, and a board member for the Veterans Business Resource Center, Mr. Findley will provide the team with real world expertise on Veteran requirements and entrepreneurial expertise and specifically insights obtained from the VBRC's local execution of the Business Marketing Program. Based on this background and past performance identified in paragraph 2 Capabilities, MSR Services would prime and manage this initiative.

#### 4. Recommendations

Having supported various Defense and Veteran contracts and having worked with dozens of marketing and outreach efforts, we would like to confirm the four task area groups (TAG) envisioned for this RFP and based on our understanding of these requirements, make several recommendations:

##### 4.1. Planned

- Task Area Group 1:** Communication and outreach strategies
- Task Area Group 2:** Audience Analysis
- Task Area Group 3:** Video and Graphics Support
- Task Area Group 4:** Program, Business and Administrative Support

##### 4.2. Recommendations

**Recommendation 1:** Any outreach and communication strategy requires that the project team have a strong understanding of the target market and the intangible “appreciation” for the requirements and challenges that the target market endures. Past performance by the Prime that directly involves and supports our Nation’s Veterans will increase the effectiveness of the outreach and communication strategy.

**Recommendation 2:** The strategy to engage the target market is more critical than the actual outreach and communication. Understanding the Business Marketing Program, knowing how our Veterans think and the challenges they face, and experience designing large scale businesses cases and communication strategies will be critical to taking existing marketing collateral and accelerating existing program and outreach efforts. A large number of outreach programs meet the basic milestones – but very few can accelerate outreach for maximum success.



**Recommendation 3: Acquisition Strategy.**

- ▶ Maintain NAICS Code 541611
- ▶ Provide 30 days for response
- ▶ No specific contract vehicle. Since 2011, MSR Services has supported half a dozen federal and Defense contracts, including the Department of Veterans Affairs. However, we do not have a GSA Schedule and this contract vehicle would prevent MSR Services and our team from supporting this initiative.
- ▶ Do not require the Prime to possess past performance in all task area groups. MSR Services has extensive past performance supporting the government in audience research and analysis, communication and outreach strategies, and program support, but there are pieces to each of these, including video support that require an industry expert. At this time, all team members are small business to provide the SBA with maximum coverage. To date, our team consists of small business, veteran owned, service disabled veteran owned, and woman owned.

## What Did We Learn

- **How and why government performs market research**
- **How to approach a sources sought**
- **You don't have to answer every question**
- **How to ghost and influence acquisition**

# Session Evaluations

**VETS** ★ **18**

**SPEAKER/SESSION EVALUATION**  
Please place the completed evaluation into the evaluation box in the back of your session room or bring it to the registration desk.

**SESSION TITLE:** \_\_\_\_\_

Please rate each of the following:	Poor		Fair		Great
Overall Session Rating.	1	2	3	4	5
Session content matches the program description.	1	2	3	4	5
The speaker(s) appeared organized, informed, and delivered effective presentation.	1	2	3	4	5
Would you recommend that this/these speaker(s) return for future presentations?	<input type="checkbox"/> Yes <input type="checkbox"/> No				

*\*Turn over for additional questions*

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