

Acquisition Hour

Marketing Materials for One-on-One Buyer Meetings: Capabilities Statements and other Collateral

March 5 | Noon – 1:00 pm

Presented by:

Jack Laufenberg, Wisconsin Procurement Institute



Assisting Wisconsin businesses compete in the government marketplace.

WPI is Wisconsin's APEX ACCELERATOR

The APEX Accelerators program, under management of the Department of Defense (DOD) Office of Small Business Programs (OSBP), plays a critical role in the Department's efforts to identify and engage with a wide range of businesses entering and participating in the defense supply-chain. The program provides the education and training that all businesses need to participate to become capable of participating in DOD and other government contracts.

WPI provides services and training to all of Wisconsin's 72 counties

- Individual counseling at our offices, client's facility or virtually
- Small group training – webinars and workshops including Acquisition Hours, Cyber Fridays, Evening FAR sessions, Federal Market Insights and Local Government Sales Opportunities
- Conferences the Governors Marketplace, The Contracting Academy (TCA), WEDCs Small Business Academy, Wisconsin Federal Contractor Forum [DC and in-state], Government Opportunities Business Conference GOBC) with WI military bases, End of Year Federal Contractor Update, Annual DOD Contract Management Update, and more.....

www.wispro.org

WPI OFFICE LOCATIONS

■ MILWAUKEE

- *Technology Innovation Center*

■ MADISON

- *FEED Kitchens*
- *Dane County Latino Chamber of Commerce*
- *Wisconsin Manufacturing Extension Partnership (WMEP)*
- *Madison Area Technical College (MATC)*

■ CAMP DOUGLAS

- *Juneau County Economic Development Corporation (JCEDC)*

■ EAU CLAIRE

- *Western Dairyland*

■ FOND DU LAC

- *Envision Greater Fond du Lac*

■ GREEN BAY

- *NWTC Startup Hub*

■ LACROSSE

- *Veterans in Professions*

■ MANITOWOC

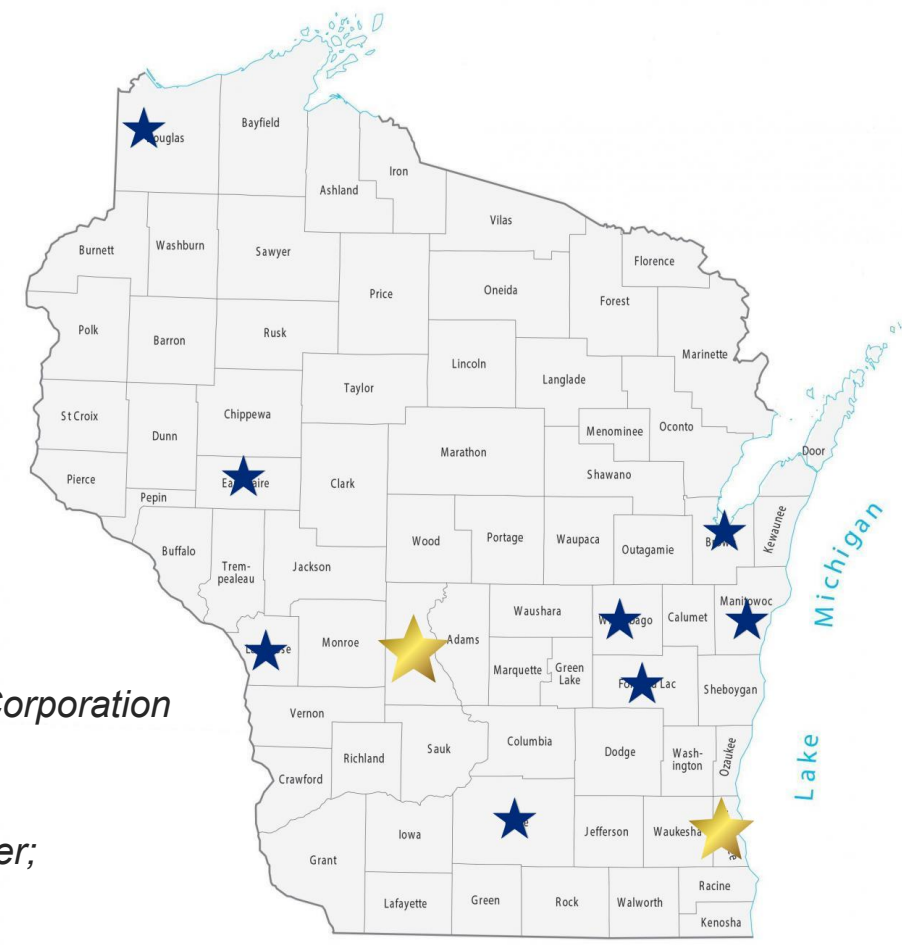
- *Progress Lakeshore*

■ OSHKOSH

- *Greater Oshkosh Economic Development Corporation*

■ SUPERIOR

- *Small Business Dev Center; UW Superior*



APEX ACCELERATORS

WISCONSIN APEX ACCELERATOR

UPCOMING EVENTS

- APR 1:00 pm - 2:00 pm
16 Acquisition Hour: SAM.gov – Tools for Contracting
- APR 9:00 am - 12:00 pm
24 Government Certification Workshop – State Certifications – Madison, WI
- APR 12:00 pm - 1:00 pm
24 Acquisition Hour: Overview of the Contractor Performance Assessment Reporting System (CPARS)
- APR April 30, 2024 - May 3, 2024
30 Lieutenant Governor's Small Business Academy
- MAY 8:00 am - 4:00 pm
16 10th Annual DoD Contract Management Update — Appleton, WI



Marketing Materials for One-on-One Buyer Meetings: Capabilities Statements and other Marketing Collateral



Marketing Materials for One-on-One Buyer Meetings

Capabilities Statements and other Marketing Collateral

- Capabilities Statements
- Business Cards
- Business Emails
- Email Signatures
- Updating your website
- Updating your LinkedIn profile
- Updating your Google Business Profile
- Updating you Dynamic Small Business Search profile (SAM.gov users only)

Marketing Materials for One-on-One Buyer Meetings

Capabilities Statements and other Marketing Collateral

- **Capabilities statements – A resume for your business**

Capabilities Statement



SMB Value Partners, Inc., a Woman-Owned Small Business, is a solutions provider for government and commercial clients. We provide enterprise-wide management solutions to support your business needs.

smbvaluepartners.com



Company Snapshot

SMB Value Partners, Inc.
POC: Deb Dietz, President
Phone: 847-414-3856 | **FAX:** 847-510-0535
eMail: ddietz@smbvaluepartners.com
Address: 2122 Warwick Lane, Glenview, IL 60026-5743
Cage Code#: ----- | **DUNS#:** -----
Work Area: Nationwide

NAICS Codes

541611 Administrative & General Management Consulting Services
 518210 Data Processing, Hosting, and Related Activities
 524298 All other Insurance-Related Activities
 541512 Computer Systems Design Services
 541613 Marketing Consulting Services
 541614 Process, Physical Dist., and Logistics Consulting Services
 541618 Other Management Consulting Services
 541690 Other Scientific and Technical Consulting Services
 541910 Marketing Research and Public Opinion Polling
 541990 All Other Professional, Scientific, and Technical Services
 611430 Professional & Management Development Training

Differentiators

- Woman-Owned Small Business, focused on quality, reliability, savings and job creation. Senior executive leadership
- Full-service management consultants: Marketing, Communications, IT, Sales, Strategic Planning, Logistics, Operations, Cybersecurity, Training & Education
- Over 100 years of industry experience
- Focus on helping Government put small business people to work
- Outsourcing and Fractional Leadership
- Industry and software agnostic

PSC Codes

7030 Information Technology Software
 A026 R&D-Defense Other: Services (Management/Support)
 A036 R&D-Defense Other: Other (Management/Support)
 AE16 R&D-Economic Growth: Employment Growth/Productivity (Management/Support)
 AE26 R&D-Economic Growth: Product/Service Improvement (m / s)
 AE36 R&D-Economic Growth: Manufacturing Tech. (Mgmt/Support)
 AE96 R&D-Economic Growth: Other (Management/Support)
 AF16 R&D-Education: Educational (Management/Support)
 AN41 R&D-Medical Health Services - Basic Research
 B506 Special Studies/Analysis-Data (Other Than Scientific)
 B553 Special Studies/Analysis-Communications
 B599 Special Studies/Analysis
 D302 IT And Telecom-Systems Development
 D303 IT And Telecom-Data Entry
 D306 IT And Telecom-Systems Analysis
 D307 IT And Telecom-IT Strategy And Architecture
 D310 IT And Telecom-Cyber Security And Data Backup
 D318 IT And Telecom-Services Solutions
 D324 IT And Telecom-Business Continuity
 G009 Social-Non-Government Insurance Programs
 R405 Support-Prof.: Operations Research / Quantitative Analysis
 R406 Support-Professional: Policy Review/Development
 R408 Support-Professional: Program Management/Support
 R410 Support-Prof.: Program Evaluation / Review / Development
 R413 Support-Professional: Specifications Development
 R422 Support-Professional: Market Research/Public Opinion
 R426 Support-Professional: Communications
 R499 Professional Service Support
 R612 Support-Administrative: Information Retrieval
 R699 Other Administrative Support Services
 R701 Data Collection
 R702 Logistics Support
 R706 Support Management
 R799 Education/Training: Training/Curriculum Development
 U009 Education/Training: General

Core Competencies

- Strategic Planning and Execution
- Marketing & Sales Management
- Project and Program Management
- Information Technology – IT
- Operational Efficiencies / Process Improvements

Past Performances

	Bass Pro Shops		Baxter
	Complia Health		Grainger
	Infor ERP		RRDonnelly
	World Kitchen		Cummins
	Zentix Electronics		Citi Group



SMB Value Partners, Inc.
*Helping Government Deliver Projects,
 High Quality, On-Time and On-Budget*



GOVERNMENT CAPABILITY STATEMENT

Government Capability Statement

Quest can help you navigate through all levels of government solutions.

Quest's Local, State, and Federal Government Solutions Help You To:

- Boost performance, efficiency, and governance by consolidating data centers via virtualization and cloud solutions
- Enable anywhere, anytime access to resources by both citizens and government workers with mobile computing and apps
- Provide the large-scale data storage and backup/recovery services that underpin "big data" behind improved, real-time decisions
- Ensure data, network, and access security capabilities scale seamlessly without adding unnecessary cost or complexity

Past Clients

- UC Davis Health System and UC Davis
- Davis Joint Unified School District
- University of Las Vegas
- California State Teacher's Retirement System
- California Prison Industry Authority
- California ISO
- City of Concord
- CA Department of Justice
- California Department of Corrections and Rehabilitation
- Covered California
- California Chamber of Commerce
- Woodland Joint Unified School District
- Health Plan of San Joaquin

Quick Facts

- **Business:** Fast growing technology management company providing customized and secure Cloud, Managed, and Professional Services and IT products
- **Corporate HQ:** Roseville, CA
- **Type:** Privately Owned Corporation
- **Awards:** CRN Triple Crown
- **Expertise:** Deep bench of IT professionals with key industry/ vendor ties.
- **Tier III Delivery Service Centers:** McCellan Park, CA and Roseville, CA with 55+ additional Service Delivery Centers in US, Europe, and Asia. Annual SOC report.
- **Security-focus:** Cybersecurity, physical security, and individual security clearance levels including Top Security as needed.
- **Disaster Recovery, BCP:** design, testing, compliance, and facilities

UNSPSC Codes

8010197, 4310000, 4321200, 4300000, 4320000, 4323000, 4617000, 4651600, 8112004, 8011700, 8011716

NIGP Codes

20800, 91800, 95800, 96200, 20400, 92600, 99900, 99948, 83800, 91800, 95800

SIC Codes

7373, 7379, 7372, 4899, 7375, 7374, 7378, 7389, 7371, 9715, 9748

USA Codes/NAICS

Primary - 54512 - Computer Systems Design Services/
 Information Technology
 51220 - Software Publishers
 57299 - All Other Telecommunications
 51820 - Data Processing, Hosting, and Related Services
 54130 - Engineering Services
 54140 - Other Specialized Design Services
 54151 - Custom Computer Programming Services
 54153 - Computer Facilities Management Services
 54159 - Other Computer Related Services
 54161 - Administrative Management and General Management Consulting Services

Government Codes:

CAGE Code: U0UD2 DUNS: 10-7550055 Federal ID: 94-2838096

Contracts:

- NASPO ValuePoint: Cloud Solutions
- NASPO Reseller for Cisco, Dell/EMC, HPE, Palo Alto, Pure Storage
- California: Multiple CMAS IT Contracts
- California: Various Software Licensing Program (SLP) contracts
- California: Information Technology Consulting Services MSA
- E-Rate: SPIN 143005814
- Federal: Promark GSA Reseller

Capabilities

- Assessment Services
- Application Development
- Managed Services
- Service Delivery Centers
- Business Resumption Center
- Cloud Services
- BCP/Disaster Recovery
- Data Collection
- Logistics Support
- Support Management
- Education/Training: Training/Curriculum Development
- Education/Training: General
- Network Health
- Professional Services
- QuestITex® SLA
- Maintenance Contract Management
- Infrastructure Services
- Data/Voice Circuits
- Technical Staffing
- E-signature Solutions

Interested in learning more?

Invest in the Capability, not the Product®
 NASPO ValuePoint@questsys.com
www.questsys.com • 800.326.4220




HIGHER ECHELON™
 TRUSTED PARTNER IN ORGANIZATIONAL EXCELLENCE

CAPABILITIES STATEMENT

HigherEchelon, Inc. is an organizational performance consulting & training firm founded in 2009 that guides clients through the rapidly changing & complex requirements of today's working environment by:

- Developing **Resilient and Adaptable** Leaders and Teams
- Leading Digital Transformations with **Culture & Change Management**
- Implementing **Cutting-Edge** Technology Solutions



“ [HigherEchelon] did an exceptional job in terms of dedication, reliability, creativity, project management, diligence, scientific rigor, integrity and going the extra mile... I wholeheartedly recommend them.”

- Program Manager, Veterans Affairs



KEY SERVICES

HUMAN CAPITAL

- Executive Coaching
- Applied High Performance
- Corporate Team Building
- Culture & Change Management
- Training and Education
- Strategic Planning
- Assessments & Diagnostics

TECHNOLOGY

- Gaming and Simulation
- Salesforce Implementation
- Cross-platform Design and Development
- Cyber Operations and Training
- Enterprise Technology
- Information / Cyber Security at the agency level
- Embedded, Systems and Software Engineering
- Weapons Systems Design and Architecture Analysis
- Verification and Validation
- Software Design to meet DoD Safety Standards
- Data Management

TRUSTED BY "They provided us with amazing service." - California National Guard















"...among the most trusted leaders in organizational excellence. -- InsideNOVA.com"

October 15, 2024

Marketing Materials for One-on-One Buyer Meetings

Overview of Today's Presentation

- I. When and Why Capabilities Statements are Important: Introducing Your Business
- II. Capabilities Statements – Key Informational Elements
- III. Other Marketing Collateral to Present Well to Potential Clients

I. When and Why Capabilities Statements are Important: Introducing Your Business

A. One-on-one buyer meetings

- i. Introduction
- ii. Creating opportunities for your business: dynamic vs. static marketing
- iii. Tips for a successful meeting

B. Other times to use your capabilities statement

- i. Marketing outreach



I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

i. Introduction

- Buyer meetings might also be called:
 - Matchmaking sessions
 - One-on-one buyer meetings
 - Buyer-supplier meetings
 - One-on-one buyer-supplier meetings

I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

- One-on-one buyer meetings are 5–10 minute meetings between a **potential supplier (your business)** and **a government agency or corporate representative (a buyer)**
- Government agencies may include:
 - Federal – Department of Defense (DoD) and non-DoD
 - State (e.g. Department of Natural Resources, Department of Motor Vehicles)
 - Local municipalities
 - [Statute 67.01.5](#): “Municipality’ means any of the following which is authorized to levy a tax: a county, city, village, town, school district, board of park commissioners, technical college district, metropolitan sewerage district...town sanitary district...public inland lake protection and rehabilitation district...and any other public body empowered to borrow money and issue obligations to repay the money out of public funds or revenues.”
- Corporations may include any corporation that is looking for suppliers, especially small business suppliers and diverse-owned small business suppliers

I. When and Why Capabilities Statements are Important

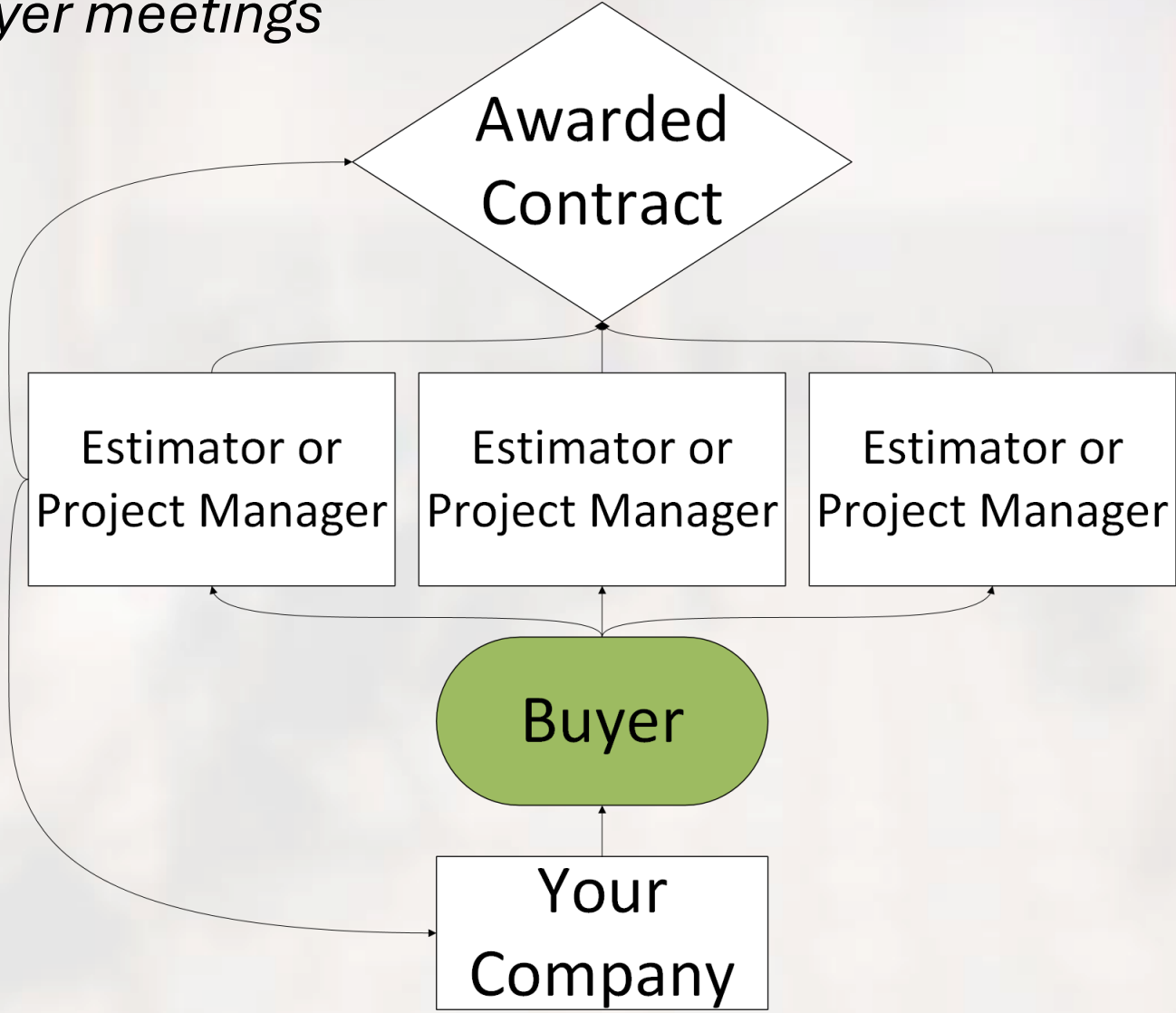
A. *One-on-one buyer meetings*

- Topics of discussion for buyer meetings includes, as applicable:
 - Prime contracts
 - Subcontracts for government prime contractors
 - Contracts with corporations

I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

Exact structure depends on organization with which you are meeting

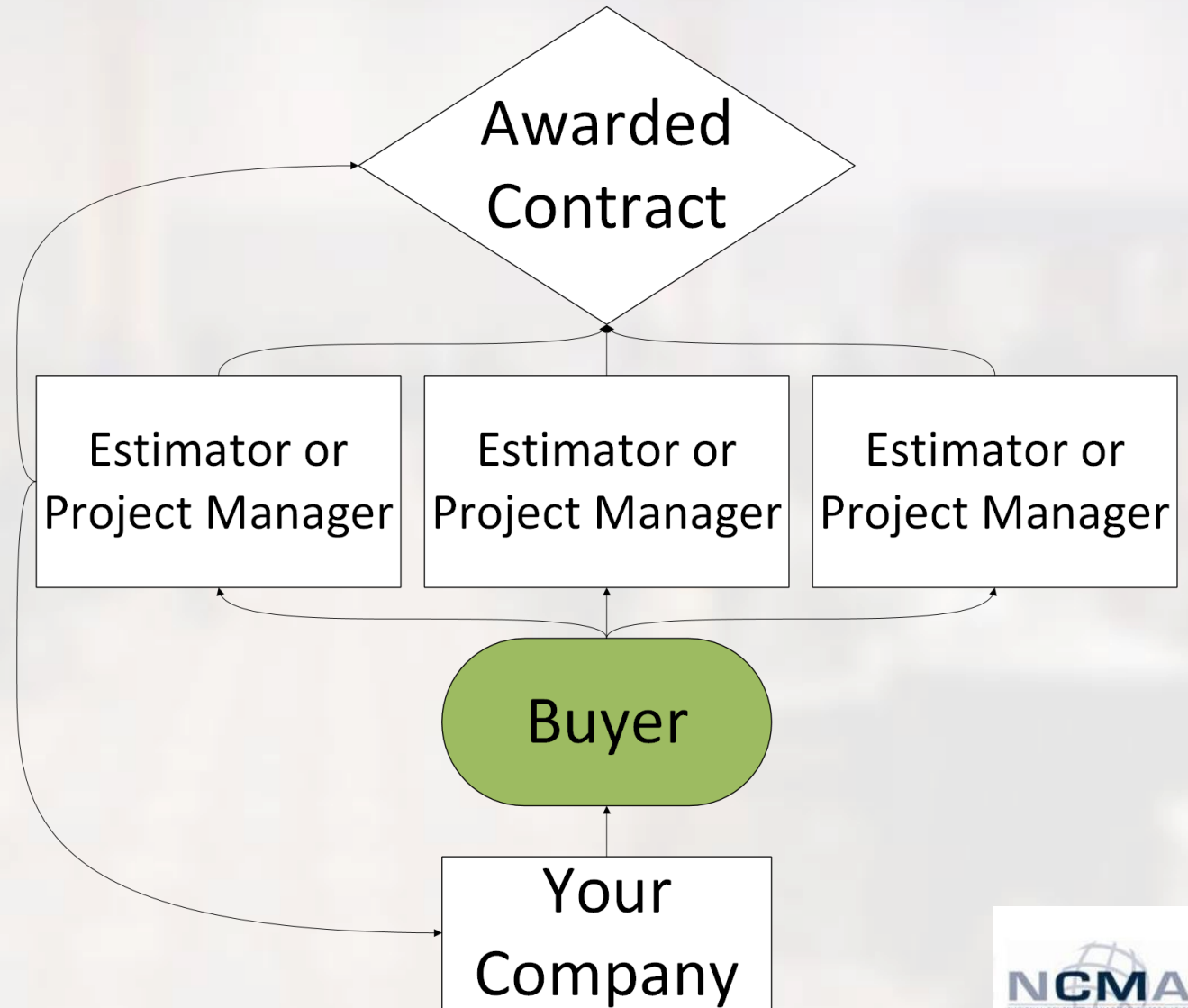


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I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

- Buyers are responsible for sourcing and giving the initial evaluation of suppliers who can meet the government or corporation's needs
- They are the initial point of contact, the gatekeeper



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I. Buyer-Supplier Meetings: An Introduction

A. One-on-one buyer meetings

Buyers from Marketplace 2024

Colleges and Universities

- Marquette University
- UW Madison
- UW Milwaukee
- UW System of Administration

Corporations/Government Prime Contractors

- CG Schmidt, Inc.
- Enbridge
- Findorff
- Oshkosh Defense
- PNC Bank
- U.S. Bank
- And more

Local Government Agencies

- City of Madison
- City of Milwaukee
- City of Wauwatosa
- Milwaukee County
- Kenosha County Dept. of Human Services
- Milwaukee Metropolitan Sewerage District
- WE Energies
- And more

State Government Agencies

- WI Dept. of Administration
- WI Dept. of Financial Institutions
- WI Dept. of Health Services
- WI Dept. of Public Instruction
- WI Department of Transportation

- WI Dept. of Public Instruction – School Nutrition Team
- And more

Federal Government Agencies

- Amtrak
- Federal Aviation Administration
- U.S. Army Corps of Engineers, Chicago and St. Paul District
- U.S. Dept. of Veterans Affairs – Great Lakes Acquisition Center
- U.S. General Services Administration, Public Buildings Center, Great Lakes Region
- And more

I. Buyer-Supplier Meetings: An Introduction

A. One-on-one buyer meetings

- Buyer meetings can be stand-alone events or part of conferences hosted by industry associations, governments, or non-profit organizations like WPI

Upcoming Buyer Meetings

- Annual WEDC’s “Marketplace Wisconsin 2025: The Governor’s Conference on Diverse Business Development” (*in-person events*)
- [Sign-up for WPI’s newsletter to stay up-to-date](#)
- If you need assistance identifying relevant industry associations, contact WPI

I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

ii. **Creating opportunities for your business: dynamic vs static marketing**

- Word of mouth marketing
- Having a basic website
- Having an email address

I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

ii. **Creating opportunities for your business: dynamic vs static marketing**

- What is your service area?
- Who is in your service area?
- Are they purchasing what you sell?
- How can you connect with buyers?
- Does your website and other marketing materials offer content tailored to your customer, including potential government customers?

I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

ii. Creating opportunities for your business: dynamic vs static marketing

- Having a website that contains a “Government Solutions” tab and relevant information like:
- Updated Dynamic Small Business Search (DSBS) profile
- Have a LinkedIn profile
- Updated Google Business profile

I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

iii. Tips for a successful meeting

- **Know who is coming**

I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

iii. Tips for a successful meeting

- **Know who is coming**

- Look over their buyer profile
- Know what current opportunities are available from the buyer
 - eSupplier – State of Wisconsin
 - Local municipal bid and RFP sites
 - SAM.gov – federal government
- Anticipate what opportunities might be on the horizon
 - Federal forecasts
 - General awareness of what state and local government is doing
 - You may find this out during the one-on-one buyer-supplier meeting

I. When and Why Capabilities Statements are Important

A. Pre-event preparation

Marketplace Wisconsin: Governor's Conference on Diverse Business Development

December 6, 2023 - December 7, 2023



DETAILS

Start:
December 6, 2023
End:
December 7, 2023
Event Category:
WPI Events

ORGANIZER

Wisconsin Economic Development Corporation
Phone:
608-210-6728
Email:
events@wedc.org

ADDITIONAL INFORMATION

Presented By
Wisconsin Economic Development Corporation (WEDC)
Event Registration
Register for Event

Confirmed Buyers for Dec. 7th Buyer Meetings

Preparing for buyer meetings? [Click here](#) for buyer meeting best practices or call 414-270-3600 to speak with a WPI counselor.

[Buyer Assignment Map](#)

Colleges/Universities


- [Marquette University](#)
- [Medical College of Wisconsin](#)
- [Milwaukee Area Technical College](#)
- [University of Wisconsin – Madison](#)
- [University of Wisconsin – Milwaukee](#)
- [University of Wisconsin – System Administration](#)

Corporate/Government Prime Contractors

- [Advocate Health \(formerly Advocate Aurora Health\)](#)
- [American Family Insurance Group](#)
- [CG Schmidt](#)
- [JH Findorff & Son](#)
- [JP Cullen](#)
- [Generac](#)
- [Gilbane Building Company](#)
- [HGA Architects and Engineers](#)
- [Leonardo DRS – NPS](#)
- [Michels Corporation](#)
- [Oshkosh Defense](#)
- [Snap-on Incorporated](#)
- [U.S. Bank](#)
- [Versiti](#)
- [WPS Health Solutions](#)

I. When and Why Capabilities Statements are Important

A. Pre-event preparation



MARKETPLACE WI
GOVERNOR'S CONFERENCE ON
DIVERSE BUSINESS DEVELOPMENT

Advocate Health

Buyer Type: Corporate/Government Prime Contractor
Website: <https://www.aurorahealthcare.org>

Looking to Purchase these Products or Services

- NAICS Codes: 561730, 561720
- Healthcare / Medical Goods and Services
- General Services / Support Services
- Construction / Trades

Desired Qualifications

- If selected to do business with AAH, vendor must go through vendor vetting and meet system requirements.

Desired Certifications

- 3rd Party - Women's Business Enterprise National Council (WBENC)
- Minority Owned
- LGBT Owned
- Veteran Owned
- Tribally Owned
- Women Owned
- 3rd Party - National Gay and Lesbian Chamber of Commerce (NGLCC)
- 3rd Party - Northwest Minority Supplier Development Council (NMSDC)
- Disadvantaged Business Enterprise (DBE)
- Federal - Women-Owned Small Business (WOSB)

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I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

iii. Tips for a successful meeting

- Know who is coming
- **Register in their procurement systems, get added to a vendor list, or register in supplier portals**

I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

iii. Tips for a successful meeting

- Know who is coming
- **Register in their procurement systems, get added to a vendor list, or register in supplier portals**
 - Register in eSupplier – State of Wisconsin
 - Register in local municipal procurement platform or be added to their interested vendor list
 - Register in SAM.gov – federal government
 - Register in corporate supplier portals

I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

State of WI eSupplier

The screenshot displays the Wisconsin eSupplier portal. The top navigation bar includes the Department of Administration logo and the text 'eSupplier'. The main content area is divided into four sections: 'My INFORMATION', 'ANNOUNCEMENTS', 'HELP DESK', and 'CURRENT SOLICITATIONS'.

My INFORMATION: This section prompts users to log in to respond to solicitations. It includes a 'Create your WAMS ID' link, a login form with fields for 'WAMS Username' and 'Password', and a 'Sign In' button. Below the form, there are links for 'Need help registering as a bidder?', 'Log in Assistance', 'What is WAMS?', 'Create your WAMS ID', 'Forgot your WAMS ID and/or password?', 'System Requirements', and 'Minimum System Requirements'.

ANNOUNCEMENTS: This section provides information about the Wisconsin eSupplier Portal for bidders, stating it offers easy access to state agency bidding opportunities and replaces the VendorNet feature. It includes a 'VendorNet' link and a small icon of a megaphone.

HELP DESK: This section addresses 'Questions related to Solicitations' and 'General Procurement Questions'. It provides contact information for the State Bureau of Procurement, including an email address (DOAWISPro@wisconsin.gov), a phone number (800) 482-7813, and operating hours (7:30 am - 6:00 pm CST, M-F). It also provides contact information for 'Technical Questions', including an email address (STARSupport@wisconsin.gov), a phone number (844) WIS-STAR (947-7827), and operating hours (7:30 am - 6:00 pm CST, M-F).

CURRENT SOLICITATIONS: This section is divided into two tables. The first table, 'All Upcoming Solicitations', lists two items: '28448-WEG' (Class 8 Printing: Carbonless Forms both Snapset and Continuous) and '28449-WEG' (Class 2 Printing: 2025 - 2026 Blue Book). The second table, 'Most Recent Solicitations', lists ten items, including '510600' (Human Service Vehicles - Medium Buses), '510612' (Custodial/Maintenance Management Services DOT Rest Areas/Safety & Weight Enforcement Facilities), and '25-504-20' (Trail Cameras).

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I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

Local School District Vendor Information

The screenshot shows the West Allis-West Milwaukee School District website. At the top left is the school district logo and name. A blue navigation menu is on the right. The main content area is titled "Vendor Information" and includes contact details for Cheryl Hengel, a "Vendor Information" section with a link to become a vendor, and a "Contact us" button. A sidebar on the right lists various services like Communication, Employee Benefits, Finance, etc.

WEST ALLIS - WEST MILWAUKEE SCHOOL DISTRICT

Vendor Information

Business Services Specialist - Accounts Payable
Cheryl Hengel
414-604-3037
hengelc@wawmsd.org

Vendor Information

Interested in becoming a Vendor?


Vendors who are interested in being added to the West Allis-West Milwaukee School District's vendor or bid list should send a letter of intent and three letters of reference from businesses who are currently contracting your services. In addition, All vendors must have a Vendor Maintenance Form and a W-9 on file for their organization. To comply with the Internal Revenue Service requirements please provide us with your Federal Taxpayer Identification Number (TIN) and the name under which your report your taxable income by completing the form W-9.

According to the Internal Revenue Code, you may be subject to a penalty for failure to provide us with your TIN. Additionally the IRS requires that we begin backup withholding on reportable amounts to a person or company who has not supplied us with their TIN.

You can access the Vendor Maintenance Form and Form W-9 by clicking on the link on the left. If you have any questions regarding this request, please feel free to call 414-604-3037.

Let's Talk! Contact us Provide information to the:

School District of West Allis-West Milwaukee, et al.
C/O Cheryl Hengel, Business Services Department
9333 W. Lincoln Avenue
West Allis, WI 53227

- Communication +
- Employee Benefits +
- Finance -
- Audit Reports
- Budget Planning
- ESSER Funding
- Final Budget Documents
- Monthly Budget Tracking
- Public Hearing Budget Workbooks
- Retirees
- Vendor Information
- Facility Services
- Food Service
- Human Resources +
- Leadership & Learning  English >
- Recreation & Community Services
- Student Services
- School Services +
- Technology Services

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I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

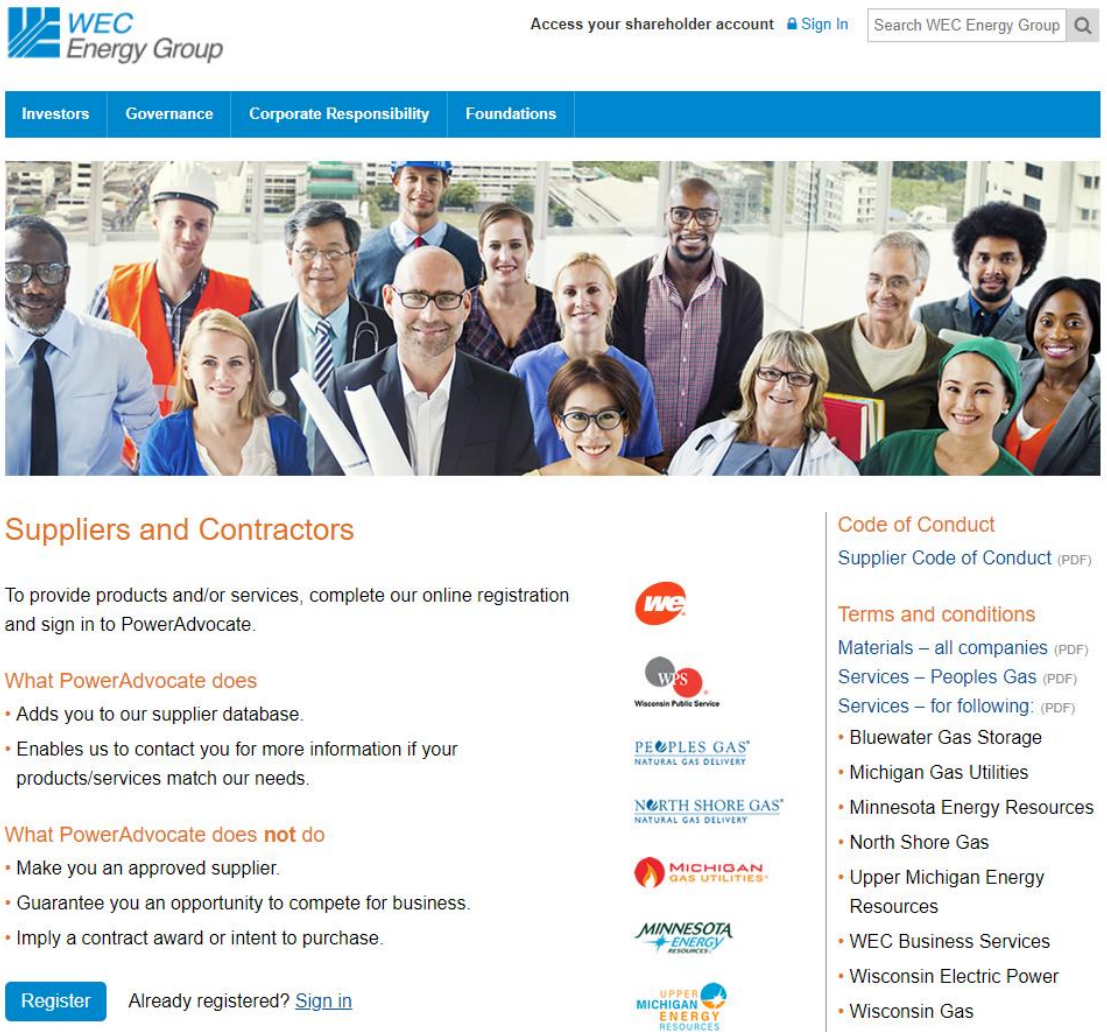
Federal
government
SAM.gov

The screenshot shows the SAM.gov homepage. At the top, there is a navigation bar with links for Home, Search, Data Bank, Data Services, and Help. The SAM.gov logo is prominently displayed in the center. To the right, a badge states "Official U.S. Government Website 100% Free". The main content area is divided into two primary sections. The left section, titled "The Official U.S. Government System for:", lists several key services: Contract Opportunities, Contract Data (Reports ONLY from fpds.gov), Wage Determinations, Federal Hierarchy (Departments and Subtiers), Assistance Listings, Entity Information (Entities, Disaster Response Registry, Exclusions, and Responsibility/Qualification (was fapiis.gov)), and Entity Reporting (SCR and Bio-Preferred Reporting). Below this list is a link to "View FASCSA Orders" for those searching for Federal Acquisition Supply Chain Security Act (FASCSA) orders. The right section is titled "Register Your Entity or Get a Unique Entity ID" and includes a brief description of the registration process, followed by three buttons: "Get Started", "Renew Entity", and "Check Entity Status". At the bottom, a search bar is visible with the text "Already know what you want to find?", a dropdown menu for "Select Domain...", and a search input field containing "e.g. 1606N020Q02".

I. When and Why Capabilities Statements are Important

A. One-on-one buyer meetings

Example Corporate Supplier Portal



The screenshot shows the WEC Energy Group website's supplier portal. At the top, there is a navigation bar with links for Investors, Governance, Corporate Responsibility, and Foundations. Below this is a large group photo of diverse employees. The main content area is titled "Suppliers and Contractors" and includes a registration prompt: "To provide products and/or services, complete our online registration and sign in to PowerAdvocate." It lists "What PowerAdvocate does" (adding to the database, enabling contact) and "What PowerAdvocate does not do" (making an approved supplier, guaranteeing business opportunity, implying a contract). A "Register" button and a "Sign in" link are provided. To the right, there are links for "Code of Conduct" (Supplier Code of Conduct PDF) and "Terms and conditions" (Materials, Services for Peoples Gas, Services for following). A list of utility logos is shown, including WEC, WPS Wisconsin Public Service, Peoples Gas, North Shore Gas, Michigan Gas Utilities, Minnesota Energy Resources, and Upper Michigan Energy Resources. A list of resources follows: Bluewater Gas Storage, Michigan Gas Utilities, Minnesota Energy Resources, North Shore Gas, Upper Michigan Energy Resources, WEC Business Services, Wisconsin Electric Power, and Wisconsin Gas.

I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

iii. **Tips for a successful meeting**

- Know who is coming
- Register in their procurement systems, get added to a vendor list, or register in supplier portals
- **Prepare your pitch**

I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

iii. **Tips for a successful meeting**

- Know who is coming
- Register in their procurement systems, get added to a vendor list, or register in supplier portals
- **Prepare your pitch**
 - Discuss with your WPI counselor

I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

iii. **Tips for a successful meeting**

- Know who is coming
- Register in their procurement systems, get added to a vendor list, or register in supplier portals
- Prepare your pitch
- **Follow-up with contacts in 1-2 business days**

I. When and Why Capabilities Statements are Important

A. *One-on-one buyer meetings*

iii. Tips for a successful meeting

- Know who is coming
- Register in their procurement systems, get added to a vendor list, or register in supplier portals
- Prepare your pitch
- Follow-up with contacts in 1-2 business days
- **Have prepared and bring the right marketing materials, especially capabilities statements**

I. When and Why Capabilities Statements are Important: Introducing Your Business

- A. One-on-one buyer meetings
 - i. Introduction
 - ii. Creating opportunities for your business: dynamic vs. static marketing
 - iii. Tips for a successful meeting
- B. **Other times to use your capabilities statement**
 - i. Marketing outreach



I. When and Why Capabilities Statements are Important

B. Other times to use your capabilities statement

i. Marketing outreach

- Emails to government procurement professionals or corporate Small Business Liaison Officers (SBLOs)
- Site visits
- Networking events
- If you need assistance developing a sales list, please contact WPI

Marketing Materials for One-on-One Buyer Meetings

Overview of Today's Presentation

- I. When and Why Capabilities Statements are Important: Introducing Your Business
- II. Capabilities Statements – Key Informational Elements**
- III. Other Marketing Collateral to Present Well to Potential Clients

Marketing Materials for One-on-One Buyer Meetings

Overview of Today's Presentation

I. When and Why Capabilities Statements are Important: Introducing Your Business

II. Capabilities Statements – Key Informational Elements

A. Overview

B. Sections to include

- i. Company data
- ii. Scope of work
- iii. Contact information
- iv. Differentiators
- v. Past performance

C. Other Considerations

III. Other Marketing Collateral to Present Well to Potential Clients

II. Capabilities Statements – Key Informational Elements

A. Overview

A Business Resume

A concise one-page document that clearly and effectively communicates your capabilities to potential government customers.

A GOOD (GREAT) CAPABILITIES STATEMENT IS CRITICAL

- Provides a concise summary for review and initial decision
- Identifies key points of interest and focus – example past experience, certifications
- Highlights your strengths and successes
- Reflects your “preparedness” and business maturity
- Provides an outline for you during initial discussions

A BAD CAPABILITIES STATEMENT – CAN QUICKLY CLOSE DOORS

Marketing Materials for One-on-One Buyer Meetings

Capabilities Statements and other Marketing Collateral

- **Capabilities statements – A resume for your business**

Capabilities Statement smbvaluepartners.com

SMB Value Partners, Inc., a Woman-Owned Small Business, is a solutions provider for government and commercial clients. We provide enterprise-wide management solutions to support your business needs.

WOMEN OWNED
CERTIFIED BY

Company Snapshot	NAICS Codes															
<p>SMB Value Partners, Inc.</p> <p>POC: Deb Dietz, President Phone: 847-414-3856 FAX: 847-510-0535 eMail: ddietz@smbvaluepartners.com Address: 2122 Warwick Lane, Glenview, IL 60026-5743</p> <p>Cage Code#: ----- DUNS#: ----- Work Area: Nationwide</p>	<p>541611 Administrative & General Management Consulting Services 518210 Data Processing Hosting & Related Activities 524298 All other Insurance Related Activities 541512 Computer Systems Design Services 541613 Marketing Consulting Services 541614 Process, Physical Dist., and Logistics Consulting Services 541618 Other Management Consulting Services 541690 Other Scientific and Technical Consulting Services 541910 Marketing Research and Public Opinion Polling 541990 All Other Professional, Scientific, and Technical Services 611430 Professional & Management Development Training</p>															
Differentiators	PSC Codes															
<ul style="list-style-type: none"> • Woman-Owned Small Business, focused on quality, reliability, savings and job creation. Senior executive leadership • Full-service management consultants: Marketing, Communications, IT, Sales, Strategic Planning, Logistics, Operations, Cybersecurity, Training & Education • Over 100 years of industry experience • Focus on helping Government put small business people to work • Outsourcing and Fractional Leadership • Industry and software agnostic 	<p>7030 Information Technology Software AD26 R&D-Defense Other: Services (Management/Support) AD06 R&D-Defense Other: Other (Management/Support) AE16 R&D-Economic Growth: Employment Growth/Productivity (Management/Support) AE26 R&D-Economic Growth: Product/Service Improvement (m / s) AE36 R&D-Economic Growth: Manufacturing Tech. (Mgmt/Support) AE96 R&D-Economic Growth: Other (Management/Support) AF16 R&D-Education: Educational (Management/Support) AN41 R&D-Medical Health Services - Basic Research BS06 Special Studies/Analysis-Data (Other Than Scientific) BS53 Special Studies/Analysis-Communications BS99 Special Studies/Analysis D302 IT And Telecom-Systems Development D303 IT And Telecom-Data Entry D306 IT And Telecom-Systems Analysis D307 IT And Telecom-IT Strategy And Architecture D310 IT And Telecom-Cyber Security And Data Backup D318 IT And Telecom-Services Solutions D324 IT And Telecom-Business Continuity G009 Social-Non-Government Insurance Programs R405 Support-Prof.: Operations Research / Quantitative Analysis R406 Support-Professional: Policy Review/Development R408 Support-Professional: Program Management/Support R410 Support-Prof.: Program Evaluation / Review / Development R413 Support-Professional: Specifications Development R422 Support-Professional: Market Research/Public Opinion R426 Support-Professional: Communications R499 Professional Service Support R612 Support-Administrative: Information Retrieval R699 Other Administrative Support Services R701 Data Collection R702 Logistics Support R706 Support Management R799 Education/Training: Training/Curriculum Development U009 Education/Training: General</p>															
Core Competencies	Past Performances															
<ul style="list-style-type: none"> • Strategic Planning and Execution • Marketing & Sales Management • Project and Program Management • Information Technology – IT • Operational Efficiencies / Process Improvements 	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </table>															

SMB Value Partners, Inc.
Helping Government Deliver Projects,
High Quality, On-Time and On-Budget

Quest TECHNOLOGY MANAGEMENT GOVERNMENT CAPABILITY STATEMENT

Government Capability Statement

Quest can help you navigate through all levels of government solutions.

Quest's Local, State, and Federal Government Solutions Help You To:

- Boost performance, efficiency, and governance by consolidating data centers via virtualization and cloud solutions
- Enable anywhere, anytime access to resources by both citizens and government workers with mobile computing and apps
- Provide the large-scale data storage and backup/recovery services that underpin "big data" behind improved, real-time decisions
- Ensure data, network, and access security capabilities scale seamlessly without adding unnecessary cost or complexity

Quick Facts

- Business: Fast growing technology management company providing customized and secure Cloud, Managed, and Professional Services and IT products
- Corporate HQ: Roseville, CA
- Type: Privately Owned Corporation
- Awards: CRN Triple Crown
- Expertise: Deep bench of IT professionals with key industry/ vendor ties.
- Tier III Delivery Service Centers: McCellan Park, CA and Roseville, CA with 55+ additional Service Delivery Centers in US, Europe, and Asia. Annual SOC report.
- Security-focus: Cybersecurity, physical security, and individual security clearance levels including Top Security as needed.
- Disaster Recovery, BCP, design, testing, compliance, and facilities

Capabilities

- Assessment Services
- Application Development
- Managed Services
- Service Delivery Centers
- Business Resumption Center
- Cloud Services
- BCP/Disaster Recovery
- Data Collection
- Logistics Support
- Support Management
- Education/Training: Training/Curriculum Development
- Education/Training: General
- Network Health
- Professional Services
- QuestITex® SLA
- Maintenance Contract Management
- Infrastructure Services
- Data/Voice Circuits
- Technical Staffing
- E-signature Solutions

Client Lists

- UC Davis Health System and UC Davis
- Davis Joint Unified School District
- University of Las Vegas
- California State Teacher's Retirement System
- California Prison Industry Authority
- California ISO
- City of Concord
- CA Department of Justice
- California Department of Corrections and Rehabilitation
- Covered California
- California Chamber of Commerce
- Woodland Joint Unified School District
- Health Plan of San Joaquin

UNSPSC Codes
80101907, 43210000, 43212200, 43000000, 43200000, 43230000, 46170000, 46516000, 81120004, 80117000, 80117016

NIGP Codes
20800, 91800, 95800, 96200, 20400, 92600, 99900, 99908, 83800, 91800, 95800

SIC Codes
7373, 7379, 7377, 4899, 7375, 7374, 7378, 7389, 7371, 9715, 9748

USA Codes/NAICS
Primary - 54512 - Computer Systems Design Services/ Information Technology
51220 - Software Publishers
57299 - All Other Telecommunications
51820 - Data Processing, Hosting, and Related Services
54130 - Engineering Services
54140 - Other Specialized Design Services
54151 - Custom Computer Programming Services
54153 - Computer Facilities Management Services
54159 - Other Computer Related Services
54161 - Administrative Management and General Management Consulting Services

Government Codes:
CAGE Code: U0UD2 DUNS: 10-7550055 Federal ID: 94-2838096

Contracts:

- NASPO ValuePoint: Cloud Solutions
- NASPO Reseller for Cisco, Dell/EMC, HPE, Palo Alto, Pure Storage
- California: Multiple CMAS IT Contracts
- California: Various Software Licensing Program (SLP) contracts
- California: Information Technology Consulting Services MSA
- E-Rate: SPIN 143005814
- Federal: Promark GSA Reseller

Interested in learning more?

Invest in the Capability, not the Product®
NASPO ValuePoint@questsys.com
www.questsys.com • 800.326.4220

Quest® and Quest, Q, and How can we help? are registered trademarks of Quest Health & Supplies, Inc.

HIGHER ECHELON™
TRUSTED PARTNER IN ORGANIZATIONAL EXCELLENCE

CAPABILITIES STATEMENT

HigherEchelon, Inc. is an organizational performance consulting & training firm founded in 2009 that guides clients through the rapidly changing & complex requirements of today's working environment by:

- Developing Resilient and Adaptable Leaders and Teams
- Leading Digital Transformations with Culture & Change Management
- Implementing Cutting-Edge Technology Solutions

[HigherEchelon] did an exceptional job in terms of dedication, reliability, creativity, project management, diligence, scientific rigor, integrity and going the extra mile... I wholeheartedly recommend them.
- Program Manager, Veterans Affairs

KEY SERVICES ★★★★★ - 4.8 Average CPARS since 2018

HUMAN CAPITAL	TECHNOLOGY	PARTNER
<ul style="list-style-type: none"> • Executive Coaching • Applied High Performance • Corporate Team Building • Culture & Change Management • Training and Education • Strategic Planning • Assessments & Diagnostics 	<ul style="list-style-type: none"> • Gaming and Simulation • Salesforce Implementation • Cross-platform Design and Development • Cyber Operations and Training • Enterprise Technology • Information / Cyber Security at the agency level 	<ul style="list-style-type: none"> • Embedded, Systems and Software Engineering • Weapons Systems Design and Architecture Analysis • Verification and Validation • Software Design to meet DoD Safety Standards • Data Management

TRUSTED BY "They provided us with amazing service." - California National Guard

"...among the most trusted leaders in organizational excellence. -- InsideNOVA.com"

October 15, 2024

II. Capabilities Statements – Key Informational Elements

A. Overview

iii. Capabilities Statements



Custom Fabricating & Supplies
5500 West Oakwood Park Drive
Franklin, WI 53132
(P) 414-421-2600 (F) 414-421-2700



Certified SBA WOSB
Woman Owned Small Business

Capability Statement

www.customfabricate.com

Founded in 2001, Custom Fabricating & Supplies (CFS) is a privately held, certified Women Owned Small Business located in Franklin, Wisconsin. Our 30+ years of expertise along with our Custom Rubber Molded Parts and Die Cuts, Extrusions, 3D Rapid Prototyping and same day shipping on stock items have made us an industry leader in Masking Protection and Plastic Finishing. Providing Great Customer Service is top priority and our goal has been the same since day one – to make sure YOU are completely satisfied!



Company Snapshot

Industries Served

- Military and Defense
- Aerospace and Automotive
- Medical and Dental
- Electronics and Lighting
- Wholesale and Manufacturing

CAGE Code: 4L1K1
DUNS Number: 058065520



Government Business POC: Henry Asik
E-Mail: henry@customfabricate.com
Phone: 414-421-2600

Core Competencies

3D Rapid Prototyping

Masking Protection

- Caps
- Plugs
- Tapes
- Hooks

Custom Rubber Molded Parts, Die Cutting and Extrusions

- Surface Protection
- Mounting & Holding
- Seals
- Gaskets
- Spacers
- Shielding
- Masking
- Insulators
- Bumpers
- Grommets
- O-Rings

Primary NAICS Codes

322220	Paper Bag and Coated and Treated Paper Mfg.
326112	Plastic Packaging Film and Sheet (Including Laminated) Mfg.
326199	All Other Plastics Product Mfg.
326291	Rubber Product Manufacturing For Mechanical Use
326299	All other Rubber Product Mfg.
333999	All Other Miscellaneous Purpose Machinery Mfg.
339991	Gasket Packaging And Sealing Device Mfg.



Quality Policy

To Exceed our customers expectations in quality, delivery and cost through continuous improvement and customer interaction.





October 15, 2024

II. Capabilities Statements – Key Informational Elements

B. Sections to include

Capabilities Narrative

Capability Statement
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Industries Served

II. Capabilities Statements – Key Informational Elements

B. Sections to include

Capabilities Narrative

- A short, concise, no more than 3-4 sentence paragraph describing your company
- Meat and potatoes – no unnecessary marketing language
- Formulaic:
 - 1st sentence: company name, location, and years in business
 - 2nd sentence: the general goods or services you provide
 - 3rd sentence: specializations or specifics about your goods or services
 - 4th sentence: additional information

II. Capabilities Statements – Key Informational Elements

B. Sections to include

Contact Information



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Company Snapshot
CAGE Code: 4L1K1
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- Wholesale and Manufacturing



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Quality Policy
To Exceed our customers expectations in quality, delivery and cost through continuous improvement and customer interaction.



II. Capabilities Statements – Key Informational Elements

B. Sections to include

CONTACT INFORMATION

- Direct contact information – name of individual and title
- Email address for the individual – potential customers should talk to the right person the first time
- Business address – PO boxes are discouraged
- Telephone – office AND cell
- Website and social media links

II. Capabilities Statements – Key Informational Elements

B. Sections to include

iii. Capabilities Statements

Company
Data



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Certified SBA WOSB
Women Owned Small Business

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Company Snapshot

Industries Served

- Military and Defense
- Aerospace and Automotive
- Medical and Dental
- Electronics and Lighting
- Wholesale and Manufacturing

CAGE Code: 4L1K1
UEI Number: 058065520

Government business POC: Henry Asik
E-Mail: henry@customfabricate.com
Phone: 414-421-2600

Core Competencies

3D Rapid Prototyping

Masking Protection

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Custom Rubber Molded Parts, Die Cutting and Extrusions

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Quality Policy

To exceed our customers expectations in quality, delivery and cost through continuous improvement and customer interaction.





October 15, 2024

II. Capabilities Statements – Key Informational Elements

B. Sections to include

COMPANY DATA

- Small business ownership certifications – Federal, State, Local and 3rd party
- Technical certifications: ISO, CMMC compliance status, JCP, ITAR, etc.
- NAICS, NIGP, PSC-FSC codes – limit to no more than 12 AND do not include descriptions if space is limited
- UEI and CAGE code numbers
- Accept credit cards?
- Long term government agreements – such as GSA (include numbers)

II. Capabilities Statements – Key Informational Elements

B. Sections to include

Scope of
Work/Core
Competencies

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Quality Policy
To Exceed our customers expectations in quality, delivery and cost through continuous improvement and customer interaction.

II. Capabilities Statements – Key Informational Elements

B. Sections to include

Core Competencies/Scope of Work

- Start with a short introductory statement
- Use bullet points to highlight the **CORE COMPETENCIES** that fit the **CUSTOMER**

Example:

Since 1962, the Really Great Construction Company has been a national leader in providing renovations that maximize energy savings and space utilization. RGCC prides itself on having a highly skilled and experienced staff, excellent safety record and has the reputation of completing projects on time and on budget. RGCC is a small business with experience in teaming on Federal and State projects. RGCC has unique capabilities in:

- Solar panel installation
- Boilers and sheet metal upgrades
- Energy Analysis

II. Capabilities Statements – Key Informational Elements

B. Sections to include

Differentiators:

Sometimes in the narrative, in other locations, and in your pitch

 Custom Fabricating & Supplies 5500 West Oakwood Park Drive Franklin, WI 53132 (P) 414-421-2600 (F) 414-421-2700		 Certified SBA WOSB Women Owned Small Business	
Capability Statement		www.customfabricate.com	
Founded in 2001, Custom Fabricating & Supplies (CFS) is a privately held, certified Women Owned Small Business located in Franklin, Wisconsin. Our 30+ years of expertise along with our Custom Rubber Molded Parts and Die Cuts, Extrusions, 3D Rapid Prototyping and same day shipping on stock items have made us an industry leader in Masking Protection and Plastic Finishing. Providing Great Customer Service is top priority and our goal has been the same since day one – to make sure YOU are completely satisfied!			
Industries Served		Company Snapshot	
<input type="checkbox"/> Military and Defense <input type="checkbox"/> Aerospace and Automotive <input type="checkbox"/> Medical and Dental <input type="checkbox"/> Electronics and Lighting <input type="checkbox"/> Wholesale and Manufacturing		CAGE Code: 4L1K1 DUNS Number: 058065520 	
Core Competencies		Primary NAICS Codes	
3D Rapid Prototyping Masking Protection <input type="checkbox"/> Caps <input type="checkbox"/> Plugs <input type="checkbox"/> Tapes <input type="checkbox"/> Hooks Custom Rubber Molded Parts, Die Cutting and Extrusions <input type="checkbox"/> Surface Protection <input type="checkbox"/> Mounting & Holding <input type="checkbox"/> Seals <input type="checkbox"/> Gaskets <input type="checkbox"/> Spacers <input type="checkbox"/> Shielding <input type="checkbox"/> Masking <input type="checkbox"/> Insulators <input type="checkbox"/> Bumpers <input type="checkbox"/> Grommets <input type="checkbox"/> O-Rings		322220 Paper Bag and Coated and Treated Paper Mfg. 326112 Plastic Packaging Film and Sheet (Including Laminated) Mfg. 326199 All Other Plastics Product Mfg. 326291 Rubber Product Manufacturing For Mechanical Use 326299 All other Rubber Product Mfg. 333999 All Other Miscellaneous Purpose Machinery Mfg. 339991 Gasket Packaging And Sealing Device Mfg.	
			
		Quality Policy To Exceed our customers expectations in quality, delivery and cost through continuous improvement and customer interaction.	
			



October 15, 2024

II. Capabilities Statements – Key Informational Elements

C. Other considerations

iii. Capabilities Statements

A FEW MORE THINGS

- **HAVE SOMEONE REVIEW BEFORE USING** – check for spelling, grammar, general appearance and overall accuracy
- Include your logo – really need one
- Include some select graphics of product or past work that supports your message
- Keep it business
- **DO NOT INCLUDE ANY** competitive information
- Prepare in WORD or other program that will allow you to easily modify and update – **THIS SHOULD BE A LIVING DOCUMENT**

CLARITY – MESSAGE – APPEARANCE – FOCUS and is consistent with your website, business card and verbal message



ATHENA
CONSTRUCTION GROUP

DUNS# 14313754
CAGE# 472WS

CERTIFICATIONS
SDVOSB (CVE Verified)
WOB
HUBZone (SBA)
DBE: Virginia, Texas,
Louisiana, Maryland

NAICS CODES
PRIMARY
236220 Commercial Construction
218590 Rough Carpentry
218190 Doors, Fixtures, Hardware
218590 Furniture
218510 Drywall
218530 Flooring

BONDING
\$10m per/\$40m aggregate

OFFICE LOCATIONS
Dumfries, Virginia
New Orleans, Louisiana
San Antonio, Texas

KEY PERSONNEL
Amber Peebles, President
Melissa Schneider, VP
Clay Frosk, COO
Sheila Henderson, CAO

CONTACT INFO
Athena Construction Group, Inc.
18031 Dumfries Shopping Plaza
Dumfries, Virginia 22026
703.221.7151 office
703.221.7929 fax
www.athenacostgroup.com
info@athenacostgroup.com

CAPABILITIES STATEMENT

COMPANY SUMMARY
Athena Construction Group is the oldest, largest and most respected SDVOSB, WOB, HUBZone construction company in America. We specialize in General Contracting and self-performing the installation of Doors, Frames and Hardware and Drywall. Widely acknowledged for our integrity and ability to complete complex difficult projects, Athena is the company of choice for federal agencies, large General Contractors and private clients.
With significant federal experience our staff has in excess of 100 years of construction expertise. Combined, our professionals speak six different languages, have multiple degrees in engineering, and have OSHA 30, USACE CQM, ASHE, ICRA and LEED certifications.
We are proud to have Hensel Phelps as our Mentor in the DoD Mentor Protégé program.

CORE COMPETENCIES
Rough Carpentry
Interior Build-out
Furniture Supply & Installation
Painting
Doors, Frames, Hardware & Installation
Light Commercial Construction
Highway Work

CORPORATE EXPERTISE
Following is a list highlighting some of our accomplishments to date:

PROJECTS

FEDERAL CLIENTS	PRIVATE CLIENTS
<ul style="list-style-type: none">• Walter Reed Medical Center• VA Healthcare, VA Canon House Office Building• DHS, St. Elizabeth's• ICC-B• Ft. Belvoir Community Hospital• Pax River	<ul style="list-style-type: none">• Baker Daniels• Blank Rome LLP• Epstein Becker Green• Frederick Community College• George Mason University• Raytheon

II. Capabilities Statements – Key Informational Elements

C. Other considerations

iii. Capabilities Statements

Content	Standard Statement	IT Statement	Manufacturing	Construction
Logo	X	X	X	X
Company Name	X	X	X	X
Company Tagline	X	X	X	X
Contact Info- name and title	X	X	X	X
Email address – with business email	X	X	X	X
Street Address – Not PO Box • Other facilities?	X	X	X	X
Website and social media	X	X	X	x
Company Data • Size of firm, • Revenue • Available Resources • Insurance and Bonding	X	• Cyber security insurance • NIST	X	• Insurance • Bonding
Certifications • Small business program designations (fed, state, local, corporate) • Security Clearances	X	X	• ISO • Welding • AS9100	x

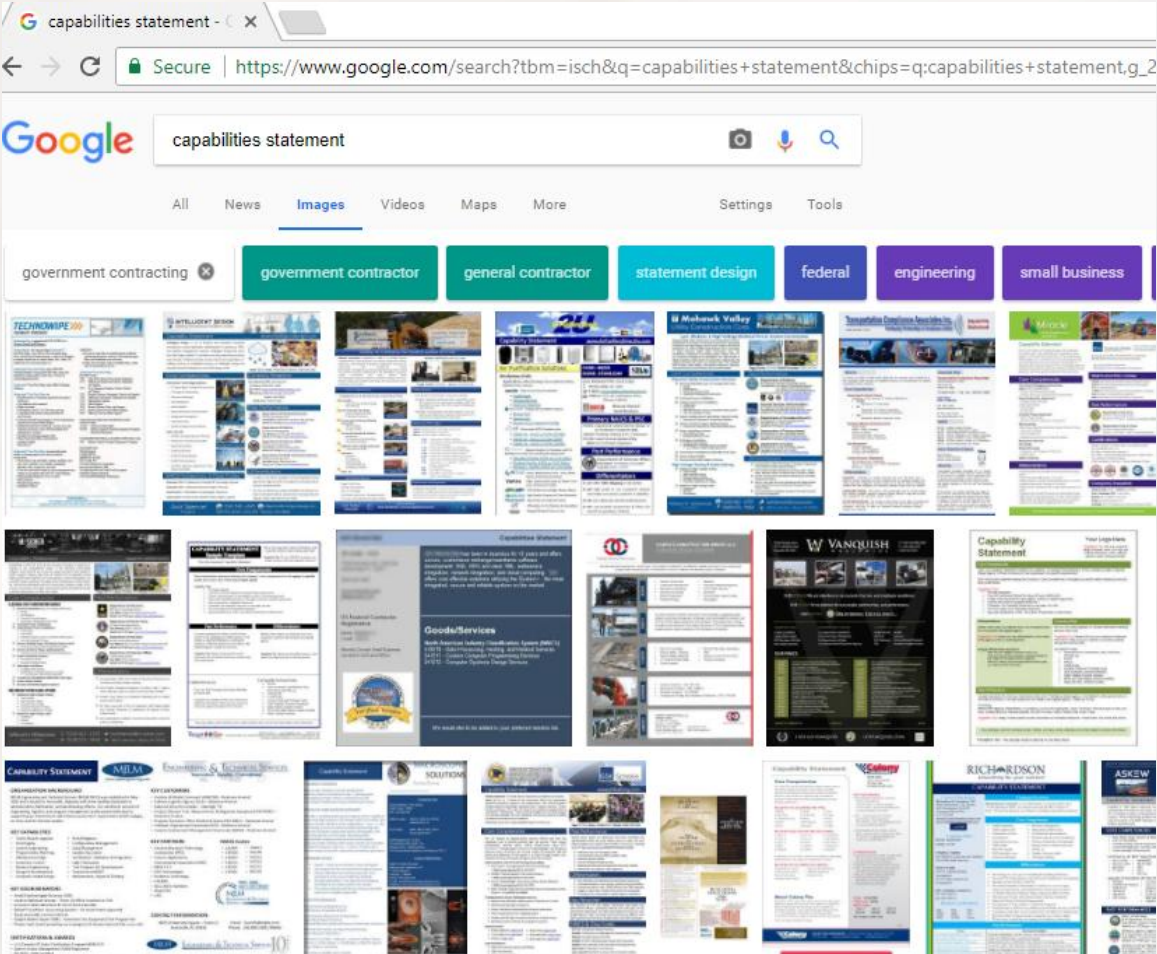
Content	Standard Statement	IT Statement	Manufacturing	Construction
Relevant codes - NAICS, NIGP, PSC-FSC, DUNS, CAGE	X	X	X	X
Systems used to run business • ERP • MRP	X	X	X	X
Past Performance • Target to customer • Most current govt. work • Or primes if no prior govt. work	X	X	X	X
Memberships in professional organizations	X	X	X	X

II. Capabilities Statements – Key Informational Elements

C. Other considerations

iii. Capabilities Statements

Recommend light color background – allows for note taking and comments



Marketing Materials for One-on-One Buyer Meetings

Overview of Today's Presentation

- I. When and Why Capabilities Statements are Important: Introducing Your Business
- II. Capabilities Statements – Key Informational Elements
- III. Other Marketing Collateral to Present Well to Potential Clients**

Marketing Materials for One-on-One Buyer Meetings



Overview of Today's Presentation

- I. When and Why Capabilities Statements are Important: Introducing Your Business
- II. Capabilities Statements – Key Informational Elements
- III. Other Marketing Collateral to Present Well to Potential Clients**
 - A. Targeted business cards
 - B. Business email
 - C. Email signature
 - D. Updating your website
 - E. Updating your LinkedIn profile
 - F. Updating your Google Business profile
 - G. Updating your Dynamic Small Business Profile (SAM.gov users only)

III. Other Marketing Collateral to Present Well to Potential Clients

A. Business cards

- **CLEARLY** states what your business DOES – use a tag line if necessary
- **COMPLETE** contact information including street address, telephone and email
- **NAICS** codes – **NIGP** codes – UEI – CAGE CODE
- Website
- Small business designations – small, HUBZone, SDVOSB, MBE.....
- Quality level, ITAR, other technical and professional certifications of value to market
- ALSO
 - Professional in appearance – include logo
 - Light colored background - non glossy paper
 - If recent “award recipient” – would need to be recognizable

	Business Name <i>Tagline/Clear statement of what business does</i> First and last name, Job title
<i>Complete Contact Information</i> Street Address Telephone <i>Email</i> <u>Website</u>	Quality level, ITAR, other professional/technical certifications All Small Business Designations (Small, HUBZone, SDVOSB, MBE...)
	DUNS Number CAGE Code Experience you have supplying to government agencies NAICS codes, NIPG codes
<i>Memberships, Recognition, Awards</i>	

III. Other Marketing Collateral to Present Well to Potential Clients

A. Business cards

ii. Business Cards



Sunrise Marketing Corp.
Brand Marketing & Consulting Services
Maria Smith, CEO

15 West Horizon Blvd
Suite 100
East Brighton, WI 53000
414-598-5555
maria@sunrisemarketing.com
www.sunrisemarketing.com

GSA Schedule Contract Holder

Woman Owned
DBE Certified
Small Business




Green Ideas Landscaping, Inc.
Environmentally sustainable lawn care services
Bob Green, Manager

62 Leaf Street Ste 120
Woodsdale, WI 50000





Office: 262-233-5555
bgreen@greenideas.com
www.greenideas.com


LEED **VOSB**
Small Business



DUNS- 1234567890 **CAGE Code – 2F6A7**
NAICS codes – 541613, 541613, 541870, 541910
NIGP codes – 91500, 91800

Recognition: 2016 In Business Small Business Awards –
Woman Small Business Award Winner





 
 



DUNS – 0987654321
CAGE Code – 2F6A7
NAICS – 561730

Member: Society of American Military Engineers (SAME)

Recognition: 2018 Winner of Sustainable Business Awards

October 15, 2024

III. Other Marketing Collateral to Present Well to Potential Clients

B. Business email

- Email handles should reflect your company name – JackL@Wispro.org, or Info@Wispro.org
 - Avoid gmail, outlook, icloud, Hotmail, or any other email address that's typically used by individuals rather than businesses.
- Professional emails increase credibility that you are a genuine business that knows how to position itself to potential clients

III. Other Marketing Collateral to Present Well to Potential Clients

C. Email signature

- Signatures should be included in every email; never sign off an email with just your name
- Signatures should include separate lines for:
 - Title
 - Company name
 - Phone number
 - Email
 - Address
 - Logo, if possible

III. Other Marketing Collateral to Present Well to Potential Clients

C. Email signature

Executive Assistant and Small Business Advisor

Wisconsin Procurement Institute (WPI) – Wisconsin’s APEX Accelerator

Assisting Wisconsin Businesses Compete in the Government Marketplace!

10437 Innovation Drive, Ste 320, Milwaukee, WI 53226

Office: 414-270-3600 | **Cell:** 414-412-1103

Website: WisPro.org | **Email:** JackL@Wispro.org

DOD OSBP webpage for Apex feedback: <https://www.apexaccelerators.us/#/feedback>

[Sign up for newsletter](#)



III. Other Marketing Collateral to Present Well to Potential Clients

D. Updating your website

- Having a website that contains a “Government Solutions” tab and relevant information like:
 - UEI and CAGE code
 - Any technical or ownership certifications
 - Capabilities Statement
 - Awards won from a buyer – example “Johnson Controls Supplier of the Year 2022”

III. Other Marketing Collateral to Present Well to Potential Clients

E. Updating your LinkedIn

- Create a LinkedIn if you don't have one
- Ensure that the “Experience” section is updated with detailed information
- An updated LinkedIn is especially important for small businesses when:
 - The business is new, but you or your team has extensive industry experience
 - Your personal brand is important to your business (ex. consultants)

III. Other Marketing Collateral to Present Well to Potential Clients

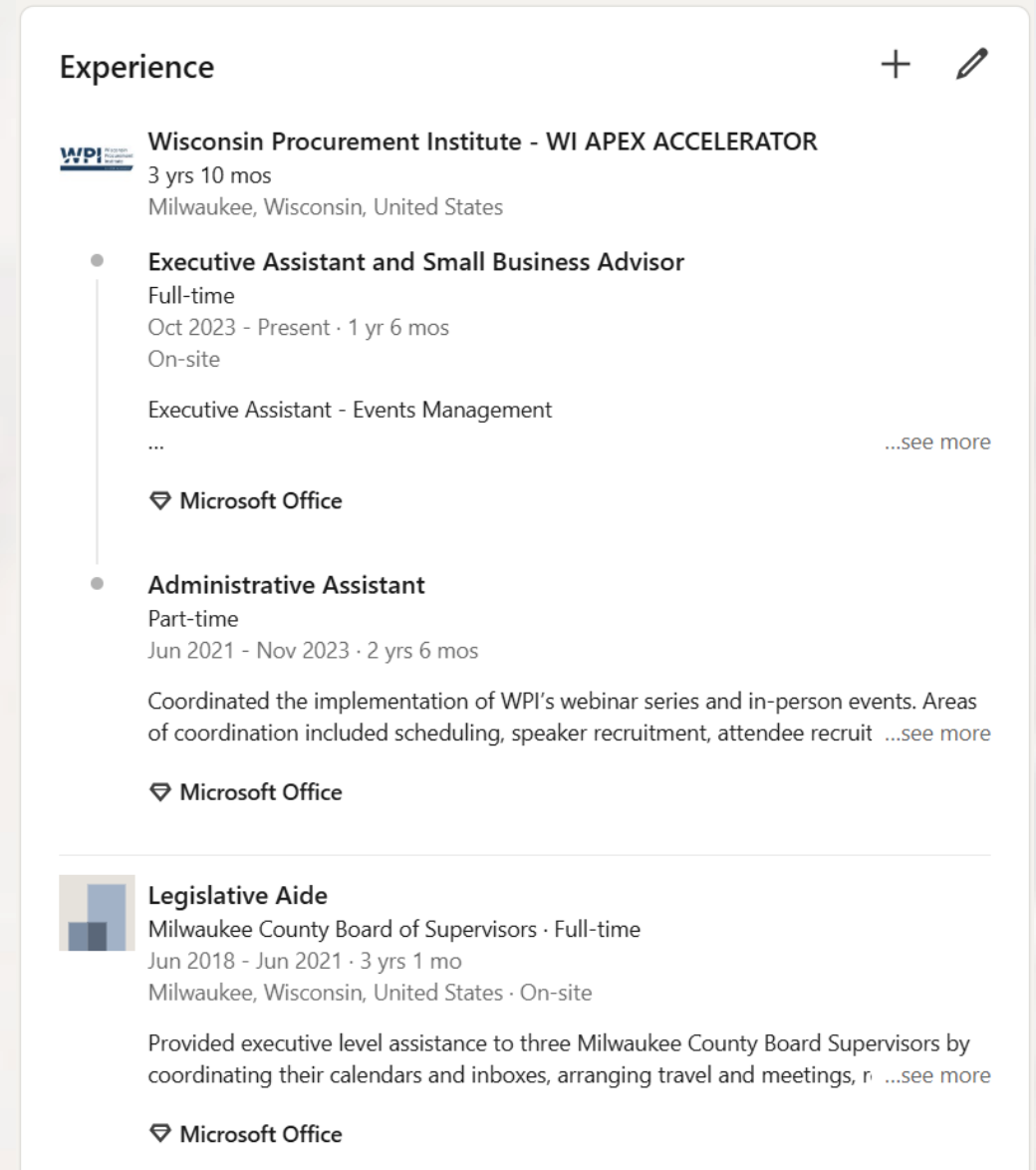
E. Updating your LinkedIn








Jack Laufenberg (He/Him)
Executive Assistant | Small Business Advisor
Milwaukee, Wisconsin, United States · [Contact info](#)
309 connections

[Open to](#) [Add profile section](#) [Enhance profile](#) [Resources](#)

 Wisconsin Procurement Institute - WI APEX...
 Marquette University



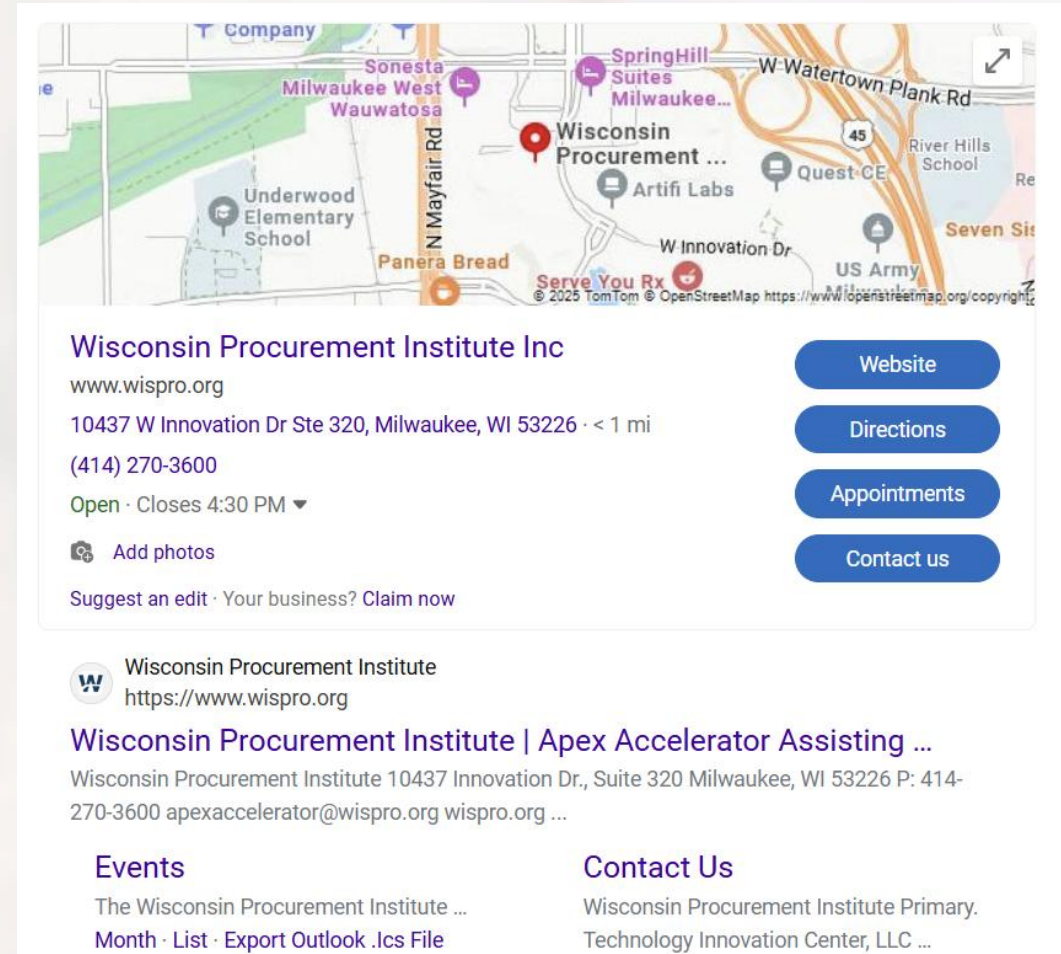
Experience

-  **Wisconsin Procurement Institute - WI APEX ACCELERATOR**
3 yrs 10 mos
Milwaukee, Wisconsin, United States
 - Executive Assistant and Small Business Advisor**
Full-time
Oct 2023 - Present · 1 yr 6 mos
On-site
Executive Assistant - Events Management
... [...see more](#)

 - Administrative Assistant**
Part-time
Jun 2021 - Nov 2023 · 2 yrs 6 mos
Coordinated the implementation of WPI's webinar series and in-person events. Areas of coordination included scheduling, speaker recruitment, attendee recruit ...see more

-  **Legislative Aide**
Milwaukee County Board of Supervisors · Full-time
Jun 2018 - Jun 2021 · 3 yrs 1 mo
Milwaukee, Wisconsin, United States · On-site
Provided executive level assistance to three Milwaukee County Board Supervisors by coordinating their calendars and inboxes, arranging travel and meetings, r ...see more


III. Other Marketing Collateral to Present Well to Potential Clients

F. Updating your Google Business profile

- Your Google Business profile can be automatically created for you by Google. If it's not, you can manually add your business
- Claiming/creating your business and updating its information is free
- Ensure that all details are correct
- Profile updater:
<https://business.google.com/us/business-profile/?ppsrc=GPDA2>



III. Other Marketing Collateral to Present Well to Potential Clients

G. Updating your Dynamic Small Business Search profile

- Small businesses that register in SAM.gov receive a [Dynamic Small Business Search](#) profile hosted by the U.S. Small Business Administration
- DSBS profile updates occur on www.connect.SBA.gov
- Login credentials are the same as your SAM.gov account
- Request DSBS access on the Connect portal, then begin update

III. Other Marketing Collateral to Present Well to Potential Clients

G. Updating your Dynamic Small Business Search profile

The screenshot shows the SBA CONNECT dashboard for user Jack Laufenberg. The navigation bar includes 'Home', 'Dashboard', 'Profile', 'Access', 'Reports', 'Help', and 'Sign Out'. A 'Request Access' button is visible. The main content area is divided into two columns. The left column contains links for 'Boots to Business Management Portal' and 'SBIR'. The right column contains links for 'Community Navigators External - For External' and 'Nexus External', with a description for Nexus: 'This application is for Resource Partners to enter client counseling and training information.'

The screenshot shows the 'Your Access' section of the SBA CONNECT dashboard. It lists the following applications and their access status:

- SBIC Web – Small Business Investment Company**: Access granted (indicated by a plus sign).
- DSBS**: Access granted (indicated by a minus sign).
- DSBS Profile**: Access granted (indicated by a checked checkbox).

Under the DSBS Profile, there is a section for 'Unique Entity Identifiers' with two input fields: 'UEI:' and 'Bank Account Number:'. A search icon and a 'Remove' button are next to the Bank Account Number field. Below these fields is a '+ Add Another UEI' button.

III. Other Marketing Collateral to Present Well to Potential Clients

G. Updating your Dynamic Small Business Search profile

The four most important sections to update are:

1. Keywords
2. Capabilities Narrative
3. Link to capabilities statement
4. References
5. Technical certifications

CONTACT INFORMATION

Wisconsin Procurement Institute (WPI)

www.wispro.org

Jack Laufenberg – 414-270-3600

10437 Innovation Drive, Suite 320
Milwaukee, WI 53226
414-270-3600

Upcoming Events

Acquisition Hour

The Acquisition Hour webinar series covers a range of topics from market entry, sales growth, small business certifications, compliance, and more. Attendees receive 1 CPE credit for attending.

- **February 26** – Understanding the US SBA and DOD Mentor Protégé Programs (MPP)
- **March 5** – Marketing Materials for One-on-One Buyer Meetings
- **March 19** – Acquisition Hour: Navigating AI: Practical Tips for Federal Contractors
- **April 15** – Government Property Management for Federal Contractors and Subcontractors

...More information and registrations at wispro.org/events



Cyber Friday

Cyber Friday is a series of one-hour webinars focusing on critical topics for DOD contractors and subcontractors in cyber security, data security, and CMMC. Attendees receive 1 CPE credit for attending.

- ~~February 28~~ – CMMC: Are You Ready for a C3PAO Assessment?
- **March 28** – CMMC: Federal Cybersecurity Requirements – Who Must Comply?
- **April 25** – CMMC: Maintaining Your CMMC Certification

...More information and registrations at wispro.org/events

Federal Market Insights

Federal Market Insights is an informal podcast designed to provide valuable information about the government marketplace for businesses interested in government contracting. Each episode is a concise 30-minute session, scheduled at the end of the week. We review noteworthy items published during the week, delve into key topics, and offer background information and perspectives relevant to the government contracting landscape. Stop by, settle in and take-in the conversation.

- February 14 – Starting Your Federal Contracting Journey: Registering in SAM
- February 21 – Getting Started with DoD Contracts: Essential Tips and Information
- February 28 – Navigating DoD Sales: From Regulations to Strategic Planning
- March 7 – Federal Certifications: Beyond Titles to Strategic Value
- March 14 – The Language of Government Contracting: Why Definitions Matter
- March 21 – Federal Information Security: Programs Every Contractor Should Know

...More information and registrations at wispro.org/events

Upcoming Events



May 14

Winning Government Business: Navigating Compliance Risks to Drive Strategic Advantage
Milwaukee, WI

EXPO HALL
BUYER MEETINGS

May 15

11th Annual DOD Contract Management Update
Milwaukee, WI



...More information and registrations at wispro.org/events



March 5 2025

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PRESENTED BY

Wisconsin Procurement Institute (WPI)

www.wispro.org

Jack Laufenberg

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