

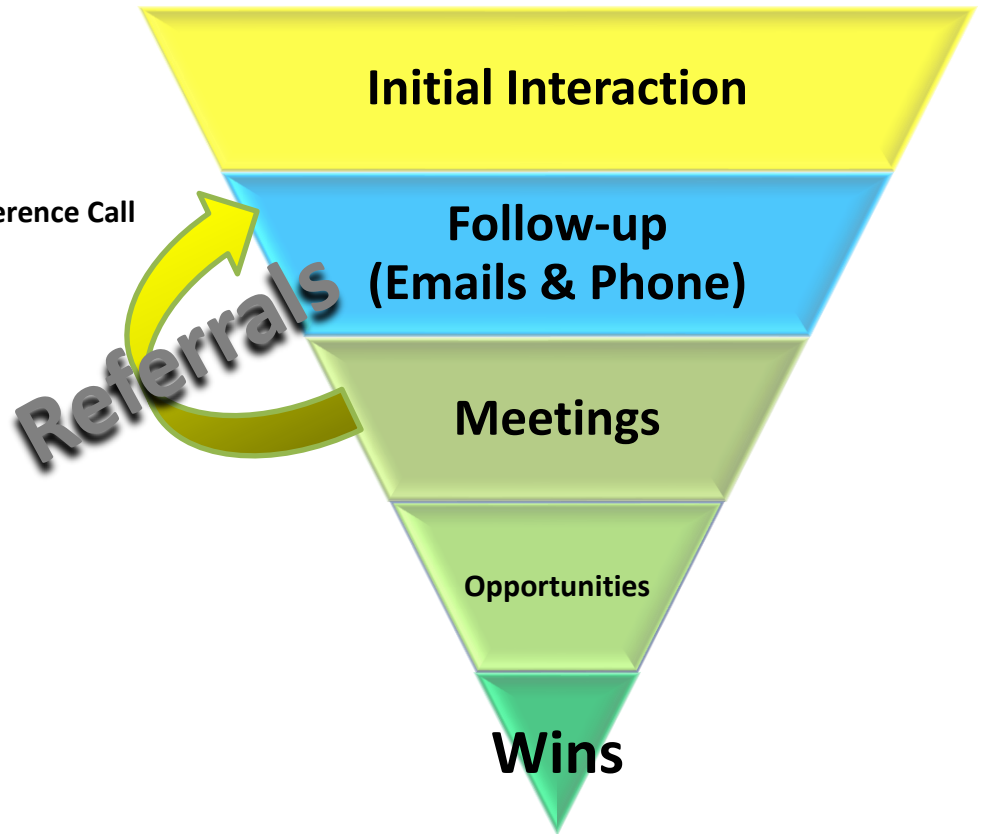
Agenda

- 1) Market Essentials Intelligence Review
- 2) Force Field Analysis
 - a. Strengths
 - b. Challenges
 - c. Gaps
- 3) Winnable Opportunity Matrix
- 4) Tactics
 - a. Briefings
 - b. Blitzes
 - c. White Paper
- 5) Proactive process
 - a. Targets
 - i. Agency
 - ii. PMs
 - iii. COs
 - iv. Opportunities
 - b. Reaching Decision Makers
 - i. Key Performance Indicators
 - ii. Contact Relationship Rating
- 6) Mining Current Relationships
 - a. Opportunities
 - b. Obtaining Referrals
 - c. Working Referrals
- 7) Metrics
 - a. Briefings
 - b. Email Campaign
 - c. Cold Calling
 - d. Opportunity Pipeline
- 8) Action Items
 - a. Weekly
 - b. 30-Day
 - c. 90-Day
 - d. 6-Month
 - e. 12-Month
 - f. Long range

Pipeline Management

Key Performance Indicators

- 1) Briefing/email
- 2) Touches
- 3) Calls made
- 4) E-mails sent
- 5) Initial Meeting/Conference Call
- 6) Opportunities
- 7) Influence Scope
- 8) Pre-Proposal
- 9) Proposals
- 10) Wins



Winnable Opportunity Matrix											
Days Known Before Release	Incumbent	Contract Size	Budget	Funding	Sample SOW Match	Number of Competitors	Turn Around	CO	PM	TR	AD
60+	You	In Sweet Spot	You Set Budget	Funded	100%	Justified Sole Source	1	5	5	5	5
45	None	20% of Sweet Spot	Budget Known	Not Funded	95%	Leaning Sole Source	2	4	4	4	4
30	Primary Competitor	50% of Sweet Spot	Budget Set		90%	2	3	3	3	3	3
15	Unknown	50%+ of Sweet Spot	Not Budgeted		80%	3	4	2	2	2	2
10					70%	4	5	1	1	1	1
5					60%	5	6	-1	-1	-1	-1
0					50%	6+	7	-2	-2	-2	-2
					10-50%		10	-3	-3	-3	-3
					None		14	-4	-4	-4	-4
							21	-5	-5	-5	-5
							30	Unknown	Unknown	Unknown	Unknown
							45				

Objective: Get in the GREEN

4 Key Potential Federal Decision Makers:

- CO Contracting Officer/Specialists (aka KO for DoD)
- PM Program/Project Manager/Coordinator
- TR Technical Rep (aka COR, COTR, CTR)
- AD Administrator (aka Director/SES)

Important: Unknown/untouched Decision Makers are automatically **RED**.

Remember Decision Makers...

Already have resources.

They are satisfied.

They have existing contracts.

They don't like change.

The already have relationships with people they like.

Relationship Goals

- Know Early
- Insider information
- Influence SOW
- Influence Budget
- Preferred Vehicle
- Short Turn-Around
- Set-Aside
- Shortlist
- Choice of Two
- Protected Opportunity

5	Champion
4	Coach
3	Supportive
2	Interested
1	Mildly Interested
-1	Non Responsive
-2	Uninterested
-3	Mildly Negative
-4	Strong for Competition
-5	Champion for Competition
	Unknown

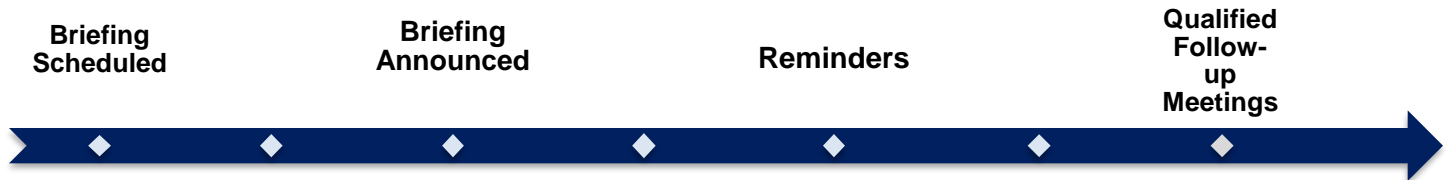
Answer the WHY:

- Why should they take your call?
- Why should they keep talking with you?
- Why should they say yes to a meeting?
- Why should they include you on a shortlist?
- Why should they say yes to a contract?

Blitz Process Overview

- 1) Capabilities Review
- 2) Import file review and access
- 3) e-mails developed
 - a. Capabilities Sent – Tuesday-Thursday
 - b. Personal email sent – Same day as introduction
 - c. Personal email 2 sent – Friday
- 4) Possible Outcomes
 - a. Response from target
 - i. Update System
 - ii. Send e-mail or call
 - iii. Update system
 - iv. Schedule follow-up call
 - b. Meeting Scheduled
 - i. Record in system
 - ii. Check calendar
 - c. No Meeting Scheduled
- 5) Follow-up by phone
 - a. Possible outcomes
 - i. Yes
 - ii. No
 - iii. Referral
 1. Other CO
 2. PM
 3. Prime
 4. SBA Liaison/OSBU
 - b. Act “as if”
 - c. Selling the meeting/conference call/follow-up
 - d. Choice of two vs. yes or no
 - e. Meeting scheduled
 - f. Tracking success

GovBrief Process Overview



Agenda Created

Personal Invites

Briefing Conducted

- 1) Briefing Scheduled
- 2) Import file review and tagging
- 3) Identify strategic targets
 - a. Customer (Company to pursue only)
 - b. High value (Assign)
 - c. Special handling
- 4) Develop Agenda
 - a. Title
 - b. Hosted by
 - c. Date
 - d. Time
 - e. Registration Link
 - f. Overview
 - i. Agency Initiatives
 - ii. Target Attendees
 - g. About The Speaker
 - h. Federal Initiatives
 - i. Memorandum
 - ii. Key Issues
 - iii. Why it is important to THEM
 - i. Topic
 - i. Education Point 1
 - ii. Education Point 2
 - iii. Education Point 3
 - j. Contact information
 - i. Company
 - ii. DUNS
 - iii. Cage
 - iv. GSA Contract number
 - v. email
 - vi. Website
 - k. Polls
 - i. Poll 1 - I expect a requirement for xxx...
 - ii. Poll 2 - I have personally experienced...
 - iii. Poll 3 - In Need Help With...
- 5) Create Briefing Master Sheet

- a. Invite panelists
 - b. PowerPoint template with Company logo
 - c. Assemble headshots
 - d. Create GoToWebinar Event
 - e. Develop email templates
 - f. Tag targets in system
 - g. Develop Call Script
 - h. Contact Company rep for call/meetings date availability
 - i. Update schedule with follow-up meeting dates
 - j. Develop gotowebinar event
 - k. Develop gotowebinar registration questions
 - i. This would be the best ever if...
 - ii. We expect a ____ requirement...
 - iii. Develop gotomeeting polls
- 6) Create Briefing e-mails
- a. Initial announcement
 - b. Second announcement
 - c. First personal invite
 - d. Reminder
 - e. Personal reminder
 - f. Recap
 - g. Personal recap
 - h. Second personal recap
- 7) Briefing development
- a. Add panelists in gotomeeting
 - b. Create Presentation
 - c. Agenda language approval
 - d. Assign talent
 - e. Create interview points
 - f. Verify emails are working
 - g. Review follow-up objectives & script components
 - h. Test email templates
 - i. Add attendee agency logos
 - j. Add best ever if... responses
 - k. Develop questions
- 8) Email Invite Response
- a. Possible Outcomes
 - i. Response from target
 - 1. Registered
 - 2. Not registered
 - 3. Sent e-mail or call
 - a. Unsubscribe
 - b. Request to be registered
 - c. Request for more information
 - d. Referral
 - 4. Schedule follow-up call or meeting
 - ii. Meeting Scheduled
 - 1. Record in system
 - 2. Check calendar

- 3. Send confirmation
 - iii. No Meeting Scheduled
- 9) Phone invitations
 - a. Possible outcomes
 - i. Yes to briefing
 - 1. They register
 - 2. We register them
 - ii. No to briefing
 - iii. Referral
 - 1. Other CO
 - 2. PM
 - 3. Prime
 - 4. SBA Liaison/OSDBU
 - b. Selling the meeting/conference call/follow-up
 - i. Choice #2 if they can't make the briefing
 - c. Choice of two vs. yes or no
 - d. Meeting scheduled
- 10) Briefing
 - a. Company joins for testing
 - b. Check video feeds
 - c. Check screen share
 - d. Launch teleprompter
 - e. Check audio feeds
 - f. Start recording on gotomeeting
 - g. Start recording on cleint
 - h. Start gotomeeting 2 min early - banter
 - i. Event - Internal Controls
 - j. Debrief
 - k. Attendee report downloaded
 - l. Identify Immediate Action Items
 - m. Q & A review
 - n. Assemble recap email
- 11) Briefing Post
 - a. Video imported and converted to MPEG
 - b. PowerPoint saved to cloud drive
 - c. Agenda saved to cloud drive
 - d. Tags saved to cloud drive
 - e. Video exported to Cloud drive
 - f. Editor notified that file is in process
 - g. Recording Edit & Lower 3rd post production
 - h. Identify speakers
 - i. Identify presentation name
 - j. Create lower 3rds for speaker and presentation
 - k. Upload to Company YouTube
- 12) Email Follow-up Response
 - a. Possible Outcomes
 - i. Response from target
 - 1. Project/opportunity identified
 - a. Assign as HOT

- b. Collect as much information as possible
 - c. Contact Company
 - 2. Sent e-mail or call
 - a. Unsubscribe
 - b. Request to be registered
 - c. Request for more information
 - d. Referral
 - 1. Update system with new information
 - 2. Contact referral
 - 3. Report back to original person
 - 3. Schedule follow-up call or meeting
 - ii. Meeting Scheduled
 - 1. Record in system
 - 2. Check calendar
 - 3. Send confirmation
 - iii. No Meeting Scheduled
- 13) Phone follow-up
- a. Possible targets
 - i. Attended briefing
 - ii. Registered no-show
 - iii. Not registered
 - iv. Strategic
 - b. Possible outcomes
 - i. Right person
 - ii. Not right person
 - iii. Referral
 - 1. Other CO
 - a. Add to system
 - b. Contact referral
 - c. Report back to original person
 - 2. PM
 - a. Add to system
 - b. Contact referral
 - c. Report back to original person
 - 3. Prime
 - a. Add to system
 - b. Contact referral
 - c. Report back to original Contact
 - 4. SBA Liaison/OSDBU
 - a. Contact
 - b. Leverage if possible
 - iv. Not interested yet
 - 1. Follow-up Ping 21
 - v. Follow-up Meeting scheduled

Metrics

Briefings:

- Date/Number Invites/Number of Attendees
- A list of Attendees and emails (John to send a thank you email)
- Follow up Actions/Contacts

Email Campaign:

- Number of Contacts/Removal Requests/Positive Response
- Contact Action List
- Meetings Appointments Set/Meeting Appointments Kept

Cold Calling:

- Calls Attempted/Successful
- Action

Pipeline:

- Opportunities Identified
- RFI/RPS responded
- 30,60,90 days action