Hosted by the Office of Small and Disadvantaged Business Utilization

CREATING MARKETABLE CAPABILITY STATEMENTS

Building Your Brand

Presented by:
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Tuesday, August 9, 2022
1:00 PM - 2:30 PM ET
Teams Live Event

PTAC
HOWARD UNIVERSITY
SBDC
SBA

AMERICA'S
DEPARTMENT OF COMMERCE
Our Presenters Today

Tim Scarborough, Program Director
University of Houston PTAC

Charles Motte, Associate Director
DC Small Business Development Center Network
Preparing an Effective Capability Statement

August 9, 2022

Tim Scarborough, Program Director, University of Houston PTAC

Charles Motte, Associate Director, DCSBDC
Today’s Agenda

- Types of Capability Statements
- Capability Statement layout – sections to include and the information within each
- Recommendations on design
- Where do I start
- Information about the Nationwide Procurement Technical Assistance Program (PTAP) and the Small Business Development Center (SBDC) Program
Today’s Goal

Provide you the information you need to know about developing a standout Capability Statement
# Types of Capability Statements

<table>
<thead>
<tr>
<th>Generic</th>
<th>Targeted</th>
<th>Customer Requested</th>
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<tbody>
<tr>
<td>“Networking”</td>
<td>Contains information about your company and is prepared for a specific</td>
<td>Requested by the government in response to a Sources Sought notice posted on</td>
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<td>potential customer after you have researched the customer to gain an</td>
<td>Contract Opportunities in SAM.gov. There is not a template for this type of CS.</td>
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<td></td>
<td>understanding of what is important to them and what goods or services</td>
<td>It is prepared based on the customer’s instructions.</td>
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<td>you provide that fulfills a need they have.</td>
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<td>representatives and / or decision makers.</td>
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Where to Use a Capability Statement

**Person to Person**
- Conferences
- Vendor Outreach
- Agency Events
- Matchmaking
- Associations, Social Events

**Targeted CS**

**Requested (govt and prime)**
- From Small Business Reps
- From decision-makers

**Generic CS**

**Virtual**
- Email, website, blog, LinkedIn

Your Resource for Doing Business with Government
Purpose of a Capability Statement

- Informs the reader of your value
- Proves your value – past performance
- Differentiates you from our competitors

If you can concisely convey this to your reader with supported facts, you can improve your chances of winning government business
CAPABILITY STATEMENT

Core Competencies

Tailor your Capability Statement to reflect your audience. An example first sentence is, "Your Company is able to help the [Target Agency or Prime Contractor(s)] meet their requirement for [Specific Requirement]."

Short introduction statement relating the Company’s Core Competencies to the agency’s specific needs followed by keyword-heavy bullet points.

Targeting Tips:
- No long paragraphs
- Use short sentences followed by keyword-heavy bullet points
- Create a new document for each agency, mission, or specific opportunity
- Call this document a Capability Statement
- Preferably, this Capability Statement is one page, one side
- Do not use slides only if absolutely necessary
- Save and distribute as a PDF, not a Word, PowerPoint or other format

Differentiators

Identify what makes you different from your competitors and how this benefits the targeted agency. Use metrics.

Targeting Tip: List your key differentiators to the needs of the agency, prime or teaming partner.

Use metrics – what have you done in your company’s history. Create a chart, done a number of times, etc.

Company Data

Put one very brief paragraph of company description detailing pertinent facts here.

Targeting Tip: Readers will click your website for additional information. Make sure your website is constantly updated and government-focused.

List Specific Codes:
- Socioeconomic certifications: 8(a), HUB Zone, SDB, etc.
- CAGE
- NAICS
- OFPP
- SBA Codes
- Accurate Credit and Purchase Cards
- GTA Schedule Contract Number(s)
- Other Federal Contract Vehicles
- SBUs and other Federal contract numbers

Past Performance

List past contracts for work you have done similar work. Prioritize by related agency, to federal to other governments to commercial contracts. If the prior projects do not relate to the targeted agency’s needs, do not list.

Format:
- Name of the Agency, Department, or Company, Contract # (if applicable), Value, Timeline. Brief description of the work done. Include milestones or customer benefits. End with Contract: Name, Position, Title, Email, Phone

Targeting Tip: Ideally, include specific contact information for immediate references. Include name, title, email, and phone.

Your address, phone numbers (voice, mobile, and fax), email, website, and other related contact information

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Key Capability Statement Tips

- **Be professional**
  - Ex: email, website, typos
  - Try not use clip art, stock graphics, ok to use images from your facility or work processes

- **Know your niche – don’t try to be all things**

- **Lead with your expertise**

- **Prove it!**
Results of A Poor Capability Statement

- May close the door on you
- Highlights your weaknesses
- Indicates you may not be capable of performing
- Points out the risk to contract with you
Capability Statement Sections

Five sections:

1. Title
2. Core Competencies
3. Past Performance
4. Differentiators
5. Company Data
“Capability Statement” as Title

- Call it what it is - Capability Statement
- Your logo and slogan (if applicable)
- Your contact information
- A mini business card across the top of the document

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F: +1-281-897-0355
W: www.rjesusa.com
Core Competencies

- **Section title:** Core Competencies or something similar, e.g., Company or Corporate Overview

- **This is the attention getter – do you sell what they buy!**
  - First thing read – if they determine you can meet their mission need, then they will read on – if not, they will likely stop at this section

- **Grab their attention: focused and on target – it should convey what you sell without ambiguity to the customer**

- **A concise summary of your company – introductory paragraph (2 – 4 sentences), followed by bullets or other standout text telling them what you sell**

- **Certifications are not your value message**
Core Competencies Example

ABC Company is Houston’s premiere R2:2013-certified ITAD (IT asset disposition) and e-waste recycling service provider. With over 20 years of industry experience, we offer creative ITAD solutions with an emphasis on:

Data Security | Environment Compliance | Logistics Management | Asset Accountability

✓ Tells exactly who they are and what they do
✓ Provides credibility “20 years of industry experience”
✓ Highlights areas of specialization
✓ No small business status or certifications stated
Past Performance

- Past performance information is one indicator of an offeror’s ability to perform the contract successfully – it is one method of conducting due diligence

- The currency and relevance of the information, source of the information, context of the data, and general trends in performance shall be considered

- Federal government procurement
  - No past performance does not make you ineligible to submit a quote, bid, or proposal
  - What else can be considered – FAR 15.305(a)(2)(iii):
    - ...information regarding predecessor companies, key personnel who have relevant experience, or subcontractors that will perform major or critical aspects of the requirement when such information is relevant
Past Performance

- **Section title: Past Performance**

- **List past customers for whom you have done work within the last one – three years.** Prioritize by:
  - Relevance
  - Government entities: federal, state and local
  - Commercial contracts
  - Include subcontracts

- **Provide contract title and number, description of work, contact name, job title, and contact info**

- **Address cost, schedule, and performance benefit**
Past Performance: Example 1

If you were the Prime Contractor:

[Agency / Customer Name]: Provided a-b-c services (meeting or exceeding) contract requirements ahead of schedule to enable the effective use of x-y-z, thereby reducing costs by $$$ over three years. Contract name, contract number, contact name, job title, contact info

The three areas of impact – cost, schedule, and performance

Your value to them is stated:

- You reduced costs
- You completed the contract ahead of schedule
- Performance met or exceeded as measured by the customer through surveillance reports and contract evaluations (CPARS or other)
Past Performance: Example 2

If you were a Subcontractor:

As a subcontractor to [Prime company name], provided a-b-c construction services in support of project x-y-z. We completed the work three weeks ahead of schedule allowing our customer to move their schedule ahead for an earlier completion time of their contract, thereby providing the customer earlier use of the facility. Contact name, prime contract number (if known), job title, contact info

Your value to them is stated:

- You reduced costs (earlier use of facility)
- You completed the contract ahead of schedule
- Performance met or exceeded as measured by the customer through prime surveillance reports and contract evaluations (CPARS or other)
Past Performance: Example 3

If you were an Employee:

As a [specific title] of [company name], for xx years, I lead five individuals responsible for a-b-c that developed/produced x-y-z. The team was recognized for outstanding technical performance in ________ and I was recognized for my effort as a team lead and technical expert in ________

Most common question from start-up businesses: Can I use experience from another job (employer) as past performance?

o Yes, you can articulate relative experience when bidding on a solicitation

[FAR 15.305(a)(2)(iii): ...information regarding predecessor companies, key personnel who have relevant experience, or subcontractors that will perform major or critical aspects of the requirement when such information is relevant]
What are Differentiators?

Unique features and/or benefits of a product, or aspect of a brand, that set it apart from competing products or brands – it separates you from the rest of the competition.
Listing Differentiators in the CS

Section title: Differentiators

Differentiators can include:

- Location
- Training
- ISO Certification
- Exclusives
- Relationships
- Experience
Differentiators are NOT

- Socio-economic certifications (8(a), WOSB, MBE...)
- One type fits all – if your competitors have it, it’s likely not a differentiator
- “Quality” people, services, products
- XX number of years of experience
- “Solutions provider”
- “Best in class”, “world class”, best of...” or other superlatives
Differentiator Questions to Ask Yourself

- Why did your biggest customer want you?
- What is it about your goods / services that make you stand out from the rest?
- What is it about your people that give you the advantage over your competitors?
- Why are your products better solutions than the others that are available?

*It is important these are clearly communicated*
Company Data

- Federal: Unique Entity Identifier (UEI) and CAGE Code
- NAICS and NIGP codes
- PSCs & FSCs
- GSA Schedule contract number(s) (if applicable)
- BPAs and other contract numbers (if applicable)
- Socio-economic certifications: 8(a), HUBZone, ED/WOSB, SD/VOSB, MBE, WBE, SBE, PDBE
- Repeat your contact information – name, email, office, direct number
CS Design Elements

Substance is always more important than design, but give your CS a presentation edge with an eye-catching design

- Use your branding
  - Logo, colors, style, and fonts
- Complement your website and business cards
- Use entire page (only the front side)
- No blank spaces
- Use graphics sparingly (increases file size and takes up space – they don’t want to see pictures)
- Prepare in editable format (Word) and email in PDF
- Do not save as a graphic file: tif or jpg
- Keep to less than 1 MB
Naming Your CS

- Save as: Your Company Name Primary Industry

  *Example:* ConsultantsRUs,MgmtConsulting

  ▶️ SB representatives receive a lot of capability statements, and they file them electronically. Help them find your CS easier by including your primary industry in the file name.
Finding Example Capability Statements?

Quick Tip

Google search “Capability Statement” and view the images for example CSs and articles on preparing one.
In Summary

- First impressions are critical
- Accurate representation of you and your company
- Easily understood – they know who you are and what you do
- Stating your value and differentiators can set you apart from your competitors for...
  - Government business
  - Commercial business
  - Whether Prime or subcontractor
Where Do I Start?

1. Review this presentation and documents to refresh your memory

2. Brainstorm your entries in each section: Title, Core Competencies, Differentiators, Past Performance, and Company Data
   ✓ Are you preparing a Generic or Targeted CS?

3. Use the Word version CS to enter the data in each section
   ✓ Make sure you can fill everything in on one page with little white space

4. Prepare your draft CS either using the Word template or a design of your own

5. Become a PTAC or SBDC client to have an advisor review your CS

6. Develop your government marketing strategy
QUESTIONS
How PTACs Help You Grow Your Business

Client-Advising Services

**No-Cost** education and guidance to individuals on federal, state, and local government procurement (*for-profit businesses only*)

(Includes Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) contracts and grants)

We primarily assist with contracts, SBIR/STTR is an exception for grant assistance

An application is required before an advisor can meet with you

Training

**No-Cost to low-cost** webinars and workshops - *(variety of government procurement subjects)*

Application not required – anyone can attend PTAC training nationwide

UH PTAC webinars and workshops: [https://www.ptac.uh.edu/ptac/Training.asp](https://www.ptac.uh.edu/ptac/Training.asp)
How to Locate Your PTAC

https://www.aptac-us.org/
About the SBDC Program

Small Business Development Centers (SBDCs) are a US SBA collaboration with major university (grantees) providing free technical assistance, educational programs, research, and assistance with access to capital. SBDCs are accredited and can be found in all States and US Territories.

To find your local SBDC office go to:
https://americassbdc.org/find-your-sbdc/
Thank you for attending!