

## **Understanding the requirement.**

The SBA 7(j) Management and Technical Assistance Program is a program in which the SBA provides qualifying businesses with counseling and training in the areas of financing, business development, management, accounting, bookkeeping, marketing, and other small business operating concerns.

Under Section 7(j) of the Small Business Act, the SBA is authorized to provide management and technical assistance through grants and cooperative agreements to qualified service providers.

Presently the SBA is looking for qualified 8(a) certified businesses that can offer innovative and transformational solutions that will foster the growth and development of small businesses. This training will be delivered to businesses in the SBA training district offices and field offices in 68 different locations. They are looking for training that will prepare the course participants for successful transition from the 8(a) business development program into the 21<sup>st</sup> century global world market by providing real world training on strategic planning, financial analysis, e-commerce and other related topics.

## **Background and Corporate Experience.**

XYZ Solutions Corporation is a professional services company that was incorporated in the state of Virginia on February 18, 2003 and provides management support services to a number of Federal government agencies. XYZ Solutions is a veteran owned company and is also certified under section 8(a) of the Small Business Act, receiving that certification on September 11, 2003. XYZ Solutions' strategic approach has been to diversify the range of services and products that we deliver to our government customers to give our clients a wider range of options while enhancing our ability to withstand marketplace fluctuations in any given service/product line.

To date our product line has included delivery of training and training materials. This background is the foundation for the team of training experts to deliver the training discussed herein.

XYZ Solutions Corporation is a long-term provider of government contract support services and a proven solid performing member of the government/contractor team. We have broad-*based experience* and the right mix of skills needed to provide relevant government program support across a wide spectrum of disciplines. Selected experience in supporting critical training, instructional and presentation initiatives is summarized below.

**Department of Labor, Employment and Training Administration (ETA), Office of Job Corps Management Services.** Provided training and technical assistance to Job Corps Regional Offices and the 83 Job Corps centers nationwide.

**NAWCAD Logistics Competency (3.2.2), Foreign Military Sales**  
Performed program administration and management functions such as attending meetings/conferences; preparing reports of meetings/conferences; preparing

presentation material including graphics, illustrations, overhead projector transparencies, handouts and other management support services.

**Department of State, Foreign Service Institute (FSI)**

Provide on-site management support services to the School of Language Studies, Foreign Service Institute (FSI/SLS) in the office of Continuing Training Testing (CTT), and the School of Applied Information Technology. Our on-site personnel closely coordinate with subject matter experts (SMEs) and video production team members of the Instructional Support Division (ISD).

**Military Sealift Command (MSC) Headquarters, Washington, DC**

XYZ designed and developed twenty seven (27) comprehensive safety at sea classroom training modules from task and skills analysis, curriculum design, instructional material/training aids to CD/Power Point development for each 2-3 hour session. We also designed and developed a safety at sea training DVD and companion crew familiarization presentation CD with narrative.

**Technical Approach.** Our proposed initial technical approach is outlined below and discusses the curriculum we propose, method of course delivery, course promotion and marketing, course registration.

**Proposed Curriculum.** After careful consideration and consultation with current 8(a) program participants, 8(a) program graduates, small businesses and women owned businesses, we propose a broad based curriculum designed to provide participants with the foundational knowledge needed to succeed both in the commercial arena as well as in the government contracting arena. All courses will have hands on exercises and opportunities for participants to apply what they are learning. Course tracks are described below.

- Uncovering and capitalizing on your unique selling proposition as it applies to commercial and governmental entities. – 4 hours – Webinar only
- Business Development Track One – Commercial Entities – 6 hours
  - Creating your marketing strategy
    - Differences between selling to the government and commercial entities
    - Market Research and Marketing Plans
    - Creating the right collateral materials
    - Making contact with the right people
    - The commercial sales process
    - The players
  - Commercial Selling Skills
    - Cold Calling
    - Social Marketing and Networking
    - Presentations
    - Asking for the sale and closing the deal
- Business Development Track Two – Government and public sector entities – 12 hours

- Marketing to the government
  - Market Research and Marketing Plans
  - Creating the proper collateral materials
  - Identifying the right people
  - Understanding the process
- Selling to the governmental and public sector entities
  - Bids vs Proposals vs RFIs
  - MAS and other contract vehicles
  - The players
  - Getting appointments
  - Networking and Social Marketing
- Proposal Writing for governmental and public sector entities
  - RFP/IFB Analysis
  - Bid/No Bid Decision
  - Win Strategy and schedule
  - Proposal Outline
  - Writing the proposal
  - Compliance Matrices
  - Format and organization
  - Past Performance
  - Resumes
  - Creating a proposal library
- Financial Management 12 hours
  - How the FAR and the Cost Accounting Standards impact their businesses.
  - The elements of an acceptable accounting system for government contractors.
  - An explanation of and the difference between Direct and Indirect Costs.
  - What pooling of costs are required and how to allocate costs to the various indirect costing pools –fringe pool, overhead pool, general and administrative pool, unallowable cost pool.
  - The elements of an acceptable labor tracking system and how the various labor types are tracked
  - The elements of an acceptable job costing system for accumulating job costs
  - The role of DCAA and the types of audits/surveys they conduct
  - How to develop and use indirect rates in proposals and in invoicing.
  - How to develop Policies and Procedures that are in accordance with the FAR requirements.
  - How to prepare an Incurred Cost Submission.
  - Forecasting and budgeting
  - Financing
  - Cost and price analysis for government contracts
- E-Commerce – tools to market your business 4 hours – Webinar only
  - Websites
  - Blogs and branding
  - Social Networking and Digital Marketing
  - E-marketing
- Leadership 4 hours
  - 360 degree leadership

- Leadership and management styles in the workplace

### ***Proposed Method of Course Delivery.***

While we are fully prepared, capable and ready to deliver the training sessions proposed herein in person at each of the 68 SBA district offices, we urge the SBA to consider alternative delivery methods as well. Specifically, to accommodate the busy schedules of small business owners, and to maximize the SBA budget we are proposing that all curriculum be offered both as webinars and as in-person seminars. Webinar software that allows for interaction through simultaneous use of a telephone and an online question and answer module will still allow for the critical interaction that is required for effective learning. This integrated approach affords many benefits to the SBA as well as to the beneficiaries of this assistance program.

1. Travel costs for production of this seminar series will be dramatically less.
2. Logistics of producing and shipping materials will be drastically reduced as materials for the webinar will be delivered electronically upon registration
3. Harnessing the power of the Internet and webinar technology allows participants in even the most remote location to affordably participate in this important training.
4. We propose to offer each webinar participant a ½ hour personal telephone consultation with the subject matter expert that was his or her instructor anytime within 6 months after course completion.
5. Due to the online nature of webinars, and the fact that each webinar can be recorded and available on demand later, participants will not have to block off several days to participate in the entire program. Recording of the webinars allows participants to take the training anytime, and to view the sessions in their entirety or in small bits as their schedule allows. The software that we propose to use for this on-demand training contains robust reporting features that will allow SBA to track program participation.

### ***Proposed Course Promotion and Marketing.***

In order for this program to be successful, a careful strategy must be developed that will accomplish the following.

1. Inform the participants of the program.
2. Document course curriculum to include objectives, agendas, and desired outcomes.
3. Entice participants to block time to register and participate.

We plan to use a combination of online marketing tools to accomplish this process. Each marketing strategy is designed to provide useful information, deliver a strong call to action, and then a follow up action all designed to maximize participation. First, we will create a website for the program that will contain the following information:

- Objective of the Program

- Description of courses
- Biographies and photos of all presenters
- Schedule of in person and online courses
- A blog that will provide useful information as well as document success stories and participant observations as sessions are held

Second we will create a series of email messages each containing valuable summary information concerning one aspect of the training sessions. These emails will be sent automatically using an auto-responder Internet program/system to email addresses of firms SBA directs us to contact. In accordance with Anti-Spam laws our organization will segregate these emails from any marketing efforts not related to the SBA programs and training needs unless participants opt-in to receive information from our organization. These materials will be created once the final curriculum is selected. Emails will be sent every 5 – 7 days, 6 weeks before scheduled class or webinar, to promote upcoming live trainings as well as webinars. Each email will contain a strong “call to action” to entice the reader to act and register for the course.

The SBA, prior to use, will approve all marketing materials and web copy that will be utilized to promote this program.

### ***Proposed Course Registration and Participant Surveys***

All registration will be handled electronically using an Internet hosted registration system that contains auto-responders confirming registrations, forwarding materials/manuals, sending reminders and other necessary communications. These same systems can be used to survey participants after the course is delivered for feedback and to measure success.

### **Proposed Subject Matter Experts and Instructors**

In order to deliver the best and most up to date training to the participants of this program, we have assembled a team of well rounded subject matter experts that will serve as our instructors. The individuals that we propose in many cases are published authors and well-known speakers in their disciplines nationally. The individuals presented are a representative sampling of the type and caliber of subject matter expert we have the capability to engage under this project.

### ***Unique Selling Proposition – Instructor Lyn C.***

Lyn spent 15 years in the world of academics as an award-winning teacher. She was Director of Innovation for Franklin Covey prior to starting her own coaching and training business. Presently she works as a coach and trainer with business owners and leaders helping them grow profitable, centered businesses through the identification and attainment of goals.

Lyn is well known in small business coaching circles for taking the “hedgehog concept” first put forth by Jim Collins in his book “Good to Great” where he wrote about the differences between good and great companies. The hedgehog concept is a simple, crystalline concept that flows from deep understanding about the intersection of the following three circles:

1. What you can be the best in the world at (and, equally important, what you cannot be the best in the world at).
2. What drives your economic engine? All the good-to-great companies in Collins’ book attained piercing insight into how to most effectively generate sustained and robust cash flow and profitability. In particular, they discovered the single denominator – profit per x – that had the greatest impact on the economics.
3. What you are deeply passionate about? Again, the companies in Collins’ book focused on those activities that ignited their passion. The idea here is not to stimulate passion but to discover what makes you passionate.

Lyn uses this concept to help business owners and leaders identify their market position to maximize their business development efforts.

### ***Business Development Track One – Commercial Entities – Marketing Instructor - Cindy E.***

Cindy is president & CEO of a marketing and sales firm that helps small businesses and solo-entrepreneurs obtain solid high-paying, high-value clients every day. Cindy is especially committed to empowering entrepreneurs to build successful businesses. Prior to starting her company Cindy was a member of the Small Business Training and Development Team at the Corporate College of Cuyahoga Community College in Ohio where she specialized in sales and marketing.

Cindy is a speaker, trainer, and author on the topics of sales and marketing, publicity and networking, and a master strategist on building credibility and increased visibility in the commercial marketplace and how this contributes to successful sales and marketing. For over fifteen years, she has served the business community, helping professionals and entrepreneurs to promote themselves and their work. Cindy provides small businesses with actionable ideas and plans that allow them to increase their commercial market share. Cindy was previously the Executive Managing Director for eWomenNetwork, Cleveland where she monthly held training and networking events for business women for nearly 5 years.

### ***Business Development Track One – Commercial Entities – Sales Instructor – Cindy E***

Cindy is president & CEO of a marketing and sales firm that helps small businesses and solo-entrepreneurs obtain solid high-paying, high-value clients every day. Cindy is especially committed to empowering entrepreneurs to build successful businesses. Prior

to starting her company Cindy was a member of the Small Business Training and Development Team at the Corporate College of Cuyahoga Community College in Ohio where she specialized in sales and marketing.

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### ***Business Development Track Two – Government Entities – Sales and Marketing Instructor – Mac M***

Mr. McWane is a seasoned professional with over 20 years of combined government and government professional services industry experience. He has 14 years of experience and expertise in business development and sales to governmental and public sector entities.

Prior to joining XYZ , Mr. McWane founded MACI and established that organization from the ground up to it's recognition by Inc magazine as the 117<sup>th</sup> fastest growing company nationwide in 1999. Presently, he is responsible for marketing and business development as well as executive level support for XYZ Solutions, a certified 8(a) firm. Mr. McWane has a B.S. Degree from the University of Maryland, and an MBA from the George Washington University. He also holds a currently active Top Secret Security Clearance.

### ***Business Development Track Two – Government Entities – Proposal Writing Instructor – Karen W***

Karen has over 15+ use over or +, not both years experience in writing winning proposals for entities seeking to do business with government entities. Presently, she is the principal of StrategyWise an organization that provides consulting and training to individuals and organizations on a variety of business topics including government contracts, proposal writing, career development, and leadership training. She is a frequent contributor of articles on doing business with the government, career management as well as a variety of business topics.

Prior to forming StrategyWise, she was the principal and founder of a government professional services firm in the Washington, DC area which she grew to over 300 people. While in this role, she was a 7(j) instructor of Proposal Writing for the SBA Washington District Office. She is the former Executive Managing Director for eWomenNetwork, Chicago where she hosted training and networking sessions for

businesswomen monthly for 3 years, including production and hosting of the Office Depot Women's training conference in 2007. She is the author of two books, one on federal contracting and the other on utilizing assessment tools to build high performance sales teams. She has a BA from Augustana College in Liberal Arts.

### ***Financial Management Instructor – Mac C***

Mac received a Bachelor of Science degree in Accounting from University of Maryland, College Park, a Master of Science degree in Taxation from Southeastern University, Washington, D.C. and a Juris Doctorate from the University of Maryland at Baltimore. He is a CPA.

He is the principal of his own 8(a) certified CPA firm. In this capacity he is an instructor and advisor to businesses on a full spectrum of financial services. He is also a recognized expert and sought after trainer on government contract accounting. The objective of his course is to provide the small business owner with the tools he/she needs to manage the unique business accounting requirements in the highly regulated government contracting arena. The approaches taught in this class are also pertinent and useful to non-government contracting businesses.

### ***E-commerce Instructor – Cindy E***

Cindy is president & CEO of a marketing and sales firm that helps small businesses and solo-entrepreneurs obtain solid high-paying, high-value clients every day. Cindy is especially committed to empowering entrepreneurs to build successful businesses. Cindy teaches small businesses and solo-preneurs to use the internet to effectively grow their business. Topics she trains on include the following.

- \* Automated Keep-in-Touch Marketing Program
- \* Blog Creation, Maintenance and Content Writing
- \* Content Writing
- \* E-Mail Newsletters - design and send
- \* Linked In/Facebook set-up and marketing
- \* Online Shopping Cart & eCommerce setup
- \* Social Network Marketing
- \* Teleseminars

### ***Leadership Instructor – Karen W***

Karen is the principal of StrategyWise an organization that provides consulting and training to individuals and organizations on a variety of business topics including government contracts, proposal writing, career development, and leadership training. She

is a frequent author of articles on doing business with the government, career management as well as a variety of business topics.

She is an authorized distributor of several leadership assessment tools that facilitate development of effective leaders. She completed strategic leadership development training with Marshall Goldsmith on the feed forward technique used by America's top organizations to develop their leaders.

She has provided leadership training to government professional services firms, organizations and several small business around the United States. She is the author of a book on utilizing assessment and leadership tools to build a high performing sales team.