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# Developing Teaming Relationships for Competitive Advantage in Bidding Federal Contracts

Network for Enabling Small Business Teaming (NEST)  
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*The information provided in these training materials is not all inclusive  
and companies should consult with their legal, contracts and financial staff regarding all teaming decisions*



## Teaming Readiness Quiz\* – Upon Arrival Anonymous Submittal at Beginning of Workshop

Teaming Readiness Factors	Novice = 1	Practitioner = 3	Expert = 5
1. Well-defined business goals			
2. Capabilities assessment per goals			
3. Definition of general teaming needs			
4. Identification of procurement opportunities			
5. Identification of potential teaming partners			
6. Criteria for Teammate Selection			
7. Process for Vetting Potential Teammates			
8. Established NDAs, Teaming Agreements, Subcontracts vetted by Legal/Contracts			
9. Effective Legal Counsel			
10. IP Protection Strategy and Implementation			
11. Experience Bidding with Teammates			
12. Experience Winning with Teammates			
13. Experience Delivering with Teammates			

\* Source: Foundation for Enterprise Development



# Small Business Teaming Workshop Agenda

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- ◆ Teaming Roadmap (20 minutes)
  - ❖ Teaming Readiness Quiz Results Summary
  - ❖ Roadmaps for Short, Mid, and Long Term Teaming
  - ❖ Why Team? Why Prime? Why Sub?
- ◆ Teaming to Improve Bidding and Winning Federal Contracts (30 minutes)
  - ❖ Teaming Process Aligned to Federal Procurement Cycle
  - ❖ Key Steps and Artifacts in the Teaming Process
- ◆ Break – 10 minutes
- ◆ Strategic Long Term Teaming Roadmap (15 minutes)
  - ❖ When there are long lead times to make strategic teaming decisions
- ◆ Tactical Short Term Teaming Roadmap (15 minutes)
  - ❖ When there is an immediate need to make teaming decision
- ◆ Successfully Maintaining a Teaming Relationship (10 minutes)
  - ❖ Being a Good Prime and Being a Good Sub
  - ❖ Lessons Learned
- ◆ Group Discussion of Top Teaming Needs – (20 minutes)

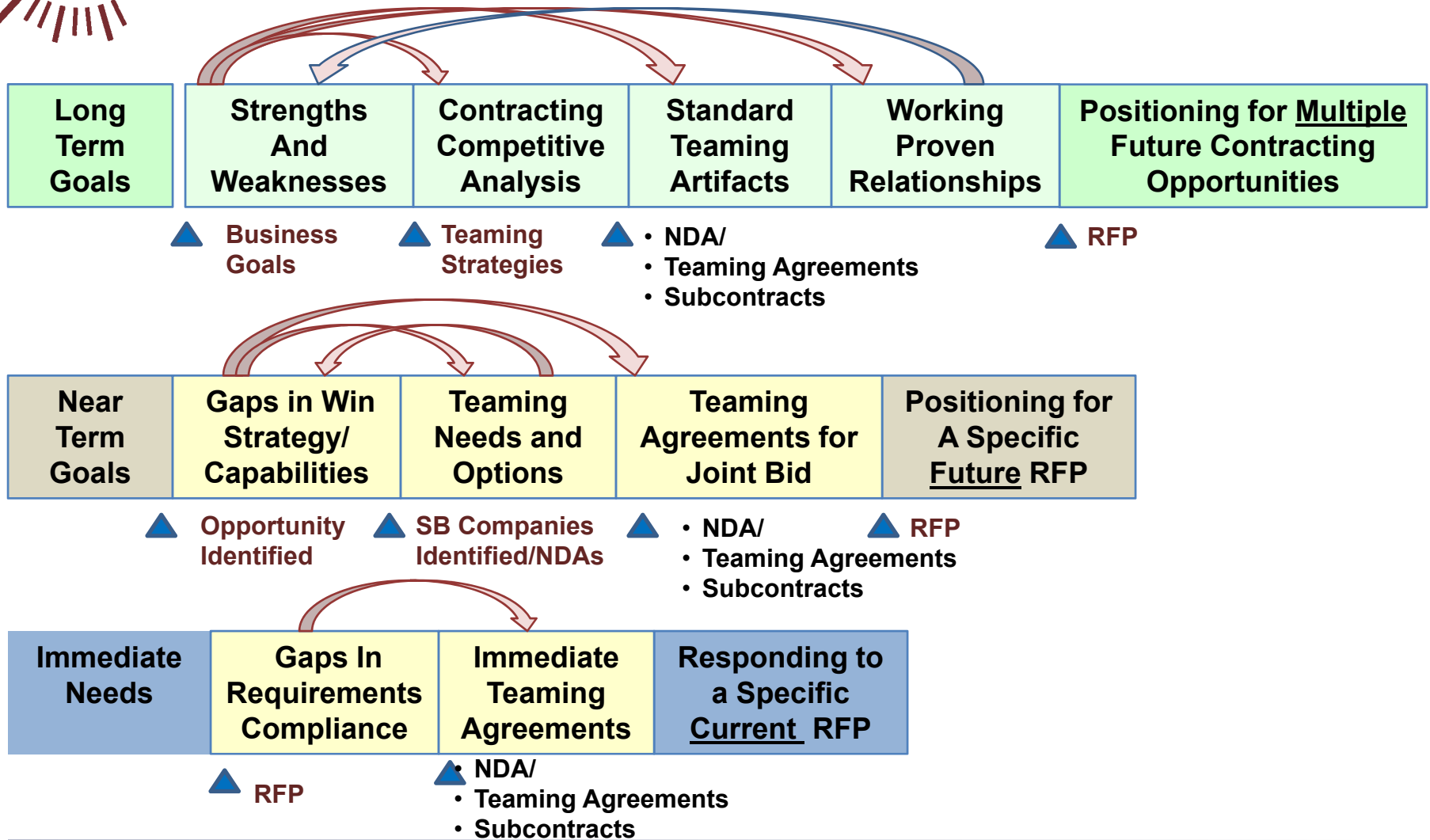


# Teaming Roadmap – This Will Light the Path

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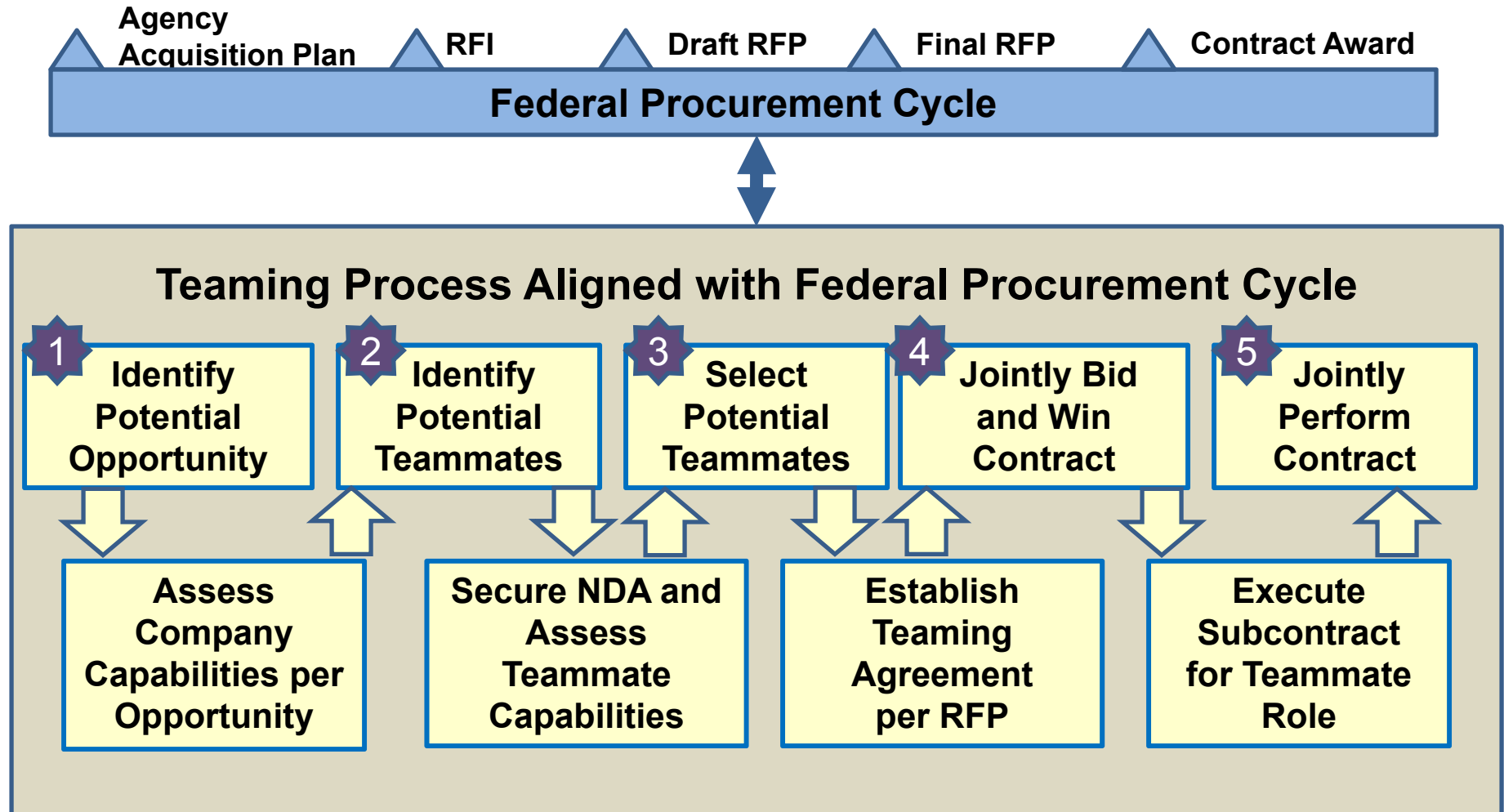
- ◆ **Definition - a planning framework for determining:**
  - ❖ Long-term business strategies that can be enabled through teaming to identify the most promising future federal opportunities
  - ❖ Mid-term business plans to respond to a specific federal procurement opportunity leveraging teaming-based strategies
  - ❖ Short-term business requirements that necessitate teaming to complete a current proposal for a federal procurement opportunity
- ◆ **Purpose - clarifying and reaching consensus on:**
  - ❖ Your business needs -- across all timeframes-- that warrant consideration of teaming with small and/or large businesses
  - ❖ Your criteria for establishing teaming relationships
  - ❖ Your decision-making on the types and levels of resources to be allocated to identify, secure, and manage teammates on bids

# Parallel Paths within the Teaming Roadmap





# Teaming Process Roadmap for Near-Term Single Opportunity





# Why Team? With or Without Gaps in Capability

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- ◆ **You have Gaps in:**
  - ❖ Customer knowledge and relevant past performance
  - ❖ Required technologies, methodologies, tools, subject matter expertise needed to be compliant and competitive per RFP
  - ❖ Financial and staffing resources to bid and perform on federal contracts
  
- ◆ **If you have “no gaps” you might also consider teaming to:**
  - ❖ Take some of the competition off the market
  - ❖ Conserve marketing resources if you think teaming is cost-effective
  - ❖ Increase win rate with expanded capabilities and qualifications

# Reasons to Prime, Reasons to Sub

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## Why You Might Prime

- ◆ You have a strong win strategy, but can't effectively implement the full scope of work
- ◆ You have more experience in and resources for bidding and implementing federal contracts
- ◆ Your relationship with the customer is more developed
- ◆ Your capabilities are more aligned with customer requirements
- ◆ You believe your qualifications and past performance qualify you for the majority of the work scope
- ◆ Note: Some Contracts require Prime to take on X% of the contract value

## Why You Might Sub

- ◆ You have relevant capabilities, but not a viable win strategy
- ◆ Your experience in federal contracting is limited and you are still learning how to effectively bid
- ◆ You don't know the customer very well or at all
- ◆ You have scarce resources for bidding federal contracts
- ◆ You don't need or want the lion's share of the work
- ◆ You need to minimize your proposal and program risk

# Pros and Cons of Being Prime vs. Sub

	<b>Being the Prime Contractor on a Team</b>	<b>Being the Subcontractor on a Team</b>
<b>Pros</b>	<ul style="list-style-type: none"> <li>• Owning the win strategy</li> <li>• Defining scope – who on the team gets what amount of work</li> <li>• Determining acceptable proposal and programmatic risk</li> <li>• Selecting key personnel</li> <li>• Deciding final bid</li> <li>• Reaping the rewards</li> </ul>	<ul style="list-style-type: none"> <li>• Aligning to a win strategy</li> <li>• Receiving partial scope of work, versus none if not bid</li> <li>• Reducing risk of proposal investment and program delivery</li> <li>• Minimizing bid costs</li> <li>• Reaping part of the rewards</li> </ul>
<b>Cons</b>	<ul style="list-style-type: none"> <li>• Managing subs on proposal and programs can be more work than being team-less</li> <li>• Assuming responsibility for risk, even with risk flow down</li> <li>• Suffering a diminished reputation from poor Sub performance</li> </ul>	<ul style="list-style-type: none"> <li>• Being unable to rescue a losing win strategy and the final bid</li> <li>• Having to teach a Prime how to be Prime</li> <li>• Suffering a diminished reputation from poor Prime performance</li> </ul>

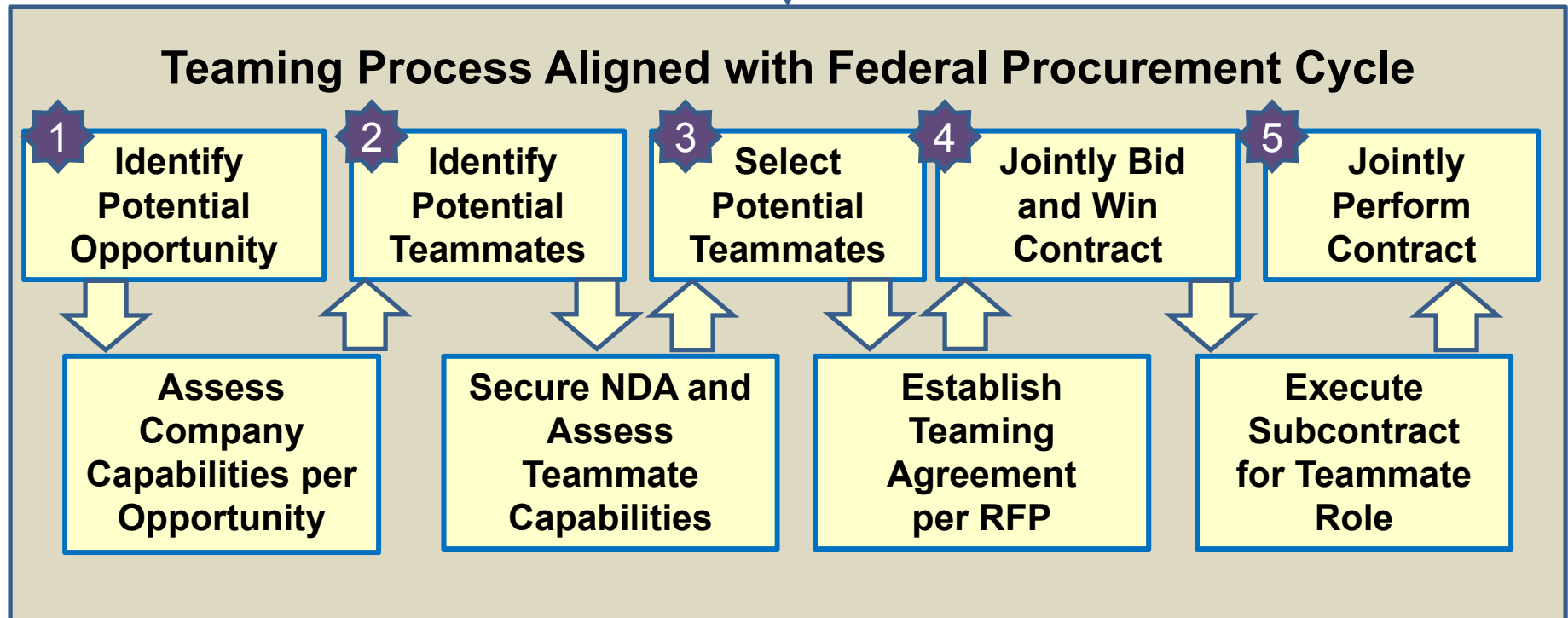


# Teaming to Improve Bidding and Winning Federal Contracts

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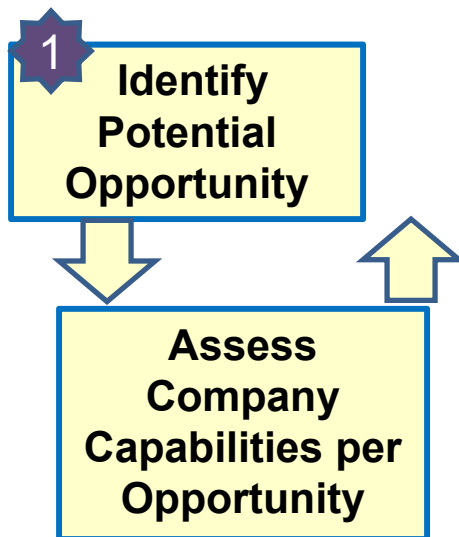


# Teaming to Improve Bidding and Winning Federal Contracts



# Identify Potential Opportunities

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- ◆ Teaming should be based on a foundation of:
  - ❖ Identifying a federal procurement that maps well to your company's capabilities
  - ❖ Completing an initial bid/no bid decision on the target opportunity
  - ❖ Performing a gap analysis of your company's technical and management qualifications versus the expected contract's scope of work
  - ❖ Assessing competitor strengths and weaknesses
  - ❖ Defining initial pros and cons of teaming on the identified opportunity

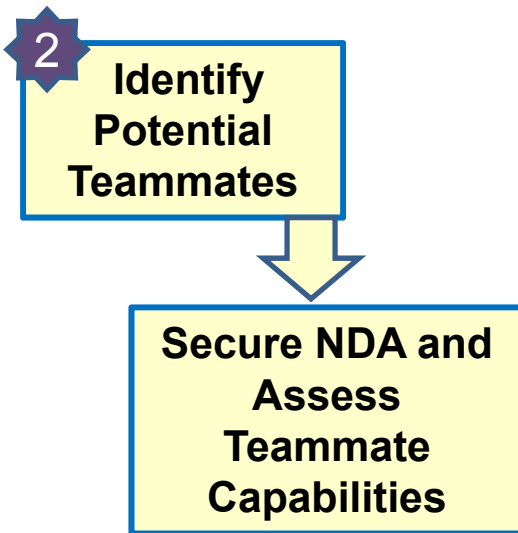


# Assess Company Capabilities per Opportunity

- ◆ Performing a structured assessment of your strengths and weaknesses will help surface teaming needs

Company Strengths And Weaknesses Assessment per Identified Federal Procurement Opportunity					
YOUR COMPANY	Company Solutions	Company Staffing	Company Finances	Past Performance	Contract Win Rates
Company Strengths					
Company Weaknesses					
Teaming Needs					

# Identify Potential Teammates



- ◆ Networking with Professional Organizations, e.g.:
  - ◆ NDIA
  - ◆ AFCEA
  - ◆ BIOCOM
  - ◆ CONNECT
- ◆ Researching current incumbent Primes and Subcontractors on existing related contracts as presented in previous session
- ◆ Accessing local services (e.g., NEST, SDADT, PTAC, SBA Small Business Development Centers (SBDC's))
- ◆ Utilizing relevant national repositories (e.g., CCR, GSA, FPDS, ORCA)



# Secure Non-Disclosure Agreements

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- ◆ **Applicability** – When you are considering discussions with other organizations when proprietary information would be shared in the process of exploring joint business opportunities
- ◆ **Purpose** – Protects confidentiality, among two or more companies which have signed NDAs, by defining what proprietary information can be shared with each other during their business relationship and what confidential information cannot be divulged with any third party or member of their company who are not covered by the NDA
  - ❖ Typically covers data, knowledge, and/or materials that are not publically known: marketing plans, bidding strategies, new technologies, etc.
- ◆ **Mechanism** – written by company Legal/Contracts staff, typically signed by individuals involved in shared private business discussions
  - ❖ Unilateral NDA – only one side agrees to not divulge confidential information
  - ❖ Multilateral NDA – both sides agree to not divulge confidential information
- ◆ **Practice** – after signing an NDA, always err on the side of caution when in doubt about what can be discussed and with whom

# Secure Non-Disclosure Agreements

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- ◆ What does a standard NDA include?
  - ❖ Scope and definition of sensitive (confidential) information to be disclosed within the business relationship
    - ◆ Business plans and contracting strategies
    - ◆ Proprietary information on personnel, processes, technologies, facilities, etc.
  - ❖ Terms of the agreement
    - ◆ Time period NDA is in effect
    - ◆ How confidential information can be used/not used
    - ◆ Markings of documents and communication of confidential information
    - ◆ Exceptions to non-disclosure
    - ◆ Return of confidential information
    - ◆ Penalties for disclosure
    - ◆ Equitable relief for disclosure (e.g., remedies, injunction)
  - ❖ Signatures of all involved
- ◆ Does not include a specific Scope of Work related to a procurement
- ◆ Example: [http://www.hbs.edu/entrepreneurship/pdf/Sample\\_NDA.pdf](http://www.hbs.edu/entrepreneurship/pdf/Sample_NDA.pdf)

## NON-DISCLOSURE AGREEMENT

THIS AGREEMENT (the "Agreement") is entered into on this \_\_\_\_ day of \_\_\_\_\_ by and between \_\_\_\_\_, located at \_\_\_\_\_ ( the "Disclosing Party"), and \_\_\_\_\_ with and address at \_\_\_\_\_ (the "Recipient" or the "Receiving Party").

The Recipient hereto desires to participate in discussions regarding \_\_\_\_\_ (the "Transaction"). During these discussions, Disclosing Party may share certain proprietary information with the Recipient. Therefore, in consideration of the mutual promises and covenants contained in this Agreement, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto agree as follows:

### 1. Definition of Confidential Information.

(a) For purposes of this Agreement, "Confidential Information" means any data or information that is proprietary to the Disclosing Party and not generally known to the public, whether in tangible or intangible form, whenever and however disclosed, including, but not limited etc.....

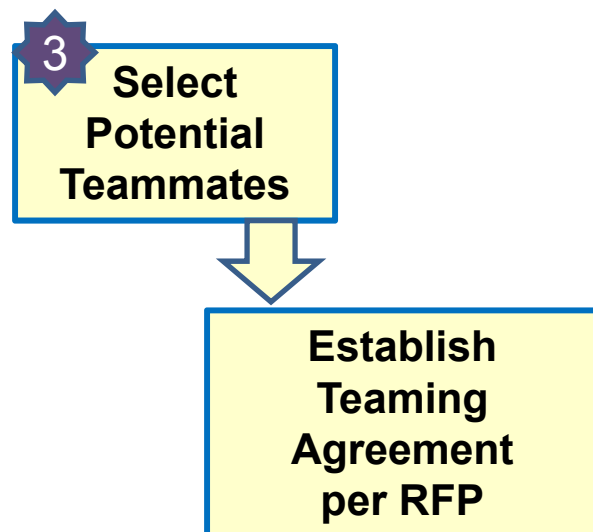


# Assess Potential Teammates – After NDA

## Sharing of Information, Strategies, Capabilities

<b>Strengths And Weaknesses Assessment – YOUR COMPANY</b>						
YOUR COMPANY	Company Solutions	Company Staffing	Company Finances	Past Performance	Contract Win Rates	
Company Strengths	<b>Strengths And Weaknesses Assessment – POTENTIAL TEAMMATE</b>					
Company Weaknesses	POTENTIAL TEAMMATES	Company Solutions	Company Staffing	Company Finances	Past Performance	Contract Win Rates
Teaming Needs	Teammate Strengths					
	Teammate Weaknesses					
	Teammate Business Needs					

## Select Potential Teammates



- ◆ Base potential selection on assessment of opportunity vs teammate capabilities
- ◆ Perform due diligence on all companies (e.g., Dun and Bradstreet, references)
- ◆ ***Conduct effective informal communications to***
  - ◆ ***clearly set expectations***
  - ◆ ***discuss issues***
  - ◆ ***initiate strong working relationships***
- ◆ Establish Teaming Agreements

## Establish Teaming Agreements

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- ◆ **Applicability** – When you have decided that in order to more effectively bid on a specific federal contract, it is beneficial to work together with another company as Prime/Sub to apply joint strategies and resources in capturing a procurement opportunity
- ◆ **Purpose** – Establish roles and responsibilities for the Prime contractor and the Subcontractor within the context of the identified opportunity for jointly performing:
  - ❖ Marketing/Capture Strategy
  - ❖ Proposal Development (pre-Award)
  - ❖ Program Implementation (post-Award)

# Establish Teaming Agreements

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- ◆ Contents
  - ❖ Terms and Conditions
  - ❖ Statement of Work (contingent on contract award) include team members role/ key personnel representation in advising and management of contract
  - ❖ Financial considerations – pricing, labor rates, overhead, and other financial information, as required by the contract requirements
  - ❖ Customer relationship management
  - ❖ Period of applicability
  - ❖ Designated company representative having lead on agreement and signature/decision authority?
- ◆ Warrants legal counsel/contracts involvement and review
- ◆ Often references or appends an NDA

# Example of Teaming Agreement

*This is a sample form of agreement intended for general informational purposes only and should not be construed as legal advice or legal opinion with respect to specific facts or circumstances. Readers with legal questions should consult a lawyer concerning their own particular situation.*

- ◆ **Copyright © 1995 Kilcullen, Wilson & Kilcullen. All rights reserved.**
- ◆ This Teaming Agreement, entered into this day of , 199 , by and between (hereinafter called "Team Leader"), a corporation, with principal offices at , and (hereinafter called "Team Member"), a corporation, with principal offices at ,
- ◆ **WHEREAS, (hereinafter called the "Customer") has issued [is planning to issue] a solicitation (hereinafter called the "Solicitation") for ; and**
- ◆ **WHEREAS, the Team Leader and the Team Member, (hereinafter called "the Parties"), because of their diverse capabilities, have determined that they would benefit from a Teaming Agreement for the purpose of competitively responding to the Solicitation, in order to develop the best technical and management approaches fully responsive to the requirements of the Customer; and**
- ◆ **WHEREAS, the Parties wish to establish a cooperative and supportive team in which each will devote adequate skilled manpower, capital equipment, facilities, and other resources to timely support the objectives of this Teaming Agreement; and**
- ◆ **WHEREAS, "Proprietary Information" means technical data, knowledge, patents, marketing data or techniques, cost or pricing information, and ideas that a Party treats as and considers to be unique, valuable, and proprietary, including, without limitation, any information protected under the Trade Secrets Act, 18 U.S.C. § 1905, and information exempt from disclosure under the Freedom of Information Act, 5 U.S.C. §§ 552(b)(3) and (4); and**

# Example of Teaming Agreement (cont'd)

- ◆ **WHEREAS**, each Party is willing to accept the Proprietary Information received from the other Party in confidence and to hold it in trust for the disclosing Party for use solely and **exclusively in connection with competitively responding to the Solicitation**, all according to the terms and conditions of this Teaming Agreement;
- ◆ **WHEREAS**, the Parties believe that it would be inconsistent with their reciprocal disclosures of Proprietary Information, and inconsistent with their reciprocal commitments of skilled manpower, capital equipment, facilities, and other resources in support of this Teaming Agreement, for either Party, after the execution of this Teaming Agreement, **to respond to the Solicitation either independently or together with any other Party; and**
- ◆ **WHEREAS**, **the Team Leader, if it receives the contract proposed by the Solicitation would be solely responsible for project management and contract performance, and would subcontract portions of the contract work to the Team Member; and**
- ◆ **etc**
- ◆ **NOW, THEREFORE**, in consideration of these premises, and in express reliance upon the mutual promises and covenants contained herein, the Parties here agree as follows:
  - ◆ **I. Proposal Preparation**

# Example of Teaming Agreement (cont'd)

- ◆ A. The Parties shall use their **best efforts to prepare a competitive proposal** in response to the Solicitation for submission to the Customer.
- ◆ B. **The Team Member shall submit to the Team Leader data and information concerning its share of the proposed contract including a proposed price,** for use in proposal preparation.
- ◆ C. The Team Leader shall prepare the competitive proposal, integrate the information provided by the Team Member, and submit the competitive proposal to the Customer. The Team Leader has responsibility for the content of the competitive proposal and **agrees to consult with the Team Member, before submission of the competitive proposal to the Customer, on all matters concerning the Team Member's share of the contract proposed by the Solicitation.**
- ◆ D. The Team Leader **shall identify the Team Member as a proposed subcontractor** and shall describe in the competitive proposal the Team Member's responsibilities concerning the Team Member's share of the proposed contract.
- ◆ E. The **Team Leader shall be responsible for any communications with the Customer concerning the Solicitation, the competitive proposal, or the contract proposed by the Solicitation, and agrees to give the Team Member an opportunity to be present at meetings with the Customer that may concern the Team Member's share of the proposed contract.**



# Example of Teaming Agreement (cont'd)

## II. Division of Responsibilities

### A. Technical Proposal Responsibilities:

Team Leader will provide:

Proposal management.; Facilities for production of the proposal.; All administrative support, this to include office equipment, telecommunications facilities, word processing, and reprographic services.

Team Member will provide: B. Division of the Contract Work:

Team Leader's contract work will include the following tasks:

Team Member's contract work will include the following tasks:

This contemplated division of the contract work is predicated on the Parties' understanding of the Solicitation and the Customer's requirements as of the date of this Teaming Agreement.

**Should the Solicitation, when issued, reflect a change to this understanding, or should the Solicitation be modified, the Parties shall have the right to modify this contemplated division of the contract work.**

# Example of Teaming Agreement (cont'd)

## **V. Proprietary Information** A. Technology Transfer:

1. The Parties shall identify in writing, by appropriate stamp, legend, or otherwise, all such Proprietary Information transferred pursuant to this Teaming Agreement. All such Proprietary Information disclosed under this Teaming Agreement shall remain the property of, and be deemed proprietary to, the disclosing Party. The receiving Party agrees to accept such Proprietary Information in confidence, to accord it the protection required by this Teaming Agreement and such additional protection as the receiving Party customarily accords to its own proprietary information, to hold such Proprietary Information in trust for the disclosing Party, and to use such Proprietary Information solely and exclusively in accordance with the terms of this Teaming Agreement, provided however, that neither Party in its capacity as receiving Party shall be liable for disclosure or use of Proprietary Information if the same:

Etc

**f. After expiration of a seven (7) year period, which period shall commence upon the date of the last signing of this Teaming Agreement.**



# Example of Teaming Agreement (cont'd)

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## VI. Termination

Except as otherwise expressly provided herein, this Teaming Agreement shall expire upon one of the following events, whichever shall occur first:

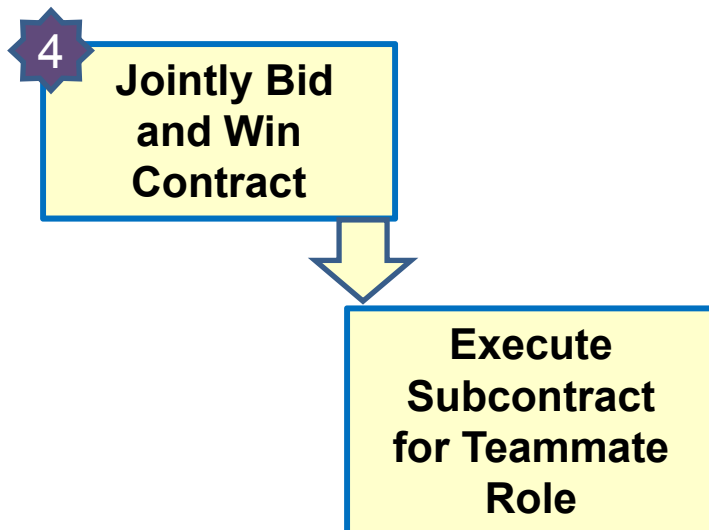
- A. Written notice from the Customer that it will not award a contract pursuant to the Solicitation.
- B. Written notice from the Customer of award of a contract to a firm other than the Team Leader.
- C. Execution of a subcontract by and between the Team Leader and the Team Member for performance of a share of the contract work.
- D. Dissolution hereof by mutual written agreement of the Team Leader and Team Member.

# Example of Teaming Agreement (cont'd)

## IX. Disputes

- A. The Parties shall exercise their **best efforts to settle any claim, controversy, or dispute** (hereinafter collectively called "Disputes") concerning questions of fact or law arising out of or relating to this Teaming Agreement or to performance of either Party hereunder, or to the threatened, alleged or actual breach thereof by either Party, including without limitation any claim, controversy or Dispute concerning the determination (in accordance with the provisions of this Teaming Agreement) of the share of the proposed contract work, or the price, or terms and conditions of any subcontract to be awarded to Team Member by Team Leader.
- B. **If the Parties are unable to resolve the Dispute within thirty (30) calendar days from the date that either Party is informed in a writing from the other Party that a Dispute exists, the Dispute shall be settled by binding arbitration** administered by the American Arbitration Association under its Commercial Arbitration Rules, and judgment on the award rendered by the arbitrators may be entered in any court having jurisdiction thereof.

# Jointly Bid and Win Contracts



- ◆ Define clear roles and responsibilities for proposal development
- ◆ Behave as a team during the bidding process to establish a foundation for working together after the win – no rogue interactions with customer
- ◆ Do what it takes to formulate a bid that can win – even if it means modifying teaming agreements
- ◆ ***Implement effective communications processes across team to stay aligned during proposal process***
- ◆ Meet your Prime or Sub proposal assignments on time to establish trust

## Execute Subcontracts After the Win

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- ◆ **Applicability** – Upon contract win, established between Prime and Subs to execute the teammate’s allocated part of the awarded procurement
- ◆ **Purpose** – Defines performance requirements for the subcontractor’s role based on the awarded contract
  - ❖ Period of Performance – may not be the same as the contract POP
  - ❖ “Flow down” of requirements defined in contract or rewritten
  - ❖ Defines work, deliverables, staffing, schedules, acceptance criteria
- ◆ **Contents can include:**
  - ❖ Scope of Work - tasks and deliverables
  - ❖ Schedule – milestones, delivery dates, task dependencies with Prime
  - ❖ Staffing Requirements/Organizational Structure
  - ❖ Invoicing Schedule, Submittal Terms, and Acceptance Criteria
  - ❖ Legal terms and conditions
- ◆ **Executed upon contract award or any time during the contract’s period of performance**



## Jointly Perform Work After the Win

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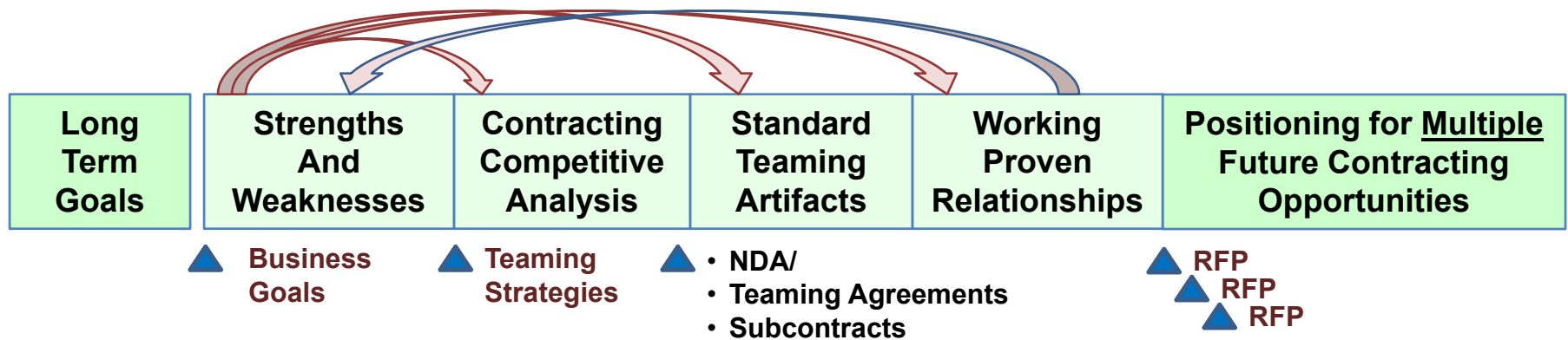
- ◆ Everyone needs to be focused on program performance to ensure customer satisfaction.
  - ◆ Prime must provide strong program management
  - ◆ Subcontractors must generate required deliverables on time and to specification
- ◆ ***Effective Communications are key to internal identification and resolution of issues, without involving customer until a united position is defined***
- ◆ Successful team performance can increase probability of securing contract option periods, winning the re-compete, and winning similar future contracts
- ◆ Conduct internal subcontractor performance reviews to ensure all technical, cost, and schedule requirements are being met by your teammates



# Break – Back in 10

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# Positioning for Future Multiple Contracts





# Positioning for Future Multiple Contracts

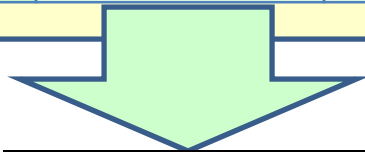
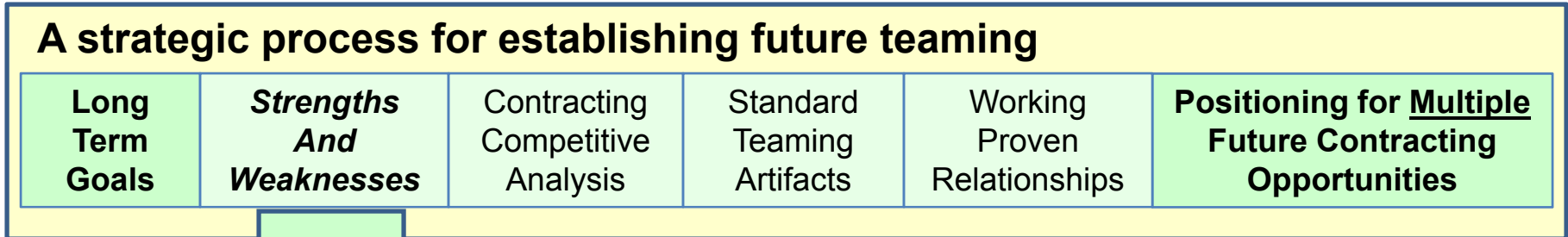
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- ◆ Proactive approach to teaming
  - ❖ Driven by business goals
  - ❖ Aligned with company strengths and weaknesses
- ◆ Greater lead times
  - ❖ For identifying companies with complementary capabilities
  - ❖ For getting to know the people with whom you would work
- ◆ Reduced Risk
  - ❖ Vetted teammate current capabilities and past performance
  - ❖ Pre-defined labor categories and rates
  - ❖ Known overhead, G&A, and fee rates



# Long Term Teaming Roadmap

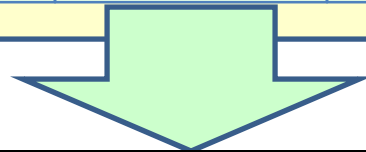
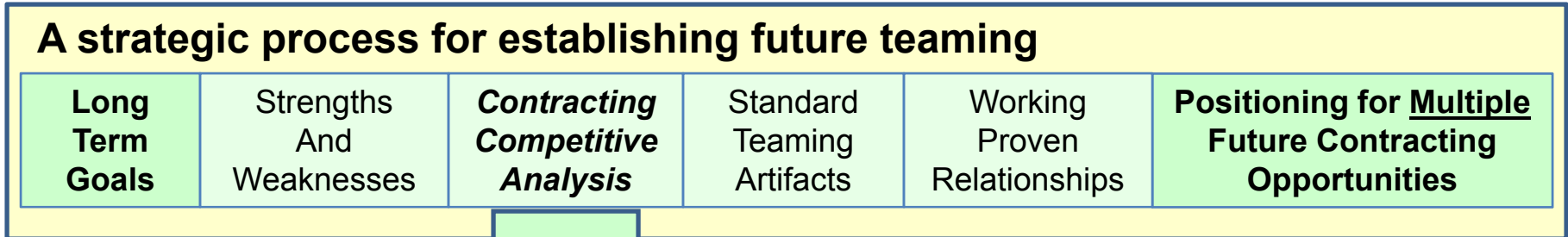
## Positioning for Future and Multiple Contracts



<b>Strengths And Weaknesses Assessment</b>					
YOUR COMPANY	Company Solutions	Company Staffing	Company Finances	Past Performance	Contract Win Rates
Company Strengths					
Company Weaknesses					
Teaming Needs					

**Before the context was winning a single procurement – Now the context is positioning for winning multiple procurements**

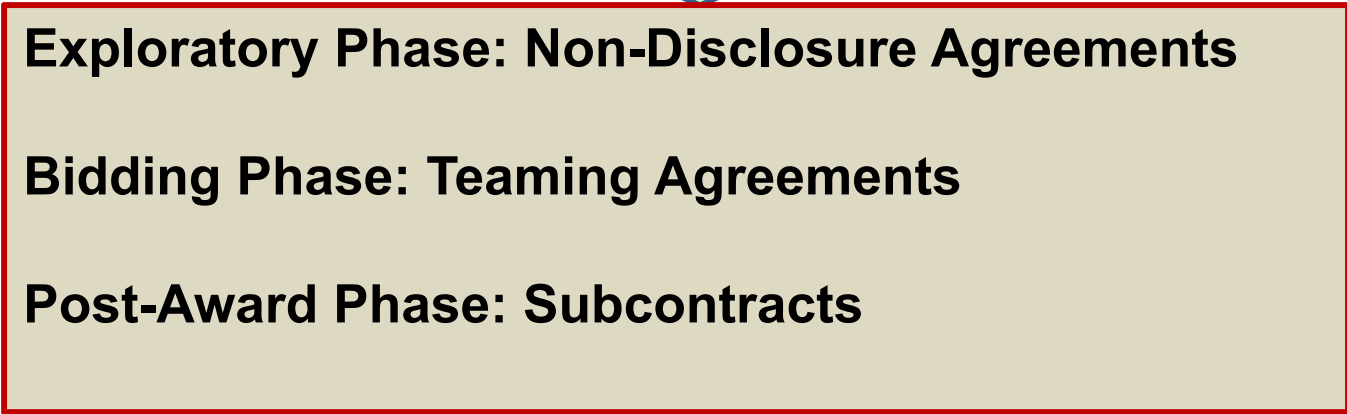
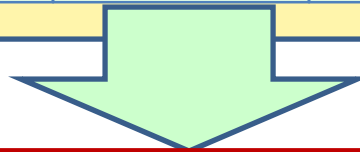
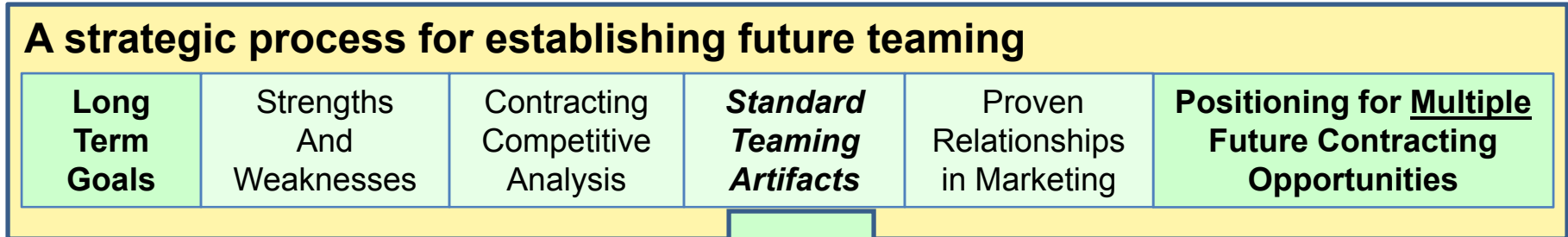
# Long Term Teaming Roadmap (cont'd)



<b>Federal Contracting Competitive Analysis</b>					
FACTORS SPECIFIC TO OPPORTUNITY	Solutions	Resources	Pricing	Past Performance	Contract Win Rates
Your Company					
Competitor A					
Competitor N					

**Before the context was winning a single procurement –  
Now the context is positioning for winning multiple procurements**

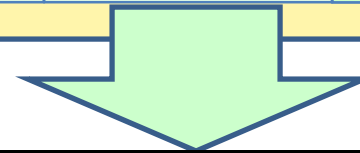
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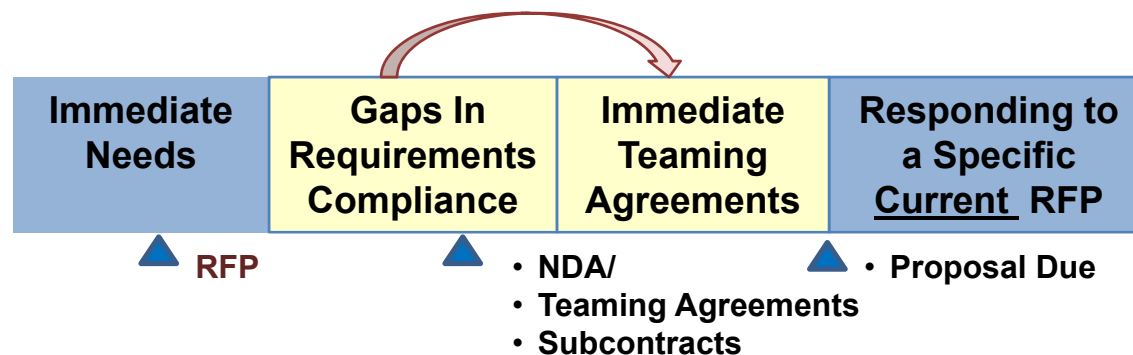
## A strategic process for establishing future teaming

<b>Long Term Goals</b>	Strengths And Weaknesses	Contracting Competitive Analysis	Terms and Conditions	<b>Working Proven Relationships</b>	Positioning for <u>Multiple</u> Future Contracting Opportunities
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Teammate Relationship Tracking				
	Trust	Performance in Bidding Contracts	Performance in Delivering Contracts	Proposal Win Rates
Teammate A				
Teammate B				
Teammate C				

# Teaming in the Short-Term



## When this is pertinent:

- ❖ The RFP is out and you have begun proposal development
- ❖ Your company realizes that there are elements in the Scope of Work for which you have little to no capability
- ❖ Management decides that gaining a team member is critical to being compliant with the RFP and having a competitive position



# Risks of Teaming During Midstream Proposal Development

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## What can go wrong for the Prime:

- ❖ During the Teaming stage: Urgency of Prime's need for teammates weakens their negotiating position with subcontractors – leading to reduced scope/revenue on: the procurement
- ❖ During the proposal stage: Once teaming agreement signed, subcontractors don't fully support proposal effort as expected or required for a win
- ❖ During the contract delivery stage: Without adequate due diligence on teammate, Prime bids subcontractor capabilities that later turn out not to exist or be adequate – leading to contract non-performance



# Risks of Teaming During Midstream Proposal Development

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## What can go wrong for the Subcontractor:

- ❖ During the Teaming stage: Decision to go with a given Prime is made hastily, and the wrong or weaker Prime is chosen – leading to a lower win rate
- ❖ During the proposal stage: Discovery that the Prime does not know how to run a proposal, and more Subcontractor resources are required than planned to get the proposal out the door
- ❖ During the contract delivery stage: Despite stepping up to assist the Prime in bidding, once the contract is awarded, the Prime does not fully implement Teaming Agreement

# Risks of Teaming During Midstream Proposal Development

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What can go wrong for the team:

- ❖ Confusion over proposal roles and over scope allocation – leading to proposal non-compliance
- ❖ Loss of focus on winning strategy given time consumed in working out teaming agreements – leading to lower win rates
- ❖ Miscalculation of Prime/Sub true capabilities given no time for due diligence – leading to proposed solutions that can not be delivered upon a win



# Opportunities of Teaming During Midstream Proposal Development

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## What can go right:

- ❖ Competition caught off guard by newly formed team
- ❖ Bid and proposal costs are lowered for all companies involved
- ❖ Combined strengths of teammates greatly increases competitive position, resulting in a win otherwise lost
- ❖ Small businesses begin developing positive working relationships that can be leveraged on future proposals

# Maintaining a Successful Teaming Relationship

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- ◆ Being a Good Prime:
  - ❖ Ensure clarification of roles and expectations
  - ❖ Make good on agreements – no renegeing
  - ❖ Acknowledge accomplishments of teammates with customer
  
- ◆ Being a Good Sub
  - ❖ Deliver what has been agreed to on schedule
  - ❖ Provide early heads up on delivery issues or risks
  - ❖ Resist urge to go rogue with customer, independent of your Prime

## Summary of Lessons Learned

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- ◆ Teaming requires trust which is built on personal working relationships
  - ❖ Legal baseline is critical for protection, but does not alone guarantee success
- ◆ NDAs are most effective when leadership insists they be honored and provides continual reminders
  - ❖ Breaching an NDA not only can bring on legal problems, but can dissolve a mature level of trust
- ◆ Teaming agreements must be definitive, so there is no ambiguity in shared expectations
- ◆ Contract performance involving Prime-Sub delivery requires commitment to maintaining working relationships



# Upcoming NEST Small Business Training

Workshops	Modules
1. Forming Successful Teams for Large Federal Contracts (November 29, 2011)	<ul style="list-style-type: none"> <li>• Researching the Federal Market for teaming opportunities</li> <li>• Assessing SB capabilities that can be strengthened through teaming</li> <li>• Developing Teaming Relationships for Competitive Advantage in Bidding on Federal Contracts</li> </ul>
2. Winning the Opportunity (February 2, 2012)	<ul style="list-style-type: none"> <li>• Deciphering Terms and Conditions to Successfully Bid on Federal RFPs</li> <li>• Pricing to Win and Deliver</li> <li>• Managing Multiple Subcontracts</li> </ul>
3. Scaling your Business to Team on Large Federal Contracts (April 3, 2012)	<ul style="list-style-type: none"> <li>• FAR Guidance for Large Contracts</li> <li>• Understanding Federal Contract Types</li> <li>• Preparing for a Government Audit</li> <li>• Effective Financial Management for Bidding and Implementing Federal Contracts</li> </ul>



# What are Your Key Needs for Small Business Teaming?

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- ◆ The NEST Program goal is to facilitate and support small businesses teaming with each other on large federal procurements
- ◆ By better understanding your needs, we can better meet them via training, mentoring, and consulting services
- ◆ Needs definitions grouped by:
  - ❖ Identification of Opportunities
  - ❖ Identification of Potential Teammates
  - ❖ Teaming Process/Agreements
  - ❖ Proposal Development
  - ❖ Program Implementation