

Readiness Checklist

Company Name:

Date:

Completed By:

STATUS	TOPIC OF INTEREST	WHAT IS THE SIGNIFICANCE?
Complete Not Complete	Event Registration	Most federal Matchmaker events have limited capacity. To ensure you are able to connect with an agency Small Business Specialist, be sure to register as early as possible.
Complete Not Complete	Review the Agency	<p>Mission and Vision. To foster, promote, and develop the welfare of the wage earners, job seekers, and retirees of the United States; improve working conditions; advance opportunities for profitable employment; and assure work-related benefits and rights.</p> <p>Budget for the Coming Year. Review priorities, goals and the anticipated allocation of funds directly related to the services you sell.</p> <p>Upcoming Opportunities. Review the Agency forecast of upcoming opportunities to identify those that are potentially a good match for your organization.</p> <p>Doing Business With. Review information provided by the Agency re: best practices for engagement.</p>
Complete Not Complete	SAM Profile Optimization	Ensure your SAM profile includes the appropriate NAICS and PSC Codes based on your event goals.
Complete Not Complete	DSBS Profile Optimization	Ensure your SBA Dynamic Small Business Search profile includes: - a well-written, comprehensive fact-based Capabilities Narrative that highlights the best aspects of your organization, - Add relevant keywords that are used and searched by federal buyers, - Add any details about bonding, quality assurance processes, special equipment and/or materials, and any other assets you possess that differentiate your organization, and - Add relevant past performance examples to your profile
Complete Not Complete	Research	Ensure you've researched the agency spending trends, key stakeholders and contact details to demonstrate that you are targeting your efforts in working with the agency.

Readiness Checklist (cont.)

STATUS	TOPIC OF INTEREST	WHAT IS THE SIGNIFICANCE?
Complete Not Complete	Capability Statement	<p>The following information is important to include in your company's Capability Statement:</p> <p>Name and company branding, slogan (if any) Summary description of the company Core Capabilities Description of major services offered Federal Small Business Certifications Contract Vehicles in which you participate (Federal and State) State Certifications Local, Quasi, and Non-Government agencies you have served Major Clients (list the most important), Commercial and Government NAICS Codes PSC Codes Partners and authorized resellers Staff clearances and certifications</p> <p>General Company information, including: Registered company name DBA Year of incorporation State of incorporation Corporation type D-U-N-S Number CAGE Code Contact information</p> <p>Tips: Visually appealing 1 page (front and back) Present information concisely Use bullets, simple tables, highlighted sections for readability Have someone from outside your company read your statement and provide feedback, before sharing with customers/potential customers Be sure to check spelling and grammar</p> <p>https://www.hhs.gov/grants/contracts/get-ready-to-do-business/write-a-capability-statement/index.html</p>
Complete Not Complete	Engagement Strategy	<p>In order to ensure a productive meeting, you need to understand the role, responsibilities and motivation of the party you are meeting with.</p> <p>Develop a comprehensive "Engagement Strategy", including a list of relevant questions to ask.</p>
Complete Not Complete	Post-Event Action Plan	<p>Create Contact Maps. If you've met a Small Business Specialist or Contracting Officer for a specific Agency, conduct research and create a map of other contacts and opportunities that are affiliated with your contact.</p> <p>Develop a Follow-Up Plan. Your follow-up plan should include referencing your communication from the event and should be planned out from a timing, messaging and duration standpoint.</p> <p>Spend Your Time Wisely. Pay attention to which contacts are providing positive feedback and presenting the best opportunities for engagement and focus your time cultivating those relationships.</p>