

Elements of a Successful Small Business Brief

Presented By:

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Purpose of this Session

- ▶ To provide DoD Small Business Professionals with the basic elements in developing a successful small business briefs
- ▶ To share information with you in order to assist in creating dynamic, engaging, informative small business briefs
- ▶ Highlight the key elements for a successful small business brief for internal and external stakeholders

DEATH BY POWERPOINT



Understand Your Audience First!

- ▶ Internal Stakeholders
 - ▶ Senior Leaders
 - ▶ Program Managers/Contracting Officer Representatives
 - ▶ Contract Specialist/Contracting Officers
- ▶ External Stakeholders
 - ▶ Small Businesses
 - ▶ Large Businesses
 - ▶ Outside Organizations



ANALYSIS



UNDERSTANDING



DEMOGRAPHICS



INTEREST



ENVIRONMENT



NEEDS



CUSTOMIZED



EXPECTATIONS

-LENNY LASKOWSKI

Plan Your Delivery!

- ▶ Clear - Concise - Convincing
- ▶ Identify your key stakeholders
- ▶ Create a baseline
- ▶ Understand the level, needs, and concerns of the stakeholders
- ▶ Develop and deliver persuasive and/or informational content

INTERNAL STAKEHOLDERS

SENIOR LEADERS

Guidance-Format and Schedule of Briefings

- ▶ The Executive Assistant will arrange briefings
- ▶ A read-ahead is required for all briefings to senior leadership to provide information about the issues before the scheduled meeting
- ▶ Read-ahead summaries should be no longer than two pages
- ▶ Provide a read-ahead a minimum of 48 hours before the scheduled meeting to appropriate person
- ▶ Provide two color copies of all slides in the briefing
- ▶ Reference your agency guidelines for preferred content, style and format
- ▶ Informal guidance includes instructions to avoid the use of color for color's sake in briefing slides
- ▶ Keep briefings to black and white unless color serves a purpose
- ▶ Provide all hardcopy brief packets for all participants in the actual meeting

Pre-Brief Slides: Cover Page

- ▶ Cover page should include:
 - ▶ Department of the Army
 - ▶ Office of Small Business Programs Pre-Brief
 - ▶ Insert Title of Requirement: XXXXXXXX

- ▶ Pre-Brief To: Senior Leader Director, Small Business Programs
- ▶ Date: XXXXXXXX

- ▶ Presented by: (list name, title and office of individuals briefing)

Pre-Brief Slides: Agenda

- ▶ Agenda:

(Every brief is different, please add information you feel is important)

- ▶ Background/Information on requirement
- ▶ Market Research
- ▶ Current Contracts
- ▶ Structure of Requirement and Contract Type
- ▶ DD Form 2579
- ▶ Small Business Participation Factor
- ▶ Include how the subcontracting plan will be monitored and assurance of the submission of subcontracting reports in eSRS
- ▶ Source Selection Process and Role of the Small Business Specialist
- ▶ Metrics /Pictures (if you have any)
- ▶ Remaining pages include other details in the order as listed on the agenda

INTERNAL STAKEHOLDERS

PROGRAM MANAGERS

*CONTRACTING OFFICER
REPRESENTATIVES*

CONTRACTING WORKFORCE

Internal Stakeholders

Program Managers, Contracting Officer Representatives, Contracting Workforce

- ▶ Make it personal and relatable to the audience members
 - ▶ Ask: Do they know a small business owner? Have they ever patronized a small business?
- ▶ Start with the ABCs: Basic foundational overview of the federal small business programs
 - ▶ Small Business Act, FAR, DFARS
- ▶ Highlight the federal government's commitment to the success of small businesses
 - ▶ The Small Business Administration, prime and subcontract awards, small business innovation research awards
- ▶ High level overview of the socioeconomic programs

Internal Stakeholders

Program Managers, Contracting Officer Representatives, Contracting Workforce

- ▶ Share information - historically and currently on your agency/office's stellar small business programs and small business goal achievements.
 - ▶ FOCUS on the DOLLARS AWARDED!
 - ▶ Break out each socioeconomic category
- ▶ Emphasize the importance and value of your office and services you provide
 - ▶ Include the mission and vision statement for the office and your organizational structure
- ▶ Identify your role in the acquisition process
 - ▶ Acquisition planning, market research, solicitation, proposal evaluation, review subcontracting plan and evaluate small business participation plan, post-contract award, etc.
- ▶ Highlight your outreach and in-reach programs!
- ▶ Underscore you are a DoD employee and DO NOT WORK for the SBA!

Know Your Audience or You'll Have No Audience



EXTERNAL STAKEHOLDERS

INDUSTRY

External Stakeholders

Industry - Small and Large Businesses

- ▶ Provide information about your specific agency and what it purchases
- ▶ Emphasis why your agency and the federal government will always use small businesses
 - ▶ Highlight some notable facts small businesses have provided to the nation and economy
- ▶ Highlight the socioeconomic programs and indicate there is parity among the programs
- ▶ Present the various internal and external small business vehicles leveraged by your agency
- ▶ Identify your role in the acquisition process
 - ▶ Acquisition planning, market research, solicitation, proposal evaluation, review subcontracting plan and evaluate small business participation plan, post-contract award, etc.
- ▶ Highlight your outreach programs!

External Stakeholders

Industry - Small and Large Businesses

- ▶ Share information - historically and currently on your agency/office's stellar small business programs and small business goal achievements.
 - ▶ FOCUS on the DOLLARS AWARDED!
 - ▶ Break out each socioeconomic category
 - ▶ Include DOLLARS AWARDED in top NAICS codes
- ▶ Emphasize the importance and value of your office and services you provide to the agency
 - ▶ Include the mission and vision statement for the office and your organizational structure
 - ▶ Give directory and/or points of contact for small business professionals within your office
- ▶ Provide motivation, inspiration, and information about agency procurements
- ▶ Underscore you are a DoD employee and DO NOT WORK for the SBA!

EXTERNAL STAKEHOLDERS

SMALL BUSINESS CAPABILITY BRIEFINGS

External Stakeholders

Small Business Capability Briefings

- ▶ Provide each small business with a confirmation email that includes the following:
 - ▶ Amount of time for the briefing
 - ▶ Limit the amount of slides (no more than 12 slides)
 - ▶ The order of outline for the presentation slides
 - ▶ Include housekeeping information, ex. electronic and internet restrictions and security processes
 - ▶ Have companies provide hard copies of their presentation
- ▶ Utilize a one page vendor overview document
 - ▶ Company overview includes POC information
 - ▶ Current contracts & subcontracts
 - ▶ Capabilities including top NAICS code
 - ▶ Certifications

Company Name

Insert brief description of company



Insert capability narrative



NAICS Code	Small Business?	Primary?

Insert past performance, e.g.:

- Prime contracts
- Subcontracts



Insert certifications, e.g.:

- Small business certifications
- Security clearances
- Industry certifications (CMMI, etc.)

Where do you think your company can provide support?

Empty text box for providing support information.

HELPFUL HINTS

- ▶ Do not use Too Much Text or Too Small Font
- ▶ Emphasize the main points
- ▶ Use a large font...at least 30-point or more
- ▶ Avoid loud, garish colors...dark text on light background is best
- ▶ Avoid text colors that fade into background, i.e. blue and black
- ▶ Keep slides SIMPLE!

HELPFUL HINTS

- ▶ 1 or 2 pictures per slide is enough
- ▶ Avoid unnecessary animation and sound effects
- ▶ Check grammar and spelling!
- ▶ Test your presentation before you show it
- ▶ Be prepared to do the presentation without the PowerPoint
- ▶ Talk to your audience, not the slides- face them!
- ▶ Leave time for Q & A
- ▶ LESS IS MORE!

Chilean Exports

- Fresh fruit leads Chile's export mix - Chile emerges as a major supplier of fresh fruit to world market due to natural resources, climate, and for fresh fruit during winter season. Government's export promotion, and incentives, and policies of Chilean government have encouraged diversification and development of nontraditional exports. Source: FAO Research Service Report
- Chile is among the leading exporters of these trends, pursuing a free market economic policy through the expansion of fruit production for export to Western Europe. Chile has successfully diversified its export base to the extent that it is now a major fruit exporting nation. Many countries have taken note of agriculture as a model to be followed.
- Meanwhile, the United States has become a major market for Chile's fruit exports. However, increased competition from European countries combined with a decline in exports to the U.S. has led to further growth in Chile's exports.
- If you've read this text, your eyes probably hurt and you've probably been reading this tedious long-winded text instead of listening to me. I'm insulted that you see I'm doing a presentation up here. Look at me! Congratulations, however, on having such good eyesight.

Beginner Motorcycles



- Most popular favorite:
Harley-Davidson Heritage Softail
Weight (~380lbs)
Adequate power
(60hp engine)
Height fits
Most riders

Buying a New Suit

WOW

WOW



