

Government Contracting Checklist for Small Business

- Obtain DUNS number - <http://smallbusiness.dnb.com/>
- Identify NAICS codes - <http://www.census.gov/cgi-bin/sssd/naics/naicsrch>
- Registrations – SAM - <https://staging.sam.gov/portal/public/SAM/>
 - CCR – Central Contractor Registration
 - Dynamic Small Business search (DSBS)
 - ORCA – Online Representations and Certifications
- Bid Match Sign-up – Small Business PTAP Clients Only
- Certifications (as appropriate) – 8 (a), HUB Zone, Veteran Owned, Woman Owned
- Simplified Business Plan* Page 2
- Define Capabilities/Offerings
 - One-page Capability Statement/”Elevator Pitch”
 - Past Performance Portfolio
- Marketing
 - Market Target & Analysis
 - Marketing & Contact Plan
 - Effective Networking
- Training
 - Procurement Training
 - Proposal Writing

Creating a Simple Business Plan

Let's start with a simplified outline.

Section 1: Your Business

Talk about your business. Sometimes just doing a little explaining can help you clarify your ideas or even spot potential trouble.

1. Describe your business.
2. Tell about the market and competition.
3. What makes you unique or special?
4. What are your business goals? (*We'll talk more about setting good goals, later.*)
5. List special training and skills, or include your résumé.

Section 2: Financial Data

You don't need your accountant for this. Let's start with records you already have. Then we'll add some guesses about the future.

1. Include past tax returns for historical data.
2. Include a list of your business assets.
3. Create projections to reach your goals. (*Make sure that your projections really point you towards your goals, from above.*)

Section 3: Supporting Documents

Think about what helps set your credibility. That's what you want to include here.

1. Letters of reference.
2. Contracts, letters of intent, or other legal documents.
3. Certifications, etc.

Goals are the Basis of Plans

1. **Where are you now?** Be honest.
2. **Where do you want to be?** Set your goals.
3. **Plan backwards, step by step.** Look at the intermediate steps to lead you there.
4. **Find the steps you can take tomorrow.** Take action immediately! As soon as possible! There is always something you can do *now* to move you forward.

Setting Good Goals

You have probably heard the term "SMART" applied to setting goals. Let's go through my version of SMART.

- **Specific:** Not just "grow my business". Grow how? Broader product lines? More employees?
- **Measurable:** Set dollar and other measurable milestones.
- **Action:** Tell what specific actions you will take to reach the goal. Will you add new product? Work with a consultant? Hire a marketer? Spend more time?
- **Reachable:** Don't over-reach with goals. Dreams are great, but keep them separate from goals.
- **Time-bound:** Include deadlines, checkpoints and other ways to be sure that you are on schedule.

With a simplified business plan, you can evaluate where you are, where you are going and how you are doing