Overview
Even if you’ve been reviewing FedBizOpps opportunities for several years, there is value to learning the techniques and strategies of other professionals. The difference between an occupation and a job is that an occupation is “lifelong learning.” So for the experienced professionals, you may find something that adjusts your review process.

The following is a checklist / guide for helping sales professionals learn how to read, review, and evaluate an opportunity on FedBizOpps in order to decide if an opportunity is pre-qualified and should be qualified in detail and/or presented to management for engagement.

Step 1 – Initial Qualification Review (60 Seconds)
Once you understand these four steps, you’ll be able to complete step 1 in less than 60 seconds.

1. Verify NAICS Code. Located in the General Information Block on the bottom right of the page. If it’s not one of your NAICS codes, should it be? If it should, make sure you add it to your SAM profile (System for Award Management). If the NAICS code is clearly not viable for your company and it’s not one of your codes, more often than not it’s an immediate no-bid and move to the next opportunity.

2. Review “Posted” date and “Response” date. How many weeks do you have to put together pricing and/or proposal? Be very careful about thinking, “Wow, this is right up our alley no matter the timeline!” If you didn’t know about the opportunity prior, have no intelligence, and you have 72 hours to turn-in a proposal, how competitive do you really think you’re going to be? A large percentage of companies that engage these opportunities fail to win.

3. Review “Place of Performance.” Is it located within your region? If not, are you willing to perform the work anywhere in the country? This is a company decision. For Federal Access Members that sell services, you must ask yourself, “Can we be competitive with companies that are in the city where the RFP identifies place of performance?” Don’t automatically say no! This is a major reason why companies team!

4. Review “Set-Aside” classification. Classifications tell you if the contract is open to all companies, only small business, or a subset of small business which are called socio-economic statuses.
   a. Blank Full and Open – any company can bid
   b. Small Business Only small businesses can bid
   c. 8(a) Only certified 8(a) minority / socially disadvantaged small businesses can bid
   d. WOSB Only woman owned small businesses can bid
   e. VOSB Only veteran owned small businesses can bid
   f. SDVOSB Only Service Disabled Veteran Owned small businesses can bid
   g. HUBZone Only companies located in a Hubzone can bid
5. **Review “Notice Type.”**
   a. Sources Sought
   b. Pre-Solicitation
   c. Solicitation or Combined Synopsis & Solicitation
   d. Modification / Amendment / Cancel
   e. Special Notice
   f. Award Notice

6. **Review “Synopsis” on main page.**
   a. Synopsis may be the entire statement of work (no attachments).
   b. Synopsis may provide little information and you’ll have to review the statement of work at a later time.

7. **Decision Point**
   a. **Yes** – Interested and *Initially qualified.* → Move to Step 2.
   b. **No** – Not qualified. Find another opportunity.

**Step 2 – Detailed Review (10 Minutes – 2+ Hours)**

1. Review Synopsis Again:
   a. If extensive, print synopsis and read word for word.
   b. **Use a highlighter** to annotate requirements and specifications
   c. **Use a pen** to make notes in the margins

2. **Questions and Answers.**
   a. As you review, make notes of what questions you have. For example, if they are requesting a product with a specific brand name, are they willing to accept a different brand with the same specifications and functionality?
   b. Remember, government employees and contracting officers are no different than the rest of us. They can accidentally omit key information but *you’re the one that needs to price the solution.* For example, the statement of work says, “We need cameras in buildings 34 and 35.” That’s all you get. Do they have drawings? Are there cameras already in these buildings and is this an upgrade? Do they know how many cameras they need? If it’s really an upgrade, they have an existing system and you need to know what it is to identify if you can support it.” There’s no guarantee you’ll get an answer but don’t bid if you don’t have all the information you need.
c. Most government opportunities provide vendors with a formally identified period for questions and answers. Identify when you have to have your question turned-in to the government. If you’re late, they don’t have to answer you. Some contracting officers will answer your questions if you’re late but don’t count on it.

d. Warning – if the “Notice Type” is “Solicitation” or “Combined Synopsis and Solicitation” any questions you ask and the answers provided WILL BE provided to all bidders. So if you ask a question that involves strategy or positioning, you can give away your strategy and lose competitive advantage. So be careful and know if you’re in pre-acquisition (prior to RFP / RFQ release) or in acquisition (after RFP / RFQ is released). In pre-acquisition you can ask anything you want without fear the competition will see your questions. If it’s already in acquisition, your competition will see your questions and subsequent answers.

3. If there are attachments, there can be one (1) or twenty (20) or more. There is an order to which you want to review them so that if something disqualifies your company from bidding, you find it as early in your review process as possible. This maximizes your time and ensures you don’t waste it. Below is the order in which you want to review. Print out each one and use a highlighter to identify every requirement. Review in this order:

   a. Statement of Work (SOW) or Performance Work Statement (PWS)
   b. Question and Answers
   c. Request for Quote (RFQ) or Request for Proposal (RFP)
   d. Other Attachments and Amendments

4. Is there an incumbent?

   a. It’s sometimes difficult to figure this out. Sometimes, you can tell by reviewing the statement of work (SOW) or performance work statement PWS).
   b. Check the Federal Procurement Data System (FPDS) for prior contracts. If you’re not sure how to do this, Federal Access provides several how-to videos on using FPDS with step-by-step instructions.
   c. The government is risk adverse. They don’t like ‘changing horses mid-stream.’ If you read requirements that appear to be specifically written for a specific company or brand, you should strongly consider a no-bid and stop your review.

5. Will there be a “site visit” or “industry day?” If there is a site visit for a walk-through or an industry day, you are planning to prime and you cannot attend, you should almost always no-bid the opportunity. Why? Because something of value will come out of the industry day or walk-through that will provide competitive advantage to those that attended. That’s the way it works.

6. Before you make a decision, evaluate if teaming will successfully fill the gaps that may cause you to no-bid.
7. Decision Point
   a. **Yes** – Your company has the resources and expertise. \(\rightarrow\) Move to Step 3.
   b. **No** – Not qualified. Find another opportunity **OR** find a teaming partner, a prime to subcontract to.

### Step 3 – Can You Be Competitive?

1. Based on Steps 1 and 2, you should be able to tell if your company will be competitive. Consider the following items when answering “Are you competitive?”
   a. Past Performance. Have you performed similar work or sold similar products on the scale identified in the RFQ or RFP?
   b. Is there an incumbent?
   c. If there is a site visit or industry day? Can you attend it?
   d. Have you highlighted **every** requirement and verified you have the capability or can subcontract it?
   e. Pricing

2. Decision Point
   a. **Yes** – **Add To Pipeline** and Notify Management.
   b. **Maybe** – Discuss with Management.
   c. **No** – Not qualified. Find another opportunity **OR** find a Prime to subcontract to.

**Note.** The results of a detailed opportunity review will feed into your company’s bid – no bid process. In fact, the initial and detailed review of an opportunity is part of your bid – no bid process. Should we bid? Do we have enough intelligence to be competitive? The bid – no bid process should not be accomplished “off the top of your head.” Visit the Proposal Module in Federal Access for an example Bid – No Bid Qualification Worksheet.

### Step 4 – Initiate Capture and Proposal Process

**Closing Notes**

Every company operates differently. But every company has the challenge of managing time. Reviewing opportunities can take-up your entire day if you’re not focused. Many companies spend half of every day reviewing opportunities. Remember, reviewing an opportunity is primarily a two-step process.

- 60 Second Pre-Qualification
- Detailed Review to identify if it should go on the pipeline

Business developers with strong time management will often arrive at work, grab a cup of coffee, and spend no more than 30 to 45 minutes quickly pre-qualifying opportunities that arrived in their inbox overnight. Then they move onto other requirements.
Then later that afternoon, they’ll do a detailed review of the two or three opportunities that were pre-qualified in the morning. Perhaps only one or two of them will actually go on the pipeline. Perhaps none.

Every company is different.