Introduction

• How to find the right teaming partner
• Types of teaming relationships
• Introducing and talking about the team
• Pitfalls to avoid
• Questions
How to Find the Right Teaming Partner

• Like minded
• Like hearted
• Like philosophy

How Do I Win?

• Define what it takes to win
• Identify potential solution to be that winning team
• Define teaming partners

<table>
<thead>
<tr>
<th>What does it take to win?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program manager with 15 years experience and direct experience working with the customer</td>
</tr>
<tr>
<td>Designed and constructed 100,000 square foot Class A facilities in TN</td>
</tr>
</tbody>
</table>
S – W – O – T Analysis

• **Strengths**
  – Stronger than most competitors

• **Weaknesses**
  – Gaps or performance issues

• **Opportunities**
  – Competition's areas of weaknesses that you have

• **Threats**
  – Weaknesses that the competition will ghost

Strengths and Weaknesses

• Be realistic and hard
• Assess your team on its own merit, not comparing to your competitors
• Identify actions to retain the strengths or to enhance your position
• Identify actions to mitigate your weaknesses
Opportunities and Threats

- Opportunities – ghost your competition (point out their weaknesses while demonstrating your strengths)
  - How is your approach stronger, better, different…
  - What lessons learned have you applied
- Threats – how your competition will ghost you and highlight your weaknesses
  - Recognize your gaps and weaknesses
  - Talk to how you have mitigated the weaknesses
- Don’t be caught off-guard

What It Takes for You To Win

<table>
<thead>
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<th>What does it take to win?</th>
<th>What do I need to do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program manager with 15 years experience and direct experience working with the customer</td>
<td>Bid Joe Johnson who has 20 years experience management similar programs and has worked with the customer for the past 5 years – outstanding references.</td>
</tr>
<tr>
<td>Designed and constructed 100,000 square foot Class A facilities in TN</td>
<td>Identify a team partner who brings this capability</td>
</tr>
</tbody>
</table>
Identify Your Solution

- **Approach**
  - What is it you offer
  - How do you offer it
    - What does the schedule look like
  - What are the performance goals and objectives

- **Organization**
  - What does the program organization look like

- **Cost/Price**
  - Lowest price or best value
  - How do you get to that price

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Teaming

*Know Where Your Gaps Are*

- First step in understanding company’s ability to respond
- Provides a good perspective of full scope for opportunity
- Becomes the basis for “why this team”
- Key components include:
  - Scope
  - Project requirements
  - Personnel requirements
  - Other client requirements (e.g., financial status)
Teaming

Developing the Gap Analysis

- **Scope** requirements
  - Services
  - Products
  - Deliverables
  - Performance measures
  - Schedule
- **Project** requirements
  - Size, risk, complexity
  - Contract type
  - Scope
  - Performance
- **Personnel** requirements
  - Key positions
  - Years experience
  - Education
  - Certifications/licenses
  - Types of projects (see project requirements)
- **Other client** requirements
  - Bonding
  - Project/personnel references
  - Subcontracting
  - Financials

Filling the Gaps

- Identify companies with capabilities in the various areas
- Consider other client requirements:
  - Key personnel have worked together
  - Companies have worked together
  - Key personnel have performed on the reference projects
Filling the Gaps

• Add in other concerns/issues:
  – Financial stability
  – Past performance issues
  – Willingness to team

• Obtain proof to support analysis:
  – Dunn & Bradstreet reports
  – Federal government registration databases (e.g., Central Contractor Registration system or the U.S. Small Business Administration)

Filling the Gaps

• Teaming considerations:
  – Have you worked with that company before?
    • Where and how was the performance rated?
  – Has that company worked with other companies on matrix before?
    • Where and how was the performance rated?
  – Has that company worked with this client before?
    • How was the performance rated?
  – Does that company want to team?
Types of Teaming Relationships

• Reasons for teaming
  – To respond to all SOW elements
  – Strengthen quality and quantity of personnel and corporate experience
  – Long-term strategic partnerships/alliances
  – Client requirements (may specify stand alone legal entity)

• Types of teams:
  – Prime/sub
  – Joint venture or other newly formed legal entity

Determining Teaming Approach

Prime/Sub Relationships

• Approach
  – Integrated team – where subcontractor personnel are integrated into the organization
  – Designated subcontract – where subcontractor performs designated scope of work
  – Work best when prime meets most of the client requirements

• Benefits
  – Single point of accountability – both corporate and personnel
  – Ability to control subcontractor performance

• Issues
  – Potential to rely too heavily on a single subcontractor – may be perceived negatively by the client
  – Lack of accountability at subcontractor level
Determining Teaming Approach

**Newly Formed Entity**

- **Approach**
  - Several forms:
    - Partnership
    - Joint Venture
    - Limited liability corporation
  - Required by some clients for larger, more complex projects
- **Benefits**
  - Provides stand-alone entity for managing larger more complex projects
  - Allows for sharing of risk and reward among all partners
- **Issues**
  - May be perceived as lacking single point of accountability

Introducing and Talking About the Team

- Based on relationship
- Address the reasons why the team joined forces *(remember the gap analysis)*
- Draw from the best that both companies have to offer
- Talk to past performance in terms of:
  - “Team member Company ABC…”
  - “Company XYZ, our team subcontractor for…”
- Don’t hide behind the relationship –
  - Use it to your advantage
  - Ghost your competition by demonstrating your strengths
Introducing and Talking About the Team

• Past performance:
  – Acceptable for a procuring agency to consider the relevant experience and past performance of the individual joint venture members

• For formal joint ventures:
  – Include documentation on joint venture
  – Obtain SBA approval, if required, BEFORE submission

Pitfalls to Avoid

• Affiliation – one of the primary reasons for disqualifying a small business
  – Work with your SBA office
  – Have appropriate paperwork in place AND approved by SBA before submission
  – Clearly define roles and responsibilities
  – BEWARE of the ostensible subcontractor rule [13 CFR 121.103 (h)(4)]
    • Deemed affiliated if there is too much reliance on a single subcontractor
Pitfalls to Avoid

• Pricing
  – Fee structure – “fee on fee” and shared fee pools
• Financials
  – Financial status
  – Bonding capacity
  – Payment terms
• Roles and Responsibilities
• Organization

QUESTIONS?