GSA's Polaris Task Order Management

How to make the most out of the IT GWAC IDIQ of the decade.

Presented by:





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Key Takeaways Don't Miss Them!



- Proactive TO analysis will help you master Polaris!
- Why use data to drive your Polaris TO BNB decision?
- Which data and how to use it to get to the best bid decision
- A data equipped PMO and BD team makes it rain!

Our Sponsors



TRIDENT Proposal Management

- SDVOSB founded in 2008
- Specialize in Capture Management and Proposal Support
- Provide full-service Business Development, Capture, Proposal Operations & Management solutions, deliverables, and training for FedGov / DoD contractors.









Proposal Management and Writing



https://www.tridentproposals.com

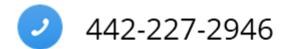
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A revolutionary business intelligence, capture, and proposal management solution within **one** secure, collaborative and customizable platform.

- Leading Edge Business Intelligence built on Artificial Intelligence
- Custom, intuitive platform providing structured business processes for collaboration and coordination, in an easy to use and stunning user interface
- Protecting your precious business intelligence and CUI in a DFARS/NIST SP 800-171 compliant, secure environment, hosted on the GovCloud.

TO LEARN MORE ABOUT C2P FEATURES CONTACT US DIRECTLY AT:





Our Speakers





Rebecca Wayland, Capture Management SME

- US Navy Surface Warfare Officer
- 8 years DoD Proposal Writing/Management
- FASTPROP Co-Author
- Trident GWAC Lead
- Market Research Team Lead



Our Speakers





Nelson Santini, Business Development Expert

- US Navy Submarine Force Officer
- 25+ Years of FedGov/DoD BD/Sales
- Over \$2B in IDIQ Sales
- Avid SOPS blogger



Our Speakers







Michelle Griggs, Product Manager

- Experienced in software support, business development and data analysis
- GovCon experience in Health & Defense sectors
 - Medicare/Medicaid Health Outcome & Spending Analysis
 - Marine Corps IT Portfolio Management
- Self-professed data geek

Agenda



- About Polaris a quick recap and update
- Why proactively manage Task Orders (TO) on Polaris?
- Which data and how to use it to get to the best bid decision
- Best practices to make the most of Polaris post award: PMO





Rebecca Wayland Capture SME

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Polaris GWAC IDIQ



- Still Pending Release
 - Anticipate SB and WOSB Pools being released together
 - HUBZone and SDVOSB to follow later in the year
- Once it's out...
 - Trident will host a webinar to summarize major and minor updates
 - GSA will host a webinar within 7 days to help orient offerors to the opportunity and submission portal

SURVEY!



What pool are you bidding on Polaris?

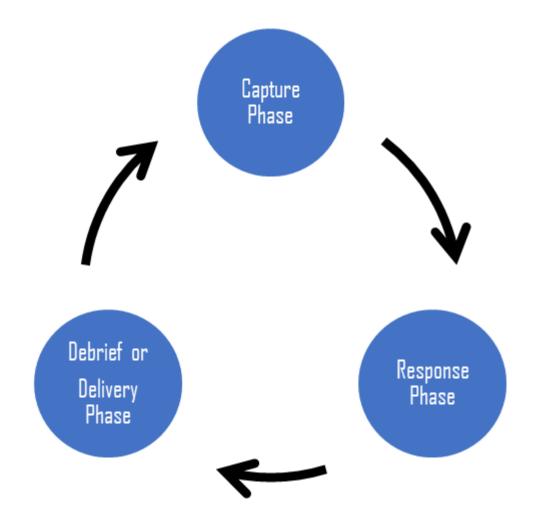
- a. WOSB
- b. SDVOSB
- c. HUBZone
- d. Small Business
- e. None. I just wanted to learn about TO management.

Select all that apply!

What is proactive TO management? (C2P)



The Rules of the Game



 Proactive TO management means generating, monitoring, and pursuing bids effectively and efficiently in a repeatable manner

Why manage TOs proactively? A Seat on Polaris is Just a License to Hunt..



- Competition at the TO level will be intense
 - Quick turnaround times
 - No additional set aside guarantees (Pool selection is OCO is discretion)
 - Price shootouts
 - Competing contract vehicles
- Getting to a "No Bid" early prevents you from wasting time and money
- Focusing your proposal efforts (and selling to customers with a known need) increases your pWin
- Tracking Wins/Losses/Passes builds awareness around critical gaps or chronic challenges
- Compiling lessons learned prevents future mistakes and helps identify best teams and relevant performance

How do you set yourself up for success? Every effort of your team counts...



Know Thyself

Don't try to bid on everything, don't bid on the unrealistic bluebirds

Know Your Customers

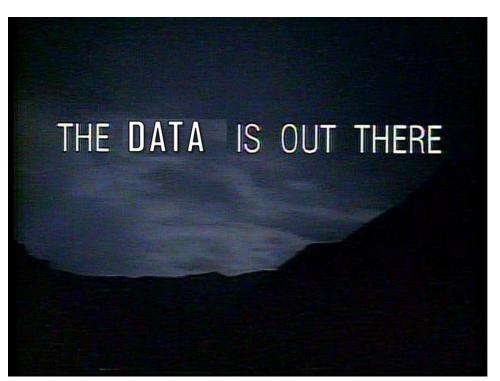
Know what they need and where they get it

Know Your Competition

• Who else is on the hunt?

Know Your Contract

How can your customers reach you?







Michelle Griggs Product Manager

www.capture2proposal.com

Which data, and how to use it Proactively pursue and BNB the best TOs



- Federal government spending on Information Technology continues to grow, with Biden's proposed FY2022 budget increasing agency-level IT-specific funding to even greater levels.
- Getting on the Polaris vehicle is an entry point. Winning task order awards is crucial once you're on it.
- Just like you can use data to make a Polaris BNB decision, it can also be used to help make the best decisions on which task orders are right for you.

SURVEY!



What research tools do you currently use?

- a. C2P
- b. Bloomberg
- c. Deltek
- d. SAM.gov
- e. None. I call on every PMs office (Old school)

Select all that apply!

What data to use in the BNB Know the customer and know the competition!



- Which government agencies are likely to buy their IT solutions using this vehicle?
- Which other government contractors are also likely to pursue this contract?
- How much competition can I expect on this task order?

During our last webinar, we said if you're looking for SDVOSB work, this isn't the vehicle for you. Thanks to updates from GSA, now it might be! We'll speculate on some differentiators between VETS 2 and Alliant 2 to determine what types of SDVOSB work may be available through Polaris.

How to get the data for TO/BNB



- FPDS spending data is often key to analyzing trends in the marketplace
- Use all the information you can gather from incumbent contracts, agency spend data, and Pre-Solicitation Documents to focus in on the most relevant factors for evaluation.
- Some key things to review:
 - Obligated funds determine actual spend, not ceiling values
 - The number of offers received is a great tool to understand levels of competition
 - With competition all within the same Set-Aside group for each pool, knowing where you provide the most value is even more crucial than ever

What data to use for Polaris

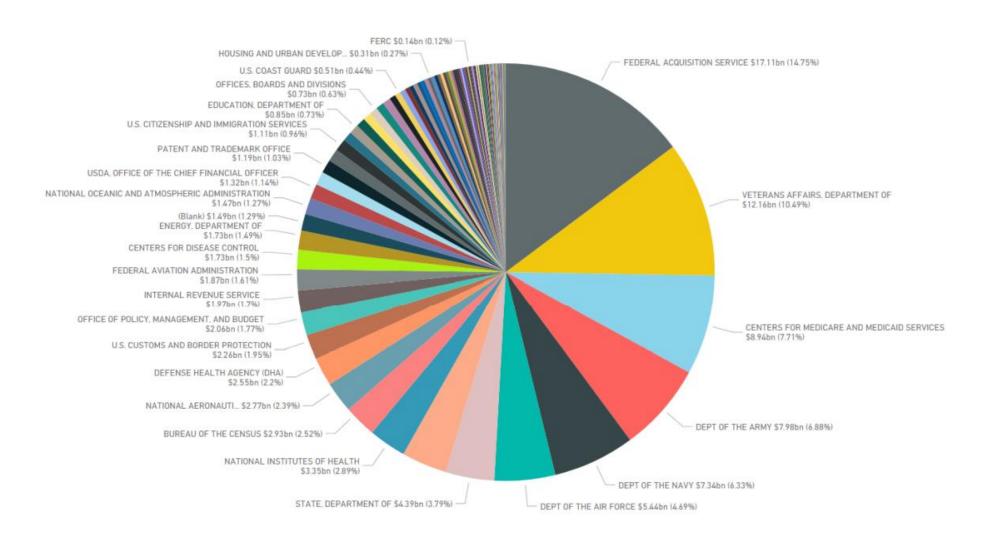


- Since Alliant 2 SB was cancelled, there is no current incumbent for Polaris in the SB arena. This means there is no feed of task orders from one vehicle to the next for this area. Still, the Alliant vehicles can be used to help understand the customer base and work scope.
- The WOSB, HubZone, and SDVOSB pools are all new pools in the offering, so looking at trends in spending in this domain and in these set-aside groups will be crucial as well as looking at historic data for Alliant.
- Use additional methods to slice and dice the data to find the work you're looking for, whether it be focused on the government customer, your teammates and/or competition, the number of bids on the incumbent, or any other factor. Then look to see where that work is being competed now, and if there is a path to move it to Polaris.

Customers, Competition & Set Asides - Some Data



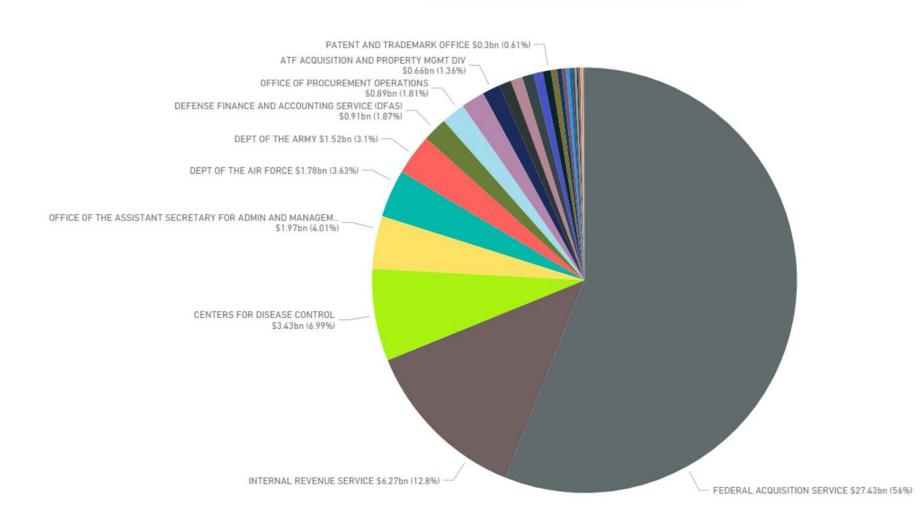
Funding by Contracting Agency for NAICS 541512 over the Past 5 Years

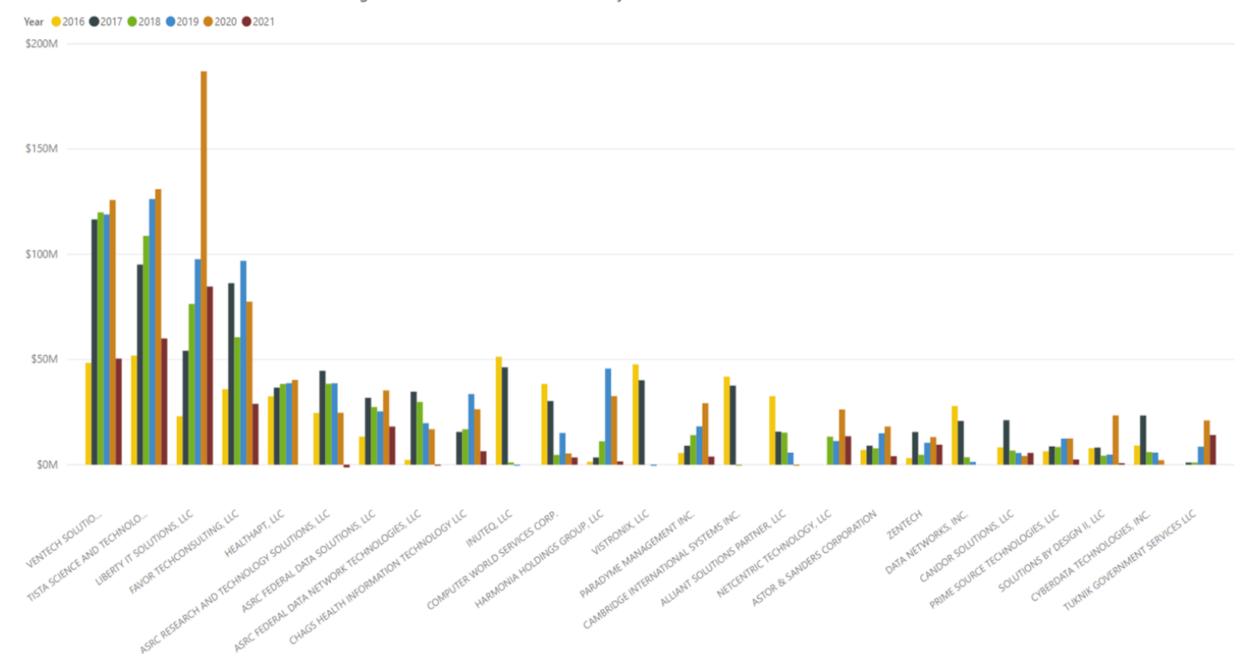


Customers, Competition & Set Asides - Some Data



Funding by Contracting Agency for Alliant 2 Unrestricted





Customers, Competition & Set Asides - Some Data



Work in NAICS 541512 over the last 5 Years Broken Down by Set Aside Type

Reported Set Aside	TypeOfSetAside	Funded Amount	% of Total
	NULL	\$270,295,059,994.38	48.93%
NO SET ASIDE USED.	NONE	\$195,668,540,195.33	35.42%
SMALL BUSINESS SET ASIDE - TOTAL	SBA	\$42,508,971,074.08	7.69%
8(A) SOLE SOURCE	8AN	\$14,016,015,175.23	2.54%
SERVICE DISABLED VETERAN OWNED SMALL BUSINESS SET-ASIDE	SDVOSBC	\$12,154,635,941.18	2.20%
8A COMPETED	8A	\$12,132,541,484.62	2.20%
HUBZONE SET-ASIDE	HZC	\$2,178,286,596.27	0.39%
WOMEN OWNED SMALL BUSINESS	WOSB	\$1,354,117,032.49	0.25%
SMALL BUSINESS SET ASIDE - PARTIAL	SBP	\$774,402,081.37	0.14%
SDVOSB SOLE SOURCE	SDVOSBS	\$523,432,829.91	0.09%
WOMEN OWNED SMALL BUSINESS SOLE SOURCE	WOSBSS	\$197,639,270.97	0.04%
VETERAN SET ASIDE	VSA	\$175,725,004.16	0.03%
ECONOMICALLY DISADVANTAGED WOMEN OWNED SMALL BUSINESS	EDWOSB	\$139,025,010.9	0.03%
HUBZONE SOLE SOURCE	HZS	\$117,705,670.59	0.02%
BUY INDIAN	BI	\$82,125,441.38	0.01%
INDIAN SMALL BUSINESS ECONOMIC ENTERPRISE	ISBEE	\$59,250,842.9	0.01%
ECONOMICALLY DISADVANTAGED WOMEN OWNED SMALL BUSINESS SOLE SOURCE	EDWOSBSS	\$17,086,002.82	0.00%
INDIAN ECONOMIC ENTERPRISE	IEE	\$16,368,675.75	0.00%
8(A) WITH HUB ZONE PREFERENCE	HS3	\$6,777,656.85	0.00%
VETERAN SOLE SOURCE	VSS	\$5,893,581.26	0.00%
HBCU OR MI SET-ASIDE PARTIAL	HMP	\$4,505,909.97	0.00%
EMERGING SMALL BUSINESS SET ASIDE	ESB	\$7,000	0.00%
Total		\$552,428,112,472.41	100.00%

Polaris SDVOSB Pool vs VETS 2 - Some Data



Product Service Codes with task order work in the Alliant 2 and VETS 2 GWACS

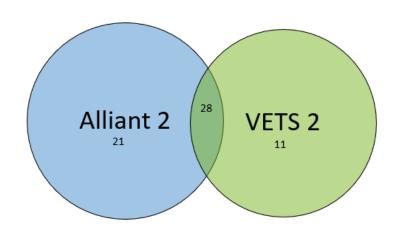


Both Alliant 2 and VETS 2	Alliant 2 Only	VETS 2 Only
7030 - ADP SOFTWARE	5895 - MISC COMMUNICATION EQ	7021 - ADP CENTRAL PROCESSING UNIT (CPU, COMPUTER), DIGITAL
7035 - ADP SUPPORT EQUIPMENT	7010 - ADPE SYSTEM CONFIGURATION	7042 - MINI AND MICRO COMPUTER CONTROL DEVICES
7A2O - IT AND TELECOM - APPLICATION DEVELOPMENT SOFTWARE (PERPETUAL LICENSE SOFTWARE)	7D20 - IT AND TELECOM - SERVICE DELIVERY MANAGEMENT (HARDWARE AND PERPETUAL LICENSE SOFTWARE)	7045 - ADP SUPPLIES
7A21 - IT AND TELECOM - BUSINESS APPLICATION SOFTWARE (PERPETUAL LICENSE SOFTWARE)	7E20 - IT AND TELECOM - END USER: HELP DESK; TIER 1-2, WORKSPACE, PRINT, PRODUCTIVITY TOOL (HW/PERPETUAL SW)	7520 - OFFICE DEVICES AND ACCESSORIES
D301 - IT AND TELECOM- FACILITY OPERATION AND MAINTENANCE	AC23 - R&D-MISSILE & SPACESYS-ADV DEV	AN73 - R&D-SPEC MED SVCS-ADV DEV
D302 - IT AND TELECOM-SYSTEMS DEVELOPMENT	AC25 - R&D- DEFENSE SYSTEM: MISSILE/SPACE SYSTEMS (OPERATIONAL SYSTEMS DEVELOPMENT)	D319 - IT AND TELECOM- ANNUAL SOFTWARE MAINTENANCE SERVICE PLANS
D305 - IT AND TELECOM-TELEPROCESSING, TIMESHARE, AND CLOUD COMPUTING	B550 - SPECIAL STUDIES/ANALYSIS- ORGANIZATION/ADMINISTRATIVE/PERSONNEL	D321 - IT AND TELECOM-HELP DESK
D306 - IT AND TELECOM-SYSTEMS ANALYSIS	D303 - IT AND TELECOM- DATA ENTRY	DC10 - IT AND TELECOM - DATA CENTER AS A SERVICE
D307 - IT AND TELECOM- IT STRATEGY AND ARCHITECTURE	D304 - ADP SVCS/TELECOMM & TRANSMISSION	DG11 - IT AND TELECOM - NETWORK - TELECOM ACCESS SERVICES
D308 - IT AND TELECOM- PROGRAMMING	D311-IT AND TELECOM-DATA CONVERSION	JO70 - MAINT/REPAIR/REBUILD OF EQUIPMENT- ADP EQUIPMENT/SOFTWARE/SUPPLIES/SUPPORT EQUIPMENT
D310 - IT AND TELECOM- CYBER SECURITY AND DATA BACKUP	D313 - IT AND TELECOM-COMPUTER AIDED DESIGN/COMPUTER AIDED MANUFACTURING (CAD/CAM)	R410 - SUPPORT- PROFESSIONAL: PROGRAM EVALUATION/REVIEW/DEVELOPMENT
D316-IT AND TELECOM-TELECOMMUNICATIONS NETWORK MANAGEMENT	D314-IT AND TELECOM-SYSTEM ACQUISITION SUPPORT	R413 - SUPPORT- PROFESSIONAL: SPECIFICATIONS DEVELOPMENT
D318 - IT AND TELECOM-INTEGRATED HARDWARE/SOFTWARE/SERVICES SOLUTIONS, PREDOMINANTLY SERVICES	D325 - IT AND TELECOM- DATA CENTERS AND STORAGE	R611 - SUPPORT- ADMINISTRATIVE: CREDIT REPORTING
D399 - IT AND TELECOM- OTHER IT AND TELECOMMUNICATIONS	DB01 - IT AND TELECOM - HIGH PERFORMANCE COMPUTING (HPC) SUPPORT SERVICES (LABOR)	U012 - EDUCATION/TRAINING- INFORMATION TECHNOLOGY/TELECOMMUNICATIONS TRAINING
DA01 - IT AND TELECOM - BUSINESS APPLICATION/APPLICATION DEVELOPMENT SUPPORT SERVICES (LABOR)	DB02 - IT AND TELECOM - COMPUTE SUPPORT SERVICES, NON-HPC (LABOR)	
DA10 - IT AND TELECOM - BUSINESS APPLICATION/APPLICATION DEVELOPMENT SOFTWARE AS A SERVICE	DB10 - IT AND TELECOM - COMPUTE AS A SERVICE: MAINFRAME/SERVERS	
DC01 - IT AND TELECOM - DATA CENTER SUPPORT SERVICES (LABOR)	DD01 - IT AND TELECOM - SERVICE DELIVERY SUPPORT SERVICES: ITSM, OPERATIONS CENTER, PROJECT/PM (LABOR)	
DE01 - IT AND TELECOM - END USER: HELP DESK; TIER1-2, WORKSPACE, PRINT, PRODUCTIVITY TOOLS (LABOR)	DK10 - IT AND TELECOM - STORAGE AS A SERVICE	
DE10 - IT AND TELECOM - END USER AS A SERVICE: HELP DESK; TIER 1-2, WORKSPACE, PRINT, PRODUCTIVITY TOOLS	R415 - SUPPORT- PROFESSIONAL: TECHNOLOGY SHARING/UTILIZATION	
DF01 - IT AND TELECOM - IT MANAGEMENT SUPPORT SERVICES (LABOR)	R608 - SUPPORT- ADMINISTRATIVE: TRANSLATION AND INTERPRETING	
DF10 - IT AND TELECOM - IT MANAGEMENT AS A SERVICE	R612 - SUPPORT- ADMINISTRATIVE: INFORMATION RETRIEVAL	
DG01 - IT AND TELECOM - NETWORK SUPPORT SERVICES (LABOR)	R704 - SUPPORT- MANAGEMENT: AUDITING	
DH01 - IT AND TELECOM - PLATFORM SUPPORT SERVICES: DATABASE, MAINFRAME, MIDDLEWARE (LABOR)	S119 - UTILITIES- OTHER	
DH10 - IT AND TELECOM - PLATFORM AS A SERVICE: DATABASE, MAINFRAME, MIDDLEWARE	Z2BC - REPAIR OR ALTERATION OF RADAR AND NAVIGATIONAL FACILITIES	
DJ01 - IT AND TELECOM - SECURITY AND COMPLIANCE SUPPORT SERVICES (LABOR)		
DJ10 - IT AND TELECOM - SECURITY AND COMPLIANCE AS A SERVICE		
R408 - SUPPORT- PROFESSIONAL: PROGRAM MANAGEMENT/SUPPORT		
R412 - SUPPORT- PROFESSIONAL: SIMULATION		
R425 - ENGINEERING AND TECHNICAL SERVICES		
R499 - SUPPORT- PROFESSIONAL: OTHER		
R699 - SUPPORT- ADMINISTRATIVE: OTHER		
R706 - SUPPORT- MANAGEMENT: LOGISTICS SUPPORT		
R799 - SUPPORT- MANAGEMENT: OTHER		

Polaris SDVOSB Pool vs VETS 2 - Some Data



Contracting Offices with task order work in the Alliant 2 and VETS 2 GWACS



Both Alliant 2 and VETS 2	Alliant 2 Only	VETS 2 Only
USDA, OFFICE OF THE CHIEF FINANCIAL OFFICER	OFFICE OF POLICY, MANAGEMENT, AND BUDGET	EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF THE SECRETARY	OFFICE OF THE INSPECTOR GENERAL	FOOD AND NUTRITION SERVICE
NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION	FEDERAL PRISON SYSTEM	BUREAU OF RECLAMATION
NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOGY	ATF ACQUISITION AND PROPERTY MGMT DIV	OFFICE OF SURFACE MINING, RECLAMATION AND ENFORCEMENT
PATENT AND TRADEMARK OFFICE	STATE, DEPARTMENT OF	U.S. MARSHALS SERVICE
OFFICES, BOARDS AND DIVISIONS	BUREAU OF ENGRAVING AND PRINTING	OFFICE OF PERSONNEL MANAGEMENT
OFFICE OF THE ASSISTANT SECRETARY FOR ADMIN AND MANAGEMENT	OFFICE OF THE COMPTROLLER OF THE CURRENCY	VETERANS AFFAIRS, DEPARTMENT OF
DEPT OF THE NAVY	FEDERAL COMMUNICATIONS COMMISSION	SMALL BUSINESS ADMINISTRATION
BUREAU OF THE FISCAL SERVICE	EQUAL EMPLOYMENT OPPORTUNITY COMMISSION	INDIAN HEALTH SERVICE
INTERNAL REVENUE SERVICE	RAILROAD RETIREMENT BOARD	ENERGY, DEPARTMENT OF
DEPT OF THE ARMY	FEDERAL AVIATION ADMINISTRATION	DEFENSE HUMAN RESOURCES ACTIVITY
FEDERAL ACQUISITION SERVICE	FEDERAL RAILROAD ADMINISTRATION	
OFFICE OF ADMINISTRATIVE SERVICES	CENTERS FOR DISEASE CONTROL	
NATIONAL SCIENCE FOUNDATION	NULL	
DEPT OF THE AIR FORCE	HOUSING AND URBAN DEVELOPMENT, DEPARTMENT OF	
OFFICE OF PROCUREMENT OPERATIONS	THE COUNCIL OF THE INSPECTORS GENERAL ON INTEGRITY AND EFFICIENCY	
U.S. CITIZENSHIP AND IMMIGRATION SERVICES	USTRANSCOM	
OFFICE OF THE INSPECTOR GENERAL	DEFENSE SECURITY SERVICE	
U.S. COAST GUARD	DEFENSE FINANCE AND ACCOUNTING SERVICE (DFAS)	
U.S. SECRET SERVICE	DEFENSE MEDIA ACTIVITY (DMA)	
U.S. IMMIGRATION AND CUSTOMS ENFORCEMENT	U.S. SPECIAL OPERATIONS COMMAND (USSOCOM)	
TRANSPORTATION SECURITY ADMINISTRATION		
U.S. CUSTOMS AND BORDER PROTECTION		
FEDERAL EMERGENCY MANAGEMENT AGENCY		
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION		
DEFENSE INFORMATION SYSTEMS AGENCY (DISA)		
DEFENSE HEALTH AGENCY (DHA)		
WASHINGTON HEADQUARTERS SERVICES (WHS)		





Nelson Santini

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SURVEY!



Do you have a PMO to maximize your IDIQ business?

- a. Yes
- b. No
- c. What is a PMO (Program Management Office)?

Select one answer!

Seed your PMO Prepare for Work after the Win



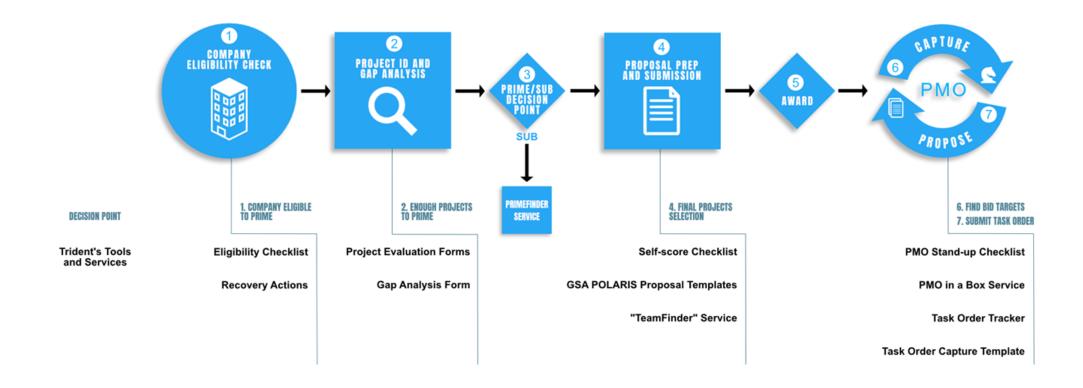
- Qualifying for Polaris is just the start
- Need to make the most of your BD/Proposal Teams
- Failing to bid -> off-ramp -> negative reputation with KO
- Must stay ahead of Task Order waves
- Stay away from duds!

But how?

Follow a Process!



TRIDENT'S GWAC/IDIQ PROVEN PROCESS



SURVEY!



Which of these is your greatest obstacle in maximizing IDIQ business?

- a. Identifying/tracking opportunities and task orders to respond to
- b. Too busy to write/manage proposal responses
- c. Submitting competitive proposals and/or actually winning work
- d. Steering customers to use the contract vehicle(s)
- e. None, we're pretty good at this

Select all that apply!

An effective PMO will keep you in the game by...



- Conducting effective capture/shaping through customer engagement to identify, watch, and/or generate the "right' task orders to respond to
- Planning or allocating resources efficiently so you know when you'll need to engage outside help with writing/managing proposal responses
- Tracking the reasons you pass on bids and analyzing trends
- Tracking the lessons learned from responses (losses AND wins) so that you don't repeat errors
- Submitting competitive proposals and actually winning work
- Steering customers to use the contract vehicle(s)



Capture2Proposal – High-Level Capabilities





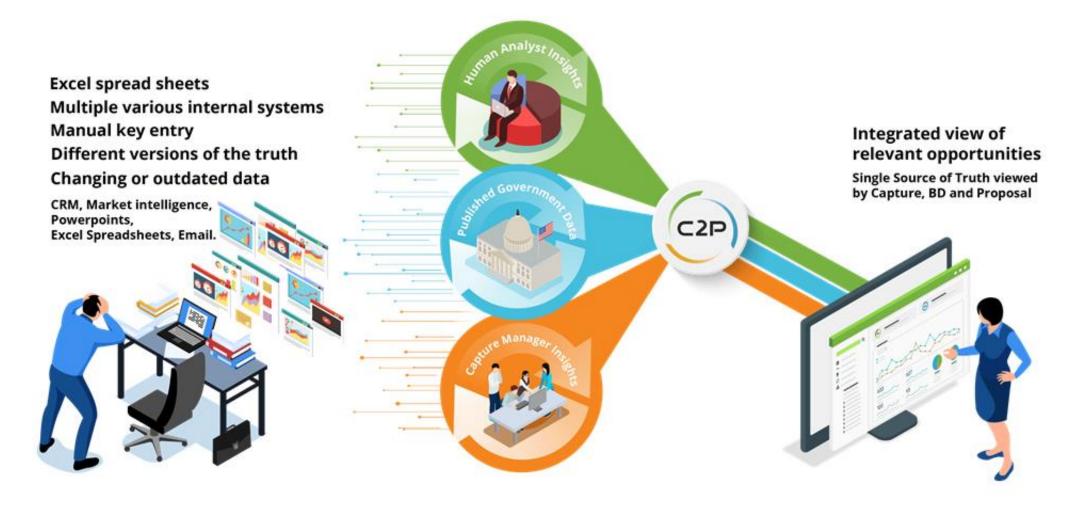
- Industry-Leading Federal and State/Local Intelligence
- Pertinent Opportunity Discovery
- Customized to Your Business Development Process
- Activity Tracking and Contacts Rolodex
- Effective Scheduling and Data Call Management
- Powerful Proposal Repository Search Tool
- Task Order Integration
- Industry-Leading Analytics Designed for Capture
- Contract Vehicle Analytics
- Incumbent Contractor Performance
- Incumbent Contractor Location Work Share Analytics
- Secure Document Management for Proposal Teams
- Invite, assign roles, and manage your proposal teams' access to C2P's DFARS/NIST SP 800-171 compliant proposal repository with ease.

Business intelligence, capture, and proposal management solution within one secure, collaborative and customizable platform.

Why BD Teams Need an Integrated Tool Set

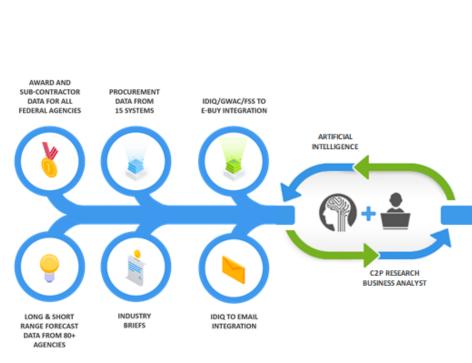
C2P)

Manage the Opportunity Lifecycle



Identify Opportunities from All Sources in One Place





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Task Order Request Automation



GovAl™ extracts information, such as scope, acquisition dates, set asides, and more from email and attached documents.



When you win Polaris...



What is your plan to "own" the Task Orders when you get your seat?

- Having a plan "on award" will put you ahead of others
- Staffing a PMO (W2/1099) pays for itself!!
- Staying ahead of the TOs is KEY to build your reputation with KO

Don't be caught on your heels. Leaning forward is your competitive advantage.







Questions on new content?

First - Still time to bid Polaris

Our Support Options



Third Party Compliance Check

\$4,750

Professional Support to Determine Eligibility, Prime, Sub, or No Bid Decision

- Review all of Volume 2 and Volume 3 documentation
- Complete your compliance and scoring matrix for Polaris within 2 business days
- Deliver a gap assessment with remedial recommendations
- Debrief with your capture and proposal team to discuss our findings and recommendations for improvement

Done for You Proposal Support

\$29,750

Professional Support to Complete the Proposal

- Complete your compliance and scoring matrix for Polaris, and guide you through an initial "Bid/No-Bid Evaluation"
- Help your team collect, organize, and prepare all materials required to complete your submission
- Perform a detailed review of your proposal and substantiating documentation to ensure compliance
- Monitor Q&A and Amendments to recommend updates or adjustments throughout the proposal response period
- Conduct a final quality check prior to submission

Only 2 packages left!

Meet with us!



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