

## Phone Script Outline for Contracting Officers

- I. Introduction
  - a. A brief exchange of pleasantries and personal/business level introductions. Business name, Professional Title within organization, Purpose of Call.
- II. Company Info - Explain your company and what you offer.
- III. Product/Service Info Details
  - a. Give a brief description of products and/or service relevant to the discussion or bid that you are discussing.
  - b. Give an idea of what differentiates you from your competitors and why you should be considered over your competitors.
- IV. References/Past Performance
  - a. Go over your most relevant and current contracts, product sales, or services that you have offered and completed that highlight your differences and practices that make your entity stand out from your competitors in the same product/service categories.
- V. What is the Contracting Officer or Purchasing Agents Needs at this time or in the near future?
  - a. Find out the products and/or services that they currently procure through vendors through bids or contracts.
  - b. Find out if they have upcoming product/service needs, expiring contracts up for competitive bidding, or other new contracts that will be issued within the near future.
  - c. Ask about any current areas where they feel they could get a better price, performance, or relationship with an existing vendor that you can do better.
- VI. How does this Contracting Officer or division currently procure their needs?
  - a. Find out how they are fulfilling their product/service needs at this time. What contracting methods, and what vendors they are working with.
  - b. Find out if they are going through Open Bidding, or another Contract method. See if they are using their current method due to price, timeliness, or other reasons. See if you can offer these better than the vendor they are utilizing currently. This is all public information so they must reveal whom they are working with, and the pricing per the transparency in contracting acts in place at the Federal and State levels.
- VII. Ask what is the Forecast for your needs concerning my products/services? Do you have any long term contracts that are due to expire?
  - a. Before you start selling you need to find out if they have any upcoming needs that you can use to “get your foot in the door”. This is where you can inquire about long term contracts, and any immediate needs they may have available for direct purchase order, or Simplified Acquisition Processing (SAP) rather than the full bid proposal process.
- VIII. This is How my Entity can Assist you Better
  - a. This is where you sell your differentiators from your competitor and how you can do it better. This is where you sell your entity to them directly. Let them know why they need to use your company and how it can save them cost, time, and quality. Let them know the benefits of using your entity over their current contractor, or competitors in the near future.

## Contracting Officer Phone Script

Hello, my name is [First & Last Name] from [Company Name] - How are you today?

I'm contacting you today to introduce [Company Name]. We're a certified [Ex. WOSB, GSA Schedule Holder, Small Business] that's interested in doing business with your agency. We primarily provide services procured under (NAICS code/SIN/Schedule XXX). From my research

I see that you have procured services under this/these [NAICS code/SIN/Schedule XXX] - Is that correct?

Well, we've been in business since [XXXX], and we're located in [City/State]. We would be honored to work with your agency and help fulfill your contracting needs.

Do you have a few minutes to talk today, or would it best if we scheduled time for another day?

*(Do not have time now)* - Ok no problem, if you're able to check your calendar I would be happy to schedule another time that is more convenient for you. Also, in the meantime I'll send over my capabilities statement and a link to my website in case you have time to look into us prior to our next conversation.

*(Yes, they have time now)* - Ok great, if you would like I can give you a quick overview of who we are and what we do. Then we can discuss your agency and some of the immediate and ongoing needs that you may have. Does that sound like a plan?

[Give a brief description of products/service relevant to the discussion or bid that you're discussing.]

[Explain what differentiates you from your competitors and why you should be considered.]

[Explain your most relevant and current contracts, product sales, or services that you have offered and completed that highlight your differences and practices that make your entity stand out from your competitors in the same product/service categories.]

After your brief explanation see how the conversation goes. Either the Contracting Officers will take control of the conversation, or you can start to ask questions to determine the following –

- What is the Contracting Officer or Purchasing Agents Needs currently or in the near future?
- Find out the products and/or services that they currently procure through vendors through bids or contracts.
- Find out if they have upcoming product/service needs, expiring contracts up for competitive bidding, or other new contracts that will be issued within the near future.
- Ask about any current areas where they feel they could get a better price, performance, or relationship with an existing vendor that you can do better.
- How does this Contracting Officer or division currently procure their needs?
- Find out if they are going through Open Bidding, or another Contract method.
- See if they're using their current method due to price, timeliness, or other reasons.

Based on the conversation determine how this relationship is going to proceed. Are you sending over your capabilities statement, submitting a bid on an expiring contract, providing references, etc.?

Let them know why they need to use your company and how you can help with cost, time, and quality. Let them know the benefits of using your entity over their current contractor, or competitors in the near future.