

Phone Script Outline for SADBUs/OSDBU Contacts

- I. Introduction
 - a. A brief exchange of pleasantries and personal/business level introductions. Business name, Professional Title within organization, Designated Socio-economic status, Purpose of Call.
- II. Company Info - Explain your company, certifications you hold and what you offer.
- III. Product/Service Info Details
 - a. Provide a brief description of products and/or services you offer.
 - b. Explain what (Socioeconomic Status) differentiates you from your competitors and why you should be considered.
- 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. Discuss how the SADBUs at the department/agency can help your business.
 - a. Determine if they are helping with sub to prime opportunities.
 - b. Find out if they have upcoming product/service needs, expiring contracts up for re-compete, or other new contracts designated for set asides.
 - c. Determine if they have upcoming events you can attend to meet contacts for contract opportunities.
- VI. What additional services are provided by this department/agency?
 - a. Calendar Events
 - b. Webinars
- VII. 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 subcontractor they are utilizing currently.
- VIII. Ask what is the Forecast for your needs concerning my products/services? Do you have any long-term contracts that are due to expire?
- IX. Subcontracting Opportunities
 - a. Discuss Small Business Subcontracting Plans
 - b. Commercial vs. Individual Plans
 - c. Subcontracting Goals
 - d. Subcontracting Plan Templates
 - e. Reporting Requirements

Phone Script for SABDU/OSDBU

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] and we're currently pursuing subcontracting and Set-aside bidding opportunities nationwide/ in [State].

We primarily provide services procured under [NAICS code/SIN/Schedule XXX], and from my research I see that you are the [small business contact] - Is that correct?

Well, as I mentioned, we are certified as a [Certification], and from my understanding you can help me understand the benefits and help that is provided by your department/agency for small businesses like mine?

We have open interest in Government and commercial teaming and/or subcontracting opportunities, and I would really appreciate if I could schedule a call or in person meeting with you to learn more about how we can become part of your support system, or subcontracting team. 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 research 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 some of your immediate and ongoing needs. Does that sound like a plan?

- Provide a brief description of your business and/or award history.
- Provide a brief description of your products/service relevant to their department/agency.
- Explain what differentiates you from your competitors and why you should be considered for contracts and sub to prime opportunities.
- After your brief explanation see how the conversation goes. Either the Contact will take control of the conversation, or you can start to ask questions to determine the following –
 - Determine if they are helping with sub to prime opportunities.
 - Find out if they have upcoming product/service needs, expiring contracts for re-compete, or new contracts designated for set-asides.
 - Determine if they have upcoming events you can attend to meet contacts for contract opportunities.
- What additional services are provided by this department/agency?
- Calendar Events
- Webinars

Based on the conversation determine how this relationship is going to proceed. Are you sending over your capabilities statement, 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 subs.