Federal Procurement Data Reports Inc.

THE FEDPLAN WORKBOOK

My Personal, Step by Step Plan to Help You Win Federal Contracts

PREPARED FOR

Company Name: _____

Date: _____

Prepared For You, Personally, By

Gregory M. James, CEO

Federal Procurement Data Reports, Inc.

myfpdr.com

linkedin.com/in/gregorymjames

Table of Contents

About Your Guide: Why I'm Qualified to Help You **3**

Introduction: Why I Built This For You **5**

1. Registration Profiles **6**

1.1 SAM Registration Profile 6

1.2 SBA Profile 7

1.3 Capability Statement 9

1.3.1 Capability Statement Guide 11

2. Procurement Data Report/Leads Profile **12**

3. Contract Opportunities **14**

4. Ask for a Debrief **17**

Appendix A: Procurement Data Report/Leads 18

Appendix B: Key Websites 20

Why Working With a Guide Gets You There Faster **22**

Ready to Win More Federal Contracts? **23**

© Federal Procurement Data Reports, Inc.

About Your Guide



This is the kind of conversation I want to have with you, one-on-one, about your company, not a canned pitch.

Hi, I'm Gregory M. James, CEO of Federal Procurement Data Reports, Inc.

With over 30 years in the industry, I've helped small businesses like yours find the federal agencies already buying what they sell, reach the right decision-makers, and turn that into awarded contracts. My time running a Department of Defense-backed procurement center and my work with the U.S. Department of Commerce are simply why I can get you there faster.

Learn more at myfpdr.com.

Here's What This Means for You

- I'll show you exactly which federal agencies already buy what you sell, not a generic list, your list.
- I'll help you get your SAM, SBA, and capability statement profiles consistent and accurate, so you look credible the moment a contracting officer checks.
- I'll work with you directly on your capability statement so it actually gets read instead of ignored.
- I'll give you a realistic, milestone-based plan for moving from registered vendor to awarded contractor.
- I'll be honest with you about the barriers, the sales cycle, the regulations, the paperwork, because I've helped companies push through every one of them.

© Federal Procurement Data Reports, Inc.

Let's Talk About Your Company

Every federal market looks different up close, and the fastest way for me to get you clarity on yours is a direct conversation. Connect with me on LinkedIn to ask me specific questions about your company's federal opportunity, or visit myfpdr.com and let's schedule a one-on-one consultation.

→ Connect & Schedule a Consultation ←

linkedin.com/in/gregorymjames
myfpdr.com

Gregory M. James | CEO | Federal Procurement Data Reports, Inc.

© Federal Procurement Data Reports, Inc.

Introduction: Why I Built This For You

I built this workbook to help you understand the complexities of doing business with government entities. By the time you finish it, you and I will have worked through the answers to these questions together:

- Does the government buy my company's products or services?
- How much does the government buy?
- Who makes the buying decision?



This is you, a few weeks from now, reviewing your own procurement data with a clear plan in hand.

This workbook helps you update your registration profiles, identify target agencies for potential business opportunities, and search for contract opportunities. It also includes required homework assignments, because reading about federal contracting and actually doing the steps are two very different things.

I'll give you a procurement data report and contracting leads to insert into your Procurement Data/Leads Profile. See Appendix A.

© Federal Procurement Data Reports, Inc.

1. Registration Profiles

The goal of this section is to make sure the information in your SAM registration, SBA profile, capability statement, LinkedIn, and other social media platforms is consistent and accurate. A contracting officer who finds three different versions of your company online won't trust any of them.

1.1 SAM Registration Profile

Assignment: Submit your revised SAM registration for review.

Don't forget to click the SAM Search Authorization and the SBA Supplemental Page to make sure your SBA profile is updated.

Steps

1. Sign in to Login.gov.
2. Click on the Search tab.
3. Click on Entity Information.
4. Enter the CAGE Code in the search box.
5. Click on the company name.
6. Click the Action button, then download the PDF version of the company registration.

Use the form below to evaluate the SAM registration.

Section	Status
Legal Company Name	
CAGE/NCAGE	
Expiration Date	
Business Types	
Entity Start Date	
Socio-Economic Types	
Accepts Credit Card Payments	
Points of Contact	
Doing Business As	
NAICS Codes	
Product and Service Codes	

© Federal Procurement Data Reports, Inc.

Section	Status
Notes	

Submit the revised SAM Registration to: gregory@myfpdr.com

1.2 SBA Profile

Steps

7. Click on Small Business Search.
8. Go to the Quick Search box and enter the company name.
9. Select the company name and click on it.
10. Evaluate the profile and correct it as soon as possible.
11. Review How to Update Your DSBS and use secure.login.gov.

Use the form below to evaluate the SBA Profile.

Section	Status
Company Name	
Capabilities Statement Link	
Trade Name/Doing Business As	
E-mail Address with Company Domain Name	
E-Commerce Website	
Contact Person	
Address	
CAGE Code	
Year Established	
Accepts Government Credit Card?	
GSA Advantage Contract(s)	
Ownership and Self-Certifications	
SBA Federal Certifications	
Non-Federal Certifications	
Capabilities Narrative	
Special Equipment/Materials	

© Federal Procurement Data Reports, Inc.

Section	Status
Bonding Levels	
NAICS Codes	
PSC Codes	
Keywords	
Quality Assurance Standards	
Export Profile (Trade Mission Online)	
Past Performance References with Contact Information	

Submit the revised SBA Profile to: gregory@myfpdr.com

© Federal Procurement Data Reports, Inc.

1.3 Capability Statement

Use the form below to evaluate and update your capability statement.

A. Core Competencies

What is your niche in the marketplace?

B. Capacity

Describe your ability to manage projects. Consider the following:

- What equipment do you have?
- What is your staff size?
- How do you finance your projects? How do you mitigate risk?
- Who are your teaming partners?

C. Past Performance

How well did you perform on similar projects?

- Period of Performance / Contract Number
- Contracting Office/Government or Prime Contractor
- Contract Award/Completion Date / Dollar Value
- Type of Contract

D. Past Experience

Identify two projects, with references, that are similar to your target agency project.

E. Cybersecurity Policy

Review and provide the following, if applicable:

- Compliance with FAR 52.204-7012, NIST SP 800-171 Questionnaire, Plan of Action and Milestones, System Security Plan
- Incident Response Plan and Reporting, Subcontractor Flow-Down Requirements

Company Information

Unique Entity ID: _____

Cage Code: _____

Website: _____

LinkedIn Address (Optional/recommended): _

YouTube Presentation (Optional/recommended): _____

Primary NAICS: _____

Primary PSC: _____

Year Business Started: _____

Socio-Economic Certification: _____

Bonding/Insurance: _____

Quality Control Plan: _____

Contract Vehicles: _____

Business Certifications: _____

Accepts Credit Cards: _____

Office Locations: _____

Contact Name: _____

Email: _____

Phone Number: _____

Company Logo:

Submit the revised Capability Statement to: gregory@myfpdr.com

© Federal Procurement Data Reports, Inc.

1.3.1 Capability Statement Guide

A. Format Requirements

- Title the document Capability Statement.
- Include the company logo in color.
- Include the primary address, telephone number, fax number, email address, and website.
- Keep the capability statement to one page, one side. Use the back side only if necessary.
- Keep the file size under 1MB.
- Tailor the capability statement to the specific agency, prime contractor, or opportunity.
- Use short sentences, keywords, and a full-page layout.
- Let readers know they may visit your company website for more detailed information.

B. Past Performance vs. Experience

> **A Distinction Worth Getting Right**
>
> "There is an important distinction between a contractor's experience and its past performance. Experience reflects whether contractors have performed similar work in the past. Past performance, on the other hand, describes how well contractors performed the work, in other words, how well they executed what was promised in the proposal. Experience can be considered a source selection factor or subfactor. Both experience as a factor or subfactor and past performance should be evaluated under performance risk."

Submit the revised Capability Statement to: gregory@myfpdr.com

© Federal Procurement Data Reports, Inc.

2. Procurement Data Report/Leads Profile

Complete this section using the procurement data report handouts I'll prepare for you. Fill in the blanks below.

NAICS Spending

NAICS	Dollar Amount
	$
	$

Top Five Agencies

Agency Name	Sub-Agency	FY2025 Spending

Award Types

Award Type	FY 2025
Delivery Order	
Definitive Contract	
Purchase Order	
BPA Call	
Other	

Top Competitors

© Federal Procurement Data Reports, Inc.

Competitor Name	Notes

Target Agency

Select the agency you want to do business with.

Agency Name	Contact	Email	Phone Number

Contracting Offices Leads

Office Name	Contact	Email	Phone Number

Note: Leads can be captured from the contact information at the bottom of each notice in SAM.gov Contract Opportunities. Insert your NAICS code and review all applicable notices.

© Federal Procurement Data Reports, Inc.

3. Contract Opportunities

When government agencies need to buy goods and services, they issue a synopsis notice on SAM.gov and on their own websites. Types of synopsis notices include:

- Request for Information (RFI)
- Sources Sought Notice (SSN)
- Request for Quote (RFQ)
- Request for Proposals (RFP)

Steps for Searching Contract Opportunities

12. Sign in through secure.login.gov.
13. Register the company in SAM.gov.
14. Select Search in the header menu, then select Contracting in the domain header.
15. Select Contracting on the home page, then select Contract Opportunities under Select Domain. You can enter keywords or a Notice ID in the search bar. For additional filter options, select Advanced Search.

Search Filters

Keyword Search

Enter a keyword or phrase for the type of contracts you want to locate, such as light bulbs, construction, or another relevant term.

Federal Organizations

Enter the code or name for the federal organization you want to search. For example, you may enter General Services Administration or 047.

Select the (...) icon located next to the federal organization search bar to expand the filter and search by sub-tier within a department or independent agency. You can select multiple federal organizations to see results from all selected organizations in one search.

Dates

Filter by either the response date/date offers are due or by the updated date.

Notice Type

Use the dropdown arrow to select the type of notice you want to filter by. You can select multiple notice types.

Product or Service Information

© Federal Procurement Data Reports, Inc.

Filter by entering a NAICS code. For example, use 23 for construction. You can also filter by entering a product or service code, such as 51 for hand tools. You can select multiple NAICS codes and PSCs.

Set-Aside

Use the dropdown arrow to select the set-aside you want to find. You can select multiple types.

Place of Performance

Enter the ZIP code you want to filter by. You may also enter the state or province or use the dropdown arrow to select. You can select multiple states individually.

Contract Awardee

Enter the contractor awardee name by typing the contractor's name into the search bar. You may also enter the unique entity ID to search for a specific entity. You can also filter by entity name, ZIP code, and state/province.

Status

Select Active or Inactive to search for either active or inactive contract opportunities.

More Filters

To add more filters to your search, select More Filters. A pop-up box will appear, allowing you to add or remove specific filters to narrow your search. Additional filters may include:

- Published date
- Inactive date
- Authority
- Contract award details (e.g., contract award dollar amount, contract award number, task/delivery order number, title)
- Contract office details (e.g., point of contact, ZIP code, state/province)

Reset

To reset all filters, select Reset.

© Federal Procurement Data Reports, Inc.

4. Ask for a Debrief

Unsuccessful offerors may request a debriefing from the contracting officer within three days of receiving notice of exclusion from the competition. If you don't submit a timely request, you don't have to be given either a pre-award or a post-award debriefing.

Offerors are entitled to no more than one debriefing for each proposal.

Debriefings may be made orally, in writing, or through any other method acceptable to the contracting officer. The contracting officer should normally chair any debriefing session, and the individuals who conducted the evaluations should provide support.

At a minimum, pre-award debriefings should include:

- The agency's evaluation of significant elements in your proposal.
- A summary of the rationale for eliminating you from the competition.
- Reasonable responses to relevant questions about whether the source selection procedures, solicitation requirements, applicable regulations, and other applicable authorities were followed during the process of eliminating you.

A Word of Advice From Me

Do NOT argue with the contracting officer. At that point, it's too late to change the outcome, even if you plan to file a protest. Carefully consider all the facts before protesting after the award.

The best time to protest is usually before the award is made. During a debriefing, ask clarifying questions to deepen your understanding. Avoid asking questions that can be answered with a simple “yes” or “no.”

© Federal Procurement Data Reports, Inc.

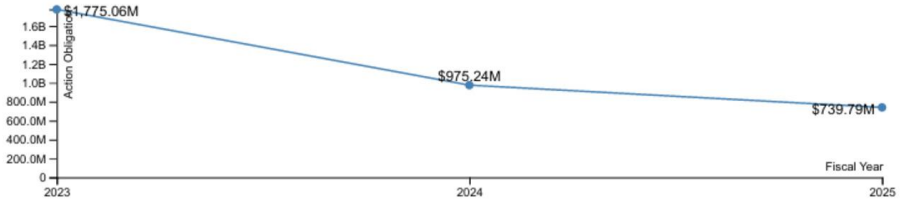
Appendices

Appendix A: Procurement Data Report/Leads

Here's a sample of the procurement data report I prepare for clients, built from a real NAICS code (541310, Architectural Services), so you can see exactly what you'll be working with.

Contracting History Fiscal Years 2023-2025

Federal Contracting Trend (2023-2025) Total: $3,490.09M



Top Contracting Agencies (2023-2025)

Agency Name	Sub-Agency Name	
DEPARTMENT OF STATE	DEPARTMENT OF STATE	$1,028.72M
GENERAL SERVICES ADMINISTRATION	PUBLIC BUILDINGS SERVICE	$509.93M
DEPARTMENT OF VETERANS AFFAIRS	DEPARTMENT OF VETERANS AFFAIRS	$409.9M
DEPARTMENT OF DEFENSE	DEPARTMENT OF THE ARMY	$368.1M
DEPARTMENT OF DEFENSE	DEPARTMENT OF THE NAVY	$315.56M
AGENCY FOR INTERNATIONAL DEVELOPMENT	AGENCY FOR INTERNATIONAL DEVELOPMENT	$148.05M
DEPARTMENT OF DEFENSE	DEPARTMENT OF THE AIR FORCE	$142.38M
DEPARTMENT OF THE INTERIOR	NATIONAL PARK SERVICE	$137.16M
SMITHSONIAN INSTITUTION	SMITHSONIAN INSTITUTION	$133.84M
DEPARTMENT OF JUSTICE	FEDERAL BUREAU OF INVESTIGATION	$60.07M

Award Types (2023-2025)

Award Type	
DELIVERY ORDER	$2,116.88M
DEFINITIVE CONTRACT	$1,300.01M
OTHER	$38.62M
PURCHASE ORDER	$34M
BPA CALL	$570.37K

> **What I want you to see here:** *This is a real contracting-history report for one NAICS code: the federal spending trend by year, the top buying agencies, the award types in play, and the top product/service codes. I build one of these for you using your own NAICS code, so every number on the page is about your market, not a generic example.*

© Federal Procurement Data Reports, Inc.

	PrimaryContactFullname	PrimaryContactEmail	PrimaryContactPhone	location
2	Aaron Lay	aaron.lay@gsa.gov	9518090541	PBS R00 SPECIAL PROGRAMS DIVISION
3	Acquisition Office	Jordan.oaa@usaid.gov		USAID/JORDAN
4	AE Contracting Team	AE@state.gov		
5	ajohnson	purchasing@fiscal.treasury.gov		
6	Alex Jackson	a4jackson@bop.gov	2025789940	
7	Andrew Lucas	andrew.lucas@spaceforce.mil	30198583247467	
8	Anne Mulhern	manila-roaa-rfp@usaid.gov		USAID M/OAA
9	Berry, Edwin	edwin_berry@contractor.nps.gov	3039692288	
10	Brandi Elwell	brandi.elwell@nexweb.org		NAVSUP OTHER HCA
11	Britney Machado-Potestio	britney.l.machado-potestio.civ@us.n		NAVFAC PACIFIC CMD
12	Brittney Lazo	brittney.a.lazo.civ@us.navy.mil		NAVFACSYSCOM HAWAII
13	Brittney Morrison	brittney.morrison@usace.army.mil	9077532894	ENGINEER DIVISION PACIFIC OCEAN
14	Bujumbura Procurement Section	BujProcurement@state.gov	25722207006	
15	Capt Christopher Fisher	christopher.fisher.7@us.af.mil	6182225113	JFHQ USPFO IL
16	Carly Galloway	carly.n.galloway.civ@us.navy.mil	4073808255	NAVAIR NAWC TSD
17	Casey Pridham	casey.a.pridham.mil@army.mil	6037153668	JFHQ USPFO NH
18	Cassie Blair	cassie.blair.1@us.af.mil		JFHQ USPFO SC
19	Chanel S. Wade	wadecs@si.edu		SMITHSONIAN INSTITUTION
20	Charity Daniel	Caridad.Daniel@faa.gov	4059547834	6973GH FRANCHISE ACQUISITION SVCS
21	Ching Hung	ching.hung@gsa.gov		
22	Christopher P. Broschart	christopher.broschart@us.af.mil	3046165412	JFHQ USPFO WV
23	Cindy Dwier	cindy.dwier@gsa.gov		
24	Vangie Miller	vangie.miller@va.gov	No phone calls will	
25	Fannie-Ann Riddle-Koroma	Fannie-Ann.Riddle-Koroma@va.gov		
26	Stephen E Slaby	Stephen.Slaby@va.gov		260-NETWORK CONTRACT OFFICE 20 (36C260)
27	Rhonda M Richardson	Rhonda.Richardson5@va.gov		
28	Abby L Monroe	abby.monroe2@va.gov	913-946-9916	255-NETWORK CONTRACT OFFICE 15 (36C255)
29	Brian Bentley	Brian.Bentley@va.gov		249-NETWORK CONTRACT OFFICE 9 (36C249)
30	Brian Rosciszewski	Brian.Rosciszewski@VA.gov	937-268-6511	
31	Cedric Graham	Cedric.Graham@va.gov	913-946-1141	255-NETWORK CONTRACT OFFICE 15 (36C255)
32	Daniel W Spaulding	Daniel.Spaulding@va.gov		
33	David Sterrett	david.sterrett@va.gov	(913) 946-1146	255-NETWORK CONTRACT OFFICE 15 (36C255)
34	Denise A. Morman	denise.morman@va.gov	804-675-5170	
35	Devan Bertch	Devan.Bertch@va.gov		
36	Devin Russell	devin.russell@va.gov		

What I want you to see here: *This is the kind of contracting-officer leads list that comes with your report: names, direct emails, phone numbers, and the office they work in. This is what turns a data report into actual conversations with the people who make buying decisions.*

© Federal Procurement Data Reports, Inc.

Appendix B: Key Websites

1. Registrations

a. SAM Registration: sam.gov
b. Local Government Registration Websites: See below.
c. Primary NAICS: census.gov/naics
d. Primary Federal Supply Classification Code (FSC) or Product Service Code (PSC): support.outreachsystems.com/resources/tables/pscs
e. NIGP Codes: NIGP Commodity Codes
f. SBA Profile: search.certifications.sba.gov

2. Socio-Economic Status

a. Local Governments: nctrca.org
b. State of Texas: HUB Program; veterans only at this time.
c. Federal/State Government DBE Programs: transportation.gov/civil-rights/disadvantaged-business-enterprise
d. Summary: Certification Matrix (PDF)
e. Private Sector: WBENC: wbenc.org/certification | dfwmsdc.com
f. SBA: MySBA Certifications, including WOSB, HUBZone, SDVOSB, and 8(a).

3. Business Operations

a. Quality Certifications: tmac.org/services/quality
b. Two or more years of contracting experience.
c. A CPA familiar with government contracting.
d. An adequate management policy manual, including personnel, purchasing, and related policies.
e. A lawyer familiar with government contracts.
f. Business Plan.
g. Business Development Plan.
h. Knowledge of federal, state, and local government purchasing regulations.
i. Ability to accept credit cards.
j. Renew/Update Your SAM Registration: How To, When, and Why.
k. SBA Profile: Use secure.login.gov

4. Accounting System

a. Accumulation of costs under general ledger control.
b. A timekeeping system.
c. Financial statements prepared by a CPA monthly, quarterly, or annually.

5. Marketing

© Federal Procurement Data Reports, Inc.

a. Company website.
b. Email address with company domain name.
c. Targeted Capability Statements: Sample Capability Statement Template
d. Business cards printed on cardstock so notes can be written on them.
e. Solicitation notification websites: sam.gov | nctrca.org/member-bid-opportunities
f. Federal Contract History: fpds.gov | usaspending.gov | ssq.gsa.gov
g. SBA SubNet: SBA SubNet
h. SBA Subcontracting Directory: SBA Subcontracting Directory
i. SBA Procurement Center Representatives: SBA Procurement Center Representatives

6. Cyber Security Compliance

a. DFARS 52.204-7012: Safeguarding Covered Defense Information and Cyber Incident Reporting.
b. NIST SP 800-171 DoD Self-Assessment: Check with the Apex Accelerator at UTA.
c. Plan of Action and Milestones (POAMS).
d. Incident Response Plan and Reporting: dibnet.dod.mil
e. System Security Plan: csrc.nist.gov
f. Subcontractor Flow Down Requirements: navsea.navy.mil (PDF)

© Federal Procurement Data Reports, Inc.

Why Working With a Guide Gets You There Faster

You could do all of this alone. Plenty of companies try. Here's what I've seen, after 30+ years, actually separates the ones who win quickly from the ones who burn a year spinning their wheels:

- I've already made the expensive mistakes so you don't have to. Pattern recognition from hundreds of companies means I can usually tell you in one conversation whether your profiles are credible or where the gap is.
- I know exactly what a contracting officer checks first, and I can tell you before you submit, not after you get passed over.
- I help you avoid the common trap of three different company profiles across SAM, SBA, and your capability statement that don't match each other.
- I help you build past performance strategically, through teaming agreements and subcontracting, instead of waiting years for it to happen on its own.
- I keep you accountable to a timetable. A plan on paper doesn't win contracts. Consistent, guided action does.
- I bring relationships built over more than three decades in this industry, relationships that would otherwise take you years to build from scratch.

None of this replaces your product or your team's expertise. It just gets you to the right buyer faster, with fewer expensive detours along the way.

© Federal Procurement Data Reports, Inc.

Ready to Win More Federal Contracts?



This is the moment I want for you and your team, and I've helped a lot of companies get here.

Let Me Help You Turn This Plan Into a Win

You've done the work of reading through this workbook. Now let's turn it into a targeted federal sales plan for your company.

I'm Gregory M. James, CEO of Federal Procurement Data Reports, Inc., and I built my business around one goal: helping companies like yours get your profiles right, pinpoint exactly which agencies are buying, and position your capability statement to win.

- Have specific questions about your company's federal opportunity? Ask me directly.
- Ready to move forward? Let's schedule a one-on-one consultation.
- Need a second look at your SAM profile, SBA profile, or capability statement? Bring it to our call.

Next Step: Connect With Me

© Federal Procurement Data Reports, Inc.

Reach out to me directly on LinkedIn or visit myfpdr.com to ask specific questions about your company's federal contracting opportunity and to set up a consultation. I read and respond to every message myself.

Gregory M. James | CEO
Federal Procurement Data Reports, Inc.
linkedin.com/in/gregorymjames
myfpdr.com

Thank you for trusting me with your federal growth strategy.

© Federal Procurement Data Reports, Inc.