

Ready. Set. SBC: Creating a Killer Capability Statement

Moderator: Bre Jones, President, Martinez

Speaker: Joshua Frank, Managing Partner, RSM Federal

September 17, 2026 | 1:00 p.m.

About this Webinar

Recording

The webinar is being recorded and will be available within **24 hours**

Download the Presentation

Download the PPT under the **Handouts** tab

Q&A

Ask questions at any time under the **Q&A** tab

Chat

Engage with other participants using the **Chat** tab

PDH Credits

PDH credits are **not available** for this webinar.





Joshua P. Frank

MIS, MBA

- ▶ **RSM Federal - Managing Partner**
- ▶ **Executive Growth Advisor, Speaker, Author**
- ▶ **37 years Public Sector / Government**
- ▶ **Former Military Intelligence**
- ▶ **Small Business Advocate**
 - Strategic Advisor, National Veteran Small Business Coalition (NVSBC)
 - Chairman Emeritus, Veterans Advocacy Foundation (VAF)
- ▶ **Expertise**
 - *Tactics & Strategies* to Accelerate Revenue and Market Entry
 - Books and publications serve as academic texts at the collegiate level
- ▶ **Client and Member Success**
 - 25,000 companies trained
 - 4,500 companies coached
 - \$14.6 Billion in Small Business Government Contracts



**FUELING
FEDERAL
ACQUISITION**

What is your experience level in government sales?

- | | |
|---------------------------|---------------|
| a) Brand-spanking new! | 0 to 1 Year |
| b) Enough to be dangerous | 1 to 2 Years |
| c) Experienced | 3 to 10 Years |
| d) Mature | 11+ Years |



Including this year, how many SBC Conferences have you attended?

- a) First time!
- b) My second year
- c) 3 - 5
- d) 6+



14,234 Companies Have a GSA Schedule (MAS)

Recent Year	
14,234	Companies
48%	\$25,000+ in sales
52%	< \$25K in sales
44%	No Sales

- ▶ Half of companies with this contract vehicle...Fail
- ▶ So much for the “low-hanging Fruit” theory
- ▶ This is a “microcosm” of the overall government market
- ▶ It's not because of what they sell
- ▶ So. . . Why do 50% of GSA Schedule holders fail?



2 Identical Companies

- ▶ **Identical Products and Services**
- ▶ **Both Companies:**
 - Same education level
 - Get help from mentors, coaches, and consultants
 - Attend same conferences
 - Watch same webinars
 - Buy same business books
 - Joined the same associations and networked at the same events
 - Both certified (State and/or Federal)
 - Attend the same training sessions
- ▶ **One company wins contracts. The other does not.**
- ▶ **Why?**



Why?

Because it's not what you learn -

*It's how you **apply** it*

Which is critical for government marketing and sales



Let's Get Started

▶ Today's Discussion

- Basic to intermediate concepts, tactics, and strategies
- **Success** = making you think differently about how you *approach* and *sell* to the government

▶ Agenda

- Purpose of Capability Statement
- Core Principles
- How It's Used
- Importance of Quantifiable Value
- Core Sections
- Design Recommendations



Developing a Capability Statement

You cannot create a strong capability statement in a vacuum

You have to take into account:

Experience / Past Performance

Value You Provide

Qualitative & Quantitative Numbers, Metrics, and Percentages



How Does It All Come Together?

FOUNDATION

- SAM Registration / UEI
- CAGE Code
- DIBBS Registration
- NAICS / PSC Codes
- Socio-Economic
- Research Buyers
- Research Competitors
- Events

MATURITY, DIFFERENTIATION, & VALUE

- Qualifiable & quantifiable value - Metrics
- Differentiate from the competition
- Convince partners you'll make them more competitive
- Facilitate increased perception of maturity
- Perceived low risk

Value-Mapping™

Website

45 Second Sales Pitch

Capability Statement

MARKETING & SALES

Prospecting & Sales
Teaming
Proposals

Power Deck
Capability Briefing





What Is A Capability Statement

- 1 A concise, one-page marketing slick, specific to Federal government and DoW contracting, that communicates a perceived level of corporate maturity, trust, what differentiates you from the competition, and proven value using qualifiable and quantifiable numbers, metrics, and percentages.
- 2 Designed to convince government buyers that you are high value and low risk; to convince potential teaming partners that you will make them more competitive.



Core Principles

- ▶ **Don't get wrapped-up in what it should look like**
 - Focus on what it communicates!
- ▶ **6 Seconds**
 - You have six seconds to communicate:
 - Maturity | Competence | Value
- ▶ **Government Transformation – 6 Value Vectors**
 - Mission | Outcomes | Effectiveness | Efficiency | Speed | Commercial Acquisition Models
- ▶ **Anyone Can Create a Capability Statement**
 - More than simply listing your information
 - Many capability statements:
 - ▶ Boring
 - ▶ Communicate little to no value
 - ▶ Fail to differentiate (*government already contracts with companies like yours!*)



Core Principles

► Bridging Government Sales Strategy with Business Strategy

- You are not an expert in everything
- What is your niche?
- What value do you provide?
- Agency and command logos
- Do you take copies to every meeting and event?
- Generic vs tailored

► 3 Marketing Tiers → *Tailored*

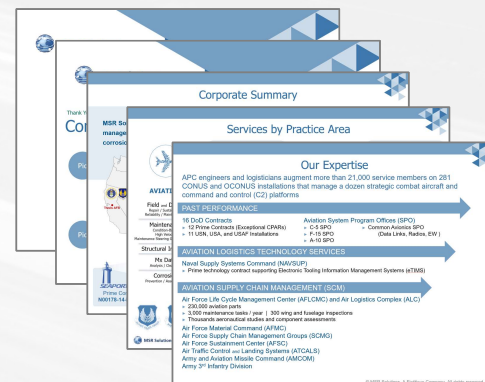
Capability
Statement
~1 Page



Power
Deck
~3-5 Pages



Capability
Briefing
~6-12 pages





Utilization by Government and Industry

▶ Government

- Market research
- Identify competent small businesses
- Validate acquisition for set-aside and sole-source

▶ Potential Teaming Partners

- Identify competent small businesses
- Identify which companies support their target agencies / commands
- *Identify which companies will make them more competitive*

Government

- Government Buyers
- Program Managers
- Acquisition (Contracting Officers / Specialists)
- Small Business Offices (OSBP / OSDPU)
- Speed Dating Events (Matchmaking)
- Conferences / Trade Shows / Industry Days
- Sources Sought & Proposals

Teaming Partners

- Teaming Partners
- Industry Days
- Associations (SAME | AFCEA | NDIA | NCMA)

Corporate Marketing

- Website
- LinkedIn



Before You Create or Update Your Capability Statement

- ▶ **Need to Know Your Market Propensity**
 - Who buys what you sell, how much, how often, and acquisition options
 - Are you targeting the right prospects?
- ▶ **Need to Know The Value You Provide**
 - Qualitative and Quantitative **metrics**, **numbers**, and **percentages**
 - Value-Mapping™



Value-Mapping™



Value-Mapping is a step-by-step process for collecting contract, customer, and project data; **focusing on metrics, numbers, and percentages**; to improve differentiation and communication of competencies and value. This process supports all solutions, verticals, markets, and industries.



Example → Company Sells Services

▶ Physical Security Company

- Access Control, Intrusion Detection (IDS), Surveillance / CCTV
- Distributor for 7 security system manufacturers
- Sell product but primarily sell “design and installation”

▶ Past Performance

- Have only operated in a 300-mile radius of their headquarters
- \$5.6M in revenue last year
- Primarily commercial clients but one \$8,000 product sale (USAF)



So What Do You Do?

“We’re a Security Company”

We support residential, schools, municipalities, clinics, and airports

A Veteran owned small business, we specialize in:
Access Control - Intrusion Detection Systems - CCTV

We’ve been in business for more than 10 years.

So... US Army... Department of Commerce....
What are your security requirements?





Review Your Past Performance

▶ Customer List

- ✓ 3,500 Homes (\$4,623,341)
- ✓ St. Charles County Courthouse (\$17,216)
- ✓ USAF product-only buy (only government buy) (\$8,126)
- ✓ Long Beach Airport (\$544,714)
- ✓ Long Beach High School District (\$318,870)
- ✓ Long Beach DMV (\$5,165)
- ✓ Los Angeles Star Health Clinics (\$8,608)
- ✓ Long Beach Community Blood Clinics (\$2,755)
- ✓ Jiffy Lube (\$7,575)
- ✓ CA Dept of Agriculture (\$4,304)
- ✓ Crying Eyes Daycare (\$2,582)
- ✓ LA Elementary (\$44,761)
- ✓ R&C Law Firm (\$12,395)
- ✓ Lambert Construction (\$3,443)



Past Performance – Physical Security Company

1

\$318,870

Long Beach Schools

School District

- ✓ Installed 450 CCTV
- ✓ 85 Schools
- ✓ 12,000 Employees
- ✓ 72,000 Students

2

\$544,714

Long Beach Airport

Municipal Airport

- ✓ 100 Acres Business Park
- ✓ 200 Businesses at Airport
- ✓ 26 Acre Shopping Center
- ✓ 9,000 Employees
- ✓ 3.8 Million Passengers
- ✓ Installed 340 IDS Systems
- ✓ Installed 125 Access Control

3

\$4,623,341

Residential

3,500 Homes

- ✓ 14,000 People
- ✓ 8 Cities and Municipalities
- ✓ 18,000 Contact Points
- ✓ 262,000 Feet of Cable

4

\$116,929

Other Customers

Metrics

- ✓ CCTV 55
- ✓ IDS 36
- ✓ Access Control 42



Value Bundling

19,400

Security Components Installed

262,000

Feet of Cable

3,740

Unique Locations

Verticals

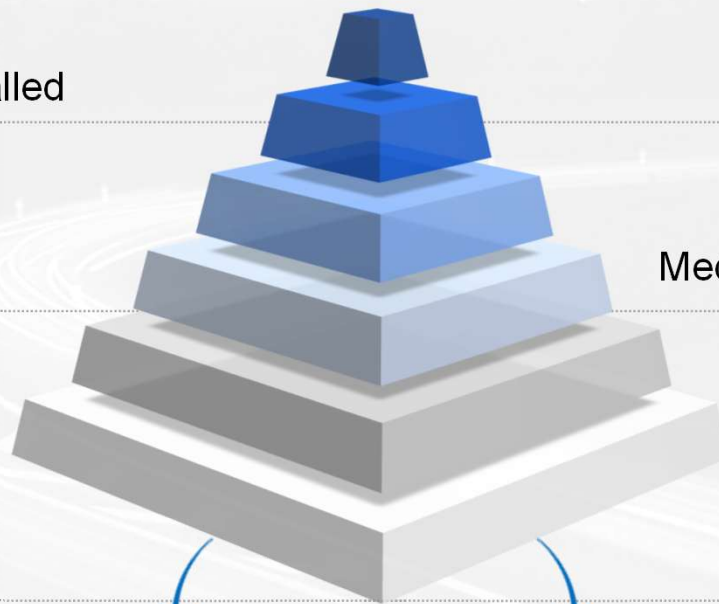
State, Federal, Education,
Medical, Commercial, Residential

3.9 Million

People Protected

Manufacturers

DMP, DSX, Honeywell,
Contintental Access
Johnson Controls

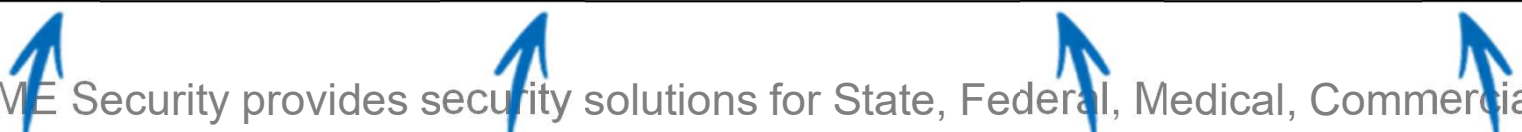


*No... you can't use bundling for **formal** past-performance write-ups in proposals. Use bundling to **communicate experience throughout proposals**; build a story on your website, collateral, and when talking to buyers / teaming partners.*



So What Do You Do?

Website • Capability Statement • Conferences • Proposals



“ACME Security provides security solutions for State, Federal, Medical, Commercial, and Residential markets. Over the last five years ACME has installed security systems at **3,700 locations** that currently protects **3.9 Million** people, including the **10th largest** airport in California.

Our installation teams have run more than **260,000** feet of cable to install more than **19,000** security products.

Over the **last ten years**, we’ve built strong relationships with seven of the industries largest manufacturers including Honeywell, Johnson Controls, and Continental Access.

ACME has a well-known reputation for strong system design and for federal clients, our customer service operates **24/7/365**.



6 Core Sections

- ▶ **Corporate Overview / Narrative** *Value you provide*
- ▶ **Core Competencies** *Products and services you provide*
- ▶ **Experience / Past Performance** *Level of maturity, capability, and quality*
- ▶ **Differentiators** *What makes you special*
- ▶ **Corporate Data + Acquisition Options** *Codes, numbers, certifications, awards
How the government can buy from you*
- ▶ **Contact Information** *Name, email, direct phone*



6 Core Sections

Corporate Overview

- ✓ Who, What, Value
- ✓ Numbers
- ✓ Metrics
- ✓ Percentages

Differentiators

- ✓ Numbers
- ✓ Metrics
- ✓ Percentages

Contact Information

MSR Solutions

CAPABILITY STATEMENT

MSR Solutions, LLC provides commercial and government clients with A/E/C project delivery on vertical construction contracts.

For every engagement, we bring our unique combination of functional expertise to minimize or eliminate risks that cost time and money.

We interface closely with on-site representatives and our teaming partners to prevent surprises and prioritize requirements.

Since 2006, MSR has primed more than 120 vertical construction projects and has subcontracted on more than 500.

With 20+ employees and a \$30 Million bonding capacity, we have outstanding and superior ratings on every project.

DIFFERENTIATORS

✓ One of only 4 contractors in our region with \$30 Million bonding capacity with extensive past performance on Central Plant Chillers.

✓ Technical Specialists. We have in-house specialists for every division of work, from design build to civil sitework, as well as building envelope, concrete and carpentry.

✓ Robust Preconstruction Services. Our preconstruction program has been upheld by our clients as a model by which they measure other contractors. On average, our clients save 4% - 6% on the total cost of the project.

✓ Project Expertise. More than 600 projects.

CONTACT INFORMATION

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Owner

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Civil Construction

SERVICES

- ✓ Mechanical Infrastructure and Piping
Cooling Towers, Central Plants, Boilers, Chillers
- ✓ Maintenance and Support Structures
Maintenance Bays, Parking Garages
- ✓ Concrete Work, Flatwork, and Foundations
- ✓ Blasting, hammer excavation, rock, hard dig
- ✓ Underground Utilities and Structures
Lift Stations, Wet Utilities, Dry Utilities
- ✓ Earthwork
Grading, Primitive Improvements, and BLM
- ✓ Other Construction Services
Sewer, Irrigation, Storm Drain

PAST PERFORMANCE

Our proactive, objective, and disciplined work ethic has resulted in repeat business from each of the organizations listed below.



CORPORATE SNAPSHOT

- ✓ DUNS: 004518772, CAGE Code: 4G882
- ✓ Bonding: \$30 Million
- ✓ Primary NAICS: 236210 (Industrial Building Construction)
- ✓ Additional NAICS: 36220, 237110, 237310, 237990, 238110, 237120
- ✓ Third Party Certified – EDWOSB WOSB
NWOCB #EDWOSB776432



Core Competencies

- ✓ **Prioritized**
- ✓ **Products**
- ✓ **Services**

Experience / Past Performance

- ✓ Client List; or
- ✓ Client Logos

Corporate Data

- ✓ UEI / CAGE
- ✓ NAICS
- ✓ Certs / Bonding
- ✓ Contract Vehicles
- ✓ Awards & Certifications



6 Core Sections

Corporate Overview + Differentiators

- ✓ Who, What, Value
- ✓ Metrics
- ✓ Numbers
- ✓ Percentages

Contact Information

MSR Solutions CAPABILITY STATEMENT

Core Competencies

Information Technology and Enterprise Systems

STRATEGY

- C-Suite and Stakeholder Advisory
- Enterprise Planning and Strategy
- Strategic Planning
- Migration of Legacy Systems
- Acquisition Support

TECHNOLOGY

- Custom Application Development
- Design and Architecture
- Engineering and Infrastructure Integration
- Compliance, Privacy, Governance

HOSTING

- 10,000 Sq Ft Data Center
- Remote Monitoring and Maintenance
- Patches and state of the art security
- Commercial and federal agencies

OPERATIONS

- Enterprise Risk Management
- Business Process Management
- Business Process Redesign & Integration
- Program & Project Management

Who We Are

Since 2013, MSR Solutions has worked with Fortune 500 and Federal agencies to streamline more than **25** enterprise systems impacting more than **150,000** employees. We work with our client's stakeholders to identify high-payoff opportunities and address their most critical challenges.

Our team is trained and certified in more than **40** emerging technologies. We prime and subcontract in commercial and federal markets.

On average, we save our clients **30%** in system management expenses.

Company Data

- ✓ **UEI** – 004518772
- ✓ **CAGE Code** – 4G882
- ✓ **GSA IT Schedule 70 Contract #** GS67S778KA
- ✓ **GSA Professional Services Contract #** 56QRAA15W003Z
- ✓ **NAICS** – 541511, 541512, 541513, 541519, 541611, 541614, 541618, 541690, 541990

Past Performance

Department of Homeland Security (DHS), 2/2013-2/2015, Contract # DHS-2013-JF-0001-TG, \$1,345,122, as a subcontractor to Lockheed Martin, provided technology integration on the Security Enhancement Immigration Portal (SEIP). Receives, processes and evaluates national threats based on data from seven other agencies. During integration of this system we reengineered and automated complex business processes and integrated the system with IBM FileNet and AWS. Contracting Officer: Mary Smith, (703) 555-1212

Titan Tire, Chief Information Office (CIO) and multiple Projects, 2/2014-Present, Contract# TT-2014-0045-01, \$550,470. As the Prime contractor, MSR supported the management and execution of seven task orders for various Titan Tire Corporation locations providing Enterprise risk management and security upgrades. Client Manager: John Dean, (703) 777-1111

The University of Iowa, 8/2017-Present, Contract# IA-2017-AA8B334, \$234,000. As the Prime contractor, facilitated strategic planning and guidance for the university's enrollment and grading system supporting more than **33,000** active students and **12,000** applications. We facilitated stakeholders from six university offices. As a result, the university has decreased data entry by **12%** and increased ease of use of their systems. Client Manager: Louis Smith, (314) 555-1212

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Core Competencies

- ✓ **Prioritized**
- ✓ **Products**
- ✓ **Services**

Corporate Data

- ✓ **UEI / CAGE**
- ✓ **NAICS**
- ✓ **Certs / Bonding**
- ✓ **Contract Vehicles**
- ✓ **Awards & Certifications**

Experience / Past Performance + Differentiators

- ✓ **Project List**
- ✓ **Metrics, Numbers, %'s**



Corporate Overview / Narrative

- ▶ **45 Second Pitch**
- ▶ **Communicates your value (qualifiable / quantifiable numbers, metrics, percentages)**
- ▶ **What you do**
- ▶ **Don't mention size or socio-economic status**
- ▶ **First sentence includes name of targeted agency / command (tailored)**

RMS Environmental provides the solutions USACE needs to meet the command's requirements and to protect it's service members.

- ▶ **Key Words**
 - Verify you are using industry keywords for your solutions
 - Example: Environmental, Remediation, Hazardous Waste, Studies

Contracts
Prime & Sub

End Users
Received Value

Strategic
Partnerships

Geographic
Locations



Core Competencies

- ▶ List your core products / services- *not necessarily every product or service*
- ▶ Break-down by categories



ADVANCED WOUND

- › Absorptive Dressings
- › Compression Bandages
- › Abdominal Pads
- › Dressing Retainers

UROLOGICALS

- › Catheters
- › Drainage Bags
- › Urinary Health Nutrition

PANDEMIC

- › Masks / N95 Particulate
- › Rapid Test Kits
- › Disinfecting Wipes
- › Gowns

OSTOMY

- › Ostomy Systems
- › Pediatric System
- › Skin Barriers / Wafers
- › Belts



CIVIL CONSTRUCTION

- Underground Utilities & Structures
- Earthwork
- Modernization and Upgrade Services (Dams)
- Sewer | Irrigation | Storm Drain
- Mass Excavation | Grading

VERTICAL CONSTRUCTION

- Tenant Improvements | Buildout | Remodel
- Service Housing
- Maintenance / Support Structures
- Mechanical Infrastructure and Piping
- Photovoltaic / Solar Arrays
- Concrete Work | Flatwork | Foundations

Core Competencies



Enterprise Planning

- Strategic Planning
- Stakeholder Advisory
- Business Process Reengineering
- Acquisition Support
- Migration Legacy Systems



Data Management

- Enterprise Resource Management
- Knowledge Management
- Content Management
- Business Analytics
- Dashboards



DevSecOps

- Identity Management
- Risk Management
- Continuous Integration / Delivery
- Cloud



Cyber Security

- Vulnerability Assessments
- Network Security
- Incident Response
- Digital Forensics



ENTERPRISE TECHNOLOGY SOLUTIONS

APPLICATION AND SOLUTION DEVELOPMENT	Custom Software Development Web Application Development GIS/GPS Solutions Microsoft Integrations Mobile Apps
CUSTOM WEBSITES AND PORTALS	Website Design & Development Web Portal Development eCommerce Solutions
DATA AND RESOURCE MANAGEMENT	Business Intelligence & Analytics Content Management Systems (CMS) Reporting & KPIs Data Migration Predictive Analytics Business Intelligence National Language Processing
SYSTEM ENGINEERING AND MODERNIZATION	Systems Integration Legacy System Re-Engineering Legacy System Migrations Database Development Software and System Maintenance



ENTERPRISE TECHNOLOGY SOLUTIONS

DATA ANALYTICS & TRENDS	Assessing data to develop strategies for improved organizational growth Data-Driven Decision Making Data Correlation Baselines Trends Analysis of Multiple Non-Uniform Data Sources Surveys Written Forms System Cloud
STRATEGY IMPLEMENTATION & TRANSFORMATION	Facilitating of Executive Strategies to Drive Organizational Change Organizational & Stakeholder Alignment Strategy Implementation Assess Evaluate Execute Monitor & Measure Strategic Communications Change & Culture Management Strategic Leadership Development
DATA ANALYTICS & TRENDS	Assessing data to develop strategies for improved organizational growth Data-Driven Decision Making Data Correlation Baselines Trends Analysis of Multiple Non-Uniform Data Sources Surveys Written Forms System Cloud
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GAO – Corporate Experience versus Past Performance

▶ Experience – What Your Company **Has Done**

- Experience focuses on "degree" to which contractor has *actually performed type of work*
- A description of a type of project
- Similar - does not have to be an exact match to RFP / RFQ requirements
- Not "can your staff do the work" but "have they done this work"

▶ Past Performance – **Quality** of Work and **How You Performed**

- Past performance focuses on the *quality of that work*
- Past performance is *size, scope, and complexity* of similar work

▶ Lack of:

- Past performance = Neutral Rating
- Experience = Unacceptable Rating



Past Performance

▶ New Company - No Past Performance

- Utilize individual experience
- "Our executive team" vs "Our company"

▶ Can I Use Commercial Contracts for Past Performance? - Yes

FAR 15.305 / RFO Part 15 (Evaluation and Award) *The core authority.* Requires solicitations to give offerors the opportunity to identify past or current contracts — including Federal, State, local government, and **private sector**...

FAR 15.305 / RFO Part 15 (Evaluation Standards) Requires contracting officers to **assess the currency, relevance, source, context, and general trends of past performance information**. This is the provision that prevents a CO from simply dismissing commercial references.

FAR Subpart 36.6 / Brooks Act (40 U.S.C. §§1101-1104) (A/E Selection) A/E services are not evaluated the same way as other contracts. Selection is qualifications-based, not price-based. Firms submit an SF-330, and past performance is one of the required selection factors alongside professional qualifications, specialized experience, and capacity. Note: **the RFO is actively revising these specific criteria agency by agency, so confirm which version applies to a given solicitation.**



Past Performance

► How Do You List Your Past Performance

- Contract / Vehicle → Brief Summary → POC → Phone → \$ Value
- Subcontractor? List your Prime

PAST PERFORMANCE

Our proactive, objective, and disciplined work ethic has resulted in repeat business from each of the organizations listed below.



Past Performance



Defense Health Agency
SharePoint Deployment
\$2.5M Prime Contract



United States Air Force (USAF)
Cloud Deployment / Network Operations
\$1M Subcontract to Northrup Grumman



United States Forest Service
Data Analytics / Database
\$525,000 Prime Contract

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Differentiators

► Differentiators

- Quantifiable and Qualifiable Metrics
- 3 types of differentiators
- Strengthen your differentiators through Value-Mapping™

► Differentiators are NOT

- Size or Socioeconomic certifications
- Generic statements about how great you are
- Unsubstantiated Bold Allegations* (UBA)

✗ *"Best in Class" – "Best of Breed"*

✗ *"Force Multiplier"*

✓ *Differentiation requires "Proof" and "Metrics"*

Direct Differentiators

- Value versus Capability or Service
- Competencies and Past Performance
- Perceived / Actual Niche
- Key Personnel, Your Staff, SMEs
- Current Customers
- Staffing / Management Approach
- Teaming Partners
- Certifications
- CPARS / PPIRS Ratings
- Facility Clearance

Indirect Differentiators

- Trust → You Can Do What You Say
- Agility, Flexibility, Innovation
- Hyper-Responsiveness
- Reputation

Balancing Differentiators

- Socio-Economic Status
- Contract / Acquisition Vehicles
- CMMI, PMO
- Cyber CMMC

* The phrase UBA was coined by the proposal team at IBM



Corporate Data

- ▶ **Relevant Codes** UEI, CAGE, Top NAICS / PSC
- ▶ **Business Locations** Offices / geographic area you serve
- ▶ **Company** Years in business, # Employees
- ▶ **Socio-Economic** Business Size and SBA Certifications (not self-certified)
- ▶ **Other** Facility & Security Clearance
Insurance / Bonding Levels
Partner Programs (Amazon, Microsoft, Cisco, etc)
- ▶ **Government POC** Name, Address, Direct Phone, Email
Hyperlinks → Website and LinkedIn



Acquisition Options

► Acquisition Options are **How the Government Can Buy What You Sell**

- Micro-Purchase
- GSA Schedule (MAS) 47QSRA20D0158 - SIN 562910REM
- 8(a) Sole Source
- SDVOSB Set-Aside
- Blanket Purchase Agreement (BPA)
- Incentive Agreement (IA)
- Small Business Set-Aside
- Prime OASIS+ 47QRCA25DD618
- Prime BPA Remediation (EPA) 44T667Y99821
- Prime BPA Audits & Studies (Forest Service) WR5576T



Acquisition Options

- ▶ **Acquisition Options are How the Government Can Buy What You Sell**
 - Micro-Purchase
 - GSA Schedule (MAS) 47QSRA20D0158 - SIN 562910REM
 - 8(a) Sole Source
 - SDVOSB Set-Aside
 - Blanket Purchase Agreement (BPA)
 - Incentive Agreement (IA)
 - Small Business Set-Aside
 - Prime OASIS+ 47QRCA25DD618
 - Prime BPA Remediation (EPA) 44T667Y99821
 - Prime BPA Audits & Studies (Forest Service) WR5576T
- ▶ **Always Tailor to Your Prospect**
 - What are the *preferred acquisition methods* a specific agency / command prefers?
 - Ask your prospect! *"Do you often use any specific contract vehicle or set-aside?"*



Design Recommendations

- ▶ **Word? Adobe? PowerPoint?**
 - Word – Most utilized
 - PowerPoint – *Recommended* (easier to develop, edit, and modify content and graphics)
 - Deliver as PDF – Regardless of how developed
- ▶ **Design**
 - Visually strong
 - Your corporate brand and color scheme (website, proposals, other marketing)
- ▶ **Format**
 - Most common – 2 Column
 - More important than columns and look and feel...
 - Corporate Experience / Past Performance Graphics
 - Value, Metrics, Numbers, Percentages



Design Recommendations

- ▶ **Label It "Capability Statement"**
- ▶ **File Name → Company – Capability Statement – Keyword – Date**
 - Grover-Construction-Federal-Capability-Statement-Remod-221020.pdf
- ▶ **Number of Pages**
 - Everyone has an opinion. No one is wrong.
 - 1 Page – What everyone tells you
 - 2 Page – Enables more detailed past performance data
 - Front and back?
 - Recommendation → One Page
- ▶ **What About?**
 - QR Codes
 - Your Picture

Design Recommendations

► Graphics

- Increases perceived level of maturity
- Graphics at 60% JPEG or PNG
- Adobe Photoshop | Canva | AI
- Remove backgrounds from graphics, logos, certifications



VS





FUELING FEDERAL ACQUISITION

Every One Is Different – *Must Communicate Value*

CAPABILITIES STATEMENT

MSR Solutions

Company Overview
MSR Solutions is a professional services and information technology firm that helps companies and federal organizations manage simple and complex enterprise transformations. We support the Department of Defense, State and Local Governments, and the private sector. MSR is widely recognized as a subject matter expert in complex software design for applications that run on secure networks.

Past Performance
Online Health Agency (Department of Defense)
SAM UEI - 08A04F15V008
CAGE - 40882
NAICS - 541511, 541512, 541513, 541519, 541511, 541513, 541519, 541511

Mary Smith, Director, Business Development

MSR has prime more than 20 contracts with commercial and federal clients and also teams with prime contractors looking for competitive advantage with MSR's past performance. Since 2011, MSR has supported the integration of more than 150 mission critical systems, impacting more than 22,000 private sector and 7,500 government employees, impacting more than \$20 Million in enterprise systems.

MSR Hardware

Enterprise Technology
Bridging Vision and Enterprise Operations

MISSION
Managing Complex Enterprise Transformations

MSR Solutions is a professional services and information technology firm that helps companies and federal organizations manage complex enterprise transformations. We support the Department of Defense, State and Local Governments, and the private sector. MSR is widely recognized as a subject matter expert in complex software design for applications that run on secure networks.

CLIENTS
MSR Past Performance
Government
Department of Defense
White House
Intelligence Community
General Dynamics
Department of State
State of MD, VA, and IN

SERVICES
Information Technology
Network Engineering (CMT)
Hardware (CompTIA Certified)
Windows (MCSA Certified)
VMware (VCP, VCEP)
Enterprise Systems
Enterprise Transformation
Infrastructure and Network Operations

technologyblue

An Information Technology strategy firm

Core Competencies
Enterprise Planning
Data Management
DevSecOps
Cyber Security
GSA Schedule 66

Corporate Overview
Technology Blue is an Information Technology strategy firm that delivers strategies, technologies and solutions for optimizing operational performance. Our services transform and improve how organizations operate in rapidly changing environments.

Every organization has undiscovered opportunities for improving operational performance, yet many remain unidentified and targeted for transformation. Technology Blue delivers over 50 years of experience to recognize opportunities and transform them into business value. Our continual focus on strategic technology adoption ensures that we build the right solution, and the solution is built right.

Our solution outcomes include fraud reduction, increased process efficiency, automated decisioning, improved cyber-defense, increased sales, predictive capabilities, optimized logistics and improved business intelligence. Our client list includes leading organizations including Department of Defense, Department of Treasury, Wisconsin Physicians Service, Wells Fargo, Caterpillar Financial, Healthways and Capella University.

Please visit our website for more information about our firm, solutions and services. When you are ready, contact us to learn more about the value opportunities within your organization.

technologyblue

An Information Technology strategy firm

Areas of Expertise
Decision Management
Business Analytics
Event Management
Pattern Correlation
Process Management
Business Process Management
Business Process Reengineering
Workflow
Data Management
Data Warehousing
Business Intelligence
IT Strategy
Modernization
Enterprise Architecture
Business Transformation

Company Data
Certifications and Accreditations
SBA (a) and SDB
State of PA MBE
Secret Facility Clearance

Contracting Vehicles
GSA IT Schedule 70
Navy SeaPort-LE
State of PA Master IT Services

NAICS Codes
541330, 541511, 541512, 541513, 541519, 541611, 541612, 541618, 541690, 541722, 541900, 561110, 611420, 611430

Geographic footprint

Office: +1.412.253.3799 | Email: info@technologyblue.com | Web: www.technologyblue.com

GSA Contract Holder

MSR Solutions

CAPABILITY STATEMENT

Core Competencies
STRATEGY
TECHNOLOGY
HOSTING
OPERATIONS

Who We Are
MSR Solutions has worked with Fortune 500 and Federal agencies to streamline more than 25 enterprise systems impacting more than 150,000 employees. We work with our client's stakeholders to identify high-potential opportunities and address their most critical challenges.

Our team is trained and certified in more than 40 emerging technologies. We prime and subcontract in commercial and federal markets.

On average, we save our clients 30% in system management expenses.

Past Performance
Department of Homeland Security (DHS), 2013-2015, Contract # DHS-013-JF-0001-20, \$1,345,122, as a subcontractor to Lockheed Martin, provided technology integration on the Security Enhancement Integration Project (SEIP). Reviews, processes and evaluates national threats based on data from seven other agencies. During integration of this system we reengineered and automated complex business processes and integrated the system with IBM iSeries and AWS. Contracting Officer: Mary Smith, (703) 555-1212

Titan Tire, Chief Information Officer (CIO) and multiple Projects, 2016-Present, Contract# TT-2014-0645-01, \$550,470. As the Prime contractor, MSR supported the management and execution of seven task orders for various Titan Tire Corporation locations providing Enterprise risk management and security upgrades. Client Manager: John Dean, (703) 777-1111

The University of Iowa, B2017-Present, Contract# IA-2017-AA8B334, \$234,000. As the Prime contractor, facilitated strategic planning and guidance for the university's enrollment and grading system supporting more than 53,000 active students and 12,000 applications. We facilitated stakeholders from its university offices. As a result, the university has decreased data entry by 12% and increased ease of use of their systems. Client Manager: Louis Smith, (314) 555-1212

Company Data
DUNS - 004518772
CAGE CODE - 40882
GSA IT Schedule 70 Grant # GSR/57789A
GSA Professional Services Contract # 56G0AA1500032
NAICS - 541511, 541512, 541513, 541515, 541511, 541514, 541518, 541600, 541600

MSR Solutions, LLC
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Crested Butte, CO 82434
(970) 334-8892

Jill Smith
VP/Chairman
j.smith@msrsolutions.com
(970) 334-8000

www.MSRSolutions.com

Tel-Tec

Corporate Overview
Tel-Tec Security Systems, Inc. is an independent security firm that provides security solutions to more than 17,500 clients. Tel-Tec designs, installs, services, and maintains enterprise level security solutions. With more than 29 years in operation, we have the competency and proven past performance to manage small and large security contracts.

Our streamlined organization provides efficiency through clear, simple and effective process and lines of communication. We have the flexibility to adjust quickly and dynamically to unanticipated requirements.

We are a small business with capabilities and experience that rivals the performance of much larger firms.

For more information on how we support Federal, State, and Local contracts, please call Leslie Kirkindol, Government Sales

Providing People Peace of Mind

Areas of Expertise
Intrusion Detection Systems (IDS)
Perimeter Security Systems
Fire Life Safety
Surveillance / CCTV
Access Control
Critical Condition Monitoring

Tel-Tec Differentiation
FIPS-201 / HSPD-12 Compliance
29 Years Experience
85% Client Retention Rate
Current Clients - 17,500
Onsite UT Monitoring Facility

MSR Solutions

Civil Construction

CAPABILITY STATEMENT
MSR Solutions, LLC provides commercial and government clients with AEC project delivery on vertical construction contracts.

For every engagement, we bring our unique combination of functional expertise to minimize or eliminate risks that cost time and money.

We interface closely with on-site representatives and our teaming partners to prevent surprises and prioritize requirements.

Since 2005, MSR has prime more than 120 vertical construction projects and has subcontracted on more than 500.

With 20+ employees and a \$30 Million bonding capacity, we have outstanding and superior ratings on every project.

SERVICES
Mechanical Infrastructure and Piping
Cooling Towers, Central Plants, Boilers, Chillers
Maintenance and Support Structures
Maintenance Bays, Parking Garages
Concrete Work, Flatwork, and Foundations
Blasting, hammer excavation, rock, hard dig
Underground Utilities and Structures
Lift Stations, Wet Utilities, Dry Utilities
Earthwork
Grading, Primitive Improvements, and BLM
Other Construction Services
Sewer, Irrigation, Storm Drain

PAST PERFORMANCE
Our proactive, objective, and disciplined work ethic has resulted in repeat business from each of the organizations listed below.

TITAN
Rockwell Collins

CORPORATE SNAPSHOT
DUNS: 004518772, CAGE CODE: 40882
Bonding: \$30 Million
Primary NAICS: 236210 (Industrial Building Construction)
Additional NAICS: 36220, 237110, 237310, 237990, 238110, 237120
Third Party Certified - EDW05B W05B
WV05C #EDW05B776432
SBA WOSB

RSM FEDERAL

The Art and Science of Government Sales

We Help Companies Win Government Contracts
30 years of industry expertise advising thousands of businesses on starting and accelerating their federal sales - cost-effectively with exceptional results. We work with small and large businesses to accelerate corporate strategy, win contracts, and increase revenue. We are not just an adviser - we are a trusted partner.

Results. We have helped entrepreneurs, small and large businesses win more than \$13.5 Billion in government contracts.

Award Winning. The success of our clients and members is a major reason why our team has won multiple awards.

Proven & Highly Effective Tactics and Strategies. We help companies understand how to navigate and position in the federal market with exceptional results. We don't just help other companies, we are also government contractors ourselves.

How Can Federal Access Help My Company?
Whether you are an entrepreneur just starting your business or a billion dollar corporation that wants to increase federal revenue, we have a wide range of outstanding training and coaching programs that are nationally recognized. If you look, you'll find references to our content and resources all over the Internet.

If you want to navigate the federal market and learn how to successfully position for and win government contracts, RSM Federal is an industry leader with proven results. Visit www.rsmfederal.com

Government Past Performance
Commercial Past Performance

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Summary

- ▶ **Nothing More Than a Tool**
- ▶ **Importance of Propensity and Communicating your Value**
- ▶ **6 Core Sections**
 - Corporate Overview / Narrative
 - Core Competencies
 - Experience / Past Performance
 - Differentiators
 - Corporate Data + Acquisition Options
 - Contact Information
- ▶ **Communicating Your Acquisition Options**



FUELING FEDERAL
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Game Changers for Government Contractors

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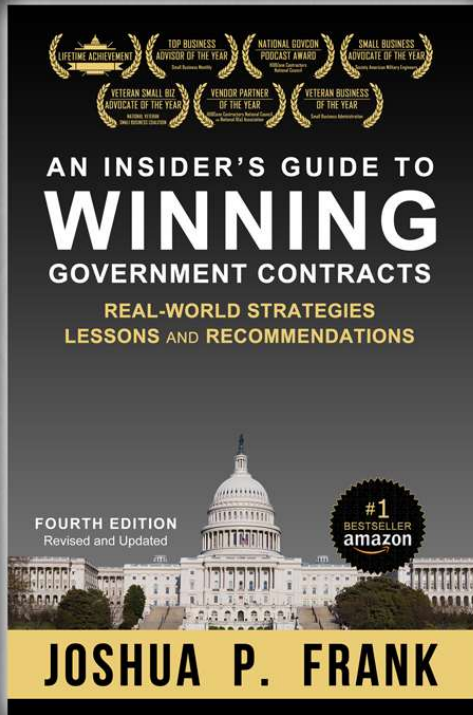
Upcoming Ready. Set. SBC Series Webinars and Reminders

- [Maximizing SBC On Your Own](#)
September 24, 2026
1:00 p.m. – 2:00 p.m. ET
- [Small Team, Big Impact: Booth Best Practices for SAME SBC](#)
October 1, 2026
1:00 p.m. – 2:00 p.m. ET
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occupation is life-long-learning”*

Joshua Frank



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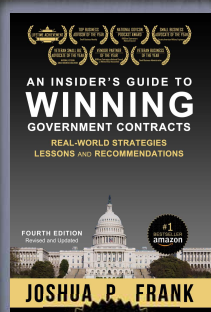
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Thanks for Listening!

- Joshua Frank
jfrank@rsmfederal.com

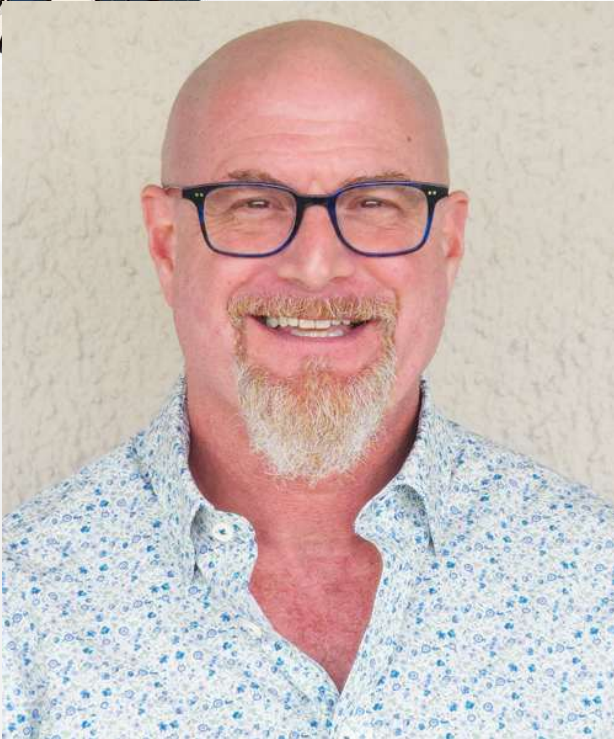


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Joshua P. Frank

RSM Federal
Managing Partner



Get to Know Me

GREW UP IN:

- St. Louis, Missouri

CURRENTLY BINGE- WATCHING or READING:

- Master Magician
by Raymond Feist

PROUDEST ACCOMPLISHMENT:

- Being a Father

BIGGEST FEAR:

- Geese. Confident, land-
walking geese.



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Style Guide



FUELING FEDERAL ACQUISITION

MAIN TEXT COLORS

Light Background

(#0c0b0d)
RGB: 12-11-13
CMYK: 74-69-65-85
PANTONE: Black 6C

Dark Background

(#ffffff)
RGB: 255-255-255
CMYK: 0-0-0-0
PANTONE:

Arial black
(Header Font)
Arial (Body Font)

MAIN COLORS

(#0c0b0d)
RGB: 12-11-13
CMYK: 74-69-65-85
PANTONE: Black 6C

(#f3722a)
RGB: 243-114-42
CMYK: 0-69-94-0
PANTONE: 158 C

(#0625bc)
RGB: 6-37-188
CMYK: 95-87-0-0
PANTONE: DARK BLUE C

(#ed2d2a)
RGB: 238-45-42
CMYK: 0-96-94-0
PANTONE: 3556 C

(#a53124)
RGB: 165-49-36
CMYK: 24-93-98-18
PANTONE: 7627 C

SECONDARY COLORS

(#f9e149)
RGB: 251-225-73
CMYK: 3-7-83-0
PANTONE: 114 C

(#f39423)
RGB: 243-148-35
CMYK: 2-49-98-0
PANTONE: 3588 C

(#b24026)
RGB: 178-64-38
CMYK: 22-87-100-12
PANTONE: 7599 C

(#2f51a2)
RGB: 47-81-162
CMYK: 92-78-0-0
PANTONE: 7685 C

(#c7202c)
RGB: 199-32-44
CMYK: 15-100-94-5
PANTONE: 711 C

(#a41e29)
RGB: 164-30-41
CMYK: 24-100-91-18
PANTONE: 187 C