

TRACIE G. GRANT



Do-It-Yourself GSA
Preparing you to:
Write • Win • Succeed

The GSA MAS Contract Marketing and Management Guide

Guidance to GSA MAS Contract
Marketing and Administration

Includes Sample Documents

DIY GSA – A Different Kind of GSA Consultant
It's not AI, it's KNOWLEDGE.

GSA Contract Marketing and Management Guide

Guidance to GSA MAS Contract Marketing and Administration

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FOREWORD

Tracie Grant is a GSA MAS Proposal Subject Matter Expert, Contracts Manager, and Author who helps companies needing or using the GSA Multiple Award Schedule to find success with this key government contracting vehicle. Currently the owner and principal consultant of DIY GSA and Contract Management Consulting, Ms. Grant is continually updating her products and services to help businesses break into the lucrative federal government marketplace. This book is written for those in the GSA proposal trenches by one in the trenches beside them. Ms. Grant has been working with GSA Schedules since 1994 and has written this book based on the challenges and successes she has seen over the last 31 (can you believe it!) years. This book is not written with AI. It's based on actual knowledge and written by an experienced GSA SME.

Ms. Grant is not an attorney and this guide is not meant to provide legal advice. It is a representation of experience gained over the last 30+ years and captures what DIY GSA would likely do in relation to documents and activities completed when putting together a GSA proposal. It has always been our philosophy that people can write their own winning GSA proposals if they have the appropriate tools. It's not easy, and though GSA has tried to find ways to help businesses, they can't seem to get into the details of proposal preparation successfully. They can review proposals and heaven knows they can reject proposals. Typically, though, they haven't written any GSA proposals. And, unless you've written proposals multiple times, there are many places where you can slip up. We try to cover as many of those places as we can.

For additional information about our **DIY tools and services**, visit us at www.diy-gsa.com. We're also on LinkedIn®, YouTube®, and Facebook®.

Also, you may see that some blank pages are included in this guide. These pages are intentionally left blank to help with the overall flow and understandability of the guide.

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Chapter 1

PRE-AWARD ACTIVITY REVIEW

Congratulations! You must have recently won a GSA Multiple Award Schedule Contract (GSA Schedule Contract/GSA Schedule/GSA Contract/GSA MAS) or maybe you have inherited a GSA MAS to manage. We salute the persistence and competence required to win one of the most valuable federal government contracting vehicles open to all businesses--large and small. Whether you wrote your winning proposal yourself, worked with someone to write it for you, or you're taking on an existing contract, significant effort has or will be expended. Whatever your situation, you need to make sure you manage and market your GSA Schedule Contract well so that you don't lose it to errors, inactivity, or lack of sales.

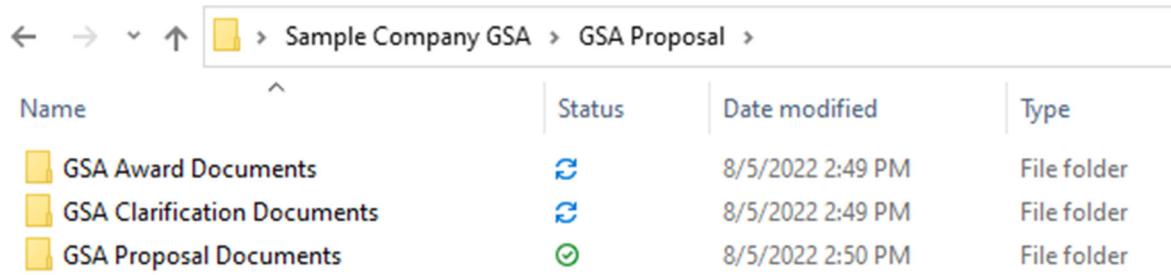
As we get started, let us recap the concluding pre-award activities here so you will understand what happened during the **clarification**, **negotiation**, and **final proposal revision** stages of your proposal so you will have the necessary documents for future use. If you have inherited a contract, this may help you understand how things went down when your company won the contract.

CLARIFICATIONS

GSA uses the clarification stage to define exactly what items you are offering, to understand what prices and discounts form the foundation of your GSA Schedule Contract, and to ensure that your organization meets GSA's strict standards. You or your agent should have received an email or electronic letter from GSA requesting additional information or requesting corrections/revisions. If you received such a request, you undoubtedly replied within the prescribed timeframe and made any necessary changes to enable contract negotiations and award to occur. The clarification step is important to remember because you probably revised your initial proposal documents after negotiations but you may not have submitted the revised documents through eOffer so there could be no electronic evidence of the change in the GSA system. You want to keep track of such documents.

You will want to ensure that you save all these documents in folders that will enable you to access them throughout the life of your contract--not just today. You may not need them for a couple of years. Many contractors don't need them again until their Contractor Assessment (formerly a Contractor Assistance Visit/CAV or audit)--we'll just call it an audit; however, you need to know where they are. It is not unheard of for a contractor to lose track of these documents during the years between award and audit. That's why it's important to set up your electronic files now so that you or the next GSA Contract Administrator can find them in the future.

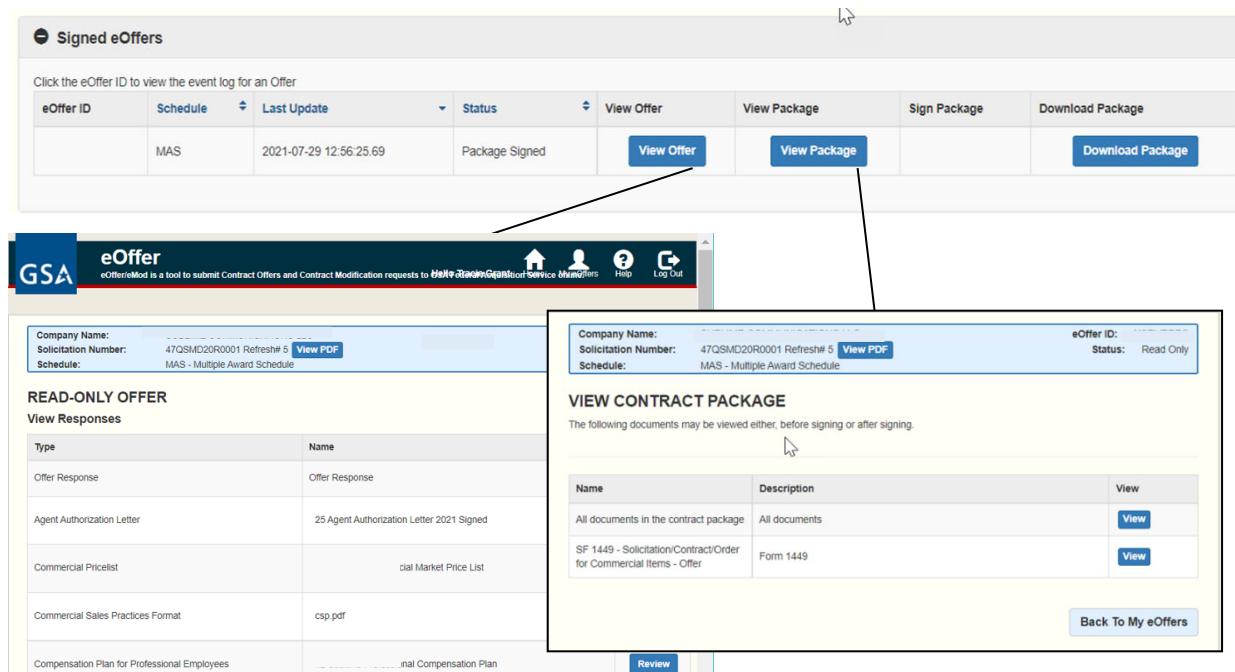
We typically suggest at least three folders in the GSA Proposal files for our most organized clients: **Proposal Documents**, **Clarification Documents**, and **Award Documents** (see the figure below). Some clients work with a single folder full of different versions of documents with no clear organization, and we have seen that lead to confusion and disaster. We suggest that you organize your folders and files now as it is hard to recall just what you were doing two or three years ago when you put the proposal together.



A screenshot of a file explorer window. The path is 'Sample Company GSA > GSA Proposal >'. The table below lists three items:

| Name | Status | Date modified | Type |
|-----------------------------|--------|------------------|-------------|
| GSA Award Documents | ⟳ | 8/5/2022 2:49 PM | File folder |
| GSA Clarification Documents | ⟳ | 8/5/2022 2:49 PM | File folder |
| GSA Proposal Documents | 🕒 | 8/5/2022 2:50 PM | File folder |

Fortunately, if you were awarded your contract recently, you can download your proposal files from GSA eOffer at any time (see the figure below), so in theory you can't lose those. The bad news is that if you didn't upload the documents from clarifications into eOffer, you may not have the most current version of the documents. Hence the clarifications folder. You could also integrate your clarification documents in with your proposal documents, and that is fine. Just make sure you know what documents may have been revised and that you keep the most current version of each document.



The screenshot shows the GSA eOffer interface. At the top, there is a table titled 'Signed eOffers' with columns: eOffer ID, Schedule, Last Update, Status, View Offer, View Package, Sign Package, and Download Package. One row is visible for 'MAS' with a status of 'Package Signed'. Below this, there are two main sections: 'READ-ONLY OFFER' and 'VIEW CONTRACT PACKAGE'.

READ-ONLY OFFER: This section shows a table of responses:

| Type | Name |
|--|---|
| Offer Response | Offer Response |
| Agent Authorization Letter | 25 Agent Authorization Letter 2021 Signed |
| Commercial Pricelist | 2021 Market Price List |
| Commercial Sales Practices Format | csp.pdf |
| Compensation Plan for Professional Employees | Final Compensation Plan |

VIEW CONTRACT PACKAGE: This section shows a table of documents:

| Name | Description | View |
|--|---------------|----------------------|
| All documents in the contract package | All documents | View |
| SF 1449 - Solicitation/Contract/Order for Commercial Items - Offer | Form 1449 | View |

Buttons at the bottom include 'Review' and 'Back To My eOffers'.

NEGOTIATIONS

After completion of the clarification process, GSA should have invited you to negotiations. Your negotiations may have been conducted via email or conference call. During the negotiations you may have reviewed the pertinent clauses applicable to your proposal and contract as well as specific pricing information. If your offer was non-TDR, by the time of award, you should be very clear about your Basis of Award (BOA) customer, or class of customers, which is often your Most Favored Customer (MFC). Your BOA customer is extremely important going forward. While this is key information, our experience is that many GSA contractors don't understand these designations, or even what customer(s) are categorized as their MFC and/or BOA. Not capturing this information can lead to critical pricing errors and could have dire consequences, such as the cancellation of a GSA Schedule Contract or worse. Additional information related to the BOA is included later in this guide.

You may want to note the following information prior to or after negotiations:

| TITLE/DESCRIPTION | REMARKS |
|----------------------------------|-----------|
| UEI Number | |
| Authorized Negotiators | |
| Contact and Ordering Information | |
| Scope of Contract | |
| SINs | |
| Commercial Delivery Schedule | |
| Expedited Delivery | None |
| Basic Discount | GSA: MFC: |
| Quantity/Volume Discounts | GSA: MFC: |

| | |
|--|---|
| Most Favored Customer (MFC) (non-TDR) | |
| FOB | |
| Maximum Order Limitation | \$ |
| Industrial Funding Fee & Sales Reporting | You will be required to submit .75% of your reported sales to GSA on a quarterly basis. Compliance will be monitored by an Administrative Contracting Officer (ACO). This ACO may contact you after award. <i>Note: If adjustments to your basic discount are necessary you will discuss them during negotiations.</i> |
| Price Reductions (non-TDR) | Your Basis of Award (BOA) and Most Favored customer (MFC) has been established as “ _____ ” as well as the relationship between our basic discount and the basic discount of your MFC. This relationship must be maintained throughout the life of the contract. If you change the discount to your MFC you need to contact GSA immediately. |
| Contract Sales Criteria | I-FSS-639 CONTRACT SALES CRITERIA (SEP 2023) The Federal Supply Schedule (FSS) Contracting Officer may decide not to exercise the first option to extend the term of the contract if the Contractor's reported sales are not expected to exceed \$100,000 within the first 60 months following contract award. The FSS Contracting Officer may decide not to exercise subsequent options to extend the term of the contract if the Contractor's reported sales did not exceed \$125,000 each 60-month period thereafter. |
| Final Proposal Revision | After negotiations GSA will send a letter via e-mail requesting your final proposal revision (FPR). A template will be included with the letter to assist in preparing the FPR. The FPR must be submitted on your company letterhead and signed by duly authorized signatories. |

FYI: It probably wouldn't hurt for you to fill in the above with the details from your FPR and make sure your Contract Administrator keeps this guide for future reference.

Sample GSA Schedule Contract Event Timeline

