TRACIE G. GRANT

DIY GSA 30-day Workbook

A companion workbook to The GSA Proposal Guide for GSA MAS Proposals

CREATE YOUR SUCCESS WITH THE GSA MULTIPLE AWARD SCHEDULE (MAS) USING OUR COMPREHENSIVE DIY TOOLS.

DIY GSA 30-Day Workbook

A companion workbook to the GSA Proposal Guide

For use in completing a GSA Multiple Award Schedule (MAS) Proposal.

Created by DIY GSA™

DIY GSA – a Different Kind of GSA Consultant.

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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.

Iconography

Great Ideas and Best Practices

Videos (On Demand and YouTube)

Live Webinars

Extra Tidbits of Good Information

Hello!

Welcome to our **30-day Workbook**. This workbook has been created to supplement our **GSA Proposal Guide** along with our **GSA Sample Proposal**. The GSA Proposal Guide was initially published in 2014 and has been updated several times as GSA has adjusted the Multiple Award Schedule program. The Workbook has been a dream since about 2015, but every time we'd have room in our schedule to work on it, GSA would update the solicitation and we'd have to turn our focus back to the GSA Proposal Guide to update it. We have finally forced the schedule because:

- GSA's efforts to communicate better and simplify the proposal process is giving contractors more tools, but they don't know things from the commercial side and what they provide isn't quite complete,
- We truly believe that there are thousands of business owners who want to save $5,000 - $15,000 (we've had one consultant quote at $30,000) in proposal writing fees, and
- Technological advances make it possible for us to offer our services to you in a blended learning platform so you can access all our resources, so,

NOW is the time to release this Workbook, and here it is!

As you start out, you will need to know that the order of the work you need to complete may not align perfectly with the GSA Proposal Guide because of so many of GSA's recent changes; however, they do complement each other, and along with the GSA Sample Proposal, they give you the trifecta of tools that will allow you to finally complete your own GSA Proposal.

The 30-day outline we suggest is provided below. You do, of course, have the freedom to move the days around to suit your business. If you are a larger business, it may take your Accounting Department longer than three days to get you the invoices you request on Day 14, so you won't have them for Day 17's activities. If that is the case, adjust your timeline.

We would suggest you review the schedule below and then read the GSA Proposal Guide before you tackle the GSA Solicitation or even GSA Pathways to Success training document. You will find common terminology in both the guide and this workbook. The extended discussion and background information in the GSA Proposal Guide will give you a good foundation for the rest of the process. Don't skip the read no matter how much caffeine it takes to get you through. 😉 (Yes, we may use an emoji from time to time.)

The Next 30 Days: What you are going to do!

This table outlines the activities you will undertake over the next 30 days. We outline the activity and the amount of time we expect it may take you to complete.

Activity	Approximate Time
Day 1 – Create a Master folder for your GSA documents, review GSA's new Roadmap site, and complete the Pathways to Success training.	2 - 5 hours
Day 2 – Review the solicitation.	1 - 2 hours
Day 3 – Create a list of the products and services you could, or that you want to, include in your GSA proposal.	1 - 4 hours
Day 4 – Review the list you created in Day 3 and choose which large categories, subcategories, and SINs fit your offerings. Review the SINs and decide which ones you will propose under.	1 - 3 hours
Day 5 – Review your client list and determine which three clients would make your best references. The projects you did for these clients should have been completed within the last two years. If it's an ongoing project, it should be at least one year old. Contact the clients to see if they will be willing to complete a Past Performance Questionnaire (PPQ) Gather contract and contact information for each one. Complete the top portion of the PPQ or gather your CPARS.	1 – 4 hours
Day 6 – Review your sam.gov registration to ensure it is current and accurate and you have all the NAICS you need in your profile. Each SIN must have a corresponding NAICS in your sam.gov profile.	.5 - 1 hour
Day 7 – Complete the Readiness Assessment.	1 - 3 hours
Day 8 – Prepare your Commercial or Commercial Market Price List, including product descriptions and/or labor category descriptions.	1 - 4 hours
Day 9 – Customize your proposal tracker and review the process.	.5 - 1 hour

DAY ONE: Folders/GSA Roadmap/Pathway to Success Training

Day 1 – Create a Master folder for your GSA documents, review GSA's new Roadmap site, and complete the Pathways to Success training.

Time Commitment:	By the end of the day, you should have:
~2-5 hours	✓ Created your folders. ✓ Familiarized yourself with the GSA Roadmap. ✓ Completed the Pathway to Success Training.

CREATING THE MASTER FOLDER: (~TIME: 15 MINUTES)

You will need to create a place where you can permanently save your GSA files. A place where you can find them over the next 20 years.

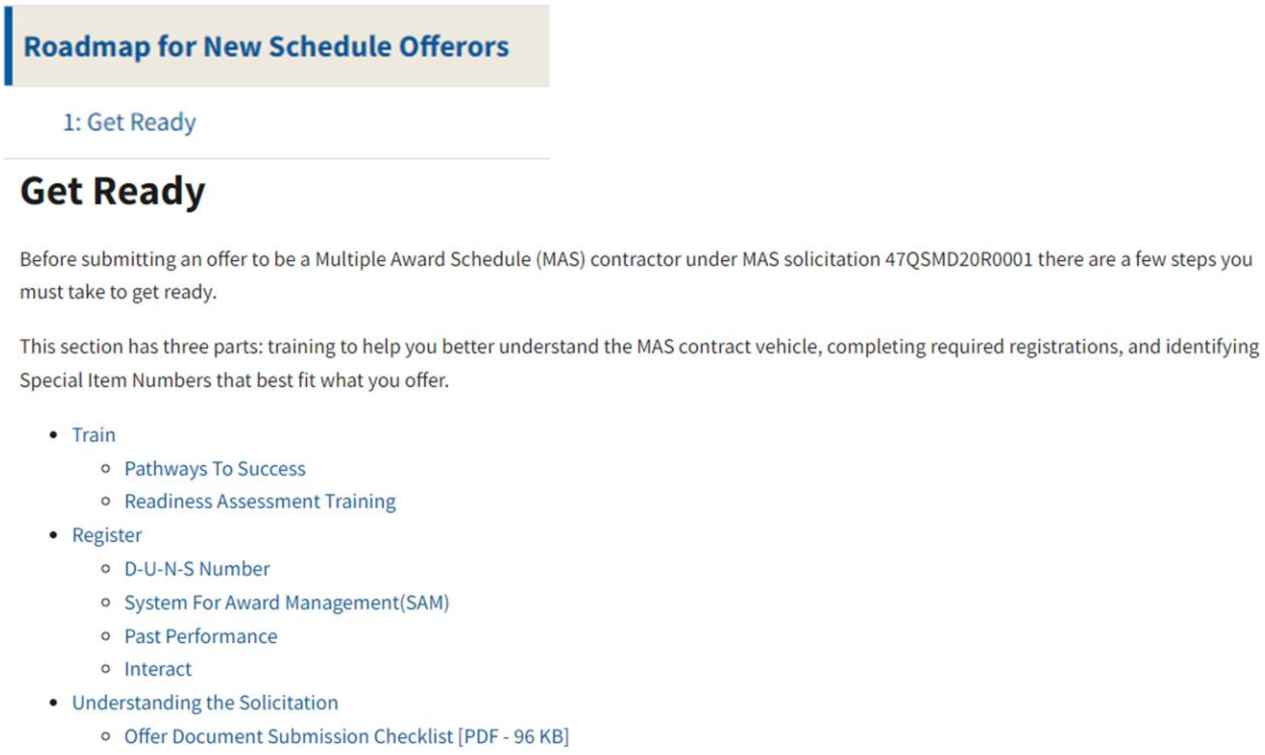
We typically set up our file storage folders with the following:

Folder "00 GSA Draft Documents"
Folder "01 GSA Info Documents"
Folder "02 GSA Award Documents"
Folder "XX ARCHIVES"

REVIEW THE GSA ROADMAP: (~TIME: 15 MINUTES - 1 HOUR)

GSA has created a Roadmap to help you complete your GSA proposal correctly. They have made monumental strides in contractor assistance with the GSA Roadmap located at **https://www.gsa.gov/buying-selling/purchasing-programs/gsa-schedule/selling-through-schedule/guide-to-preparing-a-schedule-offer**.

We will provide you some level of illustration here, but we also provide a review webinar where we walk through the site so you can see what we believe is most important.



Let's walk through the "Get Ready" section:

Train: Here on **Day 1**, we will address the Pathways to Success. We will address the Readiness Assessment on **Day 6**.

Register: This is a bit murky, and we expect GSA to clean it up over the next few months.

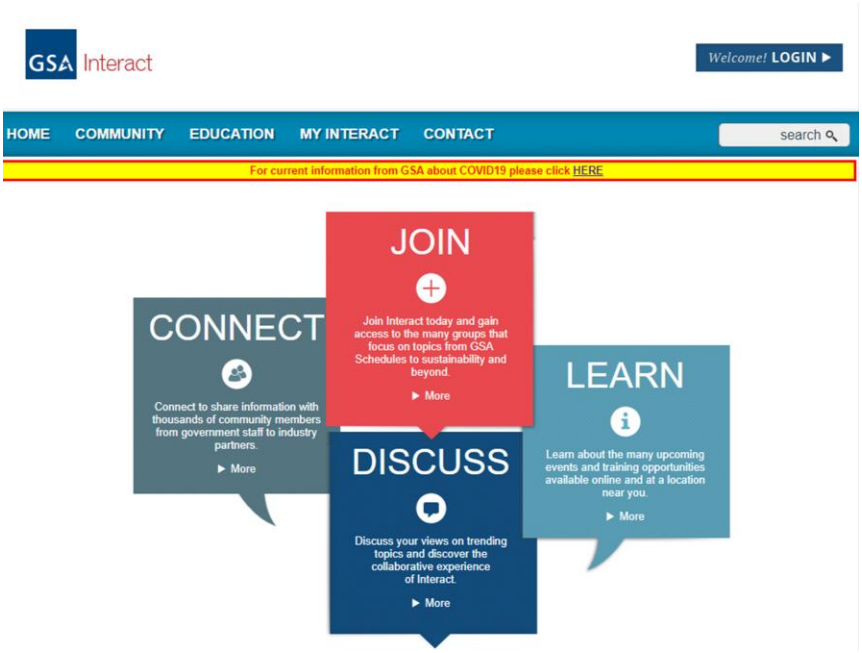
The **DUNS Number** is being replaced by the Unique Entity Identifier. If you have been in business for more than two years (as required by GSA), or if you are building a joint venture company, you should already have a DUNS Number. If you don't, you will want to get your registration completed before diving into your GSA proposal.

The **Systems for Award Management or (SAM)** registration must be completed before you can get paid for any government work. You can complete this registration on your own or pay someone to do it for you, but most companies do it themselves. Here's the URL that will take you to the registration page**: https://sam.gov/content/entity-registration**.

When you complete your sam.gov registration, GSA has advised to list the authorized negotiators you are including in your GSA proposal as your points of contacts. It will facilitate other registrations.

The **Past Performance** registration is not really applicable. There are two ways you can provide past performance. If you have CPARS, you should be able to access them without additional registration (no reference to registering for CPARS is included on the GSA page). If you're providing questionnaires from customers, there is no registration required. You will provide them the questionnaires with Section 1 completed and they complete the rest of the form. We address this further on **Day 4**.

Interact is a GSA website (**https://interact.gsa.gov/**) that gives you access to current and relevant GSA information.



It is not required for you to join Interact, but it is highly advisable. It is invaluable when it comes to staying current on all the GSA changes, and believe me, there are always changes and new places where you have to register!

Understanding the Solicitation: The solicitation is a document with more than 140 pages and 14 attachments. You will enjoy enough learning today with the Pathways to Success, so we'll tackle the Solicitation in our **Day 2** activities.

COMPLETING THE PATHWAYS TO SUCCESS: (~TIME: 1.5– 4.0 HOURS)

Have the authorized negotiator who will be signing the proposal complete GSA's Pathway to Success training. It usually takes about an hour or two to complete this project.

This “training” is currently a pdf with reference links as located here (**https://www.gsa.gov/buying-selling/purchasing-programs/gsa-multiple-award-schedule/selling-through-schedule/roadmap-for-new-schedule-offerors/get-ready#pathways**) and in the Appendix to this book. You will need to read the full PDF and actually click on the reference links and understand the information presented. We have to commend GSA for working hard over the last few years to develop material that is helpful for prospective contractors. The information in the Pathways to Success is relevant and focused. If you are already a government contractor, it will be understandable. If you are new to government contracting, it will seem overwhelming at first, but if you go through it a few times, we think you’ll find it very helpful.

Make sure to click on the comment icon in the upper left corner as it will give you insight into how the narration might sound.