




Helping Connect Business & Government In Alaska



Creating Capability Statements

What are you trying to say about your business?

Jody King, Contract Specialist, Alaska PTAC
August 9, 2023

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www.ptacalaska.org





Enter term

HOME
GETTING STARTED
EVENTS & TRAINING
TOOLS
NEWS
ABOUT

Request PTAC Services

The first step to working with PTAC is to register with us.

start your REGISTRATION »

Are you new to government contracting?

Government contracting is a more complex, involved business process than what is usually found in the private sector.

ARE YOU READY for government contracting? »

THE 10-STEP APPROACH to government contracting »

Introduction to PTAC

Procurement Technical Assistance Center (PTAC):

- Now part of the *APEX Accelerators* program
- Free assistance with all aspects of government contracting, from cradle to grave (start to finish) for federal, state and local purchasing activity
- Free one-on-one appointments
- Free workshops (Special events and extended training session may have registration fees)
- The Alaska PTAC is one of 90+ other PTACs across the US, Puerto Rico, & Guam

<https://ptacalaska.org/>
<https://www.aptac-us.org/>
<https://www.apexaccelerators.us/#/>



UAA Business Enterprise Institute

UNIVERSITY of ALASKA ANCHORAGE

The Alaska PTAC is a program of the UAA Business Enterprise Institute and funded in part through a cooperative agreement with the Department of Defense Office of Small Business Programs



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Discussion Topics

- ❖ What is a capability statement, and why do you need one?
- ❖ What is a capability statement supposed to accomplish?
- ❖ What does a capability statement look like?
 - Purposeful design - developing for specific use
 - Data components - what information should be conveyed
 - Style & Format
 - The “Z” format – 6 second read (Networking events)
 - Response to Sources Sought and RFI notices
- ❖ Are there any mistakes to avoid?
 - Critiquing published capability statements
- ❖ Posting your finished Capability Statement

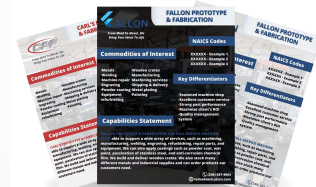


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What is a Capability Statement?

❖ Marketing document(s) that:

- ✓ Introduces your business – next step after a business card
- ✓ Tells the reader what you do or offer - provides information about the professional services offered or product lines for sale
- ✓ Shows that you are procurement ready
- ✓ Shows which government agencies or commercial entities that have paid in you the past



❖ Why are they needed?



- ✓ Requested by agencies to support procurement strategy
 - ✓ Provides small business and industry data
 - ✓ Memory aids that can be resource documents for future needs
 - ✓ Provides a summarized document with experience, expertise & success
- ✓ Used by Prime contractors with small business subcontracting goals
- ✓ Most consistent method to market to all agencies and prime contractors
- ✓ DoD OSBP considers it a critical document to be “procurement ready”



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What does it accomplish?

- ❖ The real purpose of a capability statement is to open doors.
- ❖ A capability statement is the preferred method for marketing to all levels of governmental entities.
- ❖ A well crafted Capability Statement provides an opportunity to set your company apart from your competitors. It shows what your business can do and why potential customers should buy from you.



A good capability statement should:

- ✓ Have a defined purpose so that it is targeted to your reader
- ✓ Inform why your company is a good fit for a specific need or activity
- ✓ Have a visual appeal
- ✓ Be easy to read – skim – with condensed descriptions
- ✓ Create interest in your business by highlighting specialty, expertise and overall capabilities
- ✓ Provide needed information to encourage further communication
- ✓ Distinguish you from your competitors
- ✓ Avoid “empty calorie” descriptions, terminology and fluff




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What does it look like?

Purposefully Designed Content


- ❖ Written for specific, targeted use “...needs to be to the point & specifically related to an individual agency’s needs. A capability statement should be a living document which speaks directly the agency with which you are building a relationship with.”
- ❖ Visually appealing
 - Clear, concise & precise language → No heavy blocks of text
 - Use bullets, short phrases
 - Use technical language that can be understood by the reader
 - Use graphics or charts where they make sense
 - Use clean font that can easily be scanned
 - Use colors that match you logo and company branding
 - Use heavier quality paper – think about professionally printing



What does it look like?

Data components - what information should be conveyed

1. Header
 - Company Name & Logo
 - Title "Capability Statement"
 - *Optional: UEI & CAGE Code*
 - *Optional: Socio-economic tags (certification logos)*
2. Corporate Data
 - Address, phone number
 - Website, email address
 - Government needed data
 - Unique Entity Identifier (UEI) & CAGE Code
 - Small business certifications (tags/logos?)
 - Current acquisition vehicles (GSA MAS or GWAC)
 - Industry Codes (NAICS, PSC, FSG, NIGP)
3. About Us / Company Overview
 - Your hook that leads to your pitch
 - Company history
 - Product/service overview
 - Years in business
 - CEO/Owner information
4. Core Competencies
 - List of provided services and/or products
 - Use bullets → can use icons
 - Charts or graphics
 - Don't get bogged down with including every little thing your company has ever done
 - Focus on what your company does best
5. Differentiators
 - How does your company stand apart from the rest?
 - What makes you different?
 - Why should the government choose you?
 - Include things like:
 - Facility clearance levels
 - Relevant certifications
 - Specialized licenses
 - Bonding Capacity
 - Depth of agency experience
 - Relevant intellectual property (like patents)
 - Staff uniqueness (academic credentials, employee retention, volume of certified-specialists, etc.)



What does it look like?

Data components - what information should be conveyed

7. Past Performance
 - Highlight past performance (who have you worked with) on relevant contracts or projects
 - Use specific examples and metrics to demonstrate your company's capabilities & achievements
 - Use current projects (past 3 to 5 years)
 - Start with federal and state contracts
 - Add commercial projects if you don't have government contracts or if the commercial project highlights your target purpose for this capability statement
 - For subcontracts, list the prime contractor and then note the "owner"
 - Provide contract number(s) for projects with CPAR past performance data
 - Do not use agency logos without specific permissions – most agencies specifically state not to use their logo as an advertising mechanism
 - Use corporate logos with permission
8. Client/Customer Testimonials
9. Footer (content optional)
 - Boring stuff on the bottom – NAICS codes
 - List your company's specific point of contact – not general contact information

Style & Format – Networking

The “Z” format – 6 second read

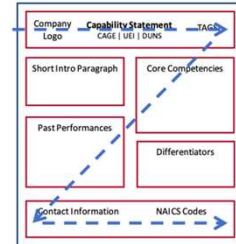
In the market research phase, buyers are just trying to collect a pool of “generally qualified” vendors & don’t have time to read lengthy documents.

You have 6 seconds to hook their interest and using clear concise language, you must tell them:

1. That you are “procurement ready”
2. What good or professional services you sell
3. What government agencies or commercial entities have paid you in the past

Capability Statement Refresh

- 6 – Second Read
- Z Format
- Use it to Highlight Tags
- One Core Competency Expanded
- Past Project Performance
- Boring Stuff at the Bottom



“Government contracting is not a secret, it’s just a process.” Neil McDonnell

The truth is that government buyers only scan capability statements before deciding whether to toss or forward it in the process.


Neil McDonnell / www.govconchamber.com

<https://www.govconchamber.com/blog/6-second-government-contracting-capability-statement>

Style & Format – Responding to RFI

Longer read → 1 to 2 pages (front & back)

- ❖ When used in responding to a Sources Sought notice or a RFI, *the document should be sure to use language called out in the posted notice.*
- ❖ Depending on the information requested, a general company capability statement could be used. General capability statements would be a basic introduction to your company. This might work if time is tight, but shouldn’t be your default supporting document.
- ❖ The longer document allows you to provide more information. This might allow to expand your past performance section





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A look at templates

**Browser search
"capability statement
templates free"**

- Look for free templates
- Use word document
- Don't worry about duplicating something you see on-line.
- Make the best capability statement that you can
- Hire a technical writer or a marketing professional to design a series of capability statements





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Getting Started

❖ Getting Started

- Capability Statement Data Collection Worksheet
 - Ask yourself:
 - ✓ Why am I in business?
 - ✓ Why should the government award me a contract
 - ✓ What things make my company unique compared to my competitors?"
- Gather the data before trying to plug information into a template
- Determine the purpose for the document – what is your immediate objective?
- Pull the information from the worksheet that best fits the purpose – you don't have to use everything that you've written down!
- Determine your color palette – this should match your logo, website and other company branding
- Audition different templates – a simple capability statement is fine if the data is good!
- Edit, edit, edit. The goal is clear, concise and brief.
- Use a mix of bullets, short phrases and full sentences.



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Mistakes to avoid

❖ Mistakes to avoid:

- Using fluff words and empty adjectives: super, exceptional
- Generic statements: “We provide quality in everything we do”
- Throw in everything including the kitchen sink – jack of all trades isn’t going to make you stand out in a crowd...instead focus on what your company does best
- Bad grammar and spelling mistakes
- Fill up every inch of the capability statement with words and graphics – be sure to leave white space for easy readability.
- Keep recycling the same capabilities statements year after year
- Waiting until the last minute to update your capability statement
- Be afraid to follow up with agencies or companies that have received your capability statement



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Posting Capability Statements

You’ve worked hard to complete your Capability Statement – now put it to use!

- ❖ Post it on your website (self hosted)
- ❖ Third-party hosting website → OneDrive, Google Drive
- ❖ SBA Dynamic Small Business Search (DSBS) → Must have a full URL that directs the viewer to the hosted document
- ❖ Certify.sba.gov → 8(a) Certified firms
- ❖ Email to Agency POC, Small Business Professionals, agency program staff, or prime contractors
 - Write an introduction in the email, note the attached Capability Statement and request a meeting to discuss your company.



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Looking at Examples



CAPABILITY STATEMENT

BUSINESS OVERVIEW
 Dunsal 081189386
 Company Type: S Corp
 Incorporated: 2016

INDUSTRY CERTIFICATIONS:
 ADP
 Solid
 City of Atlanta vendor
 Zinnov

NAICS CODES:
 517110 Wire Telecom
 517210 Wireless Telecom
 517911 Telecom Resellers
 517919 All Other Telecomm
 518210 Data Processing & Hosting
 541511 Computer Programming
 541512 Computer System Design
 541513 Computer Facilities Mgmt.
 541519 Computer Related Svc
 541011 Mgmt. Consulting Svc
 541018 Other Management Svc
 551210 Facilities Support Svc
 561320 Temporary Staffing Svc
 801522 Security Systems services
 811212 Maintenance Contractors
 811420 Computer Training
 823210 Electrical Contractors
 541390 Engineering Services
 541618 Management Consulting Svc

CONTACT INFO:
 LEGACY POINTE TELECOMMUNICATIONS
 35181 Cascade Rd
 Suite 220
 Atlanta, GA 30331
 470.242.1221 / OFFICE
DARUS EL AREE
 darus@legacypointetelecommunications.com
 www.legacypointetelecommunications.com

EXECUTIVE SUMMARY
 LEGACY POINTE TELECOMMUNICATIONS is a minority-owned, small business providing services in DAS, Small Cell, Wi-Fi, RF Services. We serve the commercial and government markets providing products and services to lead these organizations from legacy systems to next generation technologies. We have over 50 years of combined experience in the technology space. We offer turnkey fully managed solutions. Legacy Pointe's extensive knowledge of the entire project lifecycle creates and added value to our customers solutions.

CORE COMPETENCIES

SERVICES	SOLUTIONS
<ul style="list-style-type: none"> Turnkey DAS design and installation Public Safety Small Cell Construction Management Technology Consulting 	<ul style="list-style-type: none"> RF Services Staff Augmentation Testing and assessment Security Fiber

KEY DIFFERENTIATORS

- Seasoned management team
- Strong past performance
- Quality Assurance management processes
- Certified Engineers on staff
- Clear pricing and multi-vendor relationships to control cost
- Focused on maximizing client's ROI

PAST PERFORMANCE

- MRF Stadium
- T-Mobile Corporate office
- TWC Arena
- Concord Mills Mall
- Kiawah Island Resort
- Houston Turnes
- Walmart
- Chick - Fila Corporate
- BBVA - Headoff
- Navy Federal Credit Union
- Marshall Jackson Airport
- City of Atlanta



Capability Statement

UEI 123456789 CAGE Code 46Y9Z

CONTACT INFO
 POC: John Smith
 (123) 456-1789
 https://mybusinesswebsite.com/
 president@mybusiness.com 14502
 N. Main Street, Suite 100
 City, ST 12345

EXECUTIVE SUMMARY
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis aute m vel eum iure doer a hendrerit in vulgute velit esse mollitia consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zril deneu augue duis dolore te feugiat nulla facilisis.

NAICS CODES

- 236220 Commercial and Institutional Building Construction
- 238210 Electrical Contractors and Other Wiring Installation Contractors
- 541330 Engineering Services
- 541350 Building Inspection Services
- 561390 Other Services to Buildings and Dwellings

PAST PERFORMANCE


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- Consectetur adipiscing elit, sed diam nonummy nibh
- Euismod tincidunt ut laoreet dolore magna aliquam erat volutpat
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- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed nonum

CORE COMPETENCIES

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- Ut wisi enim ad minim veniam
- Quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat
- Consectetur adipiscing elit, sed diam nonummy nibh
- Euismod tincidunt ut laoreet dolore magna aliquam erat volutpat
- Ut wisi enim ad minim veniam
- Quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat

CERTIFICATIONS

- Small Business Administration (SBA) Certified
- Veteran Owned Small Business
- HUBZone Certified Small Business



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Looking at Examples



Capabilities Statement

CAGE: 5YMD1 UEI: DTRLQASTYDF7

About Us
 USFCR is the largest and most trusted System for Award Management (SAM) registration and renewal services company. We also provide set-aside registrations and certifications, including women-owned, veteran-owned, HUBZone, 8(a) Business Development Program, other federal contracting services, training, and technology.

Core Competencies

- Government Registrations
- System for Award Management
- SD/VOSB
- EO/VOSB
- 8(a)
- HUBZone
- GSA Schedule
- WAWF/rappt
- Federal Contracting Training & Consulting
- Subcontractor Onboarding & Management
- Web-based Contracts Search & Management Technology

Differentiators

- Full-service firm providing everything from registration, bid training, and SoAs.
- Advanced Procurement Portal - Developed our own app for clients to access federal opportunities in real time and handle federal CRM with ease.
- Worked with and registered over 100,000 businesses including Amazon, General Electric, Chevrolet, Exxon, and Hewlett Packard.
- Largest and oldest third-party government registration firm.

Point of Contact
 Eric Kneeling - President & Founder
 info@ustcr.com
 (877) 252-2700
 www.ustcr.com

Corporate Data
 US Federal Contractor Registration, Inc.
 9420 4th Street North, Suite 111
 Saint Petersburg, FL 33708, USA
 UEI: DTRLQASTYDF7
 CAGE: 5YMD1
 NAICS Codes:
 541618 - Other Management Consulting Services (Primary)
 541319 - Other Computer Related Services

Past Performance





CAPABILITY STATEMENT

(555) 555-5555

BUSINESS OVERVIEW
 Name: [Redacted]
 Mailing Address: 123 Street, City, ST 12345
 Structure: S-Corp, LLC, Corp.
 Ownership: MBE, WOSB, VOSB
 DUNS Number: #888888
 CAGE Code: #8888
 Contractor's License: #888888

Contact Information
 Name: [Redacted]
 Phone: (555) 555-5555
 Email: info@company.com

Certifications


NAICS Codes
 236118 Residential Remodelers
 236220 Commercial & Institutional Building Construction
 238990 All Other Specialty Trade Contractors
 238210 Electrical Contractors & Other Wiring Installation Contractors
 237110 Water & Sewer Line and Related Structures Construction

ABOUT US
 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur et efficitur ligula. Ut gravida pretium tritor non consectetur. Proin nec hendrerit lacus. Aenean rhoncus enim non justo commodo, a maximus nisl aliquet. Maecenas nulla mi, tincidunt vel mattis eget, luctus ut nunc. Integer sit odio metus. Nam ut malesuada diam. Etiam nunc quam, tristique id porttitor at, fringilla nec nibh.


CORE COMPETENCIES

Capability Area One	Capability Area Two
<ul style="list-style-type: none"> Sub Area Sub Area Sub Area 	<ul style="list-style-type: none"> Sub Area Sub Area Sub Area
Capability Area Three	Capability Area Four
<ul style="list-style-type: none"> Sub Area Sub Area Sub Area 	<ul style="list-style-type: none"> Sub Area Sub Area Sub Area

DIFFERENTIATORS

- Differentiator Example: Certifications that show your expertise.
- Differentiator Example: A specialty that your business does better than the competition.
- Differentiator Example: The capacity of your team.
- Differentiator Example: Your network of qualified subcontractors or trusted suppliers.
- Differentiator Example: Your customer service rating.
- Differentiator Example: Your team's years of experience in the industry.

EXPERIENCE
 Write an overview of the team's experience or list your key clients. Another option is to highlight projects or your portfolio. If you're a startup, add your personal experience to prove your qualifications and knowledge.



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Looking at Examples

CAPABILITIES STATEMENT

Business Name: U.S. PHYSICIAN RESOURCES INTERNATIONAL, INC.
Physical Address: 3109 Sleepy Hollow DR Plano, TX 75093-3408
Contact Person: Saeed Chary, President
Phone: 800-465-1360 / 214-951-9224 / 214-597-1573
Email: schary@virtualmedicalsupply.com
Website: www.usdrjobs.com

LEADERS IN LOCUM & RECRUITING SINCE 1990

COMPANY OVERVIEW

US Physician Resources International, Inc. is a premier staffing and recruiting firm specializing in providing medical resources for over 25 years. With our innovative processes, we have the full capability and capacity to provide skilled medical professionals for multiple medical disciplines, including Physicians, Registered Nurses, Therapists (Physical, occupational, speech), and Lab Technicians. US Physician Resources International has been a strategic partner to major medical organizations and clinics nationwide, providing excellence in staffing support and solutions, even in medically underserved areas, while keeping costs down. Our mission is simple yet critical – we fulfill resource gaps by providing the ideal qualified medical professional within expeditious timelines. Whether you need one person or an entire medical team, we match you to skilled employees and talent.




SERVICE AREAS





- Hospitals
- Clinics
- Small Single Specialty Groups
- Multi-Specialty Groups
- Solo with Coverage

DIFFERENTIATORS

- **FOCUS'D NETWORK.** We focus on the medical industry with an extensive network of medical specialists.
- **RAPID PLACEMENTS.** We have the skilled experienced medical professionals ready to be assigned, even in medically underserved areas.
- **OWN RECRUITERS.** Our recruiting specialists bring extensive expertise and years of experience in staffing medical positions. We understand medical needs.
- **SUPPORT RESULTS.** Our solutions integrate each client's customized requirements to achieve superior results while saving you cost.
- **PROVEN PEOPLE.** Highly skilled professionals with agility to flex and surge to meet dynamic requirements and solve all complex medical staffing challenges.

PAST PERFORMANCE

U.S. PHYSICIAN RESOURCES INTL.

COMPANY DATA

DUNS: 781234906
EAGE: 46053
Tax ID: 75 318 3579

CORE CAPABILITIES

- Locum Tenens
- Physicians
- Nurse Practitioners
- Registered Nurses
- Internal Medicine
- Surgeons
- Therapists (Physical, Occupational, Speech)
- Lab Technicians
- Anesthesiology
- Temporary and Permanent Placements
- Travel Positions
- Assistance with H1B1 Visa & Immigration


NAICS CODES

- 561320 – Temporary Help Services
- 541612 – Human Resources Consulting Services
- 561311 – Employment Placement Agencies
- 561310 – Employment Staffing Services
- 561310 – Office Administrative Services

CERTIFICATIONS

- Small Business
- Small Disadvantaged Business
- Minority Owned Small Business
- Harvard Business School Alum
- Thomas Jefferson Law School Alum

Capability Statement



Business Summary:
 WEM Enterprises is a business assistance firm specializing in assisting existing and emerging entrepreneurs in starting and operating small and mid size business entities. WEM Enterprises started in 2009 with a passion to offer one on one assistance and class room instruction.

Capabilities:
 WEM Enterprises assists in the following areas of starting a business: Selecting a structure, Creating a Business Plan, Developing a Marketing Strategy, Accessing Capital, Acquiring Certifications, Strategic Planning, Contract Prep and Negotiation and more.

WEM Enterprises provides class instruction in the areas of Starting a Business, Business Plan Writing, Financial Forecasting, Credit Education and more.

Expertise:
 The expertise in WEM Enterprises is provided by co-owners Ali Morris and Whitney Morris and a team of Independent Contractors. The areas of expertise are as follows:
 - Business Start Up - Strategic Advisory - Financial Forecasting
 - Business Legal Concerns - Government Contracting Assistance
 - Assistance in Acquiring Business Certifications

Clients:
 Current and Past Clients for WEM Enterprises include:
 • Quality Shuttle Service LLC - Bakersfield
 • California State University - Bakersfield / Small Business Development Center
 • MCSC – Kern Women’s Business Center
 • Black Contractors Association of Central California
 • Center for Innovation and Entrepreneurship of Kern County
 • California State University - Fresno Foundation DBESSP

Differentiators:
 WEM Enterprises brings large firm expertise to new emerging entrepreneurs at an affordable rate using a grassroots approach.

P. O. Box 71355
Bakersfield, CA 93387

Contacts:
Whitney E. Morris
Ali Morris
Tel: 877-788-5253
Fax: 877-740-4077


Email: info@wementl.com
Website: www.wementl.com

EIN: 35-2526205

NAICS:	SIC:
541611	8742
541618	8748

Cage Code: 7EBB7
DSBS ID # P1943455
D&B: 050979856

Certifications:
EDWOSB
MBE
DBE: ID-42866
SB-PW: ID-2014255



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Data Collection Sheet

Capability Statement Data Collection Worksheet

Company Name & Contact Information			
Company Name			
Company Address			
Main Phone		2 nd Phone	
Email Address		Website URL	
POC Name		POC phone	
POC Title		POC email	

Optional Company Data	
Company Slogan/Tagline	
Geographical Coverage	

Government Contract Data		
UEI #	CAGE Code	
Do you have a parent company or branch offices? Do you want to list this data?		
Parent UEI #	CAGE Code	Location
Branch UEI #	CAGE Code	Location
Branch UEI #	CAGE Code	Location

Small Business Certifications (State & federal):
 List certification type and entrance & exit dates

Current Acquisition Vehicles	
Provide contract number, schedule/award title and period of performance dates	
GSA Schedule	
GWAC	

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Capability Statement Data Collection Worksheet

Industry Codes: NAICS, PSC, FSG, NIGP

Please remember to use NAICS codes that complement each other and are for similar services. If your company does two completely different things (e.g. janicare and medical supplies), you will need to make two different capability statements - one for each focus. However, if your company does janicare and tree trimming, those are complementary services and can be listed on the same capability statement.

If you are unsure of your NAICS codes, please visit <https://www.census.gov/naics/> and enter keywords associated with your business in the '2022 keyword search'.

Your **primary NAICS code** should be for the main product or service your company offers. This may change depending on if you are preparing your capability statement for a specific solicitation or agency.

Your **secondary NAICS codes** are the other products or services you offer that are complementary to your primary.

	NAICS Code	Descriptor
Primary		
Secondary		

Product Service Codes (PSC) and Federal Supply Group (FSG) Codes can be found at <https://support.gpo.gov/help-center/resources/tables/pscs>

	PSC/FSG Code(s)	Descriptor
Highlighted		

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Questions?

Alaska PTAC Staff Contact Information

Anchorage: Phone: 907-786-7258

Carolyn Pratt, Program Manager	capratt@alaska.edu	907-786-7259
Jody King, Contract Specialist II	jlking8@alaska.edu	907-786-7270
Lynda Gregory, Program Specialist	lmgregory@alaska.edu	907-786-7258

Fairbanks: Phone: 907-456-7288

Pierre Thompson, Center Director/Contract Specialist	pdthompson@alaska.edu
Cassandra Sewell, Contract Specialist	clsewell@alaska.edu
Kristen Sullivan, Program Assistant	khsullivan@alaska.edu

General email: info@ptacalaska.org **Website:** <https://alaskaptac.org>

To request assistance, sign up here: <https://akptac.ecenterdirect.com/signup>



How can the Alaska PTAC help you?