

Case Study 1 – The Case of the Client Know-It-All

Joe Blowhard owns a business that he's run for about five years. He is a relatively new PTAC client of yours. As a Counselor, you've met with him on a couple of occasions, and you've determined that he has a successful commercial track record, selling a product line that the government currently procures from his competitors. He's attended a couple of your seminars on the basics of selling to the government. Joe has signed-up for your bid match service, but you've noticed that he doesn't check his bid matches regularly. He hasn't bid on, or won, any government contracts yet.

One day, Joe calls you on the phone and says that he's been talking with a business acquaintance who's very successful in winning government business. His friend told him that a GSA Schedule is the easiest way to do business with the government because after you're "on the Schedule" you don't have to do anything, orders just start rolling in.

You tell Joe that GSA Schedules don't work quite that way. You briefly explain that in order to win a GSA Schedule contract, a very detailed proposal must be put together, submitted to GSA, and potentially negotiated. "Yeah, yeah," Joe interrupts. "I know all that. All I want to know from you is how to get a Schedule number so I can get some orders."

You state again that what he's going to have to do first is prepare a proposal. And, you add, even after GSA awards him a contract, he's then going to have to market his products to agencies so that he can be considered for orders. "That's not what my friend does," Joe asserts. "Just tell me the starting point because I want a Schedule."

You give Joe instructions on how to identify the Schedule that matches his product line. You also tell him how to download that Schedule's solicitation. You suggest that he consider attending a couple of seminars that your PTAC is putting on this month – one is about proposal preparation and the other is about understanding the GSA Schedule process. Joe thanks you and says he'll get back with you if he needs anything else.

About two months later, Joe gives you another call. He says he put his proposal together and he wants to know if the two of you can meet this week so you can look it over before he submits it to GSA. You agree to meet, and ask him to email his draft proposal to you so you can review it before you meet. Joe says he doesn't trust email, but he'll come by during his lunch hour and drop off a paper copy of his proposal.

You return from lunch to find a big box containing several 3-ring binders sitting on your desk. You begin to review Joe's proposal document and discover that it's incomplete in several areas. You also notice that Joe has lined-through several government clauses in the Representations & Certifications section. After you complete your review and make a list of comments, you call Joe with the intention of going over the problem areas. In talking with him, you ask why he crossed-out some of the contract provisions. "I'm not about to agree to all of that stuff," Joe states, "so I'll convince the Government that if they want to buy my products, they'll have to do it on my terms."

[Answer the questions on the next page.]

- What advice do you give Joe?

- What, if anything, could you have done to put Joe on a correct path earlier in the client relationship?