

Case Study 5 – I’m Not in a Hurry, I’m Just Talking Fast

[Instructions for working on this case study: Before reading this case study, one person should volunteer to be the Narrator; one person should volunteer to be the PTAC Counselor; and one person should volunteer to be the Client. Once you have these three volunteers, they should read aloud their respective parts to the other table members. Then, your group should answer the questions at the end.]

Narrator: It’s a bright and sunny day here in Happyland. At the WHSFE-PTAC, located in Happyland, Ohio. By the way, WHSFE stands for “We Have Something for Everybody.” The PTAC has an unannounced, drop-in visitor today. His name is Mr. Evett Rivet. He’s getting ready to meet with a PTAC Counselor, Ms. Susie Helpful.

Counselor: Hi! Welcome to WHSFE-PTAC where we have something for everybody! I’m Ms. Helpful! How can I help you?

Client: Yeah, well, Ms. Helpful, I don’t know, I guess I just want to talk. My 10-year-old, \$3-million-a-year company is in the HVAC business, and we specialize in package terminal air conditioners, or PTACs for short. I’m a veteran, and I hear you can get me a contract with the government.

Counselor: Well, our PTAC can help!

Client: Wait a minute ... you mean you sell PTACs, too?

Counselor: I guess you could say we’re both in the PTAC business! Here’s all I need you to do: Go to IRS.gov and verify your TIN/EIN. Make sure it matches your D&B file and DUNS. Then, go to SBA.gov and check your SB size determination for your NAICS code. Also, look up your PSC/FSC code. As soon as you do that, go to SAM.gov and enter all your info, including EFT. Don’t miss the link in SAM to register in DSBS. Once you get your CAGE code, go to the GPE, also known as FBO.gov, and set up an account. Get verified in VetBiz, too. It looks like you sell a COTS product, so you might land a GWAC. Expect to see mostly FFP contracts, but if you’re lucky you’ll find one that’s CPFF right here in the CONUS. If it’s a DoD contract, you need to be DCMA-compliant, especially with your G&A. Also, make sure you have a QA plan. Read the SOW or the SOO carefully, and consult the FAR if you have questions. Don’t try to contact the CO/KO if the IFB is already on the street. When you see something of interest, bid on it.

Client: Huh?

Narrator: So, ladies and gentlemen, we’ve concluded yet another successful PTAC counseling session, right here in Happyland!

[Each table should answer the question on the next page.]

Thinking about Mr. Rivet, how would you, as a PTAC Counselor, chart out a counseling path that is both effective and time-efficient?