

# APTAC Body of Knowledge Competency Guide

## A. Program Requirements

### A.4 Client Counseling Steps/Process

#### Description

PTAC client counseling starts with the first meeting with a new client. Our Body of Knowledge Competency Guide Section [A.3 Client Intake](#) presents some of the important recommended questions PTACs should ask during initial contact to obtain a general understanding of the firm and its management's immediate goals and potential for seeking business with Federal, State, or Local governments. Client Intake should also include an overview of various services PTACs offer.

During Client Intake, the PTAC counselor and client evaluate the firm's potential to do business with government entities. Once a firm has been determined to have such potential, the PTAC counselor should then start providing detailed information and steps that the firm should take to ready itself to seek government opportunities.

Deciding exactly what information to provide the client is important to effective client counseling. Counselors should make a reasonable assessment regarding how much information and when to provide it based on the needs, experience, and products/services of the client. It's a good idea to avoid overloading a new client with technical information too early in the process, particularly those firms very inexperienced in the government market. Giving them too much at once can certainly confuse, frustrate, and discourage them.

The following are major areas/steps when counseling clients, remembering always to tailor specific information to each client and situation.

- 1) Ensure the client has a good understanding of the services the PTAC offers, including limitations due to SCAA and staff resources. A local PTAC marketing flyer or brochure containing guidelines would be a helpful reminder.
- 2) Review the Registration, Certification, and Verification requirements of the client. System for Award Management (SAM) registration applies to all clients that plan on seeking Federal Government contracts. Others such as State or local requirements vary. In addition, depending on the Small Business Administration (SBA) category the client falls under, other certifications and verifications will apply. Refer to section C.2 of the Body of Knowledge for more specifics on registration requirements.
- 3) Review the various methods the client could use to target agencies or government prime contractors through market research. To help clients generally recognize what the government market offers to them, start by giving them some of the more useful web sites. This will give them at least a preliminary feel about what entities buy the product and/or services they sell. Examples of some of the more important sites are cited in the references below.

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- 4) Assist the client is developing pertinent marketing materials, such as a concise Capability Statement they can use at matchmaker events, trade shows, and other events targeting government contractors. Refer to the Body of Knowledge, Section B.1 for more on the subject of Marketing.
- 5) To assist the client in understanding how the government markets differ from private sector selling, introduce the client to the Federal Acquisition Regulations (FAR), agency supplements such as the Defense Federal Acquisition Regulations (DFARS), and any known state or local government procurement regulations. Also, when possible, assist the client in locating small business specialists within the government agencies, or large business prime contractors. This will allow initial live contact and perhaps learning experience about who, what, how, and when the government agency or Prime Contractor buys its products and services.
- 6) During subsequent counseling sessions as the client locates potentially suitable opportunities, the PTAC counselor should provide technical assistance that could include helping the client understand the solicitation contents, and possibly reviewing the clients draft bids or proposals. Assistance could also include the research of competitive pricing, product specifications and/or standards, and competitive labor rates.
- 7) When a client wins a government contract or subcontract with a prime contractor, the PTAC can assist the client in understanding the post award administration requirements. See the Body of Knowledge Section C.13 for more information.

#### REFERENCES

EZ search tool in Federal Procurement Data System ([www.fpds.gov](http://www.fpds.gov) )

Federal Business Opportunities: [www.fbo.gov](http://www.fbo.gov)

Federal Acquisition Regulations <https://www.acquisition.gov/far/>

Minority Owned Small Businesses: <http://www.sba.gov/content/minority-owned-businesses>

For Veteran Owned Small Businesses <http://www.vetbiz.gov/>

For Women Owned Small Businesses <http://www.sba.gov/content/contracting-opportunities-women-owned-small-businesses>

Subcontracting Directory <http://www.sba.gov/category/navigation-structure/contracting/contracting-opportunities/sub-contracting>

US Government Spending [www.usaspending.gov](http://www.usaspending.gov)

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GSA <http://www.gsa.gov/portal/>

Programs and Publications [www.acq.osd.mil/sadbu](http://www.acq.osd.mil/sadbu)

Acquisition Community Connection, Selling to the Military  
<https://acc.dau.mil/CommunityBrowser.aspx?id=37808>

DOD EMALL <https://dod-email.dla.mil/acct/>