



Bank of America Government Contracting Group

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Government Contracting Group

Dedicated to Leveraging Industry Experience

The Bank of America Government Contracting Group represents a dedicated team of specialists whose mission is to help our clients achieve their strategic and financial objectives through the use of our intellectual and financial capital.

Industry Leading Platform

- Bank of America is the #1 lender to the industry with over \$6 billion in loan commitments globally including **\$4 billion to small and middle market government contractors nationally**
- Relationships with **82%** of the top 100 government contractors (*Washington Technology*) and **75%** of the top 200
- Bank of America has banked Aerospace Industry for over **75** years
- One fifth of the *Washington Technology's* Fast 50 Small Businesses in the government contracting market bank with Bank of America
- Bank of America is the only financial institution that has aerospace & defense expertise coast to coast
- Bank of America has experienced industry bankers who provide complete solutions to assist companies in meeting their requirements for working capital and acquisitions, equity raising, capital deployment (dividend recaps /share repurchase), treasury management, international expansion, and employee benefits



Bank of America - Government Contracting Group

Experience & Expertise

- The Government Contracting group is a national practice, with a local delivery. They are deeply ingrained in the industry as a result of their active involvement with industry-related organizations, participation in industry events, and extensive relationships with agencies and intermediaries
- Bank of America's Government Contracting group is ready to support your strategic goals as you strive to grow in a changing environment. Whether via organic growth or acquisitions, domestically or internationally, Bank of America can help you achieve your goals
- Conducting business with the government creates unique financial challenges that are best understood by industry experts

National and Regional Bank of America Government Contracting Group

Edward D Spenceley

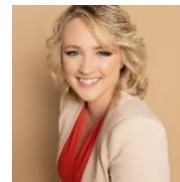
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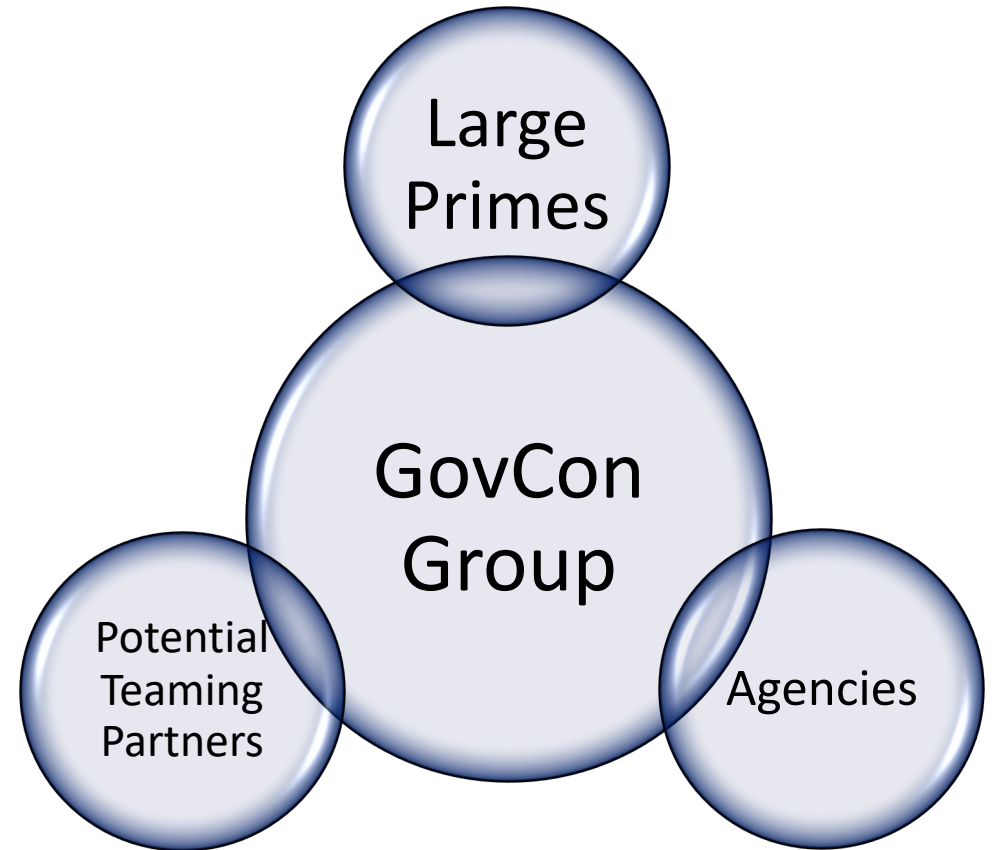
Bank of America - Government Contracting Group

How we operate

Internal Connections



Industry Connections



Leveraging Relationships to Prepare for Growth


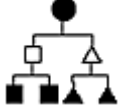
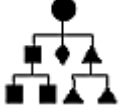
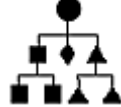

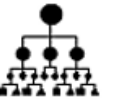






- Does your bank or capital provider understand your business and the industry you serve?
- Do they know the people you need to know that deliver to the industry?
- Engage them early and often to understand the strategy of your plan and to ensure they are working together with your other providers.
- Financial Feasibility – understanding the numbers.
 - Know both the historical figures, but also what your anticipated needs could be.



Appendix



Five Stages of Small Business Growth

	Stage I Viability	Stage II Survival	Stage III-D Success – Disengagement	Stage III-G Success – Growth	Stage IV Take-off	Stage V Resource maturity
Management style	Direct supervision	Supervised supervision	Functional	Functional	Divisional	Line and staff
Organization						
Extent of formal systems	Minimal to nonexistent	Minimal	Basic	Developing	Maturing	Extensive
Major strategy	Viability	Survival	Maintaining profitable status quo	Get resources for growth	Growth	Return on investment
Business and owner						
Key concerns	<i>Do we have enough customers and capital?</i>	<i>Do we have enough cash – is there a path to a viable ROI?</i>	<i>Can we maintain consistent cash flow to carry us through the rough times?</i>	<i>Can we consolidate the company and marshal the resources to grow?</i>	<i>How can we finance rapid growth and improve managerial effectiveness?</i>	<i>How can we maintain control of financial gains?</i>
Key risks to the business	<ul style="list-style-type: none"> ▪ Lack of supplier diversification ▪ Unstable cash flow ▪ Expensive capital 	<ul style="list-style-type: none"> ▪ Growing broke ▪ Finding the right capital at the right price ▪ Talent acquisition ▪ Accuracy of cash flow planning 	<ul style="list-style-type: none"> ▪ Effective formalization of functions ▪ Risk management ▪ Fraud mitigation ▪ Talent management 	<ul style="list-style-type: none"> ▪ Management team readiness ▪ Automation of functions ▪ Risk management ▪ Fraud mitigation ▪ Talent management 	<ul style="list-style-type: none"> ▪ Working capital optimization ▪ High debt-equity ratio 	<ul style="list-style-type: none"> ▪ Robustness of strategic planning and budgeting ▪ Effective coordination and operating control

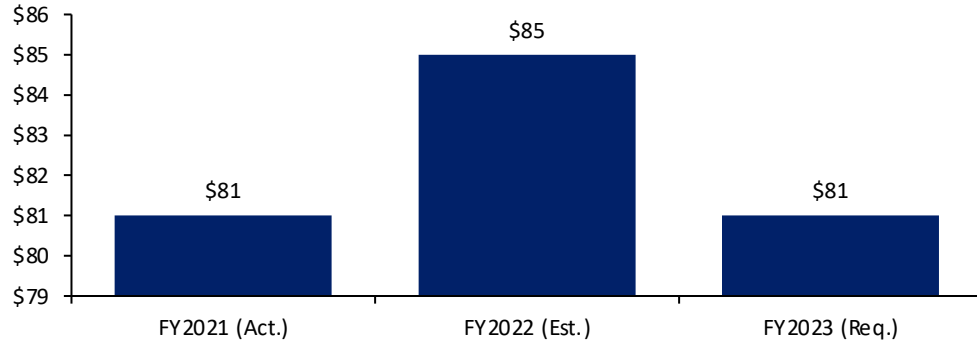


Business Lifecycle – Financing Resources



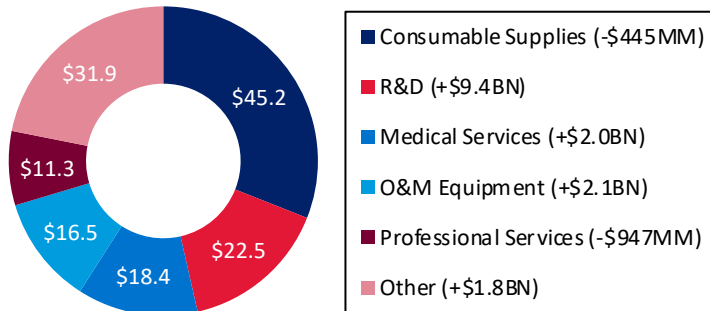
Budget Outlook – FY2023

Contractor-Addressable Budget Outlook, FY 2021–2023



Contractor-Addressable Budgets by Segment, FY2023

(\$ in millions), (+ or – comparison is with FY2021)



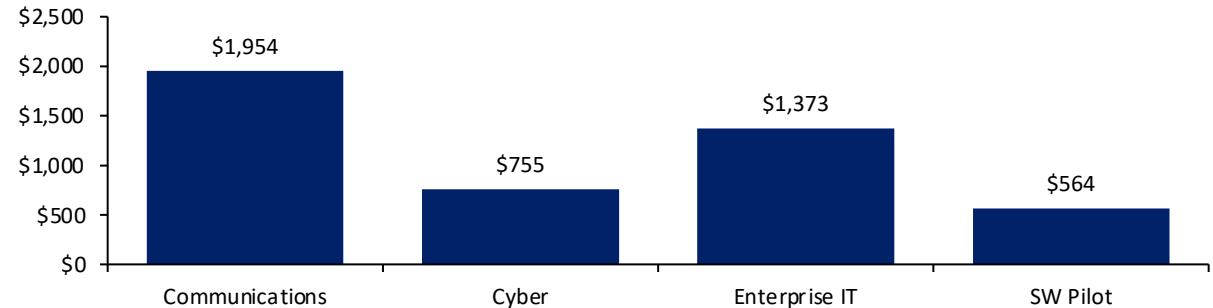
IT Highlights: Defense Agencies⁽¹⁾

Select Program Increases

■ Network-Centric Warfare Technology (DARPA)	(\$678.6MM)	(+8.0%)
■ Command, Control and Communications Systems (DARPA)	(\$305MM)	(+38.5%)
■ Chemical Biological Situational Awareness (CBDP)	(\$199MM)	(+39.2%)
■ Intelligence Systems (USSOCOM)	(\$176MM)	(+58.6%)
■ National Background Investigation Services -Software Pilot Program (DCSA)	(\$132.5MM)	(+25.3%)
■ Teleport Program (DISA)	(\$50MM)	(+66.6%)
■ Fourth Estate Network Optimization (DISA)	(\$43MM)	(+14.6%)

Select IT Budget Activity Categories, FY2023

(\$ in millions)



Source: Deltek, Inc. as of May 2022

(1) Based on identifiable IT-related programs in DOD's RDT&E and Procurement budgets. As of publication, DOD has not released IT investment details so this data does not represent total IT.



Innovation and Modernization

\$130.1BN RDT&E budget is the largest ever – 9.5% increase over the FY 2022 enacted



Science & Technology: \$16.5BN

- Maintains Basic Research at \$2.4BN



Artificial Intelligence (AI)

- Supports investments across the Department including funding for Responsible Artificial Intelligence, a top priority for AI
- Establishes the Office of the Chief Digital and Artificial Intelligence Officer



5G: \$250MM

- Continues 5G experimentations on military networks and applications
- Intelligence, and Test and Evaluation for AI



Taking Historic Steps To Combat The Climate Crisis And Advance Environmental Justice – Key Highlights

Invests in Clean Energy Infrastructure and Innovation

- Invests **\$3BN** to support clean energy projects that would create jobs and drive progress toward the Administration's climate goals
- Investments include **\$502MM** to weatherize and retrofit low-income homes
- The Budget funds **\$150MM** to electrify tribal homes and transition tribal colleges and universities

Investments in Innovation and Climate Research

- Provides a historic investment of **\$17BN** for climate science and innovation, including more than **\$9BN** to DOE for clean energy research, development and demonstration
- Within this total, the Budget provides **\$700MM** for the Advanced Research and Projects Agency – Energy (ARPA-E)

Bolsters Nation's Frontline Defenses against Catastrophic Wildfires

- Provides nearly **\$3.9BN** for Forest Service Wildland Fire Management, an increase of \$778MM, plus an additional \$2.6BN authorized in the suppression cap adjustment
- The Budget also invests **\$646MM** in Hazardous Fuels Management and Burned Area Rehabilitation programs

Strengthens Climate Resilience

- Provides more than **\$18BN** for climate resilience and adaptation programs across the Federal Government, including
 - **\$3.5BN** for the Department of Home Land Security
 - **\$5.9BN** at DOI, **\$1BN** for HUD
 - **\$376MM** for the National Oceanic and Atmospheric Administration (NOAA)

Provides Resources to Reduce Greenhouse Gas Emissions

- Invests **\$100MM** in grants to States and Tribes that would support the implementation of on-the-ground efforts to reduce and prevent greenhouse gas emissions in communities across the Nation

Supports the Clean Energy Transition in Rural America

- Provides **\$300MM** in new funding for grants, loans, and debt forgiveness for rural electric providers, as well as \$6.5BN in loan authority for rural electric loans

Upgrading Drinking Water and Wastewater Infrastructure Nationwide

- Provides approximately **\$4BN** for EPA water infrastructure programs
- Outside of EPA, the Budget also includes **\$717MM** in direct appropriation and **\$1.5BN** in loan level for USDA's Water and Wastewater Grant and Loan Program

Increase Demand of American Made, Zero-Emission Vehicles

- Invests **\$757MM** for zero-emission fleet vehicles and supporting charging or fueling infrastructure in the individual budgets of 19 Federal agencies





THE POWER OF STORYTELLING TO WIN MORE BUSINESS

Krystn Macomber, CP APMP Fellow, LEED AP
Founder + CEO, Summit Strategy



KRYSTN MACOMBER

CP APMP Fellow, LEED AP

Summit Strategy Founder + CEO

- » 20+ years of experience
- » B2G + B2B
- » Developed holistic sales process + infrastructure
- » Led marketing/pursuit teams as small as 2 + as large as 20
- » Certified proposal practitioner + APMP Fellow
- » Competitive + driven to find the winning solutions
- » APMP Global Chair | 2021



AGENDA:



Storytelling Mindset



Psychology + Content



Using Persuasion to Win!



Q+A





STORYTELLING MINDSET

WHAT IS STORYTELLING?

The process of combining facts and narrative to communicate a message and an emotion to a target audience.



Stories are remembered up to

22X

times more than facts alone.



OPPORTUNITIES TO TELL STORIES



Conversations



Proposals



Collateral



Presentations



Resumes



Case Studies



Social



PSYCHOLOGY + CONTENT

KNOW YOUR AUDIENCE

The background of the slide is a scenic landscape featuring a river flowing through a valley, with rolling hills and mountains in the distance. The sky is a warm, golden color, suggesting a sunset or sunrise. In the foreground, a wooden deck is visible, and an open book is placed on the deck, with its pages fanned out. The overall mood is peaceful and contemplative.

Understand their needs + wants, and identify their interests, attitudes, values, and beliefs.

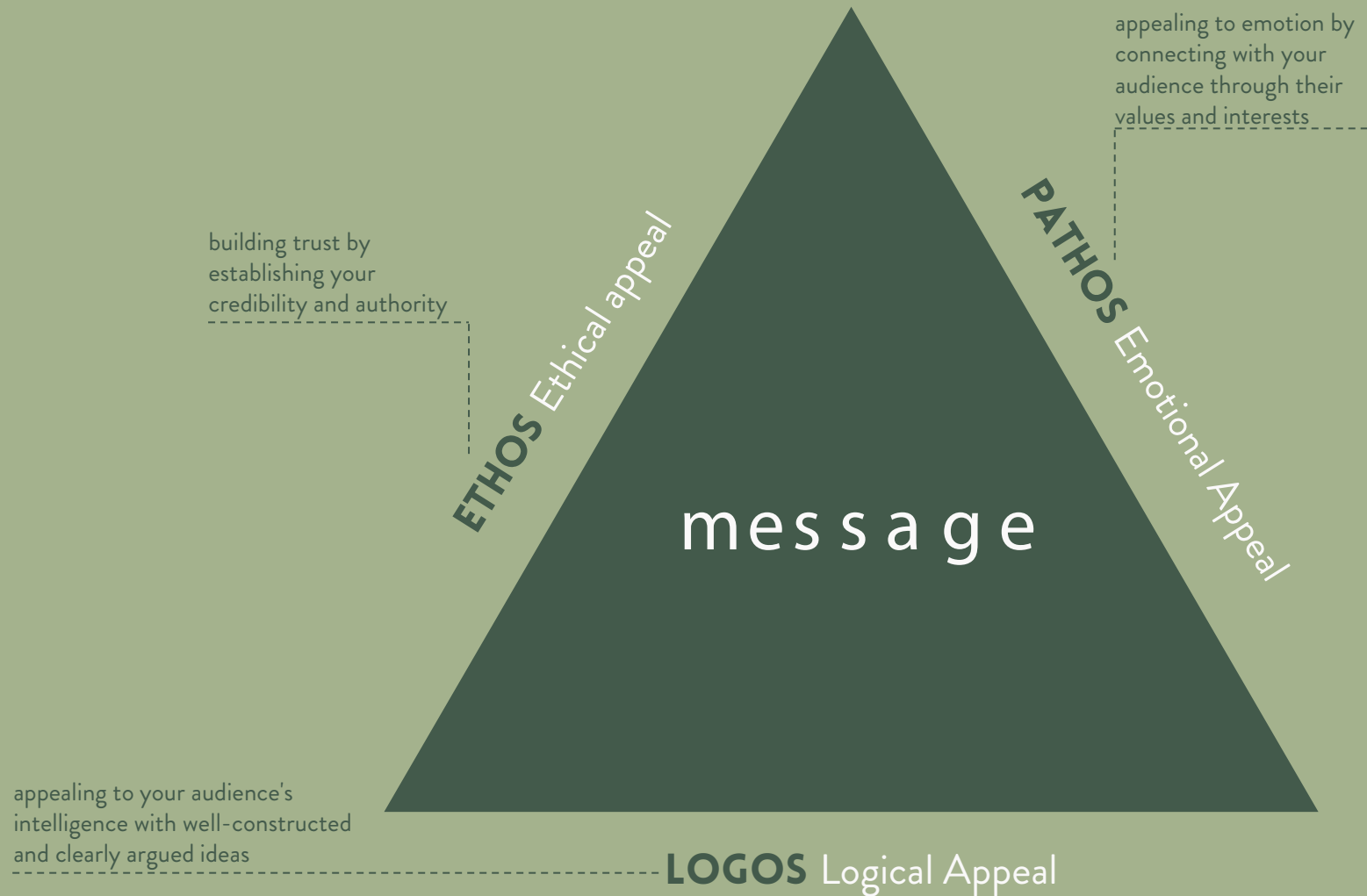
Recognize your relationship to and your role with the audience.

Adjust your writing appropriately.

AUDIENCE ATTITUDES



THE RHETORICAL TRIANGLE



WHAT YOU WRITE AND HOW YOU WRITE MATTER.

The goal is to be intentional and effective.



LET'S PLAY A GAME



Choose your words wisely.

KNOWLEDGEABLE



EXPERIENCED

Choose your words wisely.

FREEDOM



SECURITY

Choose your words wisely.

STRATEGIES



SOLUTIONS

Choose your words wisely.

MAXIMIZE GAINS



MINIMIZE LOSSES

Choose your words wisely.

TRANSPARENT



STRAIGHTFORWARD

Choose your words wisely.

NEW AND IMPROVED



WORKS AS ADVERTISED



**USING PERSUASION TO
WIN MORE BUSINESS**

COMMON MISTAKES

Providing too
much
information

Clients will have a hard
time figuring out what
you're selling

Not describing
value from
client's
perspective

Why should
the client care?

Failing to
identify what's
different
about us

You'll sound just like
everyone else out there.



WHERE TO PUT YOUR WORDS

“Give your readers as much information as possible as soon as possible. **To hell with suspense.**”

- Kurt Vonnegut, *8 Rules for Writing a Short Story*

In a single page, put the most compelling information in the first paragraph.

In a paragraph, put the most important idea in the first sentence.

Use callout boxes to summarize or highlight information.

KAIROS



KEYS TO A WINNING PROPOSAL

Compliant

1

Compelling

2

Clear

3

Credible

4

KEYS TO A WINNING PROPOSAL

Compliant

1

ALWAYS FOLLOW THE RFP

even if it makes no sense ✓

KEYS TO A WINNING PROPOSAL

Compelling

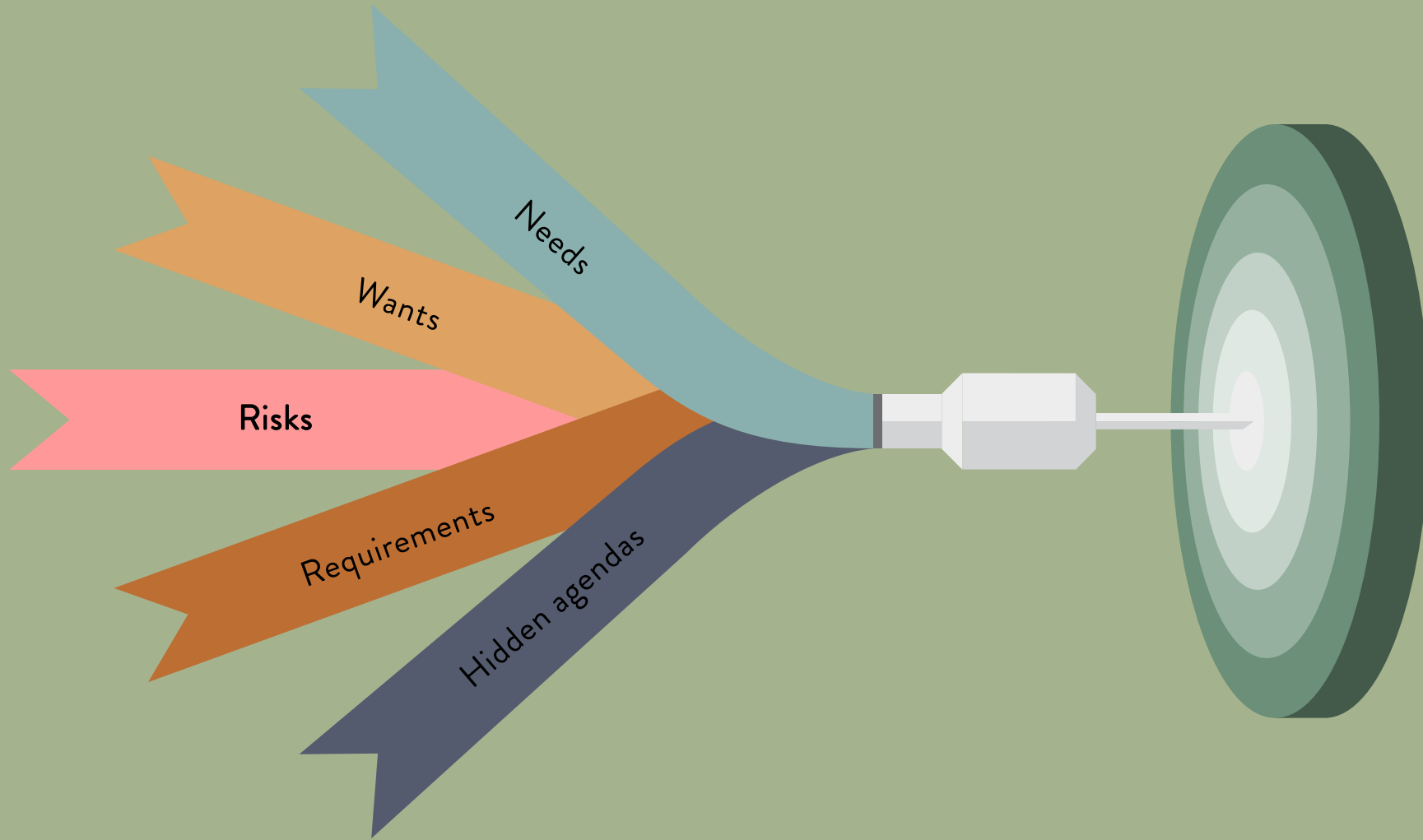
2

WHY

SHOULD THE CLIENT SELECT

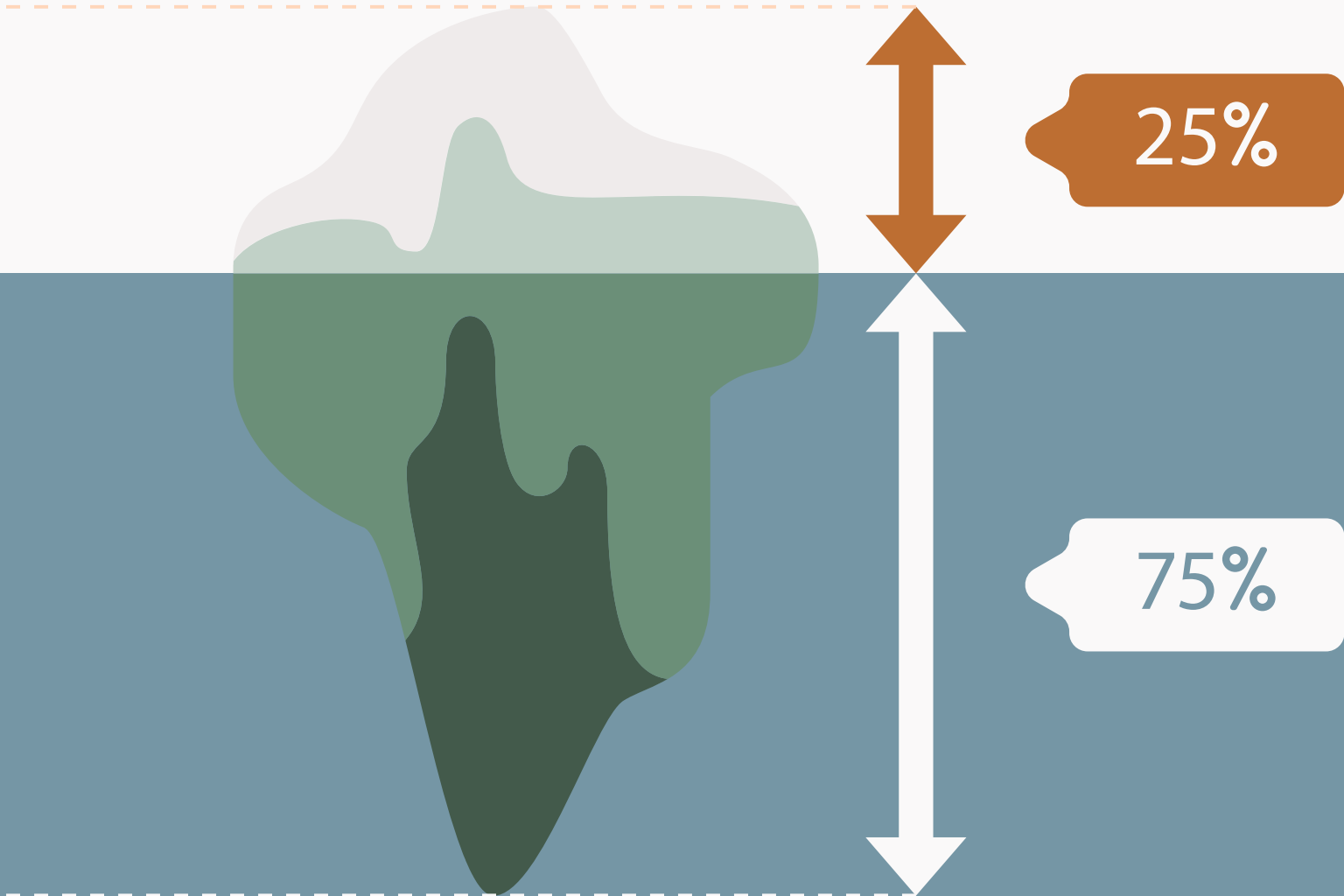
YOU **INSTEAD OF EVERYONE ELSE?**

HOT BUTTONS



What's
keeping
your
client up
at night?

DIG BELOW THE SURFACE



- Decision biases
- Pain
- Politics
- True requirements
- Fears
- Cost concerns

DEFINE YOUR VALUE PROPOSITION

I + **F** + **B** + **P**



ISSUE

The client's challenge or problem. AKA pain point, hot button.

FEATURE

Tangible things and solutions you bring to solve those problems.

BENEFIT

Why your features are important to them. AKA the so what factor.

PROOF

Evidence your claims are true. AKA prove it or lose it.

A woman with dark curly hair and a young girl with long dark hair are lying on their stomachs in a white tent. They are both looking at a tablet computer that is lying on the floor in front of them. The woman is on the left, and the girl is on the right. They are both smiling and appear to be engaged with the content on the tablet. The tent is decorated with warm white string lights that are strung across the top and sides. The lighting is soft and warm, creating a cozy atmosphere. The woman is wearing a dark blue tank top, and the girl is wearing a white long-sleeved shirt under denim overalls. A large, grey, fuzzy stuffed animal is visible on the right side of the frame. The overall scene is intimate and suggests a shared activity or learning experience.

**FEATURES
OR
BENEFITS?**




FEATURES

Gluten free
No added sugar
Organic

BENEFITS

Guilt free
All you can eat
Healthy

A hiker with blonde hair, wearing a green hooded jacket and an orange backpack, is shown in profile from the chest up. She is holding a large, unfolded topographic map and looking towards the left. The background is a vast, misty mountain range with green forested slopes and snow-capped peaks under an overcast sky.

What does
the client
want?

SO WHAT?

HEY!
THIS IS NOT ABOUT
YOU.



SAY MY NAME, SAY MY NAME

your
name

your
name

your
name



their
name

their
name

their
name

their
name

their
name

their
name

their
name

their
name

their
name

We are
pleased to
pr
proposal....

NO ONE CARES



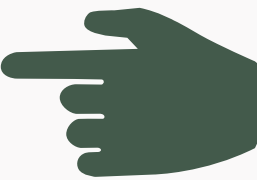


1

We are pleased to submit this proposal to the FAA. On the following pages, we have provided our technical proposal to address all RFP requirements. As the FAA's partner on this upcoming project, Summit Strategy will use our 32 years of experience to help you....

2

The FAA is tasked with a life-changing mission to As your strategic partner, Summit Strategy will use our 32 years of experience to help you



FOCUS ON WHAT THEY WANT/NEED

Dear Mr. Doe and Members of the Selection Committee:

The National Institute of Whatever (NIW) seeks a firm who can work alongside leaders to facilitate strategic change, encourage productive risk-taking, and build credibility and trust among staff. Company Gold Star's six-year partnership with NIW has given our team an exclusive perspective on the best approach to continue serving NIW on this exciting engagement. Our proven track record will serve as a guiding framework for the executive coaching we provide to improve effectiveness, sustained health, and excel as a high performing agency. Our team provides the following benefits to the NIW:

COVER LETTER FRAMEWORK

1 INTRODUCTION

Summarize client's vision, objective, and challenges
State that we will fulfill client's needs
Highlight why us?

2 BODY

Our team brings the following benefits to <client> on this project:

<Feature>: You can <improve/achieve/reduce> <benefit> by working with our team, who has the <knowledge, experience, past success> proven by <relevant experience/program> that resulted in <metric/proof>.

Repeat for 1-2 more features

3 CLOSING

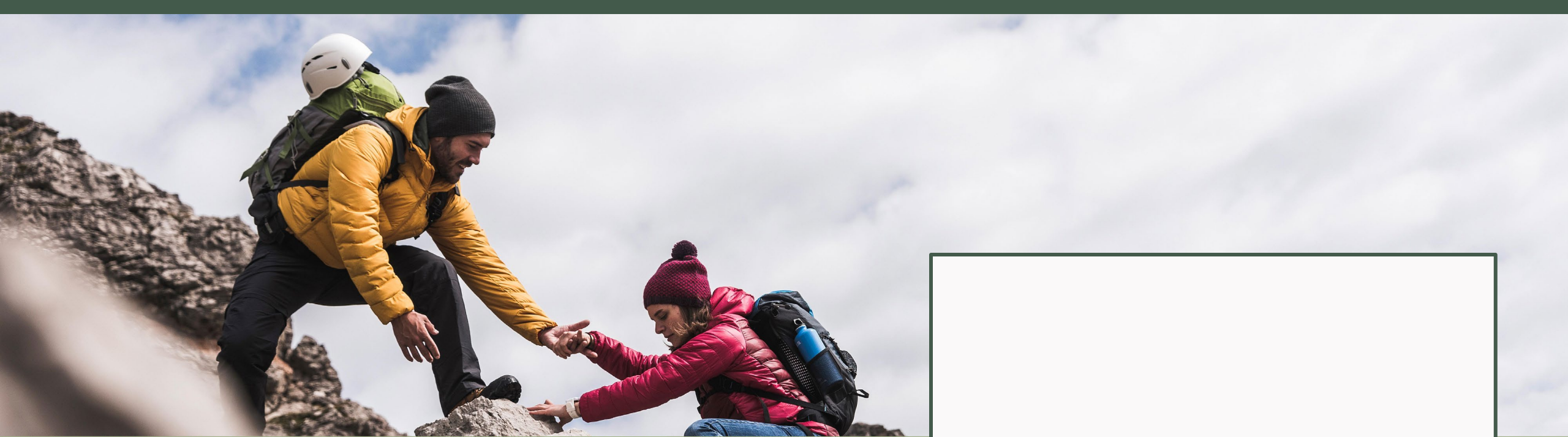
Focus on how our mission and goals align directly with the client's
Connect with the reader – inspire them to choose us
Close with next steps and contact information

A person is running away from the camera on a paved path in a forest. The path is covered with fallen yellow and orange leaves. The background consists of trees with green and yellow foliage. A semi-transparent green rectangular overlay is positioned in the center of the image, with a dark grey corner on the top-left and bottom-right. The text 'COMPELLING' is written in white, bold, uppercase letters at the top of the overlay. Below it is an equals sign made of two horizontal light green bars. At the bottom of the overlay, the text 'ACTIVE VOICE' is written in light green, bold, uppercase letters.

COMPELLING

=

ACTIVE VOICE



**ACTIVE VOICE
HELPS THE AUDIENCE
PICTURE THE
ACTION.**

90%

of a long-form document should be
in active voice.

ACTION VERBS



Taking the lead	directed, executed, operated, managed, programmed
Creating	built, designed, developed, engineered, initiated
Efficiency	enhanced, generated, maximized, reconciled, sustained
Achievement	integrated, refined, transformed, streamlined, strengthened
Research	analyzed, assessed, calculated, explored, forecasted, modeled
Communication	articulated, briefed, conveyed, illustrated, reviewed, drafted

POWER WORDS



Words that convey urgency

- Now
- Need
- Must
- Latest

Words that convey trust

- Consequently
- Results
- Secure
- Because

Words that create connection

- Join
- Help
- Discover
- Align

Words that promise a surprise

- Remarkable
- Amazing
- Incredible
- Unexpected



The power of
identification

THANK YOU

...for your consideration.

...for collaborating.

...for your efforts.

...for participating.

...for responding promptly.

KEYS TO A WINNING PROPOSAL

Clear

3

Always

TAILOR

your content



READABILITY

7-8

grade



WRITING FOR AN 8TH GRADER



1

Remember, not all your readers will be familiar with the subject matter.



2

Use shorter words, sentences, paragraphs.



3

Use simple sentence structure.



4

Use simple words, not jargon.



5

Avoid large blocks of text, and use headings, font treatment, callout boxes, and graphics to draw attention.

When our two companies
are able to partner
collaboratively together,
we create successful
experiences for
our customers.

15



When we work together,
we help our customers
succeed.

6

KEYS TO A WINNING PROPOSAL

Credible

4

PROVE IT

or lose it

PROVE IT OR LOSE IT

Substantiate all claims with facts

Metrics are best

Don't use watered-down
superlatives or platitudes





BOASTING WORDS TO AVOID

State-of-the-art

The right choice

Uniquely qualified, unique

Best of breed/class

Premier, worldclass, world-renowned

Industry standard

Leading edge, leading provider, cutting edge

***RFP:** The Agency will award this contract to a firm who has successful experience on similar work, innovative approach, and has the capacity to support more than one project at a time.*

At Summit, we have successful experience on similar work, an innovative approach, and have the capacity to support more than one project at a time.

1

Summit has successfully completed more than 25 similar projects across the state of Washington. On these projects, our innovative approach has helped clients reduce timelines by more than 1,000 days and save more than \$40M in total overhead cost. With more than 80 in-house architects and engineers, Summit can support up to 15 projects at one time.

2




USE SUCCESS STORIES AND QUOTES


 [Redacted] has provided staff with the knowledge and experience that makes the difference in successfully serving [Redacted]'s needs. They are an integral part of the construction process, providing exceptional services that enable contractors to safely perform their work, while minimizing disruption of airport operations."

[Redacted] Shutdown Control Center Manager for [Redacted]

23 GW	111,000 MW	\$150B+	20+	#3
renewable projects	HVDC capacity	mega projects	years as owner's rep	ENR CA Top Design Firms

 **Successful Management Framework Leads to High Retention Rate**
 On our engagement with [Redacted], all employees required TS/SCI due to work in Government sensitive compartmented information facilities (SCIFs) and we had many employees deployed to Outside Continental United States (OCONUS) locations. Our framework resulted in a retention rate over five years of 96%.


 In the past seven years, we have assisted Mississippi clients with over 107 projects valued at **\$597M**



1,000+ wetland delineations


300+ Phase I ESAs

70+ Phase II ESAs








20+ environmental assessments

100+ stormwater pollution prevention plans

20+ spill prevention, control, and countermeasure plans

 Our team identifies environmental and permitting factors early in the project planning phase and provides the [Redacted] and project stakeholders clear and concise project impacts to be used in the decision-making process.

Our Team's Water Experience:

-  **250+** W / WW Projects in the last 10 years
-  **100+** Pump Station Projects at: <1MGD TO >100MGD
-  **100+** Water and Wastewater Treatment Plants – Design and Upgrade
-  **30+** In the last 10 years
-  **50+** In the last 10 years
-  **425k** Asset condition assessments
-  **50+** In the last 10 years

Water Tr Plant Di Comp

Over a three-month period, [Redacted] sourced and mobilized over 30 staff members for [Redacted] support, including project managers, construction managers, project engineers, office engineers and administrative support. During this rapid mobilization, the team shared space and resources with the owner's staff and other consultant teams already on site for a seamless integration.

Our team completed site excavation, grading, concrete footings, foundations, slab, masonry, and stonework for the *Empire Trail Gateway and Battery Park City Authority (BPCA)*. In addition, the team fabricated and installed stone paver engraving and various kiosks



30+ years of experience	1,000+ wetland delineations	\$597M federal funding managed
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Q + A



**THANK
YOU**





Resumes



Case Studies
(aka Project Descriptions)

RESUMES SHOULD BE

Addressing
selection
criteria

Clear and
concise

Tailored

Easy to
evaluate

Cohesive





2
PAGES

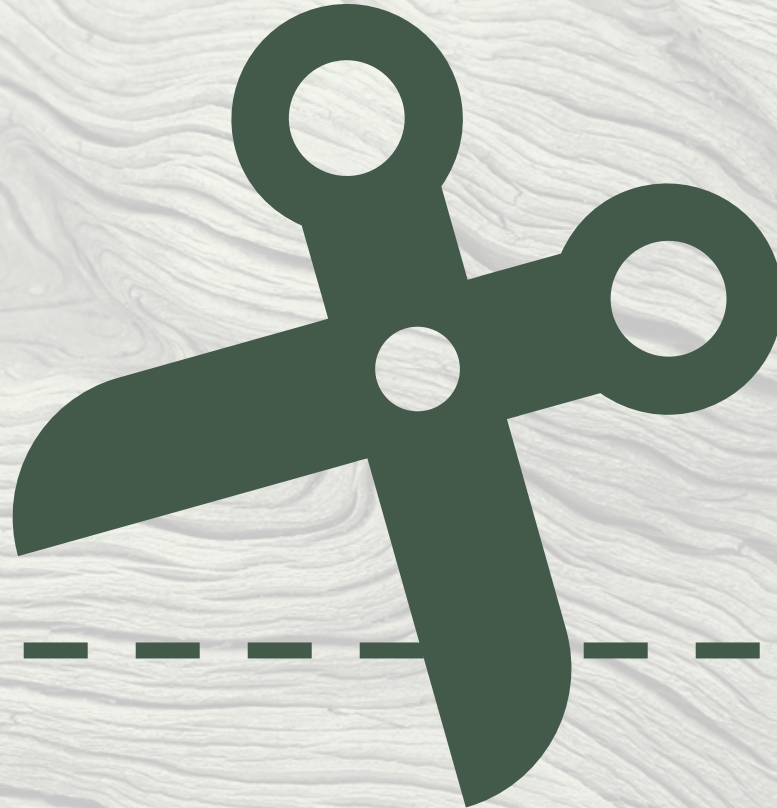
HOW TO TAILOR

Use RFP language

Write for your proposed role

Choose relevant, recent projects

Focus on specific project





**CLIENT
NEED**

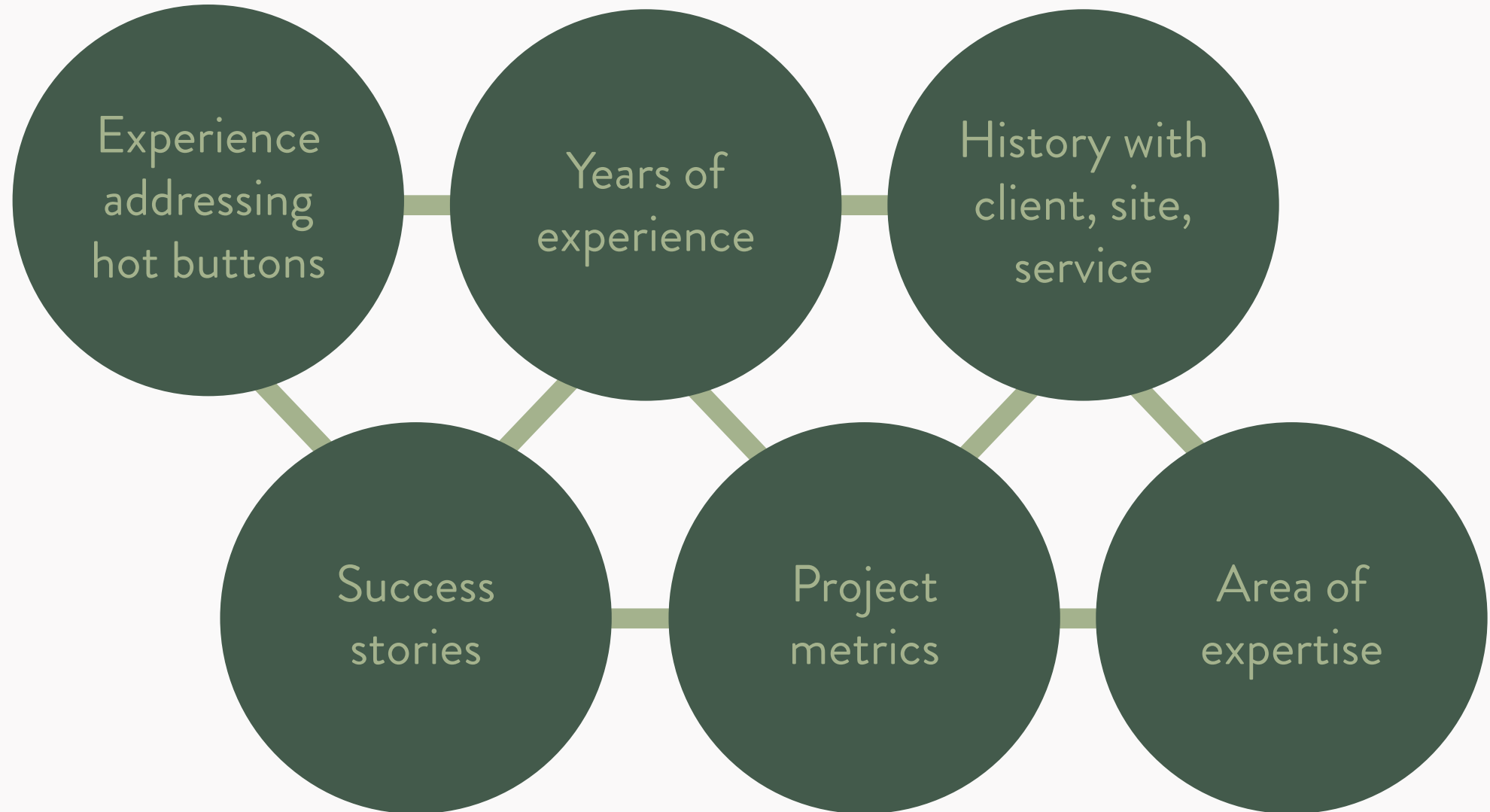


**YOUR
STORY**



**TAILORED
BIO**

ELEMENTS OF YOUR STORY



PUT THEM TOGETHER

As (project role), (first name) (what you will do: directs/leads/manages/executes) (responsibility) and will (task details).

S/he brings XX years of experience in (client hot button).

For (client/market/industry) s/he has completed XX projects more than \$XX in the past XX years.

For example, on (project) (first name) (what you did) resulting in (metric proof).

LEADERSHIP ROLE

As project director, Dan leads our multidiscipline team for Client ABC and will be your primary point of contact.

He brings 27 years of experience in large program management and complex remediation projects.

For Client ABC, he has completed eight projects valued at more than \$150 million in the past 10 years.

For the Red Line expansion, his due diligence to investigate and mitigate any belowground obstacles shaved six months off the project length.

TECHNICAL ROLE

Sara will serve as a UST technician focused on regulatory compliance and reporting.

As an ICC Certified UST installer, she brings experience on environmental management at airports and operation and maintenance of remediation systems at sites with petroleum hydrocarbons and chlorinated solvents.

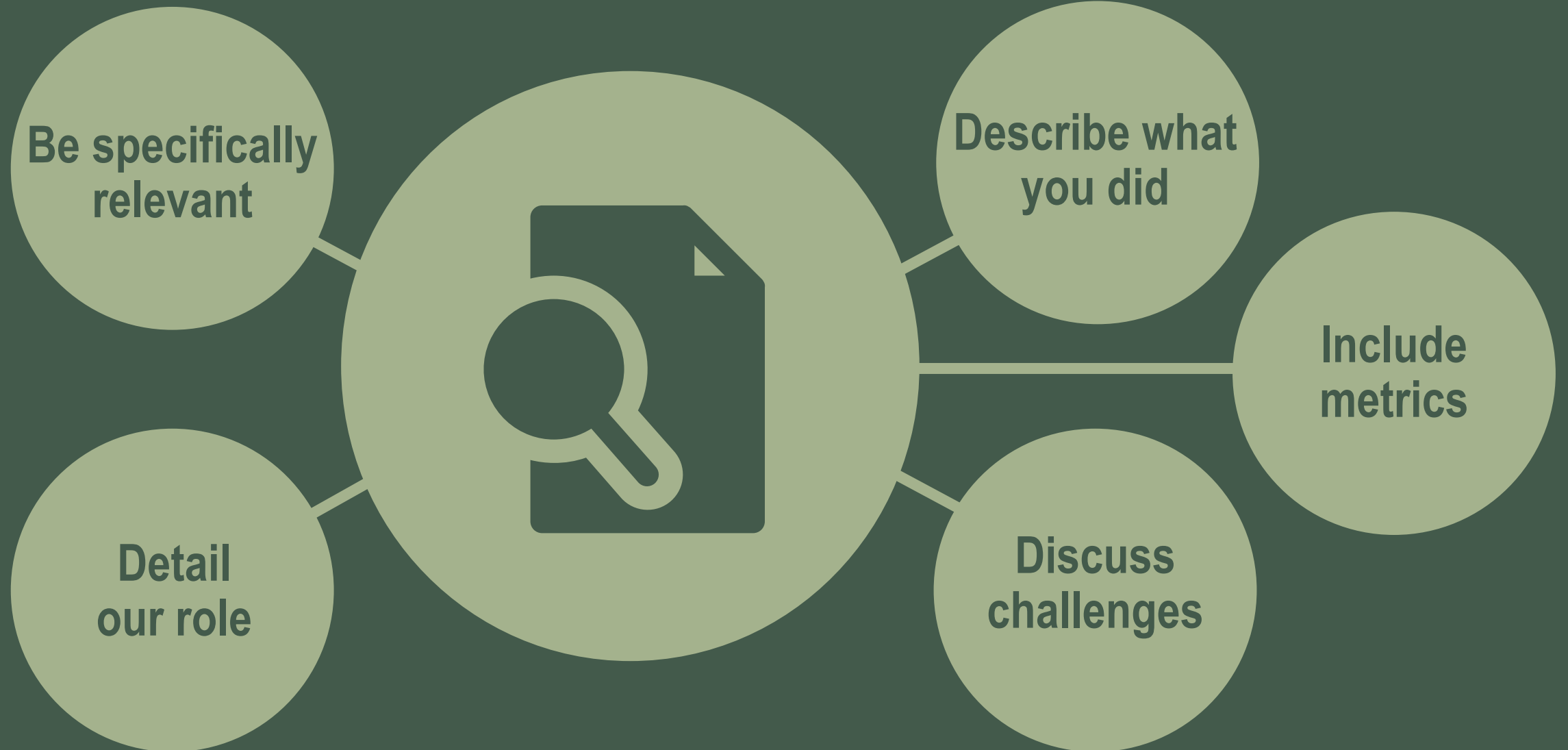
She is an emergency responder for a similar client and has completed the required OSHA 40hr HAZWOPER and OSHA 8hr HAZWOPER supervisor training.

THOUGHTFUL QUESTIONS

to ask when tailoring resume projects

- »» What was your specific role on the project?
- »» What were the project tasks? Which were you involved in?
- »» How well did we perform?
- »» Did FGMA or the client receive an award?
- »» Did the client realize significant cost or schedule savings?
- »» Did we implement any innovative or unique technologies or methods?
- »» What are our lessons learned that will translate to the next project?

PROJECTS SHOULD





CHALLENGE

+



SOLUTION

+



**KEY
ACCOMPLISHMENTS**



Case Study

Building global CX sales operation from the ground up for an international commercial and fleet manager

The Challenge

Our client, an international Top 5 automobile brand, recognized the need to overhaul their global commercial and fleet sales operation by building a new sales strategy from the ground up, designed specifically to generate revenue in North American and European markets. Looking for a proven sales partner to accelerate speed to market, our client needed to quickly establish a high performing sales engine and culture to generate results.

Our Solution

With reach back to 25+ years of expertise with B2B and lead generation sales programs in 20+ global engagement centers, Percepta swiftly assembled a team of experts. We leveraged 340+ best practices in our sales playbook to implement a domestic and international sales hub. Using our global footprint, we opened sales centers of excellence in parallel in Athens, Greece and Melbourne, Florida. Both hubs were designed to test, run, and iterate different sales motions to establish a strong foundation for continued growth. Successes included:

- **Developed enterprise sales strategy:** In less than 90 days Percepta created a phase 1 approach and launched two sales centers of excellence including training curriculum, best practices, systems training, and product knowledge.
- **Multilingual capabilities:** Each hub's operations enabled us to move quickly, supported access to required languages (English, German, Italian, Dutch, French, and Spanish), and had associates

Our Results

5x growth
in number of closed/contracted sales

+400%
in number of units sold in just four months

2x
industry standard for cold lead conversion

with necessary sales expertise. As the program scales across Europe, additional languages are being implemented.

- **Empowered sales associates:** Our goal was to create a sales culture of accountability, performance, and positive customer experiences – all while urgently meeting targets. By testing different sales motions, our associates developed **operational rigor** with a variety of leads. We empowered our associates to use customized tactics targeted at best engaging potential buyers in each geography.
- **Speed-to-market:** Leveraging a dedicated implementation team supplemented with tenured resources from other sales programs, Percepta **transitioned from a proposed concept to two fully functioning sales hubs in three months.** Our client appreciated our agility and creative approach to support both their immediate and future needs.

THOUGHTFUL QUESTIONS

to ask when tailoring project descriptions

- »» What were the major elements of the project? What were the key issues?
- »» How large or complex was the project?
- »» What technologies/methods were used? How did they improve the results?
- »» What were the measures for our success on the project? How did we perform?
- »» How was our work received by the client or owner? Do we have a positive quote from the client?
- »» What benefits were gained by the client/owner as a result of our work?
- »» How is this project relevant to the RFP/scope?