



Past Performance – 3 Steps To Success

by Judy Bradt, CEO

PAST PERFORMANCE TOOL #1: THE INTERNAL SUMMARY

Start with a list that's JUST for use inside your company. Keep it simple.

Create a table or spreadsheet like this.

When you begin, you might have a lot of un-summarized past performance, and many people are compiling that track record. Make it easy!

First step, get all the data into a table. These are the bare bones of your stories.

Here's a starting format. You might have other info you also want to collect...or your business might already be gathering even more info about each project in the course of daily operations!

Once you get a format you like for your table, store the master copy on a shared drive or as a Google Doc / Google Sheet. Set permissions for who can view and who can edit.

AGENCY or Customer Organization	Contract	Type	\$	CO Info	PM Info	Description	Dates	Role: (Prime? Sub? Teaming Partner?)
AGENCY	#	GSA/ BPA/ IDIQ	\$	Name Title Phone Email	Name Title Phone Email	Details of project	From-To	Prime? If Sub or Teaming Partner, Name, Title, Phone, Email
AGENCY	#	GSA/ BPA/ IDIQ	\$	Name Title Phone Email	Name Title Phone Email	Details of project	From-To	Prime? If Sub or Teaming Partner, Name, Title, Phone, Email

PAST PERFORMANCE TOOL #2: THE PROJECT TEMPLATE

1. Create a folder or shared folder within your company, "PAST PERFORMANCE"
2. Use this file-naming convention, to make documents easy to find and choose:
"PROJECT NAME, AGENCY, CONTRACT NUMBER, QUICK DESCRIPTION, DATES.DOC"

SET A GOAL: Get a few done each month.

PAST PERFORMANCE: PROJECT TITLE

Evaluation Criteria checklist: Check off the required criteria fulfilled with this Past Performance Submission, e.g.

	<i>Completed in the Past Two Years</i>
	<i>Similar Size and Scope</i>
	<i>Performed Within the Same State</i>
	<i>Performed By the Same Key Personnel as Proposed</i>

Agency:	Title of
Project:	
Contracting Office	
Contract Number	
Contract Type	
Total Contract Value	Dollar Amount
Contracting Officer	Name, Formal Title, Email, Address, Phone

Program Manager	Name, Formal Title, Email, Address, Phone
Administrative Contracting Officer	Name, Formal Title, Email, Address, Phone
Major Subcontractors	Company Name, PM Name, Formal Title, Email, Address, Phone
<p>Contract Work Description</p> <p><i>In 1-2 Pages Describe:</i></p> <ul style="list-style-type: none"> ✓ What was the customer’s pain? How did you solve it? ✓ What challenges did you face? How did you overcome them? ✓ What Change Orders, project modifications, or contract options were used? Describe and list. ✓ Did you deliver within budget and on time? ✓ Any Awards or Recognition for the Government Team Who Worked With You 	

PAST PERFORMANCE STEP 3: CHOOSE WHICH STORIES TO USE WHEN

Not every story is suitable for every situation! Know your buyer and what she wants. That why you've taken months to get to know the customer's team and situation, their past experiences with other contractors, and their fears. That level of details is rarely obvious to someone who is reading the solicitation for the first time close to project deadline.

If your buyer likes you, and you've been getting to know her and raising her interest in working with you based on your past performance, she might tweak the past performance requirement to be sure to include certain past performance unique to your company that she really wants you to include in your proposal.

- ✓ Would the customer be familiar with this project?
- ✓ Would they respond positively about this project if they read about it in your proposal?
- ✓ Does your customer personally know the internal government executive who worked on this project if they were to call for a referral or clarification?
- ✓ Is the project similar in size and scope to the project you're proposing?
- ✓ Does it fit all of the evaluation criteria specifically discussed in the RFP?
- ✓ Was this project completed within the time frame called for in the solicitation? (Typical time frames can be 2-5 years, but read *your* solicitation to know for sure.)
- ✓ If your buyer is federal, and your past performance is commercial, does the solicitation's call for past performance include or exclude your example project?

- ✓ If you're bidding as a prime, and your most suitable past performance is as a subcontractor, will the contracting officer consider that responsive?

When you are talking to people about your past performance, watch their FACES, and see what they are visibly lighting up and responding well to. You want to see what excites them, what people and classes clearly interest them. THESE are the items you want to include in your past performance for them.

Are you ready for more success?

You've probably already had to document past performance for proposals. You'll want to write 5-10 of these and have them ready to go. You can also use these as case studies that are quick and easy to share with prospects. They use these examples and put them into the RFP's when they're looking for YOU!

When you're talking to customers, they feel more confident to hear about what agency, who the customer is, were you a prime or sub, did you use GSA? So the sales team has these examples at your fingertips.

If they really want you, they'll put hooks in the evaluation criteria to make it easy to choose you. When they want to meet with you, you'll show your past performance.

They might ask you to give a small presentation, and you want to include STORIES about past clients. Those stories really help you sell your products. We forget about what we've done - e.g. emergencies, times you delivered and saved the day. You're going to have a table is a placeholder. On big proposals, it's hard to get the full story of past performance data in a hurry. Collect that up now, while you have time.

Once you have the facts down, start adding details of the story.

Buyers love to hear about challenges! They appreciate that you overcome challenges. Write up what happened and how you handled it. **Always include the examples you can end with "and we delivered within budget and on time."**

Don't despair: there are national companies who have never written up ANY of hundreds of examples of past performance! The smart thing to do is get started ahead of time. Better to have more details of a story than fewer. A federal RFP might ask for bare-bones contact info and a short description. You can have that pre-written, validate/update the contact info, and you'll be all ready.

Big RFP's sometimes ask for specific details on past performance. You can take a few of those mini-stories and write a few of these full page documents. We're helping you build a library of several of these, so they are all ready. You can focus on product

and pricing most of the time, and these outlines are all ready to go when you need them. As your experience grows and new team members call on new customers, because you have a list of past performance, your sales team can mention it! Even if you can't tell the whole story, you can tell some. THIS IS AN INTERNAL DOCUMENT for your team.

That way, you'll want to get them thinking, if they want to open up an opportunity for you, they'll lean and reference past performance like yours! When they like you, they will want to use that past performance as a basis for describing the past performance they require in the winning contractor.

When a bid comes out, go straight to the past performance required. Does it look like you? Make sure the examples are of similar size and scope, and within the past two years. And that you show them the examples before the RFP comes out.