

# Oral Presentations

## Are you curious about oral presentations?

Did you know ...

- that many industry proposal writers take on proposal development duties on top of their 40-hour work week?
- that written proposals are sometimes created by updating the last response, bearing the uncaught typos and prior agency names?

**Imagine a real time solicitation response tailored to your requirement. With a properly developed solicitation, this could be exactly what you get.**

I’ve yet to see a successful one-size-fits-all approach to contracting. Of course, certain techniques and approaches have worked well over the years—they are our best practices. Even so, sometimes it’s time to try something new because maybe that will work too. Not convinced? What do you think when you read this brief comparison between written responses and oral responses?

Instead of the written approach which includes...	Consider the oral response...
farming out parts and pieces to subject matter experts and then laboring to create one voice	the team who will be performing the proposed work will be preparing together and rehearsing their unified approach
company standardized formats with aesthetic graphics and charts	the actual subject matter experts telling you what they assessed from your requirements and how they would solve your problem. This is often backed up on slide decks or websites with visuals of projects they’ve completed to verify what they are saying
a (seeming) regurgitation of the government’s requirement, leading to a compliant check list in narrative form and a price	is a tailored oral walk through that clearly demonstrates the value the government can expect to receive. These solutions are also illustrated with compelling and relevant evidence

Do I have your interest...but perhaps you're not sure where to start? If so, why not try an initial practice step that will help build your muscles? A simple approach is to lead your program and acquisition team through one-on-one market research sessions. What will that do for you? Consider the following:

The government team	The contractor team
works collaboratively to develop worthwhile questions and draft requirements documents to share	has access to government draft documents, communicates an interest in the requirement and begins internal business planning
has the contracting team to set up the logistics which includes any selection process to reduce the number of sessions	gains experience working together to unify as a team culled for this project and present its insights and capabilities
is led by the contracting officer who facilitates the discussion and ensures the meeting is in alignment with the stated invitation and topic (and of course rules and regulations!)	gains experience addressing the government's need in a time bound approach, focusing on the requirement, not a sales pitch
Closes the sessions and assesses responses in aggregate to further define its requirements	waits patiently for updates – and feels kept in the loop!

Perhaps you can see by the roles and actions above that interactive market research trains the government team's muscles and prepares them for similar activities in oral presentations. By facilitating one-on-one market research sessions, the government not only receives better industry insights, it helps smooth the process for successful oral presentations. These sessions provide industry with an opportunity to help the government with relevant feedback and real time to rehearse oral presentations. Additionally, it benefits all with experience in time management--which is critical for oral presentations.

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## Are you ready to get started using oral presentations?

Are you feeling uncertain about walking the oral presentations plank? You are not alone! Many of my program offices were reluctant to try oral presentations. But once they went through the process with me, they’ve all said they only want to use oral presentations going forward. Why? Because the value of oral presentations to the government from industry competitors is immediately evident. It distinguishes a detailed and tailored solution from a check-the-box regurgitation of your solicitation.

In part 1, we discussed some first steps to prepare your team for oral presentations. Now, in part 2 of this series, we’ll finish our discussion of preparation and cover the importance of establishing a clear and coherent solicitation process. This process includes using effective solicitation language, tips to communicate with the competitors and options to conduct oral presentations.

As you know, oral presentations are a show, not tell, practice to find an industry solution to a government solicitation. However, orals don’t run themselves. For smooth sailing, I cannot emphasize enough that the contracting team post a draft solicitation early in the process. This draft should include information about your oral presentation process or at least that you will be using oral presentations. Who benefits from early engagement? Everyone does, here’s how:

Contracting	Program	Industry
Can seek constructive feedback and correct areas that are incomplete or ambiguous. Ultimately, this can result in a clearer contract which requires less intense contract administration	Can receive constructive feedback in areas that are needed to fully flush out the scope and objectives of the project. This can result in the most effective, on-time and acceptable deliverables, post award	Can share insights from having completed multiple similar projects. This can result in time saving efficiencies and avoiding known pitfalls. Early communications also allow industry the opportunity to prepare for oral presentations

At a minimum, early communications can eliminate the government scrambling for answers, making revisions and avoid extending the solicitation’s closing date. This is even more critical during oral presentations because employee schedules have been cleared and conference rooms have been reserved. To avoid rough waters, plan your orals and follow your plan.

To conduct oral presentations, a best practice is having a process plan in place and publishing certain elements of it in the solicitation (see sample at the end of this article). Much of the information here focuses on oral presentations in a virtual environment. Consider the following logistical choices:

Solutions to consider	Consequences, alternatives and notes
Educate the acquisition team	<p>The contracting officer is advised to make extra time available in the technical evaluation panel training. This is to:</p> <ul style="list-style-type: none"> <li>• Address any questions so that all members can feel confident to participate in orals on day 1 of presentations</li> <li>• Collaborate with your team and make choices that benefit the entire team (platforms, real-time questions to the contracting officer, etc.)</li> </ul>
Use WebEx to host and record the oral presentations.	<p>In my experience, most participants have been able to access WebEx without technical issues. Also,</p> <ul style="list-style-type: none"> <li>• Although Skype can be used to host orals, many government employees have had difficulty accessing or staying connected to it (sometimes it's a virtual private network issue)</li> <li>• I do not recommend MS Teams for this activity. In some configurations, MS Teams does not allow you to delete the team chat, so using Teams could be a procurement integrity risk</li> <li>• By recording the presentations, it supports the government's efforts for any future legal advice and involvement</li> </ul>
Have an alternate way to meet the acquisition team during oral presentations. This can be an open channel to communicate any important real-time questions	<p>When I use WebEx to host orals, I concurrently use Skype to establish instant messaging with the government acquisition team</p> <ul style="list-style-type: none"> <li>• If using Skype, be sure the team clicks the circle "don't join audio" when they join your meeting. This will ensure you can instant message the team or address any incoming can't-wait messages</li> <li>• If a government team member has both WebEx and Skype open (with audio) the member will not hear the WebEx presentation very well</li> <li>• If it is part of your solicitation, when the government team is scheduled to meet and develop questions for industry, the team will have to re-access Skype with audio visual access. This can be solved by closing out of the meeting and reopening it (and clicking the circle "use Skype for business full audio and video experience")</li> <li>• During the question development time the technical chair usually drafts group questions on a word processing document for all to see</li> </ul>

Now that we've covered the preparation portion of this process, let's focus on developing clear and coherent solicitation language. I cannot overemphasize how helpful it is to share up front everything industry needs to know to participate in your oral presentations. Such language is always dependent on the requirement however, I've included sample language at the end of this article. This language has evolved over time and I anticipate it will continue to evolve. The intent of sharing it is to help you get started.

It's up to you to find the right plan that fits your requirement and your team. However, here is one tried and true approach to conducting orals. Consider:

The government team	The contractor team
<p>The contract specialist coordinates the logistics (calendar invites, fields questions)</p>	<p>Keep in mind competitors may be inviting subcontractors or other teaming agreement partners to meet your need. Consequently, the team may have different questions based on their experience with your requirement and organization. Be proactive with sharing process information so they can focus on preparing and delivering their solution rather than trying to guess at the logistics of oral presentations</p>
<p>The contracting officer facilitates all oral presentations to ensure fairness and consistency across all competitors and to ensure adherence to the solicitation</p> <p>Like the government team, the industry team has worked hard to get to the oral presentations starting line, so please ensure business courtesies and professionalism are intact</p> <p>When you are in a virtual environment ensure procurement integrity is maintained and remind the government team to disable all automatic listening devices prior to starting orals</p>	<p>Competitors just want to know the rules of the road. When the contracting officer signs on 10 minutes before the presentation, it is a time to welcome the government and industry teams, share the rules of the road and field any lingering questions. This is the time to resolve any potential technical issues</p>
<p>When it is part of your solicitation, the contracting officer and the technical evaluation panel work together to establish questions for the competitor about their oral solution. If the technical evaluation panel chair feels comfortable (establish this during technical evaluation panel training session) asking questions and being recorded it can be beneficial to have the technical expert ask the technical questions. When opening the questions and answers portion with industry, the contracting officer should refer to the solicitation language and articulate the questions serve as elaborations and clarifications to competitor presented information</p>	<p>The competitor should self-monitor and assign incoming questions to their team</p>

When it comes to due diligence, perhaps you can see by the roles and actions above, oral presentations aren't much different from written response evaluations. Oral presentations do not remove any responsibilities in our procurement process. Rather orals are a streamlined approach where the acquisition team works together to hear and review the real-time presentation simultaneously.

The information in this part may seem hefty but it will begin to make more sense as you get started and make it your own. You are not alone – consider reaching out to a trusted colleague or join the federal

mentoring community at <https://openopps.usajobs.gov/communities/13> for further assistance. For now, I invite you cast anchor and walk confidently through orals, complete your evaluations and prepare for debriefings.

## Sample solicitation language:

### **Oral presentations date:**

The government will contact contract holders with the actual date, time, virtual location, and other logistical instructions for the oral presentations. Competitors will be managing their own presentation including sharing slides, changing slides, etc. Assigned times will be provided on a first come, first served basis. Please be prepared with your team's availability and expect contact from the government for this information within approximately an hour after the task order request has closed. The government intends to hold oral presentations the week of (provide an estimate or at a minimum add these dates in the final solicitation).

Within five business days of issuing this task order request, or when feasible, the government asks for a courtesy notification from the contract holder if their company intends to compete for this work. This courtesy will allow the government to complete the logistics for oral presentations. Contract holders may send this notification to the contracting officer and contract specialist.

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## Technical Presentation Instructions

Contract holder submissions must be clear, coherent and delivered in enough detail for the government to determine its level of confidence in the contract holder's ability to perform the requirements of this task order (TO). Presentations must clearly demonstrate how the competitor intends to accomplish the project and must include convincing rationale and substantiation of all claims.

Contract holders must use their own equipment to deliver the presentation. The government conference room may include standard equipment such as a lectern, microphone, presentation screen with computer connection cords, guest Wi-Fi, etc.. Competitors may arrive up to 30 minutes before the scheduled time of their presentation to set up, test connectivity, etc. The government will provide an electronic invitation to the contract holder with a link to attend the presentation.

Competitors may bring up to nine attendees. Competitors are encouraged to have only proposed personnel deliver the presentation. For the successful contract holder who wins this TO, please note the annual contract holder performance assessment may include a government statement assessing the proposed personnel, what personnel performed, and any disruptions that may delay work due to contract holder personnel replacements. Any firm may attend only one oral presentation, whether for itself as a prime contract holder or as a subcontractor for only one prime firm.

Contract holders will use the exact presentation submitted at the close of the TO request. The contracting officer will ensure the written presentation is identical to the submitted documents,

any substitutions may disqualify a contract holder from award. Contract holders' presenters and attendees may not use electronics, phones or other means to reach their firm for any input during the presentations.

Oral presentations may be recorded. Given current global conditions, there is a high probability oral presentations may be, in whole or in part, held virtually. If the presentation is not held virtually, this determination will be decided by mutual agreement between each contract holder and the government. If presentations are held virtually, each member of the competitor's team may be required to adhere to more specific restrictions. Such restrictions may include signing a statement certifying during the time of the presentation the member did not reach out to resources outside of the identified and present oral presentations team. The contract holder is responsible for sending the names and email addresses of all oral presentation participants to the contracting officer and contract specialist prior to the start of the presentation.

Due to internal government technological connectivity issues the government prefers to use a WebEx meeting for virtual orals. The government is open to alternate software solutions however alternate suggestions will require a connectivity check prior to scheduling oral presentations.

## Sample solicitation schedule

Date and Time	Activity	Duration	Location
7:30 AM ET	Competitors may arrive and begin set up	Up to 30 minutes	Bethesda, MD or virtual
7:50 AM ET	Contracting officer welcomes competitor team and provides brief process overview	5 to 10 minutes	Bethesda, MD or virtual
8:00 AM – 9:00 AM ET	Oral presentation	1 hour	Bethesda, MD or virtual
9:00 – 9:15 AM ET	Break	15 minutes	Bethesda, MD or virtual
9:15 – 10:15 AM ET	Technical demonstration of key topics. Competitors are not limited to the number of performance retrospectives. Rather presenters are limited by the time allowed. Topic 1: Operations and Development Technical Expertise Topic 2: Grants Management Systems Topic 3: Public Stakeholders with Varying Levels of Technical Experience and Access	1 hour	Bethesda, MD or virtual
10:15 – 11:00 AM ET	Break Government meets to identify any clarifications or elaborations it may require to understand the presentation and demonstration.	45 minutes	Bethesda, MD or virtual
11:00 AM – 11:45 AM ET	Questions and answers	45 minutes	Bethesda, MD or virtual

## Sample email calendar invitation

Team Competitor:

Thank you for your interest in our requirement. We have agreed upon the following date and time for your presented solution to this requirement. We look forward to meeting you online. Please forward this calendar invitation to the appropriate members of your team.

If you have any questions between now and this meeting please let us know. We will open the WebEx session at exactly 7:30 am ET so you may begin any preparation which suits your team.

If presentations are held virtually, each member of the competitor's team may be required to adhere to more specific restrictions. Such restrictions may include signing a statement certifying during the time of the presentation the member did not reach out to resources outside of the identified and present oral presentations team. The contract holder is responsible for sending these signed statements after the presentation (a personal email from each team member is acceptable) to the contracting officer and contract specialist no later than close of business the day the oral presentations are held.

The contract holder is responsible for sending the names and email addresses of all oral presentation participants to the contracting officer and contract specialist prior to the start of the oral presentation.

(insert a copy of the oral presentations table schedule from your solicitation)

Thank you,

Contract specialist

*Next page: Oral presentations are over, now what?*

## Oral presentations are over, now what?

Congratulations! You’ve made it through the biggest part of oral presentations—conducting them.

Throughout this series, we’ve covered a lot of information about oral presentations. In part 1 we discussed first steps and preparations, in part 2 we wrapped up preparations and conducted oral presentations. And just when you thought it was safe to go back in the water, I’m telling you there’s more to it. I invite you to stick with me for part 3, where we’ll look at ways to close out oral presentations. Specifically, we’ll focus on debriefings and capturing lessons learned.

Under our NITAAC GWAC task order solicitations we use FAR 16.5 processes which guide our award notifications and debriefings. Let’s break out a few items for your consideration.

Tasks	Tips
<p>Provide an award notification in email and invite the competitor to request a debriefing</p>	<p>Oral presentations might be new for you and some of the participating competitors. To excel, consider:</p> <ul style="list-style-type: none"> <li>• In good judgement, to provide industry with as much information as you legally can. Don’t let them walk in uninformed to your debriefings. By pre-sharing this information it will cut down on questions. I usually only schedule debriefings for one hour so I need to use my time wisely. Pre-sharing information is especially important to small businesses who often operate with less available resources</li> <li>• Work with your government team to establish schedule coherence so you can include in your notification an array of dates and times the competitor requesting a debriefing can choose from</li> <li>• Choose to hold oral debriefings with clear feedback to the competitors. Some contracting officers may record the debriefings for legal convenience, self-assessment and as a record to the file</li> <li>• Oral debriefings can give the contracting officer some experience of what the competitors went through in oral presentations. This serves as a continuous feedback loop which benefits future government business processes</li> </ul>

Tasks	Tips
<p>Send the competitor a recording of their mp4 oral presentations when you send the award notification</p>	<p>Your contract file will include a record of the oral presentations, whether this is the mp4, notes, a slide deck or all of these. I recommend recording and sharing the competitor’s own mp4 presentation with them. It provides a rare opportunity for industry to self-evaluate its presentation. In the NITAAC community this is a way for our contract holders to take advantage of feedback for growth opportunities. However:</p> <ul style="list-style-type: none"> <li>• Use caution when sharing this mp4 proprietary presentation. Ensure it is sent only to the correct business point of contact</li> <li>• I recommend sending it in a separate email via a secure email and file transfer service (and reference the second email in your award notification)</li> <li>• Many agencies offer them, the NIH version can be accessed at: <a href="https://secureemail.nih.gov/bds/Login.do">https://secureemail.nih.gov/bds/Login.do</a></li> <li>• Other options may be a secure cloud link, or physically on a DVD or USB</li> </ul>
<p>Provide honest, constructive feedback in your debriefing</p>	<p>At the end of this article, you can find oral presentations sample debriefing language. Also consider:</p> <ul style="list-style-type: none"> <li>• Industry is looking for ways to improve as it is not cost-effective to run a business by continuing to do what isn’t working</li> <li>• An effective feedback process allows for the NITAAC contract holder community to provide better oral presentations in the future</li> <li>• Feedback can influence our contractor holders’ abilities to retain the right skilled staff and recruit the right skill set for your task order solutions</li> </ul>

Now let’s focus on capturing lessons learned. For those who are committed to continuous professional development, this is a never-ending process. One approach is to survey, interview and separately ask your technical evaluation panel members, industry competitors and your contracting team. There are a few places in the process where I’ve found asking for feedback to be most helpful. They are: At the end of the last technical evaluation panel consensus meeting (program); during scheduled debriefings (industry) and after the kickoff meeting (your contracting team). Here are a few questions to consider asking: Did we meet our goal? What worked? What did you like? What might still be unclear? What would make this process better? Would you do oral presentations again? If so, how come?

I find oral presentations an invaluable addition to streamlining my procurements. Thank you for sticking with me for this series. I would love to hear your feedback: How has it helped you? What could be added? What could be improved? Is there anything else you would like to share?

## Sample language for debriefing oral presentations

Near the beginning of the debriefing I share something like:

Before we begin, I would like to provide a general overview of the oral presentation process. As noted in the FAR, oral presentations can be effective in streamlining the source selection process. Our oral presentation structure and schedule as published in the solicitation was identical for all competitors. The overall oral presentation process includes the morning schedule as noted in solicitation. The technical evaluation team received a copy of the slide deck and supporting documents (excluding price) the morning of each presentation. After the oral presentation the government team resumed in the afternoon to conduct the technical evaluation and consensus. The CO facilitated the evaluation and consensus. At the conclusion of the oral presentations for all competitors the government team met again and performed a review of the pricing.

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I conclude oral presentations debriefings with something like:

For oral presentations I provide the following general information to all contract holders whom I debrief

- a. Consider making concluding statements. For instance, a competitor may spend time discussing how an approach was used in another environment. How does that translate to the current requirement? A concluding statement might be: "Based on the experience we just described we excel at \_\_\_\_, from our assessment of your environment, we will use \_\_\_ approach. Consequently, in your environment we anticipate this will do \_\_\_ and \_\_\_\_. The benefit to the government of this approach is \_\_\_\_."
- b. Consider minimizing a focus on historical accolades. If in personal employment interviews it is the time to talk about yourself, in oral presentations it is the time to talk about the government's requirement. How well do you know the specific government agency and its environment? What is your solution? How would your detailed understanding be applied in the specific government environment?

## Who do I contact?

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