



VIRTUAL  
SMALL BUSINESS TRAINING WEEK 2021  
**SBTW21**  
BUILD ★ GROW ★ ELEVATE  
Expanding the Defense Industrial Base

# Strategic Market Research

## How To Get The Team On Board

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PRESENTER NAME:

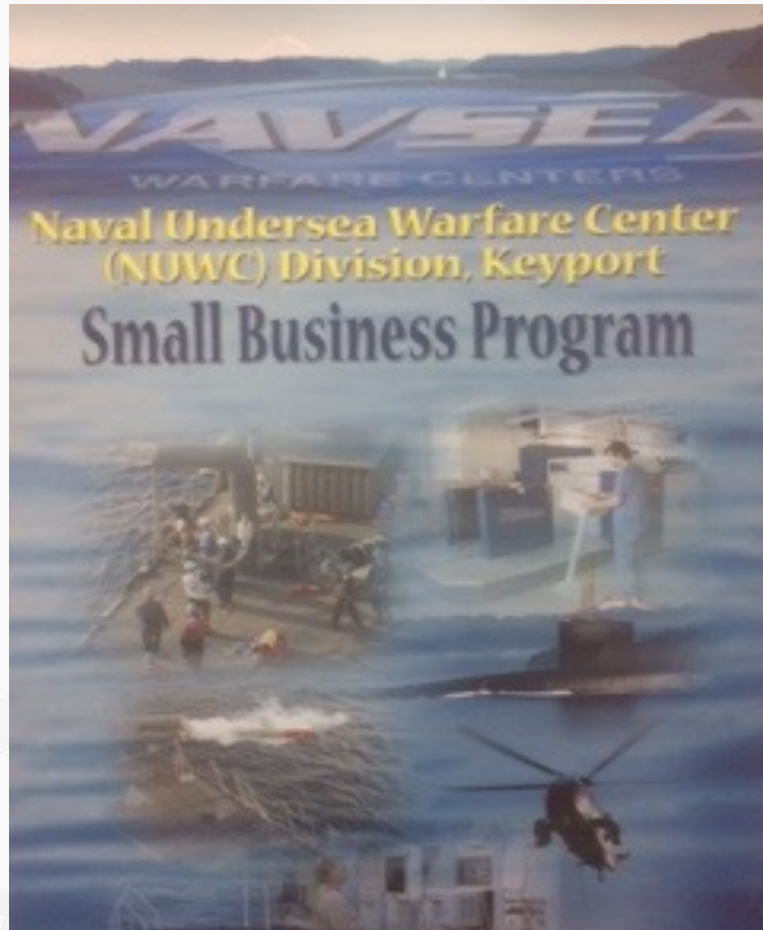
7/16/2021

Kathy Cocus, Washington State PTAC

David Walz, Deputy for Small Business, NUWC Division, Keyport

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1. Introductions
2. Market Research
  - Policy
  - Strategic / Tactical
  - Responsibility
  - Team Effort
3. Collaboration
4. Benefits
5. Conclusion
6. Questions



## **Mission: Provide advanced technical capabilities for Undersea Warfare**

- Test and Evaluation
- In-Service Engineering
- Maintenance and Industrial Base Support
- Fleet Material Readiness
- Logistics Support
- Unmanned Underwater Vehicle Support
- Contracts and Acquisition Support
- Obsolescence Management
- Corporate Operations

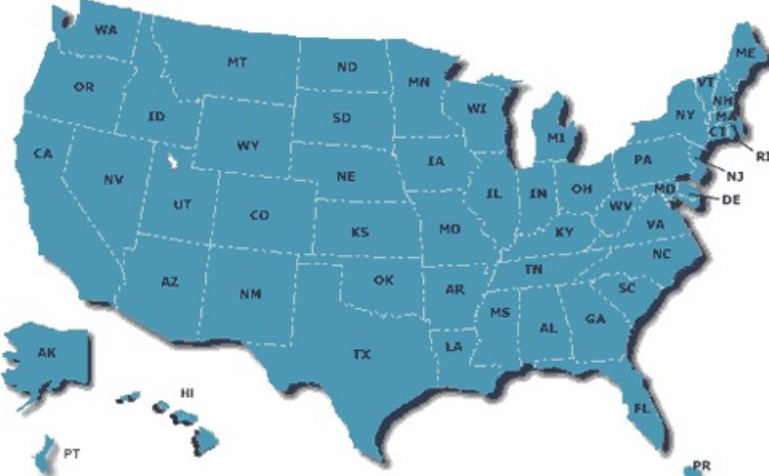
- **About PTAC**

*Procurement Technical Assistance Centers provide no-cost assistance to help firms succeed in government contracting*  
[aptac-us.org](http://aptac-us.org)

- Congress established the Procurement Technical Assistance Cooperative Agreement Program in 1985 as part of the Department of Defense (DoD) Authorization Act
- PTAC was designed to assist businesses (focusing on small businesses) with **federal, state and local government contracting**
- PTACs are funded in part through a cooperative agreement with Defense Logistics Agency and locally by partner agencies/organizations

Find a PTAC Select a State ▾

**Find a Procurement Technical Assistance Center**  
Click on the map below or select your state above to find the Procurement Technical Assistance Center  
[Find American Indian PTACs »](#)





## About PTAC

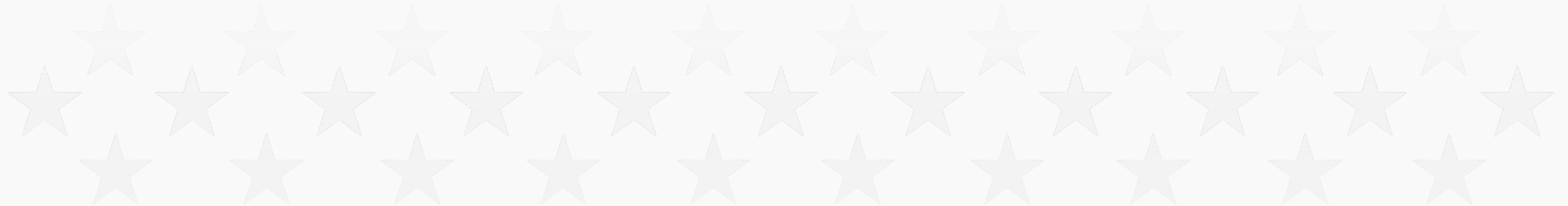
## Services

One on One Counseling	Profile and Marketing Reviews
System for Award Management (SAM) registration and updates	Dynamic Small Business Search (DSBS) profiles
Certification assistance: HUBZone, 8(a), WOSB, SDVOSB	Subcontracting opportunities with large primes
Bid Match Services	Workshops
Partnering and networking opportunities	Articles and resources



Because it is required by Federal Acquisition Regulations (FAR) Part 7 and 10

- FAR 7.102 – Agencies shall perform acquisition planning and conduct market research for all acquisitions
- FAR 10.000 – To arrive at the most suitable approach to acquiring, distribution, and supporting supplies and services
- FAR 10.001 – Agencies shall...



## Strategic Market Research

- Ongoing Process, not focused on a single acquisition
- Broad study of the market and sources
- Enables Acquisition professions, engineering, project management, and others to stay informed about overall market developments, trends, and capabilities
- The goal of strategic market research is to develop a base of knowledge about the market area of interest and its products or services
- Can then be applied to one or more acquisitions to help focus the more detailed tactical market research
- Four steps: Identify the market; identify sources of information; collect information; and document results

## Tactical Market Research

- Builds on Strategic Market Research
- Conducted at specific points during the acquisition process
- Provides in-depth information to answer specific questions about the capabilities, products, or services available in the market
- User requirements need to be continually considered
- Seven Steps: Summarize strategic market research; formulate requirements; identify sources of information; collect information from sources; collect information from users; evaluate the data; document results



## Members of the acquisition planning team (FAR Part 7)

- This planning shall integrate the efforts of all personnel responsible for significant aspects of the acquisition
  - Program Managers
  - Requirement Generators
  - Logisticians
  - Contracting (Contract Specialist, Procurement Agent, Contracting officer)
  - Small Business Program
  - Legal Counsel
  - SBA
  - PTAC



# Market Research – Team Effort

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## Get involved and participate

- Outreach
- PTAC Events
- Command Events
  - Industry Days
  - Wednesday with the Deputy for Small Business
  - One on One Matchmaking sessions
- Learn more about a company's capability
- Inform Acquisition community of new companies and technologies
- Weekly small business report
  - New companies and the capabilities are listed



## Collaboration Partnerships

- Wednesday with the Deputy
- Industry Day
- PTAC hosted events
- DoD Council
- Meeting space



- Zoom platform
- Registration
- Schedule
- Marketing



# Collaboration - Win-Win

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Zoom host  
records session

Registration can  
be one site or  
multiple sites

Follow-up

Introductions





# Keys

Partnership

Support

Flexibility



# Join Us!

Wednesday with the Deputy

August 25, 2021

9 – 10 a.m.

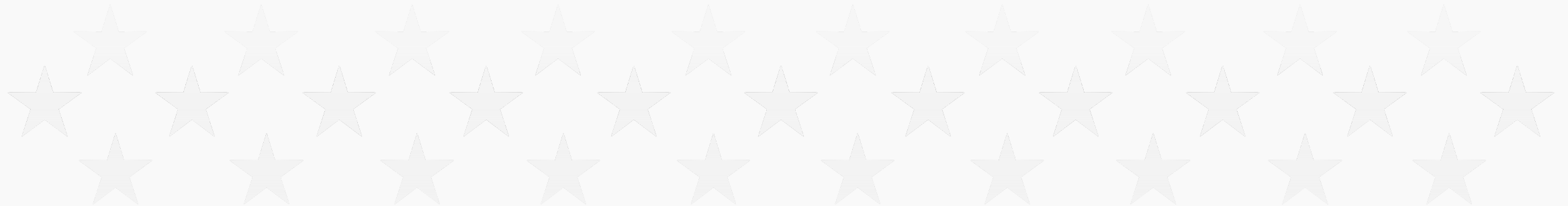
Details posted on SAM.gov



# Market Research - Benefits

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- Benefits to good market research
  - Locate new sources
  - Increases competition
  - Better products and/or services
  - Lower costs







# Market Research - Conclusion

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- Strategic and Tactical market research can be used to shape the acquisition process
- The information gleaned from market research will affect the acquisition strategy
- Refine requirements definition
- Support and test plans
- Formulate Evaluation Factors
- Refine:
  - Requirements definitions
  - Product Descriptions
  - Statement of Work; Performance Work Statements; Statement of Objectives
  - Contract terms and conditions.
- Early market research could have a major effect on how the program unfolds.



# Contact Info



David Walz

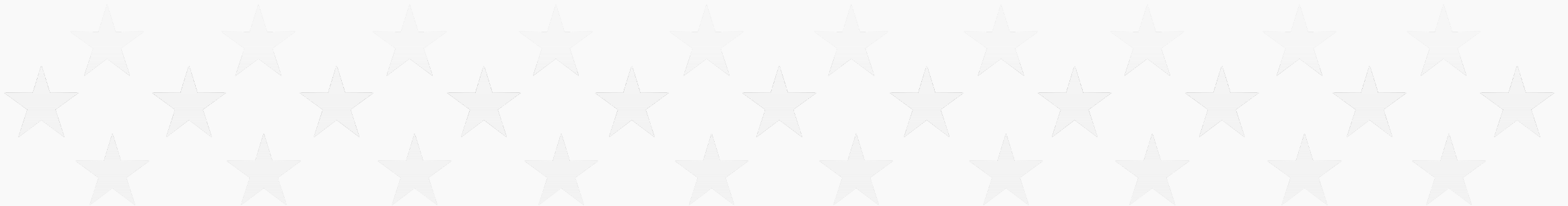
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Questions





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Thank you