PATREON PREMIUM GUIDE · FEDERAL BID-READY QUICK REFERENCE

THE SEVEN DOCUMENTS YOU NEED BEFORE YOU BID A FEDERAL CONTRACT

Quick Reference Guide · Get bid-ready before you touch a solicitation

By Rick Piña | Inspired Solutions

COO / CRO · 8(a) + SDVOSB

Federal Bid-Ready Quick Reference
Seven documents, each one explained
30-day bid-ready plan inside

> **Federal buyers stop reading when the paperwork is missing.**
>
> RICK PIÑA

INSIDE THIS BOOKLET

READY

Bid-ready first

Do not chase solicitations with an incomplete folder. Chase readiness, then bid. The stack below is the gate before pricing, teaming, or proposal nights.

LIVE

From the field

How we actually compete at Inspired Solutions as an 8(a) and SDVOSB. Real checklists you can run in 30 days.

STACK

Seven documents

UEI/SAM, reps, NAICS, capability statement, past performance, certifications, W-9 and license. Plus where to look.

PLAN

30-day path

Week-by-week build to a shareable bid-ready packet. Red lines included so you do not self-eliminate.

FROM RICK

This is for competitors, not spectators

I spend my days in federal IT at Inspired Solutions. We are an 8(a) and SDVOSB company. Here is what I keep seeing: a sharp founder finds a solicitation that looks perfect, gets excited, starts pricing, and then hits a wall. SAM is expired. NAICS is wrong. The capability statement is a Word dump. Or there is no past performance trail.

Federal buyers do not owe you a second look. When the paperwork is missing, they stop reading. Not because they dislike you. Because risk and compliance force them to.

This quick reference is the bid-ready stack I teach from how we actually compete. Seven documents. Get the folder right before you touch the solicitation.

> **Do not chase solicitations with an incomplete folder. Chase readiness, then bid.**
> FEDERAL BID-READY PRACTICE

FEDERAL CORRIDOR · BUYERS EXPECT PAPERWORK BEFORE CONVERSATION

OPERATOR RULE BEFORE THE DOCUMENTS

- If Docs 01 and 02 are fuzzy, stop browsing opportunities. Fix the entity gate first.
- Build a single shared bid-ready folder. Every owner should know the path in under 30 seconds.
- Assign a primary and a backup for SAM, certs, licenses, and past-performance library updates.

OVERVIEW

The 7 documents at a glance

01
UEI + Active SAM
Renew every 365 days. No contract without both. Screenshot Active before every pursuit kickoff.

02
Reps & Certs
Size, ownership, compliance attestations in SAM. Export PDF into the bid folder.

03
NAICS codes
What you can bid. Set-asides. List more than one. Match size standards to reality.

04
Capability statement
Federal resume. Lead with results. One to two pages. POC and UEI visible.

05
Past performance
Proof you deliver. Or start as a sub and document like a professional.

06
SB certifications
8(a), WOSB, HUBZone, SDVOSB via MySBA. Only market approved status.

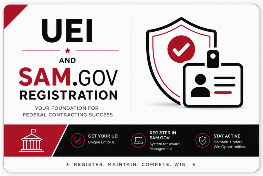
07
W-9 & license
Expire and change more than people check. Onboarding dies here quietly.

+
Where to look
SAM, forecasts, recompetes, GSA/SEWP-style lanes your buyers already trust.

DOCUMENTS 01 – 02

Entity gate: SAM and reps

Without Active SAM and clean representations, you are not in the game.



DOCUMENT 01

UEI + Active SAM.gov

Your Unique Entity Identifier and an active System for Award Management registration. Without both, you are not eligible for award.

What it is. The UEI replaced DUNS as the government's official entity identifier. SAM.gov is where entities register to do business with the federal government. Your record must show **Active**, not Expired, Incomplete, or Submitted. Registration renews on a **365-day** cycle. Complete registration means the correct legal entity, banking data, and points of contact.

Why buyers care. Contracting officers cannot award to an inactive SAM entity. Primes often cannot onboard you as a sub if SAM is wrong or expired. A mid-pursuit lapse can cost the bid, the award, or invoicing. This is a hard gate in procurement systems and policy.

HOW TO GET / MAINTAIN

- Create or claim your entity at **SAM.gov** with the exact legal name on formation docs and tax records.
- Complete core data, assertions, reps and certs, POCs, and financial information.
- Confirm UEI on every proposal cover, capability statement, teaming agreement, and invoice packet.
- Calendar **60 and 30 day** renewal alerts. Primary owner plus backup.
- Screenshot Active status into the opportunity folder at every pursuit kickoff.

COMMON MISTAKES

- Assuming "we submitted it" equals Active.
- One admin leaves with the only login.
- DBA / marketing name that does not match the legal entity.
- Banking / EFT mismatches found only after award.

RICK TIP FROM INSPIRED

Treat SAM renewal like payroll. Someone owns the date. Someone verifies Active before every pursuit. Hope is not a renewal strategy.

Rick Piña

CHECKLIST

- UEI documented and matches SAM exactly
- SAM status = Active (screenshot in bid folder)
- Renewal date on shared calendar (60 / 30 alerts)
- Entity administrator + named backup
- Legal name matches formation docs, W-9, and bank

DOCUMENT 02

Representations & Certifications in SAM

The attestations inside SAM that tell buyers who you are, how big you are, how you are owned, and what you certify under federal rules.

What it is. SAM representations and certifications cover business size, ownership and control, socioeconomic status, and compliance statements. Many solicitations pull those answers instead of re-collecting on paper. Your reps are official footprint, not marketing copy.

Why buyers care. Wrong size status, stale ownership, or incomplete reps create protest and award risk. Answers must match your proposal narrative, certificates, and reality. Marketing vs SAM mismatch kills trust before technical evaluation starts.

HOW TO GET / MAINTAIN

- Complete all required reps at registration and again at renewal.
- Align ownership, affiliates, and size answers with SBA definitions and actual control.
- Re-check when you add NAICS, change ownership, bring on investors, or enter a new set-aside lane.
- Export a PDF of current reps into the bid-ready folder.
- Quarterly: confirm proposal boilerplate still matches SAM line for line.
- If ownership or affiliates change, treat it as a SAM event the same week.

COMMON MISTAKES

- Copying last year's answers without re-reading.
- Claiming status your ownership/control cannot support.
- Incomplete reps discovered the week a proposal is due.

RICK TIP FROM INSPIRED

Your proposal story and your SAM reps must tell the same story. Consistency is a competitive advantage.

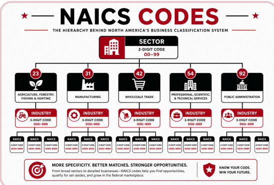
Rick Piña

CHECKLIST

- Reps & certs marked complete in SAM
- Size and ownership verified this quarter
- PDF export in bid-ready folder
- Affiliate / control reviewed if structure is complex
- Proposal boilerplate matches current SAM

DOCUMENTS 03 – 04

What you bid and how you present



DOCUMENT 03

NAICS codes

Codes that define what you claim you can perform and which size standard applies to that work.

What it is. Every federal opportunity is tied to one or more NAICS codes. Your SAM profile lists the codes you claim. Size standards (employees or average annual receipts) sit on those codes and drive set-aside eligibility. NAICS is how buyers, primes, and market research tools categorize you.

Why buyers care. Wrong or empty codes make you invisible in the right lanes and visible in the wrong ones. Set-aside eligibility, teaming, and agency market research lean on NAICS fit. Fantasy code sets burn BD hours and credibility.

HOW TO GET / MAINTAIN

- Primary NAICS plus secondary codes you can deliver today.
- Map services/products to codes before browsing. Write it down.
- Check current size standard per priority code. Growth can push you out of small.
- Save SAM.gov searches filtered to real codes and target agencies.
- Quarterly review with capture and delivery leads, not only marketing.

COMMON MISTAKES

- Listing every fashionable code hoping something sticks.
- Ignoring size standards until a CO asks.
- Bidding outside your honest NAICS story.

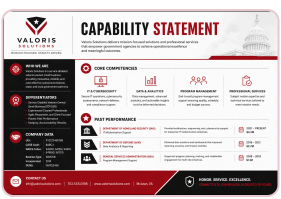
RICK TIP FROM INSPIRED

List more than one NAICS, but do not invent a fantasy portfolio. Codes follow the work you can staff and deliver.

Rick Piña

CHECKLIST

- Primary NAICS chosen and justified in writing
- At least 2 to 4 secondary codes that are real
- Size standard checked for each priority code
- Opportunity search filters saved
- Capability statement NAICS matches SAM



DOCUMENT 04

Capability statement

Your federal resume. Short, sharp, built for a contracting officer's attention span.

What it is. A one- or two-page PDF: who you are, what you do, differentiators, core competencies, NAICS, past performance highlights, socioeconomic status, vehicles if any, and how to reach you. Leave-behind after intro calls and attachment on outreach, sources sought, and teaming intros.

Why buyers care. Buyers and primes need a fast way to see if you belong. A messy brochure signals a messy delivery team. Clear gets the next conversation. Vague gets filed and forgotten.

HOW TO GET / MAINTAIN

- Lead with results and clear competencies, not a slogan.
- Include UEI, CAGE if any, NAICS, approved certs, real POC with phone and email.
- Master version first. Lane variants only when needed, and keep them consistent.
- Refresh after wins, teaming, vehicles, or cert changes. Footer last-updated date.
- Print-test: if a stranger cannot name what you sell in ten seconds, rewrite.

COMMON MISTAKES

- Three pages of adjectives and zero proof points.
- Missing UEI, POC, or NAICS so the reader cannot act.
- Old cert claim after status changed.

RICK TIP FROM INSPIRED

If a stranger cannot tell what you sell in ten seconds, rewrite the capability statement.

Rick Piña

CHECKLIST

- One to two pages, PDF, branded but clean
- Results-first competencies and differentiators
- UEI, NAICS, certs, and POC present
- Last updated date in the footer
- Lane variants still match master facts

DOCUMENTS 05 – 06

Proof and status

DOCUMENT 05

Past performance

Proof you deliver. If you lack federal primes yet, start as a sub and document like a professional.

What it is. The government's ask: have you done something similar before, on time, on quality, without drama? It shows up as CPARS, questionnaires, customer letters, abstracts, proposal write-ups, and reference calls. Commercial work can count when relevant and well documented. Federal-relevant references are the gold standard.

Why buyers care. Technical scoring often weights past performance heavily. Weak history loses to less flashy but proven competitors. Buyers buy reduced risk. Your record sells that reduction.

HOW TO GET / MAINTAIN

- Capture scope, value band, period of performance, customer POC, and outcomes.
- New to federal: pursue subcontract roles. Negotiate visibility and clean scope you can write up.
- Ask for letters and POC permission while work is fresh.
- Living library mapped to NAICS, agencies, and offerings.
- Update write-ups within two weeks of closeout.

COMMON MISTAKES

- Waiting for a perfect prime award before documenting.
- Vague "supported the mission" blurbs with no scope or outcome.
- POCs who have moved or will not take a call.

RICK TIP FROM INSPIRED

Do not wait for a prime award to start your record. A clean subcontract with measured outcomes beats a blank page.
Rick Piña

CHECKLIST

- At least 3 write-ups, or active subcontract pursuits if early
- Customer POCs confirmed and reachable
- Outcomes quantified where honest
- Relevance mapped to target NAICS and agencies
- Letters / questionnaires requested while fresh

DOCUMENT 06

Small business certifications

8(a), WOSB, HUBZone, SDVOSB when you truly qualify. Certs open doors. They do not replace readiness or delivery.

What it is. Socioeconomic and small-business certifications via SBA / MySBA and related programs: 8(a), WOSB, HUBZone, SDVOSB. Eligibility rests on ownership, control, size, and program rules. Approved status must appear consistently in SAM, capability statement, and proposals.

Why buyers care. Agencies have goals and set-aside strategies. Certs determine lanes and how primes see you. Fake or premature claims destroy trust and create legal exposure. Right cert is leverage. Wrong claim is a career problem.

HOW TO GET / MAINTAIN

- Confirm eligibility in writing before you apply.
- Use official SBA / MySBA paths. Keep evidence organized.
- Track recert and annual review like SAM renewal.
- Reflect only approved status in SAM, one-pagers, sites, and proposals.
- On status change, update every public surface the same day.

COMMON MISTAKES

- Marketing "8(a) pending" as awarded status.
- Ignoring control rules while counting ownership percentage.
- Missing recert during a live bid.

RICK TIP FROM INSPIRED

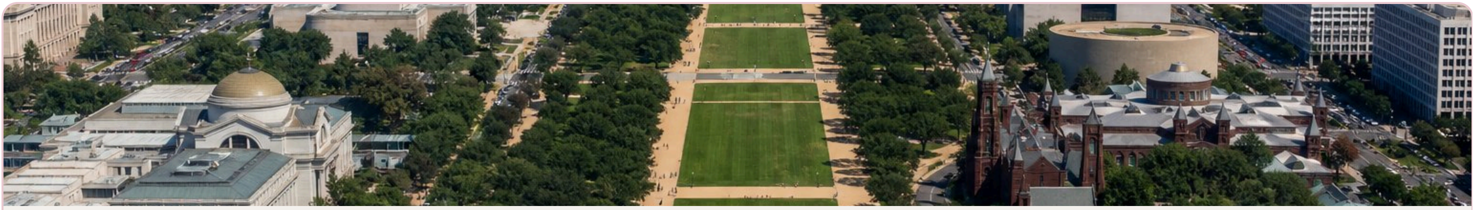
The cert opens the door. Bid-ready documents and delivery keep you in the room. Never let the badge outrun the folder.
Rick Piña

CHECKLIST

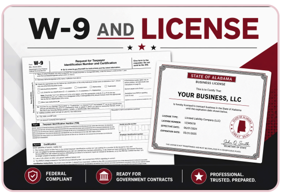
- Eligibility memo written (honest yes / no per program)
- Application or active status documented
- Recert and review dates on calendar
- Marketing claims match approved status only
- SAM and capability statement match

DOCUMENT 07 + BONUS

Hygiene and where to look



NATIONAL MALL · SET-ASIDE LANES STILL REQUIRE A COMPLETE BID PACKAGE



DOCUMENT 07

W-9 & business license

Basic corporate hygiene. These expire and change more than people check, and they stall onboarding when ignored.

What it is. IRS Form W-9 (or entity tax info buyers/primes request) plus active state/local business license and any required professional licenses. Paperwork needed to set you up in vendor systems, pay you, and satisfy compliance.

Why buyers care. Clean tax ID data matters. Expired licenses create flags. “We will send it later” often means they find another teammate. Many pursuits die in onboarding, not technical scoring.

HOW TO GET / MAINTAIN

- Current signed W-9 PDF in the bid-ready folder.
- Renew licenses before expiry. Log renewal dates with proof.
- Update tax forms when name, address, or classification changes.
- One legal name across W-9, SAM, bank, insurance, and proposals.
- Pre-stage COI / insurance if primes always ask.

COMMON MISTAKES

- W-9 with old address or nickname instead of legal name.
- Expired city/county license found during vendor setup.
- Three slightly different legal name strings across systems.

> RICK TIP FROM INSPIRED
> **One legal name. One UEI. One tax ID story. Everywhere.**
> Rick Piña

CHECKLIST

- Signed W-9 less than 12 months old, or refreshed on change
- Business license active with renewal date logged
- Legal name matches SAM and bank
- Insurance certificates ready if primes require them
- Folder shareable to primes within one business day

BONUS

Know where to look

No third-party tool brand pitch. Master official sources and the vehicles your buyers trust.

SAM

SAM.gov opportunities

Solicitations, sources sought, pre-sols. Filter by NAICS, agency, set-aside, keywords. Save searches. Review on a cadence.

FCST

Agency forecasts

Shape teaming, hiring, and capability updates months early. Forecasts beat surprise RFPs.

RE

Recompetes

Study the old vehicle, gaps, transition risk, prime vs sub fit. Homework beats last-minute heroics.

LANES

GSA / SEWP-style lanes

Learn which vehicles your buyers already use before inventing a chase.

> RICK TIP FROM INSPIRED
> **Hunt where your NAICS, certs, and past performance already give you a right to win.**
> Rick Piña

ACTION PLAN

30-day bid-ready plan

WEEK 1 · ENTITY FOUNDATIONS (01–02)

- Verify/complete SAM; confirm UEI + Active (screenshot)
- Export reps & certs; fix gaps
- Renewal dates on shared calendar; owner + backup
- Resolve legal-name mismatches across systems
- Create the shared bid-ready folder and permissions

WEEK 2 · CODES AND STORY (03–04)

- Lock primary + secondary NAICS with size checks
- Rewrite capability statement (results first)
- Align capability facts with SAM facts
- Create past-performance template for Week 3
- Save filtered SAM searches for your real codes

WEEK 3 · PROOF AND STATUS (05–07)

- 3 write-ups or 2 serious subcontract conversations
- Advance/verify SB certs in MySBA if eligible
- Refresh W-9; confirm license active
- Assemble one-day onboarding packet for primes
- Confirm POCs will take a reference call

WEEK 4 · HUNT DISCIPLINE

- Save SAM searches; review twice weekly
- Pull 2 forecasts; mark 3 recompete watches
- Identify vehicles buyers actually use
- Red-team: full packet in five minutes?
- Brief the team on owners, dates, and red lines

If Week 4 starts and Docs 01–02 are still fuzzy, stop hunting. Fix the gate.

OPERATOR RULE

RED LINES

Common failure modes

DO NOT CROSS THESE LINES

- Bidding with Expired SAM or a mismatched UEI
- Claiming NAICS or set-aside status you cannot support
- Capability statement that hides what you sell or omits POC
- Zero past performance and zero subcontract plan
- Marketing certs you have not been approved for
- Stale W-9 / expired license when a prime asks for docs
- Chasing every solicitation instead of lanes you can perform
- One-person SAM admin with no backup and no calendar
- Proposal narrative that contradicts your SAM reps

A

Excited chase, empty folder

Days on pricing, then SAM expired. Deadline does not move. Readiness beats adrenaline.

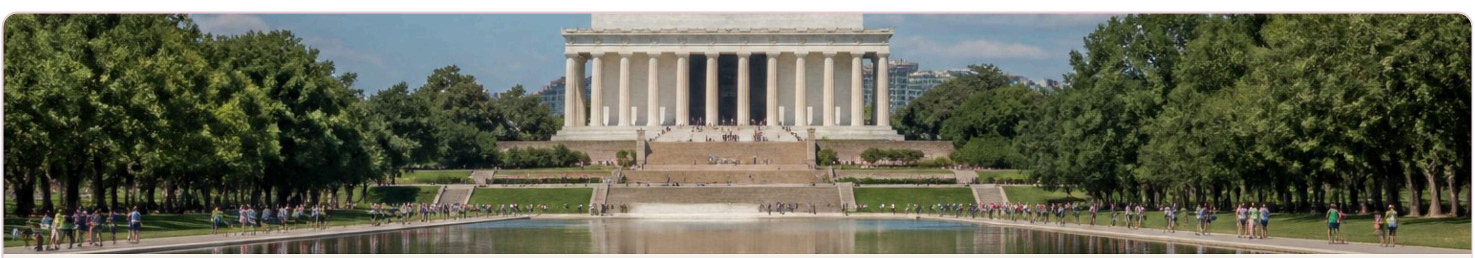
B

Cert theater

Logos on the site. Incomplete application. Trust dies in one email from a CO or prime.

Speed without paperwork is not hustle. It is self-elimination.

OPERATOR NOTE



LINCOLN MEMORIAL · CREDIBILITY IS BUILT ON RECORD, NOT RHETORIC

COMMUNITY

Discussion questions

Q1

Which of the seven is weakest in your folder right now?

Name it. Put an owner and a date on the fix this week. Weakest document becomes the first calendar block.

Q2

Are you building as a future prime, a strong sub, or both?

Your past-performance plan and vehicle strategy should match that answer. Do not write a prime story with a blank sub plan.

Q3

Which NAICS and agency lanes will you watch for the next 90 days?

Write three. Share one so we can sharpen fit and readiness together. Lanes beat random browsing.

Q4

If a prime asked for your onboarding packet tomorrow morning, what would break?

That breakage list is your real backlog. Put it on the 30-day plan before you open another RFP.

SHARE-BACK PROMPT FOR THE COMMUNITY

- Post your weakest document and the owner/date you assigned.
- Post one NAICS + agency lane you will watch for 90 days.
- If you are early stage, post the subcontract conversation you will start this month.

CLOSE

Get bid-ready. Then compete.

Federal contracting rewards preparation. Keep SAM alive, documents current, and the company story honest. Build the folder before chasing solicitations.

Run the 30-day plan. Bring questions. Raise the standard together.

Get the seven documents right. Know where to look. Then bid like you belong.

YEAR OF DISCOVERY

GREATER IS COMING

RICK

WASHINGTON, DC · ACCURATE ENTITY AND CODE DATA BEFORE THE CHASE