Industry Day Best Practices

Acquisition Management Shared Interest Group (SIG)

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SYNOPSIS

Government regularly hosts "industry day" events in order to provide detailed information on pending procurements, encourage competition, and create a level playing field for all potential offerors. Industry's motivations to participate may differ, often focusing on discovering potential partners and competitors.

This paper identifies and compiles best practices in staging successful, value-driven industry days by providing specific recommendations from the initial planning stages through the successful execution of an industry day event.

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The American Council for Technology (ACT) is a non-profit educational organization established in 1979 to improve government through the efficient and innovative application of information technology. In 1989 ACT established the Industry Advisory Council (IAC) to bring industry and government executives together to collaborate on IT issues of interest to the Government.

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Acquisition Management Shared Interest Group

The mission of the AM SIG is to deliver value to and impact our community through active participation, thought leadership, and innovation. AM SIG leadership works with our Government Advisory Panel (GAP) to select objectives and projects for the year that the SIG can support to further government/industry collaboration in acquisition areas. Our current objectives are to improve the relationship between government and industry, address acquisition workforce challenges & innovations, accelerate the adoption of shared services and strategic sourcing, and to expand the industry supply base. This project to improving industry day events was initiated in 2013 at the request of DHS.

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Executive Summary

The ACT-IAC Acquisition Management Shared Interest Group (AM SIG) launched an initiative to identify industry day best practices that would assist government in planning and conducting successful industry days. Through interviews with ACT (government) and IAC (industry) members augmented by feedback collected at recent industry day events, the AM SIG identified industry day best practices in order to:

- Ensure that government and industry understand each other's goals and expectations for industry days to maximize the usefulness of event structure and content.
- Document best practices and provide guidance from the initial planning stages through execution of an effective industry days.

Industry and government approach industry days with very different goals. Industry key objectives include:

- Meet potential teaming partners,
- Observe or discover competitors,
- Obtain the list of attendees for assessing teaming opportunities and competitors,
- Gain a better understanding of the government's needs, and
- Interact with government program personnel.

Government key objectives include:

- Encourage competition, and
- Create a level playing field by providing information to help potential offerors make bid/no bid decisions and write targeted proposals that address the government's requirements.

Both industry and government provided areas for improving industry days, including:

- Program office participation is critical to the success of the industry day. This requires program offices to dedicate time for planning and participation, and for coordination with the contracting office on appropriate information to provide in the industry day.
- Relevant procurement-related documentation should always be provided to attendees prior to the event, allowing them to become familiar with the draft documentation in advance. Advance distribution of draft documentation allows the program and contracting participants to maximize their time spent interacting with attendees, enabling deeper exchanges that often provide important strategic and contextual information. Sharing information in advance also allows industry to submit questions, enabling government to form an answer that can be disseminated at the industry day. Industry must also recognize that not all information can be shared; the government has an obligation to protect certain information that enables competition and best value.
- Companies participating in one-on-one meetings should avoid providing generic company information. Instead, provide specific recommendations or raise relevant questions.

Additional detailed recommendations on planning, preparation activities, format, agency participants, and content are identified later in this paper.

Introduction

The ACT-IAC Acquisition Management Shared Interest Group (AM SIG) is working towards increasing understanding and communication between the government and industry acquisition communities. In 2013, the AM SIG received multiple inquiries from federal agencies requesting best practices and techniques that would improve communication and reduce acquisition risk. To support these requests, the AM SIG launched an initiative to identify industry day best practices that would assist federal agencies in planning and conducting successful, value-driven industry days.

Objectives

- Ensure that government and industry understand each other's goals and expectations in order to maximize the usefulness of industry day structures and content.

- Document best practices and helpful guidance in planning and conducting effective industry days to improve government-industry engagement.

Interviews

To identify and document best practices, the AM SIG conducted one-on-one interviews with a variety of government acquisition professionals and industry executives, including contracting officers, business development executives, and acquisition support experts. Those interviewed averaged 18 years of federal acquisition experience and hosted or attended four industry days per year. The recommendations in this white paper are based on their interview responses and feedback.

Definitions

"Industry day" can be a broad term that encompasses many types of government-industry meetings, such as procurement-specific pre-solicitation, pre-proposal, and department/agency-wide industry days. The focus of the AM SIG's research was primarily on procurement-specific industry days and secondarily on department/agency-wide industry days.

1. *A procurement-specific industry day* is related to one specific procurement. Procurement-specific industry days occur after a draft solicitation/statement of work is issued but before the actual solicitation is released (pre-solicitation) or after the solicitation has been released but before the proposals are due (pre-proposal).

2. *A department/agency-wide industry day* presents broad information on different bureaus/components/programs within a department or agency rather than in-depth procurement-specific information.

Findings

Understanding Expectations

Interviewees were asked to identify their objectives for attending or hosting an industry day event.

Industry Objectives	Government Objectives

• Meet potential teaming partners
• Observe/discover competing firms
• Obtain list of attendees
• Gain a better understanding of the government's:
    o Program mission drivers
    o Program success, as viewed by the customer and/or the end user
    o Technical requirements
    o Acquisition strategy
    o Questions and answers
• Interact with government program personnel
	• Encourage competition
	• Create a level playing field by providing information such as:
	    o Scope and requirements
	    o How the contract will contribute to the program's mission
	    o Acquisition approach

Interviewees from industry and government were asked to rate the effectiveness of industry days in achieving their objectives. On a scale of 1-5 with 5 being the best, industry's average rating was a 2.75 while the government's average rating was a 4. From the interviews conducted, the AM SIG believes the difference in scores reflects a difference in expectations, which is discussed further below.

Industry Feedback – Areas for Improvement

Industry interviewees identified the following areas of improvement for government industry days:

• **Program Office Participation –** all interviewees from industry expressed the desire to have government program office staff present, to hear more from the program office on how the acquisition fits within the mission, to hear why the government is seeking contractor support, and to hear how success will be defined for the support.

• **Provide Documentation in Advance –** industry interviewees noted that providing information in advance of the industry day allows time to review the documentation, develop questions, and identify partnering needs. Critical information for the government to share includes a draft of the requirements, information related to the acquisition strategy, unique terms and conditions being contemplated, proposal instructions, and evaluation criteria. Interviewees stated that sharing this information with industry would enable better questions and allow them to determine their teaming strategy and solution development. Advance distribution of materials also would allow the government to avoid spending time at the industry day reading and repeating the requirements, instead allowing them to focus on providing context from the program team and addressing areas that may need clarification based on the questions received.

- **Distribute the List of Attendees Afterwards** – industry interviewees stated that one of their main objectives an industry day is to find out what companies and individuals attended the event. Knowing the attendees helps with partnering and understanding the competitive landscape. Several interviewees shared past examples of how helpful it was when the government has distributed the list of attendees after the industry day event.

Government Feedback – Areas for Improvement

Interviewees from government identified the following areas of improvement:

- **Avoiding Generic Company Information –** when the government holds one-on-one meetings as part of the industry day to gain input on its requirements, industry should avoid providing generic company information, instead providing specific recommendations or raising questions specific to the draft requirements.

- **Maximizing Questions and Answers Impact –** it's helpful for industry to submit questions in advance of the industry day so that the government can review and provide answers verbally and in print. The industry day can then be used to address follow-up and additional questions.

Finding the Middle Ground

Several issues raised by government and industry interviewees require continual balancing of competing objectives. It's important for both government and industry to understand these challenges and develop an appropriate framework to find the middle ground.

- **Interactions with Government Attendees** – industry hopes to meet with program officials and decision makers as much as possible, yet contracting officers have concerns about ensuring that all potential offerors have equal access to information and ensuring that the risk of protest is not increased due to the inappropriate sharing of information. One-on-one meetings can be used in coordination with industry days for formal meetings, and can be managed by the contracting officers. Contracting officers typically provide guidance to the program personnel on what information can and cannot be shared. Industry must also guide their business development staff on appropriate questions in order to avoid jeopardizing their organization's ability to bid or placing their government customers in uncomfortable positions.

- **Questions from Industry Attendees –** industry typically will not verbally ask questions at industry days that might reveal their business strategy/solution to competitor attendees. This often frustrates government organizers who desire feedback and interaction. Industry recommends asking for questions in advance of the industry day and providing a mechanism such as note-cards or emailed questions during the industry day that provide anonymity to potential offerors.

- **Information Sharing –** industry interviewees noted that industry professionals will always press for as much information as possible. As discussed above, the acquisition strategy and many elements of the draft solicitation are valuable to industry in committing business development resources and forming teaming arrangements. When possible, industry days should occur in the draft solicitation phase to allow for the sharing of information and

feedback on the requirements. Industry must recognize the need for the government to protect certain information to ensure an equal playing field among offerors while promoting competition and obtaining best value.

Industry Day Recommendations

The recommendations and best practices that came out of the project are broken into the two types of industry days previously mentioned: Procurement-specific industry days and department-wide/agency level industry day events.

1. Procurement-Specific Industry Days

The following are recommendations for hosting effective procurement-specific industry days.

Planning

A. Establish a Strategy Aligned with Your Objectives

Industry days can take many forms, but will be most effective when objectives and goals are clearly defined. What is the government's goal? Is it to provide information only? Is it to gain input and feedback on draft requirements and/or the draft solicitation? Or is it a combination of the two? Establishing your objectives and goals will determine the format and content of the industry day.

B. Determine the Timing Based on Your Objectives

Based on the government's objectives, the industry day may be a pre-solicitation industry day or a pre-proposal industry day. As the names imply, a pre-solicitation industry day occurs before a final solicitation is issued. A pre-proposal industry day occurs after the final solicitation has been issued, but before proposals are due. If the government is seeking input and feedback on its requirements, for a new need or a recompete, the government should use a pre-solicitation industry day. If the government doesn't require input, but wants to share information to promote competition, encourage better proposals through additional context or create a networking opportunity for organizations to identify teaming partners, a pre-proposal conference can be used.

C. Build the Industry Day into the Procurement Timeline

When developing an acquisition schedule, the government should consider building time in to allow for an industry day or other information exchange mechanism. When seeking feedback on draft requirements or RFP, the government should post the documentation at least two weeks before the industry day, and request that questions be submitted in advance of the industry day.

D. Identify Government Participants

The contracting officer should work with the government's program office staff to identify the right participants for the industry day. Their participation is vital and will help industry generate proposals that are clearly targeted to the government's needs and objectives

Preparation Activities

The following are recommendations related to preparing for an industry day:

1. **Location:** What space will be adequate and available? Depending on the space and the interest, will attendance need to be limited to 2-3 representatives from each organization? If in-person attendance is limited, can other representatives view and listen to the industry day through a virtual meeting service?

2. **Virtual:** If interaction and networking is less important to the government and industry for that particular solicitation, hold virtual industry days to reduce travel costs for industry. Attendee lists should still be circulated. Avoid conference lines that require an operator to allow someone into the conference, as it will delay the start of the meeting when the majority of attendees dial in at the same time. Also avoid conference lines that announce when callers are joining or leaving the conference as the interruptions disrupt the conversation.

3. **Audio/Visual:** Depending on the space, microphones may be needed for asking questions and allowing virtual participants to hear the questions.

4. **Registration:** Use a free, online service, such as EventBrite, to manage registration. Remember to publish attendee lists to help promote teaming.

5. **Guidance to Government Team:** Use this document to guide program officials on information that will be useful to industry. The Contracting Officer should train participants on what information can be shared and what cannot be shared because it would increase the risk of a protest. Provide specific examples of that information.

Format

The government's strategy, as discussed above, will drive the format for the industry day. If the goal is only to disseminate information, the industry day may include a 3-4 hour group meeting in a format such as:

1. Introductions
    a. Address "housekeeping" issues.
    b. Introduce full team.
    c. Set objectives/expectations for the industry day.

2. Programmatic Discussion
    a. Discuss roles and responsibilities as related to the procurement.
    b. Address the reasons for the need, how the procurement fits into the program/agency mission, business/mission drivers, etc.
    c. Identify success factors/outcomes for the procurement.
    d. Address unique aspects of the requirements.

3. Procurement Overview
    a. Provide information on the acquisition strategy, rationale and timeline.

    b. Highlight key pieces of procurement-related information; however avoid turning the draft solicitation or solicitation into slides and reading those to the attendees.

4. Questions and Answers
    a. Address major themes raised in questions submitted before the industry day.
    b. Receive new questions and provide answers.

5. Closing Remarks

6. Networking

One-on-One Meetings/Due Diligence Sessions

When the government is seeking input and feedback on requirements, it may want to add one-on-one meetings/due diligence sessions as part of the industry day. A best practice shared by interviewees was to allow time between the group meeting and the one-on-one meetings/due diligence sessions, so that industry can better prepare its solutions and questions. Due diligence sessions accompanying the industry day were typically 20 minutes in length, but should be based on the amount of information to be shared and the complexity of the requirements. To receive relevant feedback and not generic capability statements, the government should provide interested industry participants with guidance on the intent of the meetings, such as asking detailed questions that may be specific to a potential solution. The government should specifically state that generic capability briefings are not desired if it is seeking in-depth information or questions in the session.

2. Department/Agency-Wide Industry Day Recommendations

The following are recommendations for hosting effective department/agency-wide industry days. Many of the recommendations above apply to agency-wide industry days.

Agency Participants and Content

Based on the objective for the event, select agency participants that represent the following:

- The overall leadership of the department/agency
- Finance to discuss budget
- Agency/office/major program leaders

Rather than hearing about the person's role or a focus on the organization's mission, focus the discussion on the needs, challenges and direction of the organization and how those relate to upcoming procurements.

Because the larger procurements will have already received significant focus from industry's business development resources, present a mix of upcoming requirements that vary by size and types of services/solutions. Because it is a department/agency-wide industry day, industry participants will represent a diverse mix of IT, professional services, construction and many other fields. As such, attendees will appreciate hearing about more than just one type of requirement.

Desired Feedback

The AM SIG requests that ACT and IAC members disseminate this report and provide feedback to the AM SIG on results achieved by using this guidance or additional best practices that can be incorporated in subsequent versions.

Authors & Affiliations

Jeremy Arensdorf, Jefferson Consulting Group

Cindy Brockwell, BizConnex

John Cook, OCI

Michael Palmer, Department of Homeland Security

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