

GovCon Desk: Getting Started Guide

Oct 8, 2026

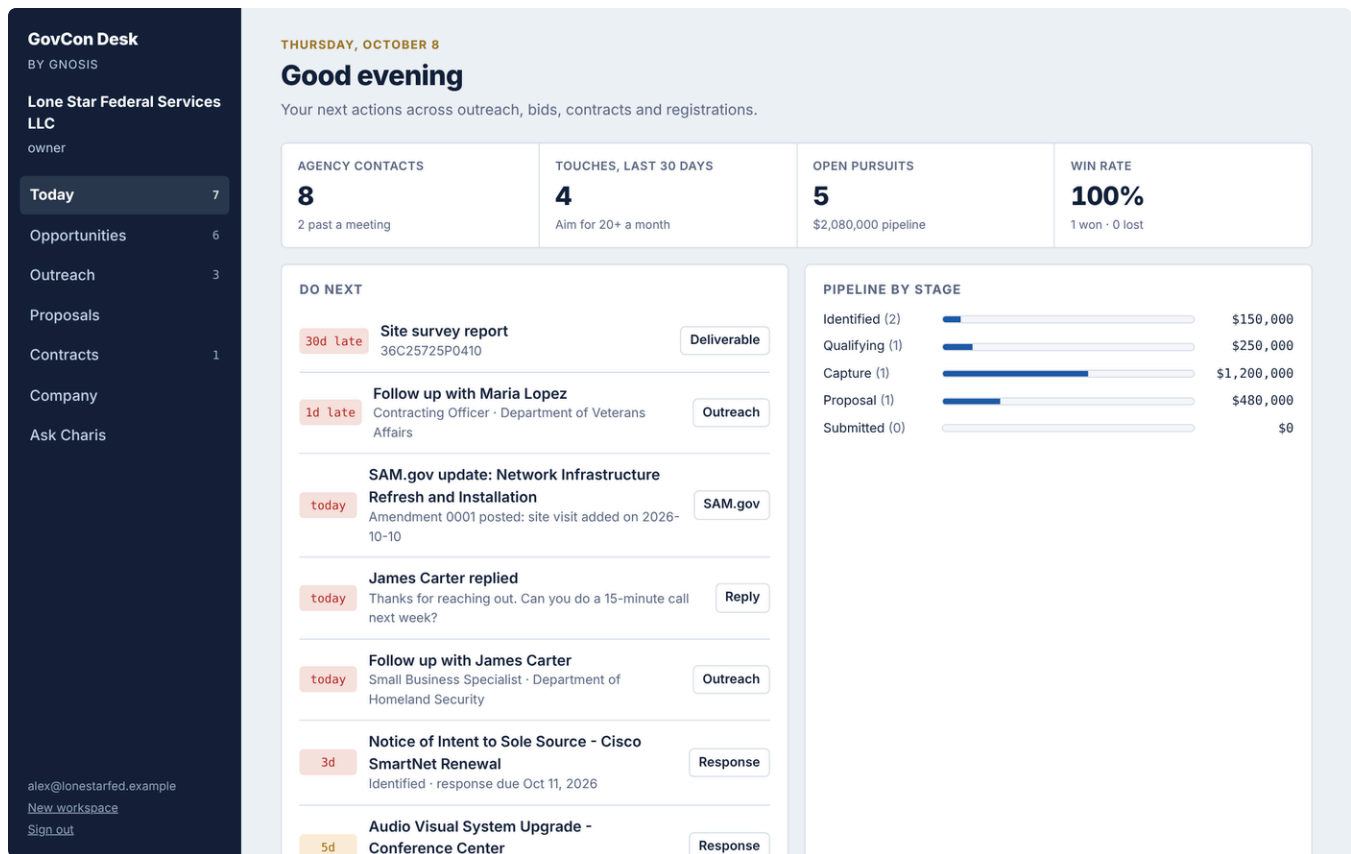
Welcome

GovCon Desk takes a small business from finding a federal opportunity to delivering the contract, in one place. Most new users are productive within an hour: set up your company profile, run one SAM.gov search, and track your first opportunity.

The app follows the same order as the work:

1. **Company** — your profile, certifications and email settings. The AI uses this in every proposal and email.
2. **Opportunities** — search SAM.gov, see how well each notice fits you, and track the ones worth pursuing.
3. **Proposals** — eight guided steps from the solicitation to a ready-to-submit proposal, with an AI red team that scores it like an evaluation board.
4. **Outreach** — find contracting officers and small business specialists, and send approved introductions and follow-ups automatically.
5. **Contracts** — deliverables, invoicing and modifications after you win.

Today is your home screen. It lists what needs attention across all five areas: late follow-ups, replies, SAM.gov amendments, deadlines and deliverables.

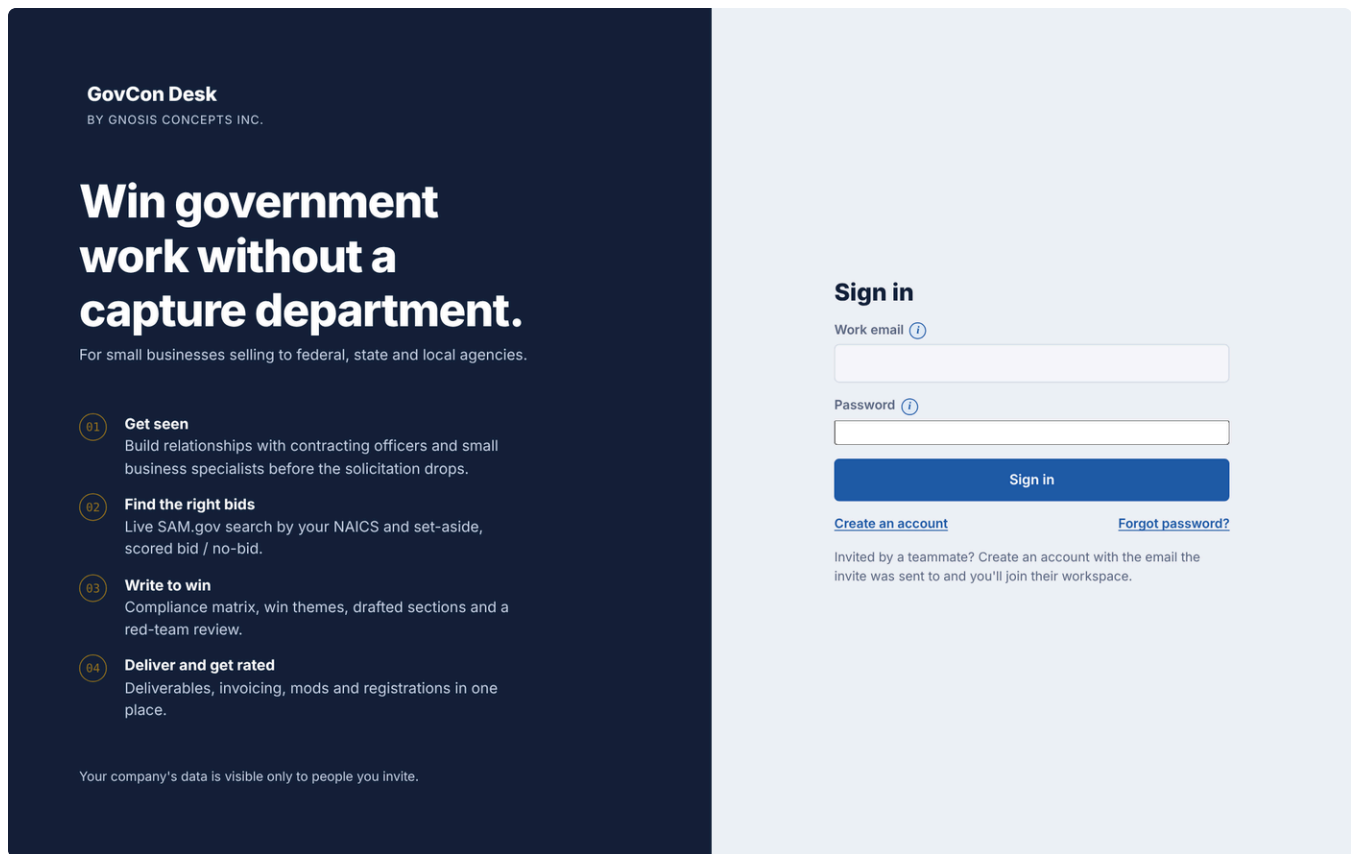


Before you start, have these ready: your 12-character SAM.gov UEI, your NAICS codes, your certifications (for example SDVOSB or VOSB), and an email address on your company's own domain.

The screenshots in this guide use a fictional demo company, Lone Star Federal Services LLC. Your screens will show your own data.

Step 1: Create your account and company profile

Your profile is what the AI writes from, so a complete profile means better proposals and emails. Plan about 15 minutes.



1. Open GovCon Desk and choose **Create an account**. Enter your work email and a password, then confirm the email you receive.
2. Enter your **legal business name** exactly as registered in SAM.gov, and a short name (for example LSFS). Choose **Create workspace**. If a teammate already set up your company, ask them to invite you instead.
3. Go to **Company → Profile**. Type your UEI under **Fill from SAM.gov** and choose **Look up**. The app fills your CAGE code, address, NAICS codes and SAM.gov expiration date.
4. Fill in **Capabilities**: core competencies, differentiators, NAICS codes (one per line) and GSA MAS SINS if you have them. Add your certifications, such as SDVOSB, VOSB, 8(a) or HUBZone.

WHO YOU ARE

Lone Star Federal Services LLC

The profile the AI uses for every email, proposal and capability statement. Keep it accurate.

Profile Past performance (1) Registrations Email settings Team (2) AI usage

FILL FROM SAM.GOV



Pulls your legal name, CAGE code, address, NAICS codes and SAM.gov expiration date.

COMPANY DATA

Legal name

Short name

Point of contact

Title

Email

Phone

Website

Address

UEI

CAGE

SAM.gov expires

CAPABILITIES

Core competencies

IT help desk and network support
Audio-visual and IT equipment supply and installation
Technical training

Differentiators

Veteran-owned; 24-hour on-site response across Texas

NAICS codes (one per line)

541512 Computer Systems Design Services
541519 Other Computer Related Services
611420 Computer Training
238210 Electrical Contractors and Other Wiring Installation Contractors

GSA MAS SINs (one per line)

5. Open **Company** → **Email settings** and set your from name, from email, reply-to address, mailing address and signature. Federal anti-spam law (CAN-SPAM) requires a postal address on every outreach email. The from address must be on a domain verified for your workspace.
6. Set a **daily sending limit**. Start around 20-30 a day and raise it slowly over a few weeks so your emails don't land in spam.

WHO YOU ARE

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The profile the AI uses for every email, proposal and capability statement. Keep it accurate.

Profile Past performance (1) Registrations **Email settings** Team (2) AI usage

SENDING

From name ⓘ
Alex Rivera, Lone Star Federal Services

From email ⓘ Replies go to ⓘ
alex@lonestarfed.example alex@lonestarfed.example

Mailing address (required by CAN-SPAM) ⓘ
100 Main St
San Antonio, TX 78205

Email signature ⓘ
Alex Rivera, President
Lone Star Federal Services LLC (SDVOSB)

Daily sending limit ⓘ
25

The from address must be on a domain verified for this workspace (lonestarfed.example). Start around 20-30 a day and raise it slowly over a few weeks.

7. Optional but worthwhile: add contracts you've delivered under **Company** → **Past performance**, and renewal dates (SAM.gov, VetCert, GSA MAS) under **Registrations** so Today reminds you before they lapse.

Step 2: Find opportunities on SAM.gov

The search pulls live notices from SAM.gov and ranks them by how well they fit your company, so the best matches are at the top.

1. Go to **Opportunities** → **Search SAM.gov**.
2. Set your filters. **All my NAICS codes** searches every code in your profile at once. Add a set-aside (for example SDVOSB), a notice type, title keywords, a state or GSA region, or a ZIP code as needed.
3. Leave **Only notices still open for responses** checked to hide closed and award notices. Choose **Search**.

4. Read each result's **Fit** score and the **Why** line under it. Fit counts your NAICS codes, keywords, set-aside eligibility, time left to respond and place of performance.
5. Choose **Track** on anything worth pursuing. It moves into your pipeline. **Add contacts to Outreach** saves the notice's contracting officer as a contact.
6. Choose **Save this search** to rerun it later with one click.

FIND & QUALIFY

Opportunities

Search SAM.gov live, track what fits, and score bid / no-bid before you spend time writing.

Add opportunity

Search SAM.gov Pipeline (5) Paste a notice

NAICS *i*

Set-aside *i*

Notice type *i*

Title keywords *i*

Place of performance *i*

All my NAICS codes (4) ▾

Any set-aside ▾

All notice types ▾

network, training...

Anywhere ▾

ZIP code *i*

Posted in last *i*

78238

30 days ▾

☒ Only notices still open for responses (hides closed, past-deadline and award notices)

Search

Save this search

My NAICS · SDVOSB ✕

Texas · installation ✕

"Posted in last" is when the notice was posted or last amended on SAM.gov, not its deadline. Respond to **Sources sought** notices even when you won't bid yet: enough capable small businesses responding is what turns a buy into a set-aside.

4 open notices

Sort *i*

Minimum fit *i*

Best fit first ▾

Show all ▾

3 closed notices hidden. Searched 4 NAICS codes. Fit is scored against your capability lines (Outreach → Plan & sourcing) and certifications.

All 4 Solicitation 1 Sole source 1 Presolicitation 1 Sources sought / RFI 1

Fit 96	Solicitation	Service-Disabled Veteran-Owned Small Business (SDVOSB) Set-Aside (FAR 19.14)	16d
Network Cabling and Wireless Installation			
VETERANS AFFAIRS, DEPARTMENT OF · 36C25726Q0144 · NAICS 238210 · San Antonio, TX · posted Oct 5, 2026 · due Oct 24, 2026			
Why: your NAICS 238210 · mentions "installation" · PSC N070 · SDVOSB set-aside · 16 days to respond · in your home state (Equipment & installation)			
Contacts: Maria Lopez			
Open on SAM.gov Track Add contacts to Outreach			
Fit 89	Sources sought / RFI	Total Small Business Set-Aside (FAR 19.5)	12d
IT Help Desk and Desktop Support			
HOMELAND SECURITY, DEPARTMENT OF · 70B04C26R0012 · NAICS 541519 · Laredo, TX · posted Oct 2, 2026 · due Oct 20, 2026			
Why: your NAICS 541519 · mentions "help desk" · PSC DA01 · small business set-aside · 12 days to respond · early: you can shape this buy · in your home state (IT services)			
Open on SAM.gov Track			
Fit 87	Presolicitation	Veteran-Owned Small Business Set-Aside	29d
Cybersecurity Awareness Training for Staff			
GENERAL SERVICES ADMINISTRATION · 47QTCA26Q0061 · NAICS 611420 · Fort Worth, TX · posted Oct 1, 2026 · due Nov 6, 2026			
Why: your NAICS 611420 · mentions "training" · VOSB set-aside · 29 days to respond · early: you can shape this buy · in your home state (Training)			
Contacts: Daniel Kim			
Open on SAM.gov Track Add contacts to Outreach			
Fit 36	Sole source		6d
Notice of Intent to Sole Source - Video Conferencing Maintenance			
DEPT OF DEFENSE.DEPT OF THE ARMY · W9124J26Q0031 · NAICS 541519 · Fort Sam Houston, TX · posted Oct 6, 2026 · due Oct 14, 2026			
Why: your NAICS 541519 · PSC DA01 · sole source: intended for one vendor; respond only to challenge it · in your home state (IT services)			
Contacts: Priya Shah			
Open on SAM.gov Track Add contacts to Outreach			

Notice types are color-coded. Use the chips above the results to show one type at a time.

Tag	What it means	What to do
Solicitation	Open for bids or quotes now	Submit a full response by the deadline
Sole source	The agency intends to award to one named vendor	Send a capability statement before the deadline only if you can challenge it
Presolicitation	A solicitation is coming	Get ready, ask questions, contact the contracting officer
Sources sought / RFI	Market research	Respond with a capability statement so the buy can be set aside for small businesses
Special notice	Industry days and announcements	Read it for dates and requirements
Award	Already awarded	Use it for competitor and pricing research

Found a notice somewhere else, like eBuy, a state portal or an email from a prime? Use **Opportunities → Paste a notice**. The AI reads it, fills in the facts and scores the fit.

Step 3: Qualify and manage your pipeline

Every tracked opportunity lives on **Opportunities → Pipeline**, grouped by stage: Identified, Qualifying, Capture, Proposal and Submitted.

FIND & QUALIFY

Opportunities

Search SAM.gov live, track what fits, and score bid / no-bid before you spend time writing.

Add opportunity

Search SAM.gov Pipeline (5) Paste a notice

Proposals in progress 1

Sorted by due date · percent complete across the 8 proposal steps

Upload a proposal for review

Solicitation 56% complete

Network Infrastructure Refresh and Installation

Department of Veterans Affairs · 36C25726Q0101

Deadline: **Oct 17, 2026 (time not set)**

9 days left

Read the RFP's submission instructions (step 8) for the exact time.

Next: Market research

ContinueDetails

SAM.gov updates 1 new

Last checked Oct 8, 5:27 PM · every 3 hours

Check now

Amendment

Network Infrastructure Refresh and Installation

Amendment 0001 posted: site visit added on 2026-10-10 · Oct 8, 2026 · [View on SAM.gov](#)

Mark read

Show pursuits in Notice type

All locations All types

IDENTIFIED 2

Sole source Unknown

3d

Notice of Intent to Sole Source - Cisco SmartNet Renewal

INTERIOR, DEPARTMENT OF THE NATIONAL PARK SERVICE · Denver, CO

Not scored

Presolicitation VOSB

30d

Cybersecurity Awareness Training

GENERAL SERVICES ADMINISTRATION.FEDERAL ACQUISITION SERVICE · Fort Worth, TX

\$150,000 Not scored

QUALIFYING 1

Sources sought / RFI

Small Business

5d

Audio Visual System Upgrade - Conference Center

DEPT OF DEFENSE.DEPT OF THE ARMY.MISSION AND INSTALLATION CONTRACTING COMMAND · Fort Sam Houston, TX

\$250,000 Not scored

CAPTURE 1

Solicitation SDVOSB

21d

IT Help Desk Support Services

HOMELAND SECURITY, DEPARTMENT OF U.S. CUSTOMS AND BORDER PROTECTION · Laredo, TX

\$1,200,000 27 · No-bid

PROPOSAL 1

Proposal 56%

Solicitation SDVOSB

9d

SAM.gov: 1 update

Network Infrastructure Refresh and Installation

VETERANS AFFAIRS, DEPARTMENT OF VETERANS AFFAIRS, DEPARTMENT OF NETWORK CONTRACT OFFICE 17 · San Antonio, TX

\$480,000 32 · No-bid

CLOSED

Awarded

Server Room Electrical Upgrade

VETERANS AFFAIRS, DEPARTMENT OF · \$185,000

Open

1. Open an opportunity card to see its details. Check the agency, solicitation number, set-aside, notice type, due date and estimated value, and correct anything that's wrong.
2. Score it under **Bid / no-bid**. Move each slider from 0 to 5, or choose **Score with AI**. A total of **70 or more** means bid, **50–69** means look for a teaming partner, and **under 50** means pass.
3. Change the **Stage** as the pursuit moves forward. Choose **Open in Proposals** when you decide to bid.
4. Add incumbent, industry-day or teaming notes under **Capture notes**.

GovCon Desk
BY GNOSIS

Lone Star Federal Services LLC
owner

Today 7

Opportunities 6

Outreach 3

Proposals

Contracts 1

Company

Ask Charis

FIND & QUALIFY
Opportunities
Search SAM.gov live, track what fits, and score

Search SAM.gov Pipeline (5) Paste a

Proposals in progress 1

Solicitation 56% complete

Network Infrastructure Refresh and Installation
Department of Veterans Affairs · 36C25726Q0101
Deadline: Oct 17, 2026 (time not set)
9 days left
Read the RFP's submission instructions (step 8) for the exact time.

Next: Market research

Continue **Details**

SAM.gov updates 1 new

Amendment Network Infrastructure Refr
Amendment 0001 posted: site vis

Show pursuits in

All locations

IDENTIFIED 2 QUALIF

OPPORTUNITY · 36C25726Q0101
Network Infrastructure Refresh and Installation
Solicitation Open for bids or quotes now. Submit a full response by the deadline.

SAM.gov notice watch ☒ Watch for updates
Checked Oct 8, 5:27 PM. Checked about every 3 hours for amendments, deadline changes, new attachments, awards and cancellations.

Amendment Amendment 0001 posted: site visit added on 2026-10-10
Oct 8, 2026 · [View on SAM.gov](#)

Check now **Mark all read**

Title Network Infrastructure Refresh and Installation

Agency VETERANS AFFAIRS, DEPART **Solicitation #** 36C25726Q0101 **NAICS** 238210

Set-aside SDVOSB **Business line** IT Services **Notice type** Combined Synopsis/Solicit

Stage Proposal **Place of performance** San Antonio, TX **State** Texas

Response due 10/17/2026 **Estimated value (\$)** 480000

Notice link

Summary

GovCon Desk watches your tracked notices for you. About every 3 hours it checks SAM.gov for amendments, deadline changes, new attachments, awards and cancellations. Changes appear under **SAM.gov updates** on the Pipeline tab, on Today and by email. Choose **Check now** to check right away.

Use **Show pursuits in** and **Notice type** above the board to filter by state or by type.

Step 4: Write the proposal

The **Proposals** page walks you through eight steps. The progress bar shows how complete the proposal is and which step to do next. **The AI never invents facts:** anything it doesn't know becomes an [INSERT ...] placeholder for you to fill.

WRITE TO WIN

Proposals

Eight steps: paste the RFP, research the market, build the compliance matrix, set win themes, price it, draft each section, red-team it, then submit.

Working on

Choose an opportunity...

UPLOAD A PROPOSAL FOR REVIEW

Already wrote a proposal? Upload it here. GovCon Desk splits it into sections, a red team scores it like an evaluation board, and the AI improves each section while keeping your facts.

1. Which solicitation is it for?

Choose an opportunity...

2. Choose proposal file

Word (.docx), PDF, HTML or text. Not in the list? [Track the opportunity](#) first (search SAM.gov or paste the notice), then come back.

Proposals in progress 1

Sorted by due date · percent complete across the 8 proposal steps

Upload a proposal for review

Solicitation

56% complete

Network Infrastructure Refresh and Installation

Department of Veterans Affairs · 36C25726Q0101

Deadline: **Oct 17, 2026 (time not set)**

9 days left

Read the RFP's submission instructions (step 8) for the exact time.

Next: Market research

Continue

Details

Open a proposal from **Proposals in progress** with **Continue**, or pick an opportunity under **Working on**.

Step	What you do
1 · RFP	Paste the solicitation. Include at least Sections C (statement of work), L (instructions) and M (evaluation).

Step	What you do
2 · Market research	Pull past awards from USASpending.gov: who buys this, who won it before and for how much.
3 · Compliance matrix	Turn every "shall" into a numbered requirement, so nothing is missed.
4 · Win themes	Set 2–4 themes: a feature, its benefit to this agency, and the proof.
5 · Price	Build line items, set markup, and check labor rates against GSA data.
6 · Write	Draft or improve each section with AI.
7 · Red team	Get scored like an evaluation board, then fix the findings (Step 5 below).
8 · Submit	Read the submission rules, download the proposal, and work the checklist.

WRITE TO WIN

Network Infrastructure Refresh and Installation

Solicitation VETERANS AFFAIRS, DEPARTMENT OF.VETERANS AFFAIRS, DEPARTMENT OF.NETWORK CONTRACT OFFICE 17 · due Oct 17, 2026

Working on

Network Infrastructure Refresh and Installation

Upload proposal

[Download proposal](#)

- Ask Charis

56% complete · next: Market research

1 · RFP ✓

2 · Market research

3 · Compliance matrix ✓

4 · Win themes

5 · Price ✓

6 • Write

7 · Red team ✓

8 · Submit

SAM.gov changed this notice since you started.

- Amendment 0001 posted: site visit added on 2026-10-10 · [View](#) ↗

Download any amendment, attach it in **Ask Charis** and press **Add to the RFP text**, then rebuild the compliance matrix and acknowledge the amendment in your cover letter. **Mark read**

PASTE THE SOLICITATION

Include Sections C (SOW / PWS), L and M at minimum.

[illegible]

letter.
Mark read

Compliance matrix

Rebuild from RFP
Add row

ID	RFP REF	REQUIREMENT	VOLUME	STATUS
R1	SOW 3.1	Furnish and install 40 network switches	Technical	Drafted
R2	SOW 3.2	Cat6A cabling for 220 drops	Technical	Drafted
R3	SOW 4.0	Train 10 IT staff	Technical	Open
R4	L.2	Signed SF1449 with amendments acknowledged	Administrative	Open

0 of 4 verified.

Pricing (step 5). Choose **Suggest line items from the RFP** to list the CLINs, then enter your cost for each. Set a default markup and, if you like, a different markup per category. The app shows your total cost, proposed price and gross profit. It never puts your cost or markup in the proposal.

letter.
Mark read

MARKUP

Default markup on cost i

Percent i

15 Use 15% for new proposals

Labor markup % Equipment / Supplies markup % Installation markup % Training markup % Travel / ODC markup %

15 (default) 15 (default) 15 (default) 15 (default) 15 (default)

Price = your cost × (1 + markup). Leave a category blank to use the default; a line's own markup overrides both. Travel is normally billed at cost under the Federal Travel Regulation, so it starts at 0%.

Line items

Suggest line items from the RFP
Suggest costs
Add line
Check GSA rates

TYPE	DESCRIPTION / LABOR CATEGORY	QTY	UNIT	YOUR COST	MARKUP %	UNIT PRICE	EXTENDED	
Equip ▾	CLIN 0001 · Network switches	40	Ez ▾	3100	15	\$3,565.00	\$142,600	✕
Install ▾	CLIN 0002 · Cabling, 220 drops	220	Ez ▾	210	15	\$241.50	\$53,130	✕
Traini ▾	CLIN 0003 · Staff training	16	Hc ▾	75	15	\$86.25	\$1,380	✕
	Technical Trainer							
	No GSA data yet							

YOUR COST
\$171,400

PROPOSED PRICE
\$197,110
Effective markup 15.0%

GROSS PROFIT
\$25,710
Margin 13.0% of price

MARKET CHECK
Run research
Step 2 compares your total to past awards

PRICING ASSUMPTIONS

Basis of estimate, assumptions and exclusions. Used in the price narrative.

i

Not legal or accounting advice. Follow the solicitation's pricing instructions, and on GSA orders never exceed your MAS ceiling rates. Cost, markup and profit never appear in the exported proposal.

Writing (step 6). Before drafting, check the **Before you draft** panel. Every input marked **Missing** turns into placeholders. Add names, credentials, subcontractors and other true facts under **Facts the AI may use for this proposal**. Then, for each section:

1. Pick the section on the left, such as Executive Summary or Technical Approach.
2. Optionally type a **Direction**, for example "3 pages max; stress 24-hour on-site response."

Page 15 of 26

3. Choose **Draft with AI**. Edit the text directly in the box. It saves as you type.
4. Choose **Improve with AI** to revise it against the red-team findings, or **Undo** to bring back the previous version.
5. Replace every **[INSERT ...]** before you submit.

Ready

 Solicitation text pasted (step 1)

Ready

 Section M / evaluation factors in the RFP text

Missing

 Win themes (step 4)

Ready

 Past performance on file (Company → Past performance)

Ready

 Section L / submission instructions in the RFP text

Ready

Ready

Missing

 Staffing and key-personnel facts below (names, roles, certifications, clearances, licenses, subcontractors)

Cover Letter

Executive Summary ✓

Technical Approach ✓

Management Approach ✓

Staffing & Key Personnel

Quality Control Plan

Past Performance ✓

Transition-In Plan

Delivery & Installation Plan

Training Delivery Plan

Price Narrative & Assumptions

Small Business Participation / Limitations on Subcontracting

Executive Summary

● Improve with AI

Redraft

Direction (optional) ⓘ

e.g. 3 pages max; stress 24-hour on-site response

Executive Summary

Lone Star Federal Services, an SDVOSB based in San Antonio...

ⓘ

Replace every [INSERT ...] before submitting.

Already wrote a proposal? Choose **Upload proposal** (Word, PDF, HTML or text). GovCon Desk splits it into sections with your wording unchanged, so you can red-team and improve it.

Step 5: Red team, improve and submit

The red team reviews your proposal the way a federal evaluation board would, before the real one does. Run it once the main sections are drafted.

1. On **7 · Red team**, choose **Run red team**. You get an overall rating, compliance gaps (by matrix ID), strengths, weaknesses, consistency problems, open [INSERT]s, and the **Top 7 fixes**. If a long report stops early, choose **Finish report**.
2. Use **Ask the red team** to talk it through. Ask why a finding matters, push back, or tell it to do the work, for example "rewrite the QC plan to fix weakness 2" or "add our ISO 9001 certificate to the facts." Changed sections show an **Undo** button.
3. Write **Your response to the red team**: which findings you accept, which you dispute and why, and any facts that resolve a gap. The AI follows your response over the report where they conflict.
4. Choose **Improve all sections**. Each section is revised to fix the findings while keeping your facts.
5. Fill the remaining [INSERT]s, then run the red team again to see the new rating.

letter.
Mark read

Red team

Run red team
Improve all sections

Overall rating with reason

Acceptable. The approach covers the switches and cabling but gives no cutover plan.

Compliance gaps (cite matrix IDs)

- R3: training approach is missing
- R4: amendment acknowledgment not mentioned

Strengths

- Local team with 24-hour response

Weaknesses and deficiencies

- No named project manager

Top 7 fixes, in priority order

- Add the training plan (R3)
- Name the project manager and give credentials
- Add a cutover schedule

Ask the red team

Clear conversation

Ask about any finding, push back, or tell it to do the work: "rewrite the QC plan to fix weakness 2", "add our ISO 9001 cert to the facts", "note that we dispute fix 4". Changed sections can be undone.

YOU
Why is the rating only Acceptable?

RED TEAM
Two requirements aren't addressed: the training for 10 IT staff (R3) and the amendment acknowledgment (R4). Evaluators can't rate a quote above Acceptable with open compliance gaps. Fix those two first, then name the project manager.

Ask a question or give an instruction... (Enter to send, Shift+Enter for a new line)
Send

Your response to the red team

Edit here, or ask the red team above to update it

Answer the findings before you improve. Say which ones you accept, which you dispute and why, decisions you've made, and facts that resolve an [INSERT]. Improve follows your response over the report where they conflict, and the next red-team run treats a justified dispute as resolved.

Fix 1: accept.
Fix 3: dispute. The RFP allows a 30-day transition (L.4.2); keep it.
Weakness 'no QC lead named': QC lead is Mary Roe, ASQ CQE, 9 yrs.
Price: we're holding the labor rates; don't change them.
Ignore the page-limit finding; Section L sets no limit.

Submitting (step 8):

1. Choose **Read submission instructions**. The app pulls the method, address or portal, deadline and time zone, file formats and required forms from the solicitation.

2. Under **Download proposal**, pick the sections to include, then choose **Word (.doc)**, **PDF** or **Price sheet (Excel)**. The file gets a cover page with your UEI, CAGE and point of contact.
3. Tick off the **Submission checklist**: SAM.gov active, amendments acknowledged, forms signed, page limits followed, Limitations on Subcontracting planned, and more.
4. Submit through the method the solicitation names. Then choose **Mark submitted** so the pipeline stays current.

letter.
Mark read

How to submit

The app reads the solicitation and tells you exactly how, where and when to send your proposal: method, address or portal, deadline and time zone, subject line, file formats, required forms and signatures.

[Read submission instructions](#)

Download proposal

Builds a formatted, submission-style file: cover page with your UEI, CAGE and point of contact, each section on its own page, a price schedule, and a footer with your company name and solicitation number.

Sections to include

☒ Executive Summary
☒ Technical Approach
☒ Management Approach
☒ Past Performance

☒ Cover page
☒ Price schedule
☐ Compliance matrix appendix
☐ Keep drafting notes

1 placeholder still to fill (highlighted yellow in the file): Technical Approach (1). Fill them on step 6 · Write before you submit.

Word (.doc)
PDF
Price sheet (Excel)

PDF opens your browser's print window: choose **Save as PDF**. Read Section L for file names, page limits and fonts before you send.

SUBMISSION CHECKLIST

- ☐ SAM.gov registration active through award date; reps & certs current
- ☐ All amendments acknowledged
- ☐ Required forms signed (SF-1449 / SF-33 / SF-18, pricing sheet)
- ☐ Page limits, fonts, margins and file names follow Section L exactly
- ☐ Every requirement in the compliance matrix has a response location
- ☐ Past performance references notified
- ☐ Price math checked twice; CLINs match the schedule; no exceptions taken
- ☐ Limitations on Subcontracting (FAR 52.219-14) planned
- ☐ Delivery method confirmed and file size limits tested
- ☐ Submitted at least 24 hours early; confirmation saved

Mark submitted

Always read Section L yourself before you send. It sets the file names, page limits and fonts that decide whether your proposal is accepted.

Step 6: Reach out to buyers

Outreach gets your company known before a solicitation is released. The workflow is: add contacts, send an approved introduction, follow up on schedule, and earn a capability briefing.

1. Find contacts. Go to **Outreach** → **Find contacts**.

- **Matched to your capabilities** pulls every contracting officer named on SAM.gov notices that match your NAICS codes, keywords, PSC codes and set-asides. Choose **Find matching contacts now**. After that it refreshes weekly on its own.
- **Small business specialists** are the best first email. Open a directory (Federal OSDBU offices, SBA PCR, DoD or VA OSDBU), copy the page, paste it in, and choose **Find people in this text**.
- **Import your own list** from a CSV or Excel file with columns such as Name, Email, Title and Agency.

Each contact gets a fit score. Anyone named on an open solicitation gets a **quiet period** until it closes, because you shouldn't market to a contracting officer about an open buy.

GET SEEN

Outreach

Build relationships with the people who buy what you sell. The workflow: add a contact, send the introduction, follow up on schedule, earn a capability briefing.

[Add contact](#)

Due today (2) Replies (1) Plan & sourcing Follow-ups (2) All contacts (8) **Find contacts** Templates (3) Send Sent

MATCHED TO YOUR CAPABILITIES

Pulls every point of contact named on SAM.gov notices that match your capability lines: by NAICS code, by keyword in the title, by product/service code, and from SDVOSB and VOSB set-asides. Each person gets a fit score, boosted when their office is a top buyer of your NAICS on USASpending.gov. People on an open solicitation get a quiet period.

IT services **Equipment & installation** **Training**

4 NAICS · 5 keywords · 2 PSC · 2 set-asides · nationwide · last 180 days · about 13 SAM.gov requests · last run Oct 5, 2026 · refreshes weekly

[Find matching contacts now](#)
[Change what's matched](#)

SMALL BUSINESS SPECIALISTS

Small business specialists exist to meet companies like yours, and they're the best first email. Open a directory, copy the page (or the part listing people), and paste it here. The AI pulls out names, titles and emails.

[Federal OSDBU offices](#)
[SBA PCR directory](#)
[DoD small business](#)
[VA OSDBU](#)

Agency these people work for (optional) ⓘ

e.g. Department of Veterans Affairs

Pasted directory text ⓘ

Paste the directory page here

● [Find people in this text](#)

IMPORT YOUR OWN LIST

CSV or Excel. Columns are matched by name: Name (or First and Last), Email, Title, Agency, Office, Phone, Role.

[Choose File](#) No file chosen

ⓘ

2. Approve your templates. Under **Templates**, review the introduction, follow-up and briefing-request emails. Only templates marked **Approved** can be sent, and only owners and admins can approve. Editing an approved template sends it back to draft.

GET SEEN

Outreach

Build relationships with the people who buy what you sell. The workflow: add a contact, send the introduction, follow up on schedule, earn a capability briefing.

[Add contact](#)

Due today (2) Replies (1) Plan & sourcing Follow-ups (2) All contacts (8) Find contacts **Templates (3)** Send Sent

[New email template](#) [New letter template](#)

Email

Introduction — Contracting Officer

Contracting Officer · SDVOSB for {{agency}}: IT services and installation

Hello {{first_name}}, I'm {{sender_name}} with {{company}}, a service-disabled veteran-owned small business... {{signature}}...

Approved

Email

Follow-up — no reply

Contracting Officer · Following up: {{company}}

Hello {{first_name}}, ...

Approved

Email

Capability briefing request

Small Business Specialist · 15-minute capability briefing?

Hello {{first_name}}, ...

Draft · needs approval

Only owners and admins can approve. Editing an approved template sends it back to draft until it's approved again. Only approved email templates can be sent.

3. Turn on follow-ups. Under **Follow-ups**, each sequence sends a series of approved emails on a schedule, for example Day 0 introduction, Day 7 follow-up and Day 21 briefing request. Check two boxes:

- **Autopilot** sends due emails automatically inside your send window. The default is Tuesday to Thursday mornings in each contact's own time zone, skipping federal holidays. Change it under **Plan & sourcing**.
- **Auto-enroll** adds new matching contacts to the sequence.

A sequence stops for a person the moment they reply, unsubscribe or bounce. Autopilot never sends more than your daily limit; anything left waits for the next send day.

Image — Follow-ups: two sequences on autopilot with their steps and counts

4. Work your daily list. **Due today** shows only the contacts that need you personally. Contacts on autopilot are handled for you and don't appear there. Choose **Follow up** or **Introduce** to send an email by hand.

Image — Due today: contacts to follow up with, best fit first

5. Answer replies. **Replies** collects responses to your emails. Answer personally within one business day and offer a 15-minute capability briefing. Move the contact to **Meeting** when a date is set, and to **Briefed** afterward.

Image — Replies: a response waiting for an answer

Step 7: Ask Charis, your contracting advisor

Charis answers questions about FAR rules, SAM.gov, GSA MAS, pricing, teaming and post-award issues. It already knows your company profile, pipeline and contacts.

1. Open **Ask Charis** in the left menu, or the **Ask Charis** button inside a proposal.
2. Under **Discussing**, pick a proposal to work on it, or leave **General question**.
3. Type your question, or pick a suggested one. Press Enter to send and Shift+Enter for a new line.
4. Choose **Attach** to add up to 8 files (PDF, Word, Excel, CSV, text or images), for example an amendment or a draft.
5. Download a long answer as a Word, PDF or Excel report.

Image — Ask Charis: suggested questions, history and the question box

Conversations save automatically under **History**. General conversations are private to you; proposal conversations are shared with your team. Always confirm advice against the solicitation and the FAR before you act on it.

Step 8: After the award

When you win, the **Contracts** page keeps deliverables, invoicing and modifications in one place, so you deliver on time and earn a strong performance rating.

1. Open the won opportunity and choose **Mark awarded → create contract**. You can also choose **Add contract** on the Contracts page.
2. Paste the award document, task order or SF-1449 text under **Fill from the award** and choose **Read with AI**. It fills the dates, values, contacts, deliverables and notable clauses.
3. Check the contract number, period of performance, total and funded value, contracting officer and COR.
4. Keep **Deliverables** current. Each one has a due date and a status, and Today warns you before one is late.
5. Update **Invoiced (\$)** as you bill. The contract card shows how much of the value you've invoiced.
6. Record modifications as they come in.

Image — Contracts: an active contract with invoicing progress

Image — Contract details: fill from the award, key fields and deliverables

Team, AI usage and quick tips

Invite your team. Go to **Company → Team**, enter a teammate's work email, pick a role and choose **Send invite**. They get a sign-up link, or join automatically if they already have an account.

Role	Can do
Owner or Admin	Everything, including the team, company profile, email settings, and approving templates and autopilot
Member	Edit everything except the team and company profile

Role	Can do
Viewer	Read only

Image — Team: workspace members, invites and email preferences

AI usage. Every workspace includes a daily allowance of AI requests. **Company → AI usage** shows how many are left. If you run out, you can buy more there; purchased requests don't expire and are shared by everyone in the workspace.

Registrations. List your SAM.gov, VetCert, GSA and other renewals under **Company → Registrations** with their due dates. Today reminds you before they lapse.

Image — Registrations with renewal dates

Quick tips

- Hover over or tap any ⓘ icon next to a field for a short explanation.
- Start each morning on **Today**. It's the shortest path to what needs you.
- Respond to **Sources sought** notices even when you won't bid. Enough capable small businesses responding is what turns a buy into a set-aside.
- Keep your profile and **Facts the AI may use** accurate. The AI only writes what's true and marks the rest [INSERT].

Common questions

Why does a contact show "late"? Their scheduled follow-up date has passed. If the contact is on an autopilot sequence, the email goes out on the next send day within your daily limit, so there's nothing to do.

Why won't an email send? Check three things: the template is **Approved**, your **Email settings** include a mailing address, and your from address is on your workspace's verified domain.

Can I use it for more than one company? Yes. Choose **New workspace** at the bottom of the left menu. Each company's data is visible only to the people invited to it.

Where do I see emails I've sent? Outreach → Sent lists every email with its delivery status.