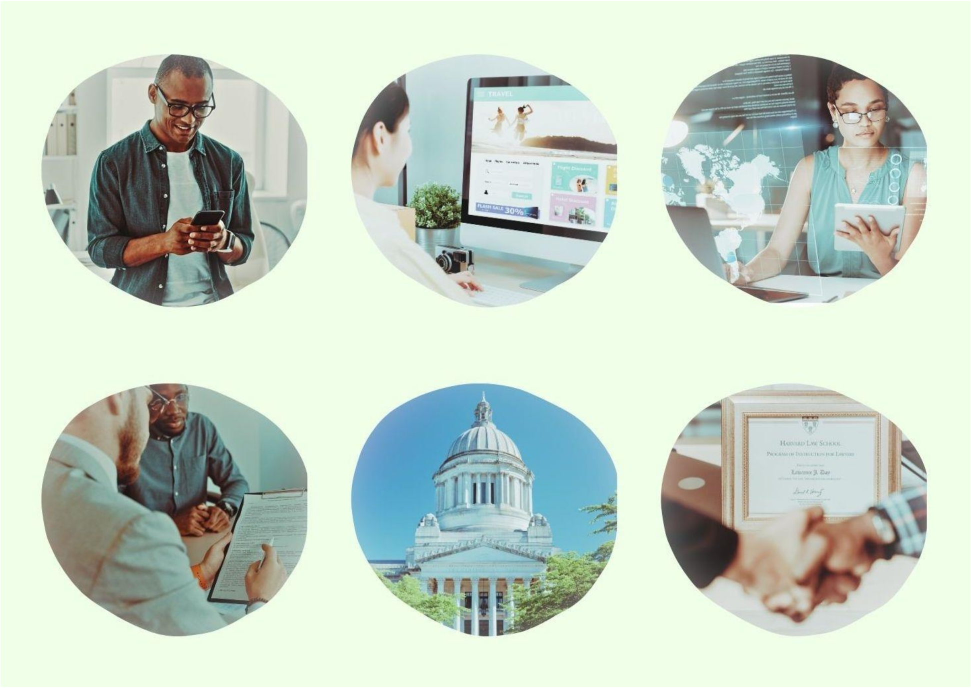
Learn & Grow Workshop Series

MATERIALS THAT MARKET: HIGH-IMPACT TEMPLATES AND TOOLS



DES Washington State DEPARTMENT OF ENTERPRISE SERVICES

GOLDEN GIFT CONSULTING, LLC

Presented by

Ryan Taylor, President
Golden Gift Consulting

November 19, 2025

Agenda

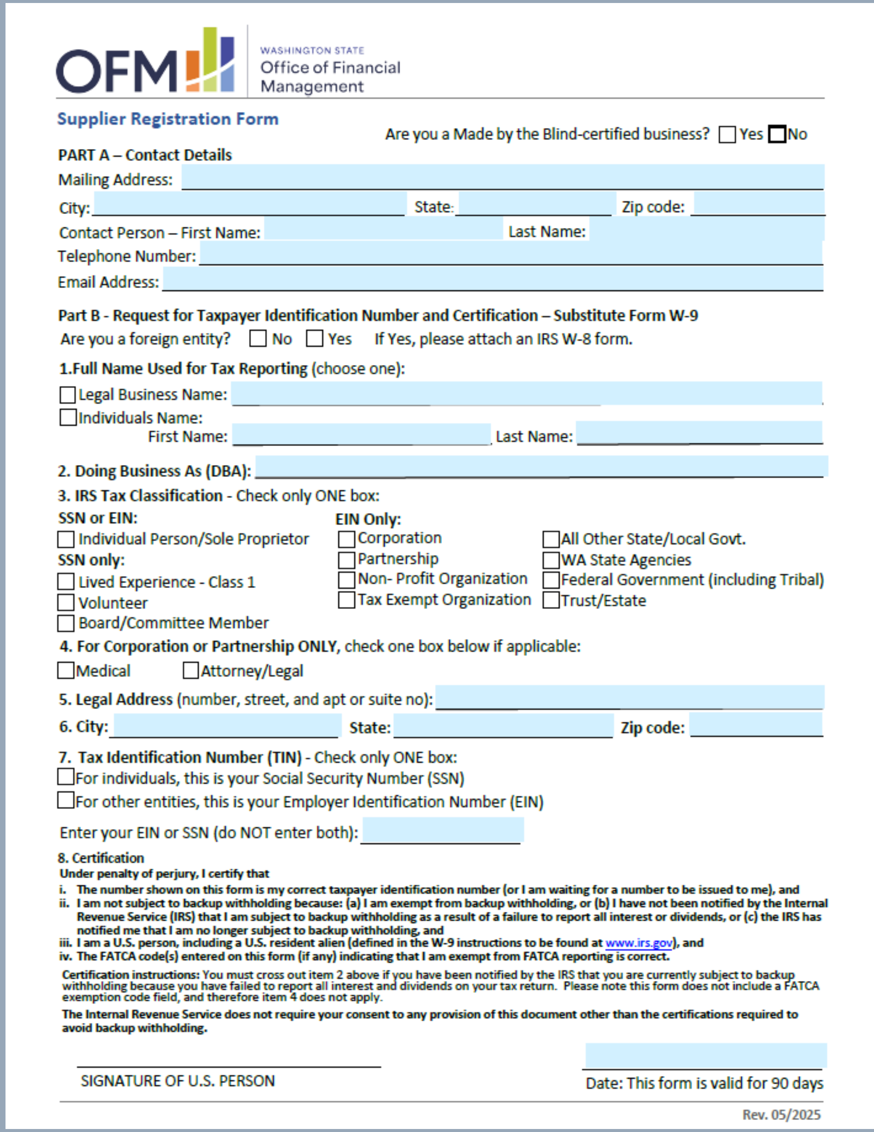
1. Welcome and Introductions
2. Workshop—State Contracting Basics
    - OFM Vendor Payee Registration
    - Sales Reporting
    - Small Business Registration & Certifications
- Scope & Quote Process

3. Workshop—Marketing that Matters: High-Impact Templates and Tools
4. Q & A and Discussion (Workshop Topic)
5. Q & A about Statewide Contracts
6. Closing Remarks

State Contracting Basics:

- OFM Vendor Payee Registration
- Sales Reporting
- Small Business Registration & Certifications
- Scope & Quote Process

OFM Vendor Payee Registration


WASHINGTON STATE
Office of Financial Management

Supplier Registration Form

Are you a Made by the Blind-certified business? ☐ Yes ☐ No

PART A – Contact Details

Mailing Address:

City: State: Zip code:

Contact Person – First Name: Last Name:

Telephone Number:

Email Address:

Part B - Request for Taxpayer Identification Number and Certification – Substitute Form W-9

Are you a foreign entity? ☐ No ☐ Yes If Yes, please attach an IRS W-8 form.

1.Full Name Used for Tax Reporting (choose one):

☐ Legal Business Name:

☐ Individuals Name:

First Name: Last Name:

2. Doing Business As (DBA):

3. IRS Tax Classification - Check only ONE box:

SSN or EIN:

☐ Individual Person/Sole Proprietor

SSN only:

☐ Lived Experience - Class 1

☐ Volunteer

☐ Board/Committee Member

EIN Only:

☐ Corporation

☐ Partnership

☐ Non- Profit Organization

☐ Tax Exempt Organization

☐ All Other State/Local Govt.

☐ WA State Agencies

☐ Federal Government (including Tribal)

☐ Trust/Estate

4. For Corporation or Partnership ONLY, check one box below if applicable:

☐ Medical ☐ Attorney/Legal

5. Legal Address (number, street, and apt or suite no):

6. City: **State:** **Zip code:**

7. Tax Identification Number (TIN) - Check only ONE box:

☐ For individuals, this is your Social Security Number (SSN)

☐ For other entities, this is your Employer Identification Number (EIN)

Enter your EIN or SSN (do NOT enter both):

8. Certification

Under penalty of perjury, I certify that

i. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and

ii. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and

iii. I am a U.S. person, including a U.S. resident alien (defined in the W-9 instructions to be found at www.irs.gov), and

iv. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions: You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. Please note this form does not include a FATCA exemption code field, and therefore item 4 does not apply.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

SIGNATURE OF U.S. PERSON

Date: This form is valid for 90 days

Rev. 05/2025

Register for OFM at: [Vendor payee registration | Office of Financial Management]

- Enter business information.
- Enter bank account information.
- Watch email for notification of acceptance, rejection or clarification.

Sales Reporting

- Complete Sales Report at the following link: Login.
- Pay management fee for all revenue generated through statewide contract during quarter. *Management fee amounts can vary. You can locate details about your management fee in your contract document.*

Gross receipts = total revenue, not profit

(total income before expenses)

- Invoice will be posted in account and emailed to you.
  - You must call the DES payment processing department at (360) 725-5700 to pay your invoice. You cannot pay through an online account.

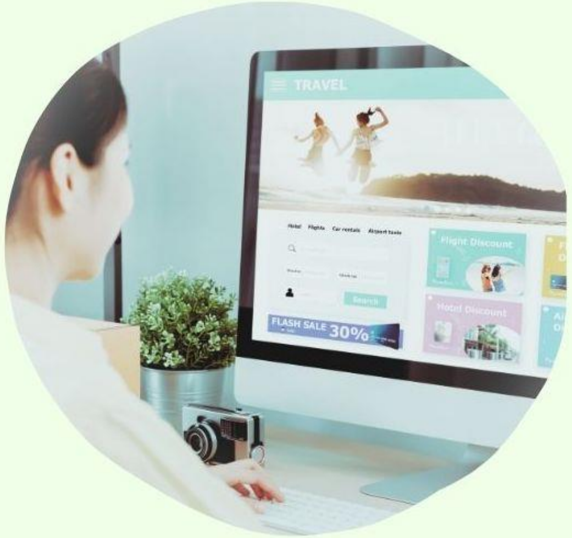
Small Business Registrations & Certifications

- Small business certifications (small business, veteran, MBE/WBE, etc.), if any, are listed next to firms on the DES contract portal page.
- If you obtain OMWBE certification (or your certification status changes) after your contract award, notify your contracting officer to update your file.

Scope & Quote Process

- Agencies will research firms
  - They conduct preliminary research to narrow firms.
  - You should consider what the agency is looking for.
- Outreach process
  - Agencies reach out to vendor(s) of interest to request quotes.

- Agencies may request
  - Technical approach
  - Firm/staff qualifications
  - Price quote (cost for firm’s goods or services, materials, and other direct costs related to the scope of work)



MATERIALS THAT MARKET: HIGH-IMPACT TEMPLATES AND TOOLS

Materials That Market: High-impact Templates and Tools

Agenda
Visual branding
Proposal templates
Company resumes
Statement of qualifications (SOQs)
Pitch decks
Folders/packets
Submission checklist

Visual Branding: Building Consistent Branding Across Marketing Materials

High-impact templates and tools should reflect a unified brand identity.

Key elements to standardize include:

- Logo
- Color palette
- Font styles and hierarchy
- Preferred imagery or iconography (themes, styles, filters)
- Brand voice — Is your tone professional, creative, authoritative, or conversational?

Tip: Develop a company brand guide to ensure all marketing materials follow consistent specifications. This helps reinforce brand recognition and streamline content creation.

Streamline Proposal Development with Templates

Proposal templates can be created in advance or adapted from a particularly strong past submission.

Core content to include:

- Company overview
- General approach and methodology
- Team bios and/or resumes
- Relevant experience
- Sample projects or case studies

This material can be reused, with minor adjustments, to save time and reduce costs when developing future proposals.

And of course, apply your corporate branding consistently!

Team Resumes: Standardized, Branded, and Proposal-Ready

Include a company-branded resume for each key team member in your proposal.

Best practices:

- Develop long-form resume templates that capture all potentially relevant experience.
- Maintain consistent formatting, tone, and branding (logo, colors, fonts)
- Keep academic and professional credentials intact across proposals.
- Curate each resume to highlight experience most relevant to the specific opportunity.

Pre-developed resumes save time and ensure our team is always proposal-ready, with minimal customization required.

Statement of Qualifications (SOQ)

- An SOQ is a concise document that showcases your company’s capabilities, experience, and expertise in relation to a specific opportunity or line of business.
- SOQ is used for prequalification (such as in response to a Request for Qualifications (RFQ), as a marketing tool (like a company resume), and to demonstrate credibility and alignment to a client’s needs.
- Government agencies often request SOQs during a Request for Qualifications (RFQ)—a prequalification stage used to assess firms before inviting full proposals.
- Prime contractors sometimes request an SOQ to evaluate your firm as a potential subcontractor or to include in their proposals.

Statement of Qualifications (SOQ) (continued)

- Typical SOQ components:
  - –Company background
  - –Relevant experience
  - –Technical capabilities and core competencies
  - –Key personnel
  - –Sample projects or case studies
  - –Certifications and licenses
  - –References or testimonials
  - –Contact information
- Keep your SOQ concise and focused on qualifications that directly address the RFQ requirements.
- Use your SOQ to demonstrate credibility, competence, and alignment with the client’s goals—your aim is to advance to the next stage!

Pitch Decks

Many proposals often include an interview stage. Use your pitch deck to make a great impression!

Tips for an effective pitch deck:

- Use your branding: Develop your deck in PowerPoint or a similar tool, incorporating your logo, colors, and fonts.
- Focus on the client's challenge: Demonstrate that you understand their specific needs.
- Present your solution clearly: Explain why your approach is the right fit.
- Highlight your differentiators: Emphasize what sets your team apart.
- Showcase your team: Include relevant qualifications and past experience.
- Keep it clear, visual, and concise, your pitch deck should complement your proposal, not repeat it.

Pitch Decks (continued)

- If the client doesn't specify, ask what they'd like you to present in your interview/pitch session.
- Be prepared for both formats:
  - A traditional Q&A-style interview with conversational back-and-forth.
  - A visual pitch deck that highlights your solution, team, and value proposition.
- Use your pitch deck as a backup if the format is informal; have it ready just in case.
- Ensure your slides are branded with your company's logo, colors, and fonts for a polished, professional impression.

Folders and Packets for In-Person Events

Branded folders or packets can make a strong impression at conferences, matchmaking events, or site visits.

Consider including:

- Capability statement
- Key personnel bios
- Past project descriptions

Folders can be time and resource-intensive. If you're on a tight budget or schedule:

- Bring only your capability statement.

- Follow up by emailing additional materials—a great opportunity to reconnect and personalize your outreach.

Tip: Keep materials concise, branded, and tailored to the audience or event.

Reminder Before Q&A: Next Session

Wednesday, January 21 - 6:00 – 7:30 pm

Proactive & Complimentary Marketing: Direct Buys, Portals, Registration, and Rosters (MSRC, DSBS, OMWBE, etc.)

Q & A:
Online Presence

What questions do you have regarding developing outstanding, high-impact marketing materials?

Q & A: Statewide Contracting

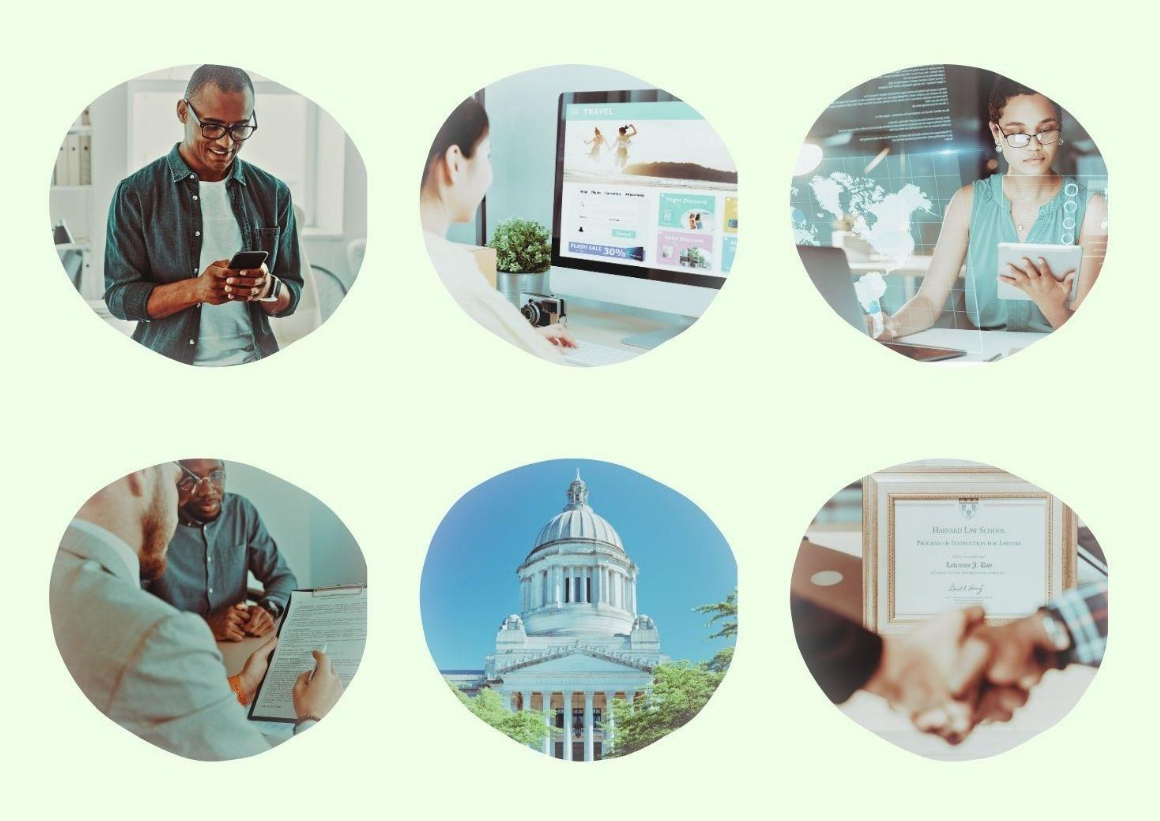
What questions do you have about managing or marketing your statewide contract, WEBS, reporting, or other topics?

Closing

- Thank you to DES for sponsoring the Learn & Grow: Statewide Contract Holder Workshop Series!
- If you need support, reach out for resources.
- The workshop presentation and handouts will be emailed to you.
- Next workshop is **Proactive & Complimentary Marketing: Direct Buys, Portals, Registration, and Rosters** (MSRC, DSBS, OMWBE, etc.), Wednesday, January 7 at 6:00 pm.

Thank You!

See you in 2026!



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