

What you provide. What I build.

Tick what you have; bring me the rest.

BEFORE ANYTHING ELSE *Start these now*

Registrations run four to six weeks, in sequence, and nobody can expedite them. I guide every step, but only your firm can execute and certify these.

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| ☐ Confirm eligibility: U.S. for-profit, majority U.S.-owned (500 or fewer employees for SBIR/STTR) | ☐ Set up portal access: Login.gov for DSIP (DoD), Grants.gov and PAMS (DOE SBIR), or NETL eXCHANGE (DOE NOFOs) |
| ☐ Register at SAM.gov and obtain your UEI | ☐ Identify your Principal Investigator and confirm availability |
| ☐ SBIR/STTR only: register in the SBA Company Registry for your SBC Control ID | ☐ NOFOs only: decide your cost share position – a signed commitment letter is a submission gate |
| ☐ Make legal name and address match exactly across SAM.gov, SBIR.gov, and the portal | |

TIER 01 Federal Funding Readiness Sprint

YOU PROVIDE

The starting facts

- ☐ A plain-language summary of your technology and the problem it solves
- ☐ Any feasibility evidence to date: test data, prototypes, prior results, publications
- ☐ Target agency, topic, or announcement of interest – or I'll help identify the best-fit open ones
- ☐ Your current registration status, from the list above
- ☐ Principal Investigator name and availability
- ☐ Your track record on projects of comparable size, the basis of a prime-capability judgment

I DELIVER

Your decision package

- + Fit and qualification screen across open federal funding opportunities – SBIR and STTR topics, and NOFOs
- + A clear go / no-go recommendation
- + Proposal outline mapped to the agency's scoring criteria
- + Eligibility, cost share, and registration gap-check with a punch list
- + Prime-versus-teaming assessment, where award size warrants it
- + A roadmap and timeline to submission

NOTES

TIER 02 Phase I or NOFO Proposal Package

YOU PROVIDE

The science and the facts

THE SCIENCE

- ☐ The technical approach and innovation: how it works, why it's feasible
- ☐ Technical objectives, tasks, and expected results — your R&D substance
- ☐ PI and key personnel: names, bios/CVs, roles, qualifications

THE COMPANY

- ☐ Company data: legal name, UEI, EIN, ownership %, employee count, any prior SBIR/STTR awards
- ☐ Corporate experience on projects of similar nature and complexity — what reviewers weigh, not the founder's résumé
- ☐ Foreign disclosure: any foreign ownership, affiliations, or talent agreements

THE MONEY

- ☐ Cost inputs: labor rates and hours, subcontractors and consultants, equipment, indirect rates, quotes
- ☐ NOFOs: your cost share source and the signed commitment letter

ONLY YOU CAN SIGN

- ☐ Relationships for any partner, teaming, or site-access letters — I draft, you confirm
- ☐ Firm-level training and certifications, e.g. DoD Fraud/Waste/Abuse training
- ☐ The authorized official who will certify and sign the submission

I AUTHOR AND DELIVER

Structure, compliance, scoring

- + Technical narrative or technical volume: structured, sharpened, and mapped to the evaluation criteria — you supply the science, I make it score
- + Commercialization plan, or statement of project objectives and project management plan, depending on the mechanism
- + Cost volume, budget workbook, and justification, structured from your numbers
- + Full compliance pass to the specific solicitation: required volumes, page limits, format, file naming
- + Reviewer-psychology and scoring optimization
- + Assembly of the complete, submission-ready package in the agency portal — DSIP, PAMS, or eXCHANGE

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