

Prime or Sub - Writing the rules to be the best teaming partner ever!

Thank you for attending our session and helping brainstorm rules about teaming. This document is first a living document. We had an hour and a half in each of these sessions to determine some basic rules about being a good prime or subconsultant. We could've spent a day on this topic. Please add to these rules, expand on them, make them better, share them. This document is secondarily, a starting point for teaming ethics. Take it back to your office, use what works for you, make it better.

For our own entertainment and to stress the importance of the conversation, we have named the following rules like "commandments." Again, they are intended to be a starting point for you to develop a checklist or your own personal set of guidelines that best fit the teaming needs of your firm. Think of these as recommendations, every step with take to refine them improves communication for the greater good of the A/E/C industry.

If you have edits or additions, please send them to Frank Lippert at frank@go-strategies.com, Kristi Pempin at kpempin@redbudmarketing.com, or Donna Corlew at djcorlew@yourconnectedge.com. We will keep the living document fresh and up-to-date.

Where the "Rules" have been written:

March 7, 2017 | SunBuilt Regional Conference, Amelia Island FL

February 23, 2018 | SMPS Oklahoma, Marketing Resolutions, Tulsa OK

April 13, 2018 | SMPS Southwest Regional Conference, Salt Lake City UT



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1. Thou shall not send email blast after the RFP is out unless I have a valuable skill or unique service to promote.
2. Thou shall communicate with the Prime before you pay a visit to the owner.
3. Thou shall follow the lead of the Prime.
4. Thou shall research and establish a list of Primes I want to work with.
5. Thou shall research and establish of list of Subs I want to work with.
6. Thou shall make a checklist of questions to ask when teaming as either a Prime or a Sub.
7. Thou shall establish a go/no go process.
8. As a sub – Thou shall approach the Prime with a reason to call you back by providing valuable information or services that fill their needs to pursue a project.
9. Thou shall provide specialty services and specialized or “in-demand” certifications when possible.
10. Thou shall develop a position on teaming before initiating a project pursuit.
11. As a Sub -Thou shall come to us with value and differentiators to join our team.
12. As a Sub -Thou shall leverage your knowledge.
13. As a Sub -Thou shall be responsible, responsive, and align your pursuit with the Prime.
14. As a team for a “mega” project -Thou shall build brand awareness early.
15. Thou shall know what the client expectations are and build a team based on those expectations.
16. Thou shall share information, participate and contribute to the team.
17. Thou shall invite Subs to be included in meetings when it makes sense.
18. As a Sub -Thou shall ask to be included in meetings as it makes sense.
19. As a Sub -Thou shall be honest about your limitations, workload capacity, and services.
20. If exclusive -Thou shall consider utilizing an exclusive agreement to up the ante or to obtain a larger “piece of the pie.”
21. As a Prime -Thou shall have a checklist of items and questions to ask of your Subs.
22. Thou shall partner with firms of similar values.
23. Thou shall agree on the investment level of all team members in the pursuit.

24. Thou shall know and understand the leadership commitment between all team members.
25. Thou shall have the hard conversations early in the pursuit process of who is responsible for what/preliminary scoping.
26. Thou shall have a teaming agreement.
27. Thou shall communicate several times in several formats (phone, email, text etc.) throughout the pursuit process.
28. Thou shall communicate about teaming internally.
29. Thou shall communicate with the right person.
30. Thou shall communicate, provide, request, or work through Owner requirements of forms and templates with Sub partners.
31. Thou shall understand the scope of work.



Society for Marketing
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1. Thou shall position or begin your pursuit planning from when you hear the rumor.
2. Thou shall utilize public data to decide on what public projects to pursue.
3. Thou shall be as proactive as possible to have information prepared and available for quick response.
4. Thou shall get the technical professionals out and talking to people.
5. Thou shall check with the client and ask what subconsultants are doing their work and how are they doing.
6. As a Prime, thou shall have an established relationship with the client prior to the RFP.
7. Thou shall build a network of trusted professionals for lead generation and follow-up.
8. As a subconsultant, thou shall only give the prime what they ask for.
9. Thou shall include the marketing team in the teaming conversations following a go decision.
10. Thou shall communicate in terms the project team can identify with.
11. Thou shall ask small business partners if they are teamed with anyone else and if they can provide current information.
12. As a Subconsultant thou shall keep the Prime's pursuit strategy confidential.
13. As a Prime, thou shall always send the RFQ when asking the sub for information.
14. As a Prime, thou shall let the entire team know when they are/are not short-listed.
15. As a Subconsultant, thou shall provide information that was specifically asked for.
16. As a Prime, thou shall not be afraid to send examples of what you need from your team members/subconsultants.



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1. Thou shall think carefully about approaching a major team player to join your team during the procurement stage.
2. Thou shall be positioned before the RFP.
3. Thou shall pay attention to different delivery methods in your area.
4. Thou shall have realistic expectations for teaming before the pre-proposal meeting.
5. Thou shall talk to the owner when you are trying to get on a team.
6. Thou shall check the references of your subs and primes.
7. Thou shall not believe that you can win the job if your team does not know the owner.
8. Thou shall be honest about your quality of work when talking about teaming.
9. Thou shall be transparent
10. Thou shall not bait and switch project team members.
11. Thou shall do BD together when your team is secure.
12. Thou shall build teaming relationships that are longer than the one pursuit.
13. Thou shall invest in teaming relationships.
14. Thou shall respect deadlines of the firm putting together the proposal.
15. Thou shall not have fire drills.
16. Thou shall respond as accurately as possible.
17. Thou shall understand the rules of the RFP even if you are not the prime.
18. Thou shall be willing to do what it takes to win the job.
19. Thou shall develop a go/no go form when you are a prime and when you are a sub.
20. Thou shall ask for information in a reasonable amount of time when you are the prime.
21. Thou shall be honest with your teaming partners about their weaknesses.
22. Thou shall ask for feedback on how the RFP process was executed.
23. Thou shall teach your partners how to work with you.
24. Thou shall keep information confidential when you are on multiple teams.
25. Thou shall be honest about exclusivity.
26. Thou shall ask/tell if you are on multiple teams.
27. Thou shall be prepared for the owner's question which prime you like the best.
28. Thou shall let the subs know when they are on the prime's team.
29. Thou shall ask for exclusivity when it makes sense.
30. Thou shall have a strategy when you go exclusive and don't.
31. Thou shall negotiate as a subconsultant when you go exclusive.
32. Thou shall weigh past performance in the decision to team or be exclusive.
33. Thou shall consider cultural match when it comes to D/B.
34. Thou shall set clear expectations throughout the project.

35. Thou shall set clear marketing responsibilities, roles, expectations during the proposal process for D/B.
36. Thou shall have established trust to do JV.
37. Thou shall have terms on how the firms will operate during a JV.
38. Thou shall have a teaming agreement always.
39. Thou shall make the teaming agreement specific to this project and will be revisited for each project after.
40. Thou shall plan and practice for an interview with the team members.
41. Thou shall be considerate of your partners during the process.
42. Thou shall not assume a small biz subconsultant will be on your team without asking.
43. Thou shall communicate early and often.
44. Thou shall communicate outside of the deadlines of the pursuit.
45. Thou shall not assume anything.
46. Thou shall follow up in writing.
47. Thou shall not send blanket emails, bcc or blanket phone calls to ask to be on a team.
48. Thou shall not unfairly tax subconsultants for information.
49. Thou shall not interrogate subs on what they know about projects.
50. Thou shall work in compatible software.