



Federal Contracting Journey Guide

Understand your stage. Know your next step. Choose the right CastlePath package.

Purpose of This Guide

This guide explains what to expect as you move toward federal contracting readiness. It outlines the common stages of the journey, the decisions that usually need to be made, the documents and systems that matter, and the CastlePath Advisory service package that best fits each scenario.

Discover

Clarify where your business stands today.

Position

Build the profile, materials, and strategy to be seen as credible.

Pursue

Identify realistic opportunities and prepare with confidence.

How to Use This Guide

Read the stage descriptions below and identify the one that sounds most like your company today. Each stage includes what it means, what should happen next, what CastlePath can help with, and which service package is usually the best fit.

Simple Rule of Thumb

If you are unsure where you fit, start with the Federal Readiness Assessment. If you already know you want a practical market-entry roadmap, start with the Federal Discovery Package.

At-a-Glance Package Recommendation

Client Situation	Best CastlePath Package	Why This Package Fits
We are interested in federal contracting but do not know where to start.	Federal Readiness Assessment	You need a clear baseline, readiness score, and first action plan before investing in deeper pursuit work.
We are registered or close to registered and want a practical market-entry roadmap.	Federal Discovery Package	You need positioning, target agency direction, opportunity landscape, and a 60-90 day plan.
We need to improve our capability statement, SBA profile, certifications, or federal-facing materials.	Certification & Capability Positioning	You need stronger buyer-facing visibility and cleaner messaging before outreach or proposal efforts.
We want to find realistic opportunities and decide what to pursue.	Opportunity Research & Capture Support	You need targeted research, agency/competitor insight, and a bid/no-bid method.
We found a solicitation and need help understanding requirements and organizing a compliant response.	Proposal Compliance Support	You need solicitation review, compliance matrix, proposal outline, and submission readiness support.
We want ongoing guidance over several months.	Monthly Advisory Retainer	You need recurring support, pipeline development, advisory check-ins, and accountability.

The Federal Contracting Journey

Most businesses do not move into federal contracting in one step. They move through stages. CastlePath helps you understand your current stage and avoid wasting time on the wrong next move.

Stage 1: Explore

You are interested in federal contracting but need to understand whether it is realistic for your business.

This sounds like you if: - You have heard about SAM.gov, set-asides, or SDVOSB/VOSB opportunities but are not sure what applies. - You need to know whether your services match federal buying needs. - You want a practical first step before spending money on deeper consulting or proposal work.	Recommended package: Federal Readiness Assessment What CastlePath helps you do: - Clarify your core services and commercial/federal fit. - Review whether your business is ready for SAM.gov, UEI, CAGE, NAICS, and capability positioning. - Identify major gaps that should be addressed before pursuing solicitations.
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Stage 2: Register

You are preparing your basic federal identity and registration foundation.

This sounds like you if: - You need to understand SAM.gov registration, UEI, CAGE, NAICS codes, and SBA profile requirements. - You may be registered but are unsure whether the information is aligned to what you actually want to sell. - You need help understanding what your registration does and does not accomplish.	Recommended package: Federal Readiness Assessment or Federal Discovery Package What CastlePath helps you do: - Confirm registration status and key profile details. - Align NAICS/PSC codes to realistic services and target markets. - Understand the difference between being registered and being ready to pursue work.
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Stage 3: Position

You need to look credible to buyers, primes, agencies, and teaming partners.

This sounds like you if: - You need a capability statement or your current one is outdated. - You want to explore SDVOSB/VOSB readiness or improve your SBA Small Business Search profile. - You need clearer messaging, differentiators, and past performance framing.	Recommended package: Certification & Capability Positioning What CastlePath helps you do: - Build or refine a federal-facing capability statement. - Review certification readiness and documentation needs. - Improve profile language so buyers understand what you do and why you are credible.
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Stage 4: Discover

You are ready to understand the market and identify where your company may fit.

This sounds like you if: - You need target agencies, likely buyers, realistic opportunity categories, and a 60-90 day action plan. - You want to stop searching randomly and start with a focused market-entry roadmap. - You need to know what agencies buy, who your competitors are, and where to begin outreach.	Recommended package: Federal Discovery Package What CastlePath helps you do: - Develop a federal market-entry roadmap. - Identify target agencies and buying patterns. - Create a practical action plan for outreach, positioning, and opportunity tracking.
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Stage 5: Capture

You are evaluating opportunities and need a method to decide what is worth pursuing.

This sounds like you if:

- You are seeing solicitations but do not know which ones are realistic.
- You need competitor/incumbent insight and a bid/no-bid framework.
- You want to build a pipeline instead of reacting to deadlines.

Recommended package:

Opportunity Research & Capture Support

What CastlePath helps you do:

- Research opportunities and fit.
- Use a bid/no-bid scorecard to avoid bad pursuits.
- Create a capture action plan for opportunities worth pursuing.

Stage 6: Propose

You found an active solicitation and need help organizing a compliant response.

This sounds like you if:

- You need to understand instructions, evaluation criteria, forms, volumes, attachments, and submission requirements.
- You need a compliance matrix and proposal outline.
- You want to reduce the risk of missing a requirement or submitting an unorganized response.

Recommended package:

Proposal Compliance Support

What CastlePath helps you do:

- Review solicitation requirements.
- Prepare a compliance matrix, outline, and final submission checklist.
- Support proposal narrative organization and readiness.

Stage 7: Grow

You want ongoing advisory support as you build a pipeline and pursue work over time.

This sounds like you if:

- You want regular check-ins, accountability, and help staying focused.
- You need recurring opportunity review, pipeline support, outreach strategy, or capture planning.
- You want an advisor available as your federal efforts mature.

Recommended package:

Monthly Advisory Retainer

What CastlePath helps you do:

- Maintain a pipeline and action plan.
- Support recurring strategy, opportunity review, and pursuit planning.
- Help you refine your federal approach over time.

CastlePath Package Menu

Each package below is designed around a clear business situation. You do not need to know exactly what you need before contacting CastlePath. The discovery conversation will confirm the best starting point.

Federal Readiness Assessment \$750-\$1,500

Best for companies exploring federal contracting for the first time.

A clear baseline review of where your business stands today and what steps matter next.

- 60-90 minute strategy session
- Current-state readiness review
- SAM.gov/UEI/CAGE readiness discussion
- NAICS/PSC alignment review
- Certification readiness discussion
- Written action plan

Federal Discovery Package \$2,500-\$5,000

Best for companies ready to build a full federal market-entry plan.

A practical roadmap that helps identify where your business fits, which agencies to target, what materials are needed, and what to do over the next 60-90 days.

- Discovery call and business intake
- SAM/SBA profile guidance
- NAICS/PSC recommendations
- Target agency and buyer profile
- Initial opportunity landscape
- Capability statement support
- 60-90 day roadmap

Certification & Capability Positioning \$1,500-\$3,500

Best for companies strengthening their federal-facing profile.

Support for capability statements, certification readiness, SBA profile visibility, and buyer-facing messaging.

- Capability statement development
- Core competencies and differentiators
- Certification readiness review
- SDVOSB/VOSB positioning discussion
- Past performance formatting
- Profile optimization guidance

Opportunity Research & Capture Support \$1,500-\$5,000

Best for companies ready to find and qualify opportunities.

Targeted research, opportunity qualification, competitor/incumbent review, and capture planning to help you focus on realistic pursuits.

- SAM.gov opportunity research
- Agency and buyer targeting
- Set-aside and fit review
- Competitor/incumbent research
- Bid/no-bid support
- Capture action plan

Proposal Compliance Support \$1,500-\$7,500+

Best for companies responding to active solicitations.

Solicitation review and proposal organization support to help reduce missed requirements and strengthen submission readiness.

- Solicitation review
- Compliance matrix
- Proposal outline
- Attachment checklist
- Technical narrative support
- Final QC and submission checklist

Monthly Advisory Retainers Starting at \$1,500/month

Best for companies that want recurring support.

Ongoing advisory support for readiness, pipeline building, capture planning, and proposal preparation.

- Light Advisory Retainer
- Growth Retainer
- Capture Support Retainer
- Recurring meetings and action tracking
- Pipeline and opportunity support
- Priority support based on tier

Real-World Examples: Which Package Fits?

The examples below show how CastlePath recommends a package based on where a business is in the federal contracting journey.

Example 1: Commercial Contractor Exploring Federal Work

A roofing or specialty trade company has strong commercial experience but no federal registration, no capability statement, and no clear target agency.

Recommended path

Start with Federal Readiness Assessment. If the company is a strong fit, move into the Federal Discovery Package.

Example 2: Registered in SAM.gov but Not Gaining Traction

A business has SAM.gov registration and a UEI/CAGE but does not know how to find opportunities or present itself to agencies or primes.

Recommended path

Start with Federal Discovery Package to build a market-entry roadmap and target agency strategy.

Example 3: Veteran-Owned Business Preparing for SDVOSB/VOSB Positioning

A veteran-owned company wants to understand certification readiness and needs a better capability statement and SBA profile.

Recommended path

Start with Certification & Capability Positioning.

Example 4: Company Finding Opportunities but Unsure What to Bid

A company sees opportunities in SAM.gov but is not sure which are realistic or how to prioritize them.

Recommended path

Start with Opportunity Research & Capture Support.

Example 5: Active Solicitation with a Near Deadline

A client has a solicitation and needs help understanding instructions, evaluation factors, required attachments, and proposal organization.

Recommended path

Start with Proposal Compliance Support.

Example 6: Business Wants Ongoing Accountability

A business wants recurring pipeline review, outreach support, and strategic guidance over multiple months.

Recommended path

Start with a Monthly Advisory Retainer. Choose Light, Growth, or Capture Support depending on activity level.

Choosing the Right Monthly Retainer

Monthly retainers are best when federal contracting is not a one-time project. They create a consistent operating rhythm for readiness, outreach, opportunity tracking, capture planning, and proposal preparation.

Retainer	Best For	Meeting Rhythm	Primary Focus
Light Advisory	A company that wants periodic guidance and accountability.	Monthly	Readiness check-ins, light opportunity review, action plan updates.
Growth Retainer	A company actively building a pipeline and federal presence.	Biweekly	Opportunity research, target agency work, outreach, bid/no-bid discussions.
Capture Support Retainer	A company actively pursuing opportunities and preparing proposal responses.	Weekly	Capture planning, proposal calendar, compliance support, teaming strategy.

What to Expect When You Work with CastlePath

1. Discovery Conversation

CastlePath learns your business, goals, services, past experience, ownership structure, current registrations, and federal contracting questions.

2. Package Recommendation

CastlePath recommends the package that best fits your current stage. The recommendation is based on your readiness level, timeline, goals, and available documentation.

3. Scope Confirmation

You receive a scope of work that confirms deliverables, timeline, fees, client responsibilities, and advisory boundaries.

4. Document Collection

CastlePath requests the information needed to complete the engagement. This may include company background, registrations, capability materials, prior work, certifications, target services, and opportunity links.

5. Advisory Work and Deliverables

CastlePath performs the agreed consulting, research, strategy, or proposal-support work and provides client-facing deliverables according to the scope.

6. Review and Next Steps

CastlePath walks you through findings, recommendations, and next actions so you understand not only what was delivered, but how to use it.

What CastlePath Does Not Do

CastlePath provides consulting, readiness support, research, strategic guidance, and proposal assistance. CastlePath does not guarantee contract awards, certification approvals, agency decisions, proposal selections, revenue results, or legal outcomes. Clients remain responsible for final business decisions, official submissions, pricing, certifications, representations, and legal/tax/accounting advice from licensed professionals.

Client Responsibilities

- Provide accurate and complete company information.
- Review all deliverables before using them externally.
- Maintain control of official government accounts and final submissions.
- Make final decisions about bids, pricing, certifications, and representations.
- Respond timely to requests for documents or clarifications.
- Consult legal, tax, accounting, or compliance professionals when formal advice is needed.

Plain-English Federal Contracting Terms

Term	Meaning
SAM.gov	The federal system used for entity registration and federal contract opportunity search.
UEI	Unique Entity ID. A government identifier used for organizations doing business with the federal government.
CAGE Code	A code assigned to organizations doing business with the federal government, often generated through SAM registration.
NAICS Code	A code that describes the type of industry or service a business provides.
PSC Code	A Product Service Code used by the government to classify what it buys.
Capability Statement	A one-page federal-facing summary of what a company does, why it is credible, and how buyers can contact it.
Set-Aside	A contracting approach where competition may be limited to certain small business categories.
Capture	The process of researching, qualifying, and preparing for a specific opportunity before proposal submission.
Compliance Matrix	A tool used to map solicitation instructions and requirements to proposal sections and attachments.

Official Sources CastlePath Uses to Ground Client Work

CastlePath uses official and widely recognized federal contracting resources when helping clients understand registration, certification, market research, opportunity research, and proposal context. These include:

- SAM.gov - entity registration, Unique Entity ID guidance, and contract opportunities.
- SBA VetCert / MySBA Certifications - veteran-owned and service-disabled veteran-owned small business certification information.
- SBA Small Business Search - buyer-facing small business profiles and search visibility.
- GSA Sell to Government and market research guidance - practical government market-entry context.
- USAspending.gov - award history and federal spending research.
- Acquisition.gov / Federal Acquisition Regulation - official FAR reference, including market research and proposal/evaluation context.

Final Decision Support

The best package is the one that matches your current stage. If you are still unsure, CastlePath will help you identify the right starting point during the discovery call. The goal is to help you avoid guessing, avoid chasing the wrong opportunities, and build a clear path forward.



Ready to Build Your Federal Path?

Book a discovery call at castlepathadvisory.com

From registration to readiness to pursuit.