

## Capability Overview Meetings

An important part of SCE's Supplier Diversity Program is to connect diverse business enterprises with decision makers at the Utility. This relationship is critical to better understanding our business and upcoming procurement opportunities. Our Supplier Diversity & Development team assists by facilitating capability overview meetings with aspiring, qualified, certified DBE suppliers, Supply Operation and key business unit personnel. These capability overview meetings provide suppliers with the opportunity to present their company's business plan, experience, qualifications and credentials to SCE personnel responsible for procuring materials and services on behalf of Southern California Edison.

Tips for Successful Capability Overview Meetings:

**Be prepared** – Conduct research beforehand that will allow you to intelligently discuss the capabilities of your company as it relates to SCE business needs and priorities:

- ✓ Mission
- ✓ Values
- ✓ Industry
- ✓ Market conditions
- ✓ Business Operations
- ✓ Business Requirements
- ✓ Regulatory Mandates
- ✓ Current Legislation
- ✓ How the materials and services your company offers meets SCE needs

**Prepare A Capability Overview Presentation** – This should be “clean”, concise and professional looking. The presentation should include: (add somewhere – It should be self-explanatory in the event you need to leave it behind. Anyone should be able to pick it up and have a good understanding of what you are offering. Also, it should be between 3-5 slides if using a presentation format. Also know your audience in advance. )

- ✓ General Company Information
  - General business description/statement
  - Number of years in business
  - Legal Structure (Public, Privately Held, Corporation, LLC, Partnership, Sole Proprietorship)
  - Facility Location(s)
  - Service Area Location(s)
  - Executive Team/Key Personnel Qualifications/Brief Biographies
- ✓ Specific products and services offered
  - Include detailed specifics of the products/services your company offers
  - Highlight products/services that pertain to SCE requirements/company needs
  - Indicate the solutions your company can offer to SCE
- ✓ Experience
  - Include example of specific experiences in providing your products/services to similar companies

- Include example(s) of completed projects in providing products/services directly linked to specific SCE needs
- Indicate number of years of experience in providing the products/services your company offers
- ✓ Qualifications
  - List technical competencies
  - List any certifications; licenses; credentials and company awards
  - State what makes your company better than your competition
  - State why we should use your company
  - Provide any other information relevant to your company's expertise
  - Provide specific information about unique features/offerings
- ✓ References
  - Include current and previous clients
  - Highlight utility clients
  - Include client testimonials
- ✓ Financial Data
  - Provide gross annual sales for last 3 years
  - Include an Audited Financial Statement or other data to substantiate financial stability and dependability (may be submitted separately)
- ✓ Diverse Business Certifications
  - List any minority or diverse business certifications you have
  - Provide a copy of your certifications

**Prepare a One-page Company Summary** – Often attendees want a quick reference sheet that includes:

- ✓ General Company Information
- ✓ Executive Team/Key Management Biographies
- ✓ Products/Services Offered
- ✓ Previous/Current Clients
- ✓ Contact information
- ✓ Can be two-sided

**Be EARLY!!**

- ✓ Allow additional time for SCE's SECURITY check in procedures
- ✓ Arrange to come early if you need to set up equipment (i.e. laptop, projector, etc.) (Test your equipment in advance or borrow SCE equipment. Remember the firewall issues.) Have enough copies for all attendees and bring extras to leave with your supplier diversity advocates. Confirm your attendance 24 hours before the meeting with a live voice.

**Bring Materials**

- ✓ Copies of your presentation
- ✓ If presenting a virtual presentation, bring a copy of your presentation on a memory stick, your laptop and projector (if not previously arranged for with SCE)
- ✓ Copies of your Company Summary
- ✓ Business cards

**Be Attentive**

- ✓ Ask/Listen for the opportunities
- ✓ Address how your company can successfully meet these opportunities

**Follow-Up**

- ✓ Ask next steps and a contact to follow up with
- ✓ Send a “Thank You”
- ✓ Allow appropriate time before calling to follow up