

## The U.S. Small Business Administration (SBA)



### ABOUT THE CLIENT

Created in 1953, the U.S. Small Business Administration (SBA) continues to help small business owners and entrepreneurs pursue the American dream. SBA is the only cabinet-level federal agency fully dedicated to small business and provides counseling, capital, and contracting expertise as the nation's only go-to resource and voice for small businesses.



Reviewed and Pre-screened Thousands of SBA Firm Owner's



Created Training Guides for SBA Set-aside



Developed GCBF Dashboard Containing Data Analytics and Visualizations to Illuminate Trends in SBA Pre-screening Data

### OBJECTIVE

SBA engaged LinkVisum to help drive improved results in the prescreening phase of the certificate management process for the following GCBF set-aside programs: 8(a) Business Development, Historically Underutilized Business Zone (HUBZone), Women-Owned Small Business (WOSB), and Mentor-Protégé Program (MPP).

### LINKVISUM'S SOLUTIONS

To accomplish the client's goals, LinkVisum:

- Performed prescreening activities
- Developed prescreening training documentation
- Implemented process improvements
- Captured prescreening process metrics

### OUTCOME

Throughout the engagement, LinkVisum identified and implemented the following process improvements and improvement opportunities:

- Created training guides for SBA set-aside programs
- Reviewed and pre-screened thousands of SBA firm owner's applications
- Developed and presented case-level data by program area to SBA management
- Cleared SBA program backlog of previous business firm owners' applications
- Developed GCBF executive and program dashboard containing data analytics and data visualizations, such as pie charts and graphs, to illuminate trends in SBA pre-screening data

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### ABOUT LINKVISUM

LinkVisum Consulting Group is a woman-owned company that provides a full range of management consulting services to government agencies and private industry. We are an ISO 9001 certified company with an approved DCAA accounting system. Our staff possess significant skills, advanced degrees, and relevant certifications, garnering numerous exceptional ratings on Contractor Performance Assessment Reporting System (CPARS).

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### ADDITIONAL PROJECT DETAILS

As part of its certification management process, the U.S. Small Business Administration (SBA)'s Office of Government Contracting and Business Development (GCBD) has undertaken initiatives to comprehensively review and overhaul, as needed, how it performs the certification management function. These initiatives include the integration, streamlining, digitization, and automation of set-aside program processes. LinkVisum also used ServiceNow® to create a GCBD executive and program dashboard that helps the client observe trends, identify patterns, and pull insights from the certificate management process data for the benefit of SBA leadership. As LinkVisum supported the optimization of the certification management prescreening process, we developed institutional knowledge that our staff used to create individual training guides for each GCBD set-aside program. These training guides document all the steps, systems, and processes needed to prescreen SBA applications. Our efforts to develop the training guides resulted in process improvements and streamlined procedures. These improvements allowed the client to employ a standardized training approach for the certification management prescreening process across all GCBD set-aside programs.