



KeyStone Research Corporation
Linking research, policy and practice

Practitioner Networking Workshop: Careers in Contract Research

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***American Sociological Association
Annual Meeting
New York, NY
August 10-14, 2007***

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Setting Up & Running A Business

- **Determining legal status:** sole proprietorship; LLC, S corporation, C corporation
- **Identifying and cultivating linkages:** financial institutions, legal council, auditors/CPAs, insurance brokers and other HR associations
- **Establishing organizational policies & procedures:** with employees this gets more complicated, with all the human resource issues of supervision, performance assessment, complying with federal/state laws/regulations, grievances, etc.

Finding Out About RFPs

- Word of mouth
- Government approved vendor lists (e.g., GSA schedules, MATO, state lists)
- Government websites and announcements/communications about RFPs
- List serves from other organizations/agencies
- Networking with funding agencies and other contractors

Making Decisions about Proposals

- **Analyze Core Competencies:** Do careful analysis of your core competencies and/or ability to bring on additional expertise via contract services (determine how narrow or broad your focus)
- **Know the Competition:** Know your competition and be prudent about the changes of being awarded a contract
- **Balance Time Spent:** Recognize need to balance time spent on current work vs. searching for new work
- **Content of RFPs:** Follow RFP proposal guidelines and recognize different styles of proposals for different funding organizations

Sales and Marketing

- **Determine Need:** do you really need to do sales and marketing
- **Determine Budget:** assess the amount that you can afford to spend on sales and marketing; don't forget low cost methods of sales and marketing
- **Develop Strategic Plans:** identify your goals with respect to your contract business and determine the strategies to get you there

Client Relationships

- **Client Needs:** Essential to determine client's needs (sometimes clients may not be able to articulate this, or have a misconception as to their needs)
- **Your Capacity & Capability:** Ensure that you are capable of responding to their needs (don't get into situations where you do not have either the capability or capacity to provide excellent services); recognize when there isn't a good fit.
- **Service Delivered:** Go above and beyond in providing your service—but within reason so as not to lose money (this engenders good will and can lead to additional work)
- **Evaluation of Service:** Have client provide evaluation of your services, and learn from what works & what doesn't work

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