

# **NotebookLM Output Templates for Source One Spares**

## **INSTRUCTIONS FOR NOTEBOOKLM**

Use these templates to generate standardized outputs for opportunity assessments. Start with the Quick Initial Assessment. Only proceed to Full Comprehensive Assessment if the initial assessment returns "GO" or "NEEDS FURTHER ANALYSIS."

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### **TEMPLATE 1: QUICK INITIAL ASSESSMENT (8-Point Go/No-Go)**

Use this template for ALL opportunities first. Copy exactly as shown, replacing bracketed items with actual quoted text from the solicitation.

**\*\*QUICK GO/NO-GO ASSESSMENT\*\***

**\*\*PIPELINE TITLE:\*\***

P/N: [Part number or "Various" if more than 2] | Announcement#: [Insert announcement number] | Acft/Spt Equip: [Aircraft type or "Support Equipment"] | Descript: [Brief description max 5 words]

**\*\*0. Announcement Number:\*\*** [Insert announcement number]

**\*\*1. Acquisition Type:\*\*** "[Quote describing work]" (Page X) - [Classify as: Managed Repair / New Purchase / Manufacturing]

**\*\*2. Sole Source / SAR:\*\*** "[Quote about source approval or sole source]" (Page X) - [No blockers / SAR BLOCKER / Sole source BLOCKER]

**\*\*3. OEM Traceability / Tech Data:\*\*** "[Quote about technical requirements]" (Page X) - [FAA standards apply / Gov owns data / NO DATA BLOCKER]

**\*\*4. Refurb / Surplus / Common Commercial:\*\*** "[Quote about acceptable parts]" (Page X) - [Refurbished acceptable / New only BLOCKER]

**\*\*5. Certifications:\*\*** "[Quote about required certs]" (Page X) - [SOS can meet / CANNOT MEET]

**\*\*6. Commercial Platform Alignment:\*\*** "[Quote identifying platform/parts]" (Page X) - [Commercial platform / Military only]

**\*\*7. FAR Part 12 Usage:\*\*** "[Quote about acquisition procedures]" (Page X) - [Commercial procedures / Standard procedures]

**\*\*8. Incumbent / Prior Vendor:\*\*** "[Quote about current contractor if any]" (Page X) - [Open competition / Incumbent exists]

**\*\*Final Assessment:\*\***

**\*\*[QUICK GO / QUICK NO-GO / NEEDS FURTHER ANALYSIS]\*\***

[One-line justification]

**\*\*If NO-GO due to SAR or OEM restriction:\*\*** Contact CO about future acceptability

**DECISION RULES FOR QUICK ASSESSMENT:**

- **QUICK NO-GO** if ANY of these appear:
  - Military Source Approval Required (SAR)

- Sole source to another vendor
- Technical data not available
- OEM owns technical data
- Factory new only (no refurb allowed)
- Security clearance required
- Certifications SOS cannot meet (AS9100, NADCAP)

**Remember: Hard stops OVERRIDE all positive indicators**

- **QUICK GO** if ALL of these conditions met:
  - No hard stops found above
  - Commercial platform or FAR Part 12
  - Refurbished/surplus acceptable
  - FAA standards or commercial specs
- **NEEDS FURTHER ANALYSIS** if:
  - Mixed indicators (but no hard stops)
  - Unclear requirements
  - Potential teaming opportunity
  - SLED opportunity
  - Dual-use parts identified
  - CLS or complex requirements

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## **TEMPLATE 2: FULL COMPREHENSIVE ASSESSMENT**

Only complete this if Quick Assessment = GO or NEEDS FURTHER ANALYSIS

**\*\*SOURCE ONE SPARES COMPREHENSIVE OPPORTUNITY ASSESSMENT\*\***

**\*\*PIPELINE TITLE:\*\***

P/N: [Part number or "Various" if more than 2] | Announcement#: [Official announcement number] | Acft/Spt Equip: [Aircraft type or "Support Equipment"] | Descript: [Brief description max 5 words]

**\*\*BASIC INFORMATION\*\***

**\*\*Announcement Number:\*\*** [Insert]

**\*\*Issuing Agency:\*\*** "[Full agency name]" (Page X)

**\*\*Contract Type:\*\*** "[Contract type]" (Page X)

**\*\*Estimated Value:\*\*** "[Dollar amount and period]" (Page X)

**\*\*Response Due:\*\*** "[Date and time with timezone]" (Page X)

**\*\*Small Business Set-Aside:\*\*** "[Type or unrestricted]" (Page X)

**\*\*SECTION 1: HARD STOPS VERIFICATION\*\***

**\*\*Source Approval Required:\*\*** "[Quote]" (Page X) - [PASS/FAIL]

**\*\*Sole Source Status:\*\*** "[Quote]" (Page X) - [PASS/FAIL]

**\*\*Technical Data Restrictions:\*\*** "[Quote]" (Page X) - [PASS/FAIL]

**\*\*Security Clearance Required:\*\*** "[Quote]" (Page X) - [PASS/FAIL]

**\*\*SECTION 2: OPPORTUNITY CLASSIFICATION\*\***

**\*\*Acquisition Type:\*\*** "[Quote]" (Page X) - [Managed Repair / Spares Supply / Manufacturing / CLS]

**\*\*Platform:\*\*** "[Quote]" (Page X) - [Commercial / Military / Dual-Use]

**\*\*FAR Part 12:\*\*** "[Quote]" (Page X) - [Yes/No]

**\*\*SLED Opportunity:\*\*** [Yes/No - Federal/State/Local]

**\*\*Dual-Use Parts:\*\*** [Yes/No] - "[Supporting quote if yes]" (Page X)

**\*\*SECTION 3: TECHNICAL ALIGNMENT\*\***

**\*\*Parts Acceptability:\*\*** "[Quote]" (Page X) - [Score: +3 to -5]

**\*\*Traceability:\*\*** "[Quote]" (Page X) - [SOS CAPABLE / CANNOT MEET]

**\*\*Certifications:\*\*** "[Quote]" (Page X) - [SOS HAS / LACKS]

**\*\*Technical Score:\*\*** [Total]

**\*\*SECTION 4: DELIVERY & PERFORMANCE\*\***

**\*\*Delivery Timeline:\*\*** "[Quote]" (Page X) - [ACHIEVABLE / CHALLENGING / UNREALISTIC]

**\*\*Geographic Scope:\*\*** "[Quote]" (Page X) - [Domestic / OCONUS / Both]

**\*\*Performance Period:\*\*** "[Quote]" (Page X)

**\*\*KPIs/Metrics:\*\*** "[Quote if any]" (Page X)

**\*\*SECTION 5: COMPETITION & STRATEGY\*\***

**\*\*Set-Aside Status:\*\*** "[Quote]" (Page X) - [SOS QUALIFIES / NOT QUALIFIED]

**\*\*Incumbent:\*\*** "[Quote if mentioned]" (Page X) - [Name if known]

**\*\*Past Performance Required:\*\*** "[Quote]" (Page X) - [SOS CAN MEET / CANNOT MEET]

**\*\*Evaluation Criteria:\*\*** "[Quote main factors]" (Page X)

**\*\*SECTION 6: FINANCIAL & COMPLIANCE\*\***

**\*\*Bonding Required:\*\*** "[Quote]" (Page X) - [None / Amount]

**\*\*ITAR/Export:\*\*** "[Quote if mentioned]" (Page X) - [Required / Not Required]

**\*\*Special Compliance:\*\*** "[Quote any special requirements]" (Page X)

**\*\*PARTNERSHIP ASSESSMENT\*\***

**\*\*Prime Viability:\*\*** [HIGH / MEDIUM / LOW]

**\*\*Subcontractor Potential:\*\*** [HIGH / MEDIUM / LOW / NONE]

**\*\*Recommended Approach:\*\*** [PRIME / SUB / TEAM LEAD / TEAM MEMBER]

**\*\*Potential Partners:\*\*** [List if identified from incumbent/awardee info]

**\*\*RECOMMENDATION:** [GO / NO-GO / NEEDS FURTHER ANALYSIS]\*\*

**\*\*Pursuit Strategy:\*\*** [PRIME / SUBCONTRACTOR / TEAM]

**\*\*Confidence Level:\*\*** [HIGH / MEDIUM / LOW]

**\*\*Strengths:\*\***

- [Bullet list key advantages]

**\*\*Risks:\*\***

- [Bullet list key risks]

**\*\*Next Actions:\*\***

1. [Specific next step with date]

2. [Second action if applicable]

3. [If SAR/OEM NO-GO: Contact CO re: future aftermarket acceptability]

**\*\*EXECUTIVE SUMMARY:\*\***

[2-3 sentence summary capturing decision, key factors, and recommended approach]

## NOTEBOOKLM PROCESSING RULES

1. **Always start with Quick Assessment**
2. **Stop if Quick Assessment = NO-GO** (unless specifically asked to continue)
3. **For GO or NEEDS ANALYSIS:** Proceed to Full Assessment
4. **Quote exactly** - Never paraphrase or summarize quoted material
5. **Include page numbers** for every quote
6. **Flag missing information** rather than assuming
7. **When uncertain:** Default to "NEEDS FURTHER ANALYSIS"

# SPECIAL INDICATORS TO HIGHLIGHT

## Positive Indicators (🟢):

- "FAR Part 12"
- "commercial item"
- "refurbished acceptable"
- "or equal"
- "small business set-aside"
- "no security clearance"
- Engine components (often dual-use)

## Negative Indicators (🔴):

- "source approval required"
- "sole source justification"
- "factory new only"
- "OEM only"
- "proprietary"
- "classified"
- "drawings not available"

## Investigate Further (🟡):

- "intent to award"
- "brand name or equal"
- "previous contractor"
- "may be set aside"