ELECTRONIC ORGANIZATIONAL EFFICIENCIES

PRESENTED BY:

SEAN HYNES AND NICK CANJAR
GROUND RULES
3 DIFFERENT TYPES OF ELECTRONIC ORGANIZATION MANAGEMENT

• Electronic Filing
• Electronic Online Bidding
• Electronic Contract Management
ELECTRONIC FILING
WHY GO ELECTRONIC?

Reduce physical storage areas

• Optimizes tighter office spaces
• Eliminate off-site storage for older documents
• Can be overwhelming to save every piece of paper associated with a solicitation or agreement
WHY GO ELECTRONIC?

Reduces Cost

• Supplies & Equipment
  • paper/printer supplies, folders, bid jackets, labels, etc.
  • File cabinets, replacement parts, etc.

• Administrative Time
  • Time spent reorganizing and purging files
WHY GO ELECTRONIC?

Ease of access

• Hard to search through paper files
• Improper filing of physical files can lead to headaches
• Multiple individuals can access electronic files at the same time
HEADACHES/SOLUTIONS
ELECTRONIC FILE MANAGEMENT

Headaches:

• Managing decisions at start up
• Ensuring statutes are followed for record retention
• Filing accuracy
• Disposition of existing physical documents
WHY GO ELECTRONIC?

Solutions:

• Form a team to assist with start up decisions
• Procurement Team Training
• Electronic Handouts to accompany training
• Become friends with your Records Custodian (or equivalent)
ELECTRONIC FILING

Things to think about:

• Transition will not happen overnight and will take dedication and team work to accomplish correctly

• Project Champions need to keep team positive during transition period
ELECTRONIC SOLICITATION PROCESS
ELECTRONIC SOLICITATION PROCESS

Why?

• Streamline process
• Increase competition
• Increase access
• Less paper files
• Industry standards
HEADACHES/SOLUTIONS
ELECTRONIC SOLICITATION PROCESS

Headaches:

• **Creation of new documents**
• **Re-working of documents likely to be required**
• **Training of office staff**
• **Training of vendors**
• **Consistency in procedures**
• **Introduction of new ideas**
• **Leadership changes**
ELECTRONIC SOLICITATION PROCESS

Solutions:

• Finding the right platform to fit your needs
  • Budget
  • Ease of Use
  • Support Team
  • Complexity
ELECTRONIC SOLICITATION PROCESS

Solutions:

• Work with appropriate parties to update solicitation documents for the electronic solicitation process

• Opportunity to evaluate your documents

 ➢ What is this document?
 ➢ Why is it there?
 ➢ Do we still need it?
ELECTRONIC SOLICITATION PROCESS

Solutions:

• Conduct training for Procurement Staff
• Conduct vendor training
• Create a checklist of required steps for the electronic solicitation process
ELECTRONIC CONTRACT MANAGEMENT
ELECTRONIC CONTRACT MANAGEMENT

Why?

• Less paper (get the theme?)

• Ease of access
  ➢ Multiple people can access same document at the same time

• Consolidation of data
  ➢ Reduced four (4) spreadsheets into one (1)
ELECTRONIC CONTRACT MANAGEMENT

Why?

• Contract Metrics
  • Expanded purpose after consolidation of log sheets
• Started Tracking
  ➢ Cycle Time
  ➢ Buyer Case Loads
  ➢ Contract Savings District Wide
HEADACHES/SOLUTIONS
ELECTRONIC CONTRACT MANAGEMENT

Headaches:

• Implementation/Creation
• Finding the appropriate method of going electronic
• Onboarding of Procurement Department
• Training all outside department staff
ELECTRONIC CONTRACT MANAGEMENT

Solutions:

• Form a committee to help understand the direction you want to take with electronic contract management
QUESTIONS?