Implementation of a Real-Time Contract Tracking Management System

In September 2017 Hurricane Irma had a devastating impact in the Caribbean Islands and on Florida. Although Brevard County was not hit directly by the hurricane, the county was affected by sustained winds up to 58 miles per hour, gusts upwards to 94 mph, and more than 11 inches of rain. These conditions had a damaging impact to School Board buildings; particularly to building roofs, which needed to be repaired quickly. This situation helped initiate the need for the District to create a better and faster process then what was previously in place.

Up to this point, all purchase order requests coming from the Plant Operations & Maintenance Department (PO&M) were submitted via paper with wet signatures required, taking an average of 23 days for purchase order creation and 12 days for P-Card authorization. With over 4,000 requests being processed annually from PO&M, these delays had a major effect on time, budget, and resource utilization efficiency. PO&M needed an online tool to coordinate in real-time between employees and vendors to accomplish repairs as quickly as possible prior to students going back to school. A department employee recommended Smartsheet, a powerful and simple tool that could assist with multiple facets of the emergency management process.

Smartsheet is a cloud-based platform that allows the School Board to plan, manage, automate, and report on inter-department and collaborative projects allowing us to achieve more with limited resources. Smartsheet was rolled out quickly in the aftermath of Irma with little knowledge of just how effective it would be. However, the initial spreadsheet created to manage approvals of purchase requisitions became an immediate benefit as 86 entries were processed and approved for emergency repairs in just a five-day period. PO&M quickly expanded this style of requisition approval throughout the department, adding features such as automation, budget management, and workload analysis. Most impressive was the decrease in turnaround time of purchase requests, currently showing an average of nine days for PO creation and same day authorization for P-Card transactions. Seeing these rapid efficiency improvements, Procurement and Distribution Services adopted the use of Smartsheet to improve contract administration management, track savings, employee workloads, and aid in our move to a more paperless office.

For our department the initial rollout of Smartsheet was strictly an internal process change to assist in the combination of multiple Excel spreadsheets that served as our contract administration system. Using Excel was limiting our department’s efficiency with single user file restrictions, outdated information in previous fiscal years, and increased human errors due to manual entry operations. Beginning in July 2018 all new solicitation and agreement requests
began being logged by Procurement staff in Smartsheet. The immediate benefit of this new process was the ability to create reports based on each specific Buyer so they could look solely at their own workload. These reports update automatically when information is added or changed to the main spreadsheet and vice versa. The individualized reports cut down on time spent searching long Excel sheets to make only a small update to a specific contract. Eventually a multitude of reports were created including one that displayed all active solicitations, one for each end user school/department, and one for requests needing assignment to a Buyer.

One of the most important aspects of Smartsheet is the live or real time component. Information that is updated by Procurement staff can immediately be seen by the person viewing the sheet. End users and other stakeholders often want to keep a close eye on where in the process their Procurement request is, so it is important to be able to consistently provide the most accurate information. When an end user can view status updates and trust they are accurate, no time is spent making a call or sending an email to stay informed. As Procurement moved forward and evolved with Smartsheet; new features were tested, new reports were created, and more information was tracked.

During our most recent department audit, a recommendation was given to develop processes and procedures which improve the documentation of solicitation workflow. One feature of Smartsheet that is assisting with these improvements is the creation of an online form meant to be completed by our end users called a Procurement Action Request (PAR). At any time when an end user requires Procurement to act, the PAR must be completed. This includes new solicitation requests, agreement review and signature, agreement or solicitation renewals, and quote requests. Additional automated workflows set up in Smartsheet notify end users of upcoming renewal or expiration of solicitations or agreements eliminating the need for the Buyer to manually generate notices. The PAR form serves to further reduce Buyer’s load by having some of the request input completed by the end user.

Although we have only begun to scratch the surface on how automated workflows will increase our department’s efficiency, it is already clear just how important it is. For example, our office is required to verify that certificates of liability insurance are current and on file for our vendors prior to a purchase order being approved. Procurement began tracking these certificates in Smartsheet using automated workflows to send notifications directly to the vendor 30 days prior to certificate expirations requesting an updated one. This reduces time spent seeking certificates by Buyers and end users as well as ensuring certificates are already on file before a purchase request is entered so there is no delay in purchase order approval. Automation has also been set up to send notifications of upcoming expirations, archiving of outdated or expired information, and new PARs being received. It is no secret that procurement professionals are tasked to do more with limited resources and time is a very valuable one. The automation of even
just one task can provide some of that time back to procurement professionals so that time can be spent more efficiently elsewhere.

One of the more exciting aspects of Smartsheet is the ability to track data and create metrics for review and comparison. Metrics are at the forefront of private and public business practices and it is very rewarding to see the value added by the Procurement department throughout our District. We are currently tracking the turnaround time of various solicitation and agreement types with the goal of maintaining a consistent timeline for our end users. We are also recording monetary savings and cost avoidance data of agreement negotiations, contract pricing verification, and rebates offered directly from suppliers. Verifiable metrics such as these provide us the opportunity to show quantitative data demonstrating how the Procurement department, and their strategic role is critical to the continued success of stretching the District’s resources to their fullest potential.

We feel that our implementation and continued improvement of Smartsheet to create a real-time contract management system is a Best Practice in the category of Innovation. Procurement has been able to utilize a simple, cost-effective tool to create fully customized, automated and accurate workflows, capture metrics, provide end users and stakeholders easy access to information, and identify and quantify the value our department brings to the district. With the implementation of this system, Procurement is equipped to provide our end users with innovative, efficient, and valuable support and service which will assist them in achieving their goals and initiatives.