

Kevin Minor: 0:03

Welcome to the NASPO Pulse, the podcast where we are monitoring issues in state procurement.

Amanda Valdivieso: 0:08

We've got our finger on the pulse. I'm Amanda Valdivieso.

Kevin Minor: 0:11

And I'm Kevin Miner, and today we're taking you on a journey, so don't stop believing.

Amanda Valdivieso: 0:17

We're not doing journey puns, are we?

Kevin Minor: 0:19

Well, I mean, that's really the only journey song I know. So do you know any?

Amanda Valdivieso: 0:24

Yes, I know tons of journey songs. That one is just a little bit overrated and not really my bag of tea. But today. I'm more interested in the Journey we're going to be talking about with Kelly Sanders, the Chief Procurement Officer for the state of Ohio, and Andrew Cochran, their State E-Procurement Manager.

Kevin Minor: 0:40

Yes, ohio's E-Procurement Journey, that's right. Manager. Yes, ohio's e-procurement journey, that's right. We're going to talk with Kelly and Andrew about the last few years into their process of acquiring an e-procurement system. We'll ask them about these unique Kaizen events they held with state agencies and why Kelly calls this an agency-driven solution.

Amanda Valdivieso: 1:01

Yep, and we're also going to be discussing the concept of a competitive dialogue, which is what they used in place of a traditional RFI.

Kevin Minor: 1:08

So exciting. This episode of the Pulse podcast is brought to you by NASPO's research and innovation team, bringing you timely resources and the best practices to keep your office up to date on procurement around the state. Head over to [naspo.org](https://www.naspo.org) and click on the research and Innovation tab to browse their massive catalog of publications. Let's take that pulse.

Amanda Valdivieso: 1:30

Can you both, first off, just give us a little bit of a background of your responsibilities for each of your roles? Kelly, would you like to start?

Kelly Sanders: 1:39

Sure. So I've been in public service for 27 years, always had a passion for public procurement and in every position that I've held always had that some aspect of public procurement in every position throughout my career and had the great opportunity to join the Central Procurement Office here in Ohio about six years ago and do serve as the chief procurement officer Ohio about six years ago and do serve as the chief procurement officer. So really just in that role have the opportunity to guide and set policy for Ohio and support the agency's boards, commissions and the business community in procurement in Ohio.

Amanda Valdivieso: 2:18

Yeah, so, andrew, tell us a little bit about yourself.

Andrew Cochran: 2:25

Yeah, so I've worked with the state for about nine and a half years.

Andrew Cochran: 2:27

Came in originally with our Office of Information Technology and really throughout my career have focused a lot on digital government initiatives. That was kind of where I started for the first several years, kind of working with state websites and some of our enterprise applications, and then had the opportunity to move over to our general services division about six years, seven years ago, and in that time got a chance to work a lot on our e-procurement initiatives. And then had a chance to work with Kelly, actually while she was still at the agency out at Rehab and Corrections, and then ultimately, as she came over to procurement services in my role as the deputy director's office advisor, I was able to work on a lot of different strategic initiatives, e-procurement being one of them, kind of helping to research with other states, helping to pull together some different aspects of the RFP, and was fortunate enough to be able to apply for the position for the e-procurement manager and get that role about three years ago and have been working with Kelly and the team ever since.

Kevin Minor: 3:31

Both of you, over the last few years, have had the opportunity to dive into the process of acquiring an e-procurement system for Ohio, and that's really what we want to talk about today. Right now, e-procurement has become a focus of many procurement offices, both public and private, so can you guys give us some insight into how your journey began in e-procurement? I think that was around 2016. Right?

Kelly Sanders: 3:57

Yep, sure can. And you know one thing that Andrew had mentioned you know I was in corrections prior to thing that Andrew had mentioned. You know I was in corrections prior to, and so what actually brought me to DAS and the Central Procurement Office was the opportunity to really have a say in helping to guide Ohio in transforming procurement, modernizing procurement and transforming procurement, and so I really had the opportunity and serve as the executive sponsor for our e-procurement OhioBuy solution. We started the journey back in 2016, as you said, and that was just about a few months after I actually joined the team. We really started with OK, let's lay the foundation. And what we did was we actually worked with our Lean Ohio team here within the Department of Administrative Services to host two Kaizen events.

Kelly Sanders: 4:49

So it was very important to not jump to some technology. We ultimately knew we'd need technology to support us in modernizing and transforming procurement, but really wanted to understand okay, what are we doing here within the central procurement office as well as at the agency procurement level? And so hosted two Kaizen events and for those that may or may not be familiar with Kaizen, that is a Japanese term and it is to change for the better and so what we did was we invited folks from our central procurement team as well as some agency representatives in to our first Kaizen event, which was focused on central procurement. And so what we did was, as part of the Kaizen event is you basically do this process mapping of what is your, what is your as, is your current state, and what is your your future to be, state to be, and and so you work with the team to basically process map. So we have all these like beautifully colored walls full of post-it notes that all have a different designation of what that color is, but worked really collaboratively between the center procurement team and those agency representatives to really kick the tires. So that's kind of a the term I always say is let's kick the tires, let's just not, let's understand what we're doing today.

Kelly Sanders: 6:06

And I really wanted the agency representatives to challenge us to say why do you do it that way? So we've been doing it that way for a long time, but what we were really doing was trying to imagine and envision what we could do to make procurement better in the state of Ohio, better in the state of Ohio. And so what we did was that central procurement focused Kaizen event first and then, a few weeks later, we had an agency focused

procurement, so really weren't just focusing on what central procurement does, but we're looking at procurement in Ohio holistically and how to really transform that. And so what we did was basically invited some of the same representatives from the first Kaizen event into the second, so we had some continuity there but also had the opportunity to bring others into the discussion, and so that event was really focused on what do we do at the agency.

Kelly Sanders: 6:58

So, again, I had 21 years in corrections prior to coming to the central procurement office so I could weigh in from that perspective and work with the agency representatives as well as those central procurement folks that said, okay, agencies, why are you doing it that way? So we really had this great dialogue around what we do today and what do we collectively want to do tomorrow, and so it really was a great opportunity to to do those two kaizen events, which then sprung board from. When you think about kaizen event, you can't have a lot of people, so, just based on the nature of the the event, we had to limit it to around 25 people and so we tried to do that cross-section of understanding, you know, kind of small agency boards, institutional agencies, so getting that perspective at the table with us, but couldn't have everybody.

Kelly Sanders: 7:49

So then we led from those Kaizen events into discovery sessions. So we basically took it on the road, so to speak, and invited the remaining agencies, boards and commissions that didn't have the opportunity to participate in the events to understand what that future state was, what we collectively, as those two Kaizen teams, came together to say this is what we think procurement should look like in Ohio. So really got a chance to kind of, you know, kick the tires with the rest of the group of contacts throughout the state to say, did we miss anything? We were really trying to hit that 80-20 rule, make sure that we were covering things. So so led into some basically discovery sessions with the agencies after that.

Kevin Minor: 8:32

The information and the knowledge was pretty easily transferable, yeah.

Kelly Sanders: 8:36

Yes, yeah, and one of the yeah and one of the key things that we did with those discovery sessions and was very foundational for this journey and we always, we do, talk about it as a journey, so again started in 2016 and it's still continuing today.

Kelly Sanders: 8:51

But a key aspect of that journey was for this to be very much agency driven or agency focused. So while DAS or the Central Procurement Office had the opportunity to sponsor this solution, it's going to be a solution that supports procurement period, not just the transactions that we do to support the state agencies from a central procurement aspect, but supporting what those agencies do, which is a very high volume of transactions and dollars. So really making sure that it was agency driven. And so what we had was agency ambassadors. So we had folks that participated in those Kaizen events with us and really as we went out to do that further discovery and just sharing of information with other stakeholders, they were front and center. I stood behind them. I really wanted them to present this is where we want to take procurement in Ohio, and so you know that was a key focus of those just foundationally on the journey, but those discovery sessions as well.

Kevin Minor: 9:52

And Andrew, what was your role during these events?

Andrew Cochran: 9:56

So that was, Kelly and her team were still primarily leading it at that time. In at that time I was helping out more on the policy side, you know, putting forward some different proposals, helping to kind of foster some of the

conversations around budgeting and just kind of that enterprise strategy. So a little bit bigger picture for me and, you know, really kind of coming in on the tail end as we started to get more into the evaluation is where I started to kind of have more of a daily tactical type of role in the project.

Andrew Cochran: 10:25

So, a lot of the Kaizians. I was there and I was certainly kind of listening into the conversations, but that was a lot of that. Credit goes to Kelly and the team. That was work that predated me for the most part.

Amanda Valdivieso: 10:37

But given your background in technology, I can see you being on that practical end. It was very beneficial.

Kevin Minor: 10:42

Yeah.

Andrew Cochran: 10:43

Yeah, and we had a lot of conversations even early on with other states, and so we talked with Virginia I think it was about 2014, 2015. We had our first conversation with Bob Sievert, who obviously now is the CIO for NASPO, and so I can remember sitting there with Kelly and our director's office and some of our leadership and having that initial conversation about what is e-procurement, and that's been a key part, I think, as well as just continuing to kind of benchmark and, you know, look at other states and how other states have done it and learning what were some of the trials and tribulations that they went through. That all was really important process and part of you know what's led us to where we are today.

Kevin Minor: 11:28

Yeah, absolutely Kelly. You mentioned that it was an agency-driven solution. What exactly does that mean?

Kelly Sanders: 11:36

So when I say agency-driven again foundational to have agencies really driving the change right alongside with me and the remaining central procurement team From, again, those Kaizen events, those discovery sessions we then carried those folks over into development of the RFP. And so, you know, really wanted that those agency ambassadors, as we call them to be, you know critical aspects of where we were going throughout the entire journey. We then transitioned, you know, once we did actually develop the RFP. They were key and integral in those discussions, making sure that we had the requirements right. You know we started with that but really collaborated on those requirements to make sure, again, it was going to meet not only central procurement but the agency's needs. And then they flowed through to the evaluation.

Kelly Sanders: 12:30

Once we did release the RFP. They stayed with us through the evaluation and ultimately the decision on the solution that we went with. And then for even the next step, at the design table, we had agency representatives at the design table. We had agency representatives at the design table along with us so that again, we continue to consistently basically have the perspective from the agencies as well as central procurement. Excellent.

Amanda Valdivieso: 12:56

So let's dive in a little bit on the early stages, where you brought them into the conversation. Why did you choose to invest so early into cultivating the relationships with the agencies?

Kelly Sanders: 13:05

Because it was so for one.

Kelly Sanders: 13:07

I was from an agency, so I brought my agency perspective to the language and that was that was key for me Even when I had the opportunity to join central procurement. It was I felt like it was a benefit for me to be able to bring my agency perspective to the team to share again, because you just, you don't know what you don't know, and so, you know, really just sharing that information was so important and you know, it was really, you know, collaboration and support and really needing them to have ownership. That was a key element of it. It wasn't, it wasn't DAS or the central procurement team saying, yeah, we're going to create this over here in a dark room and then thou shalt use it. That, no, no, no, no, no.

Kelly Sanders: 13:56

This needed to be agency owned and driven, because I really need their support, because are there going to be bumps in the road? Heck, yes, this journey has had some potholes. We've had potholes along the way, but we collectively have worked together to work through those potholes and understand, okay, what's the best way to navigate those on the journey as we moved forward. And so, you know, really making sure that they have that ownership to help us then carry that adoption message, because it's one thing to get to that point of saying, okay, we're going to invest in a solution, but making sure that that solution is going to be used by the agency. So I needed those agencies as we, you know, move through the implementation phase going to run into snags hey, we didn't think of that. But really, again, tapping into them as a collective resource to say, okay, one thing you said at a design table, now you're functionally using it, let's work through how could we potentially enhance this or what can we do to change our business process to support the solution. So just very, very critical.

Kevin Minor: 15:11

Kelly, what's a? What was you? You said there's a lot of potholes on the way and I'm sure that learning experiences, things that didn't go right, things you had to switch Is there one specific one that stands out to you, one good learning experience you can share?

Kelly Sanders: 15:27

I'll tap into Andrew with me on this one because again, you know, I think you know, during the development phase of the RFP and the evaluation, you know had some good opportunities to just really talk through okay, what do we really like, what do we not like, and you know, kind of those opportunities to work through some differences of opinion, not really a pot hole, but really just coming to say here's my perspective, here's yours, what's the best way?

Kelly Sanders: 15:54

But I think Andrew might be able to tap into some good ones, just from kind of the implementation phase as well.

Andrew Cochran: 16:01

Yeah, I think one thing that has been really important just to kind of go back on the agency-driven solution thing for a second I think a really important attribute has been we've been able to find ambassadors that they're not afraid to tell us their opinions. They've been great partners to work with. They're very collaborative, but they're also honest. They're not gonna just kind of roll over. But they're also not gonna just kind of roll over but they're also not going to just kind of throw their hands up and walk away and say, you know, forget it, we're not working with you, right? So I think those have been some really important qualities and those have been. You know, some of our biggest challenges really have have been, kind of, as we get into it, you can design this stuff all day, looking at a screen, kind of talking in a group in a design session. You know, just's just when you, when the rubber starts to meet the road and people actually start using the system, uh, our users just don't always use the system that we thought they would. Uh, they, they're searching for things slightly differently, they're thinking about things slightly differently than we anticipated. Um, they're, they're coming up with new ways to do things and, you know it continues to amaze me what they'll come up with and what they try to put in the system, and it's that's been a challenge for us. Yeah, it continues to kind of be something where having a configurable solution helps us kind of be able to adjust and respond to those needs. But that has been sort of one of the biggest challenges is again trying to move away from just in theory it sounds great. In practice, though, this is how people are actually sort of playing it out and actually using it. That's been really important, and these systems today are so complex, they're so

sophisticated and a lot, I mean, they're so capable of doing whatever you want them to do. Your imagination is kind of the limit, but you really have to kind of be able to partner with those agencies and, you know, take things one thing at a time, too, I think, is another really big thing. You know we've gotten to points at times where I felt like we were trying to boil the ocean and you just have to kind of get back to basics. You have to kind of say, okay, one thing at a time here, let's chunk it up, let's take one workflow or let's take one part of a workflow, because at.

Andrew Cochran: 18:01

I think we started to kind of get overwhelmed with so much going on, so many workflows, so many design decisions, so many requirements, and it really got to be, you know, at times almost felt overwhelming, and so we really had to kind of try to dial that back and compartmentalize it and say you know what? It's one thing, these tools, you know, we can get to a place where they're using all of the functionality somewhere down the road. It's going to be a growing process, it's going to be sort of a journey to get there, but we've got to kind of we had to kind of keep reeling ourselves back to say it's important we just get them in the system. You know, even if they're not doing electronic signatures on contracts and offering contracts in the system right now and using all of the bells and whistles, at least they're using the system.

Andrew Cochran: 18:45

And I think that has been something that we're continuing to really try to strive for is don't worry about all the bells and whistles right now, just focus on getting started. How can we get your foot in the door? How can we get you going? And the system, we hope and we think that it's going to start to sell itself. We just got to get people in the door and kind of whet their appetite but that's been another challenge along the way is trying to. You know, Kelly and I, and really I think a lot of our project team, want to just kind of push the entire solution. And you know, hey, look at all these cool things that this system can do and it's so great and it's really exciting and all that. And, just like I said, one thing at a time make sure that we're not getting too far ahead of ourselves, because that can be a trap that's easy to follow. Right.

Kelly Sanders: 19:26

Yeah, and Kevin, I could say, just as I reflect back on kind of the journey and the potholes, I think one that was kind of a that stands out in my mind from a frustration perspective was so we do have this e-procurement solution that is basically integrating with our ERP, our existing ERP, which is PeopleSoft. And so you know, I remember at points when we were doing kind of the procure to pay you've got that integration.

Kelly Sanders: 19:54

So you're working over here in the procurement solution. We need those to successfully integrate back into the ERP and we're having some integration issues, and so the frustration factor everybody's like okay, you want me to use this, but I got to make these purchases. I don't know when it's going to bomb out, why it's bombing out, it's taking time to figure it out, and so that again is collectively, even within the project team. These are our ambassadors that have, you know, been with us in the trenches the whole way. But y'all the frustrations levels are running high and, you know, one of the key things that we, that we always had kind of as our ground rules too, was to give grace. Okay, everybody we're going to, we're going to be at each other, we're going to hit some of those bumps, but we got to just step back, take a breath and give everybody grace, because we're going to have some tough times and we just collectively need to come back together to get through them.

Kevin Minor: 20:43

Yeah, I was going to ask how you guys combat some of those frustrations. What it sounds like just understanding and patience.

Kelly Sanders: 20:51

And communicating. Communication is another key element is really making sure when we know something's happening, even if we don't have an answer, trying to get the message out hey, we are dealing with this, we'll keep

you posted. We have an agency lead within all of our early adopter agencies that we communicate with so that they're in the know, can keep their users in the know. Posting messages within the solution on kind of the landing page is important, but really just that communication element is critical as well.

Andrew Cochran: 21:20

And if I can build on that. I think you know it sounds intuitive but to say communication is really important, but I also think making sure that those communications are clear and are accurate. It's very easy to kind of fall into a trap sometimes where somebody says something and you know, hey, these suppliers aren't in the system. And you know, let's take a minute, let's talk through that a little bit more. You know we've found cases where, well, the suppliers actually are in the system and so I think it's really important to to just be able to kind of not take things at face value. You know, take the time, look things up. You know, do your homework, dig into those things, so that you don't start to have either you know, myths or legends or whatever you know, kind of starting to persist about what the system can or can't do.

Andrew Cochran: 22:03

I can't tell you how many times you know, we've we've kind of an agency maybe has come forward with a concern and said, well, you know, this is, this is our concern and the system can't do it. Or you know there's a limitation here and when you actually sit down and start talking with them and just kind of coax those, those concerns out of those, those business processes out of them. You know, not to say that we're going to hit a home run every time, but a lot of times what you, what you do end up finding is taking that time to just talk through things collaboratively. And that goes back to again having good agency partners that are willing to do it but being able to talk through those things. A lot of times you can actually kind of meet in the middle.

Andrew Cochran: 22:36

But I think it's, you know, it's so easy and it's so. I've seen it with other enterprise projects where you start to get off kind of on a rabbit pole, you know, down a rabbit hole and you're kind of chasing your tail for things that aren't really true or only half true. So I think it sounds intuitive, but I really do encourage people to take the time, do that homework. It takes longer, you know. It takes longer sometimes to go and actually look up the SQL logic or to go, you know, pull a list of suppliers and kind of really filter through that. But it's truly been invaluable because it really kind of helps to keep everybody grounded and it helps prevent people from kind of getting misinterpretations about what the system can or can't do.

Amanda Valdivieso: 23:15

So we've been talking a little bit about challenges, and one of the challenges I wanted to ask you guys about was regarding working with the state agency representatives and throughout the process. You've worked with them, not only in the Kaizen event, but also during the RFP process implementation and, obviously during the sessions, the ideas of group decision issues such as groupthink or conflicts between agencies. How did you work to make sure those issues didn't overrule the conversations?

Kelly Sanders: 23:48

So I think we can, Andrew and I can tag team on this one. But I can say, you know, when we looked for those agency ambassadors, I wanted people that were going to challenge us and would and historically that I've worked with when I was in the agency and when I came to central procurement weren't afraid to share, as Andrew said, their vocal. They're going to speak for their perspective and so um was very thrilled to have folks like that, um, which again you can, you know, again share perspectives and you know I don't think that I ever saw. You know, I think there's a point to get to consensus. So similar to what we do in a procurement, you know, in, in, in procurement is getting to consensus. So you know there's there's not a, it's not one's right, one's wrong, it's okay, let's all share perspectives and then come out with that consensus and kind of the agreement between the team on the path forward and I don't know.

Andrew Cochran: 24:47

Andrew, if you wanted to add anything from even just kind of design sessions. I think one of the things that really stands out in my mind is going through design sessions is you do reach those points where every agency is unique. Is you do reach those points where every agency is unique? You know they all have their own core missions and you know they all have a slightly different way of looking at things and thinking about things. And it is a challenge to kind of be able to balance that and say we understand the need for that agency uniqueness, if I can kind of, you know, coin that term, I guess.

Andrew Cochran: 25:11

But there's also that need to kind of balance it from an enterprise perspective. Right, we can't support a system that has 100 different ways of doing a requisition. It's just not scalable. And so we had a lot of those conversations in the design session where we had agencies around the room saying, well, I do it this way, well, I do it this other way, and tough conversations, but good ones, and ultimately, you know it's more of sort of an art form than a science, probably to find that balance.

Andrew Cochran: 25:38

You know how do you strike that balance between, okay, I get all, you're not all exactly the same, but you're also not all that entirely different either. Right, there is a little bit of overlap there in what you do, and trying to kind of strike that balance to say we can give you some flexibility but still provide something that's able, you know that our team's able to support and is scalable and you know our team doesn't have to learn a hundred different ways that an agency might do a requisition, has been really, I think, a huge, a huge, a huge thing for us to figure out and kind of strike that balance, because it's and it's not just requisition workflows, focus for all of the different workflows and just being able to kind of have that back and forth and talk through that with the agencies was really helpful. And we had to balance to our central procurement office, so you almost had sort of the central procurement office and the agencies. They start to kind of do some of the same things.

Andrew Cochran: 26:31

When you talk about sourcing and contracting, like Kelly mentioned, our agencies do a lot of procurement still on their own and so having to kind of strike that balance as well between our central procurement office that's been doing this for a long time and tends to, you know, have what does have the policy authority and having to kind of listen to the agencies was interesting as well. But again, just you know, having that open conversation and ultimately everybody committed to the same goal, I think was really what allowed us to get to where we are.

Kevin Minor: 26:59

Yeah, what's the saying? You're unique just like everyone else. Yeah, right, no, but that's. I mean that's really interesting and breaking down those initial barriers. You said it's hard but seemed to be really helpful. I mean because you guys are very successful now coming off. This is five years, this journey.

Kelly Sanders: 27:21

Yep, and we're still on it, still got a ways to go.

Kevin Minor: 27:24

Still on it, potholes and all. So, in place of the traditional RFI, you guys hosted a competitive dialogue event. What exactly did that entail and what were the results?

Kelly Sanders: 27:39

Sure. So what we did with the competitive dialogue event it was an opportunity for us again on this journey of Kaizen to discovery sessions. This was that next kind of leg in the tour, so to speak, of before you know, finalizing an RFP was really to tap into the supplier community and so, you know, many times you'll hear people do that RFI or request for information, where you're putting out a questionnaire, getting that information back. What we did was

an in-person event and it was an opportunity for us to share with the supplier community and for this specific event we ended up having about 30 different entities. So we had system integrators, we had just supplier community, some of the suppliers just you know, that would actually be selling to the state. We had representatives from actual e-procurement platforms and other, you know, just different actual procurement solutions that attended the event. So it was this great cross-section of us having the opportunity to say this is what we've been working on, this is the vision the state of Ohio has here's some of the problems we've had, this is the vision that we have for procurement in Ohio and really be able to share what we were looking to accomplish by going out to RFP and tapping into all of this experience sitting in the room to share and we actually we had some kind of leading questions.

Kelly Sanders: 29:09

You know, after we did our piece of introducing, you know what we were working on and what we were hoping to accomplish of introducing. You know what we were working on and what we were hoping to accomplish. It was okay. What lessons have you guys learned in responding both to responding to RFP? So how can we make the RFP a good solicitation? What have you learned from implementation?

Kelly Sanders: 29:28

And really just trying to tap into this experience, that was sitting in the room and I think you know I always chuckle because I was like okay, so we have like an hour set aside for this event. I've got all these people there's probably probably close to 50 people in the room. You know we I'm up in the front do the presentation of this is what the state's, you know, been working on this, where we want to go. And then, you know, at the point where I'm hoping to have this like engaging conversation, I throw out that leading question and I'm holding my breath like, and I'm like, ok, crickets, it was probably the longest 30 seconds of my entire life, but literally the you know, one of one of the representatives started the conversation and we had this awesome conversation because, again, competitors sitting in the room, you know and you know will they actually share and it was a great exchange that not only gave us, you know, ideas about how we what we need to incorporate in the RFP before we released it to try and ensure that that we had the best document that we could, but also things to keep in mind, as you know, after the contract was awarded from an implementation perspective.

Kelly Sanders: 30:38

So it was a great opportunity to again, in a, you know, open forum, to invite all of this feedback, collaboration and just sharing of information towards the common goal of Ohio being successful in implementing a new procurementprocurement solution to transform and modernize procurement. So great opportunity, great event.

Amanda Valdivieso: 31:00

So let's talk a little bit about when you went through the process of acquiring that e-procurement system and you went through that early adoption stage. So you had mentioned before working with organizational change management agents or OCM agents. Can you provide us with some insight into what their roles were in the acquisition process?

Kelly Sanders: 31:21

Sure. So one thing that I'm so like proud of with this journey and the approach that we took was the investment that we made in organizational change management. I myself and it was from my own experience of when I was working in corrections and implementing PeopleSoft over a decade ago being that agency representative and making sure that my very large decentralized procurement agency was ready to for this going from a mainframe to you know, the PeopleSoft solution and standing there looking behind me like who's behind me helping me out, and so you know I would go to these change you know workshops and things like that and then have to carry that back to to the agency that support the agency. So as we went into this, we made an investment. So we actually had a practitioner that joined us and was actually part of the demo. So we brought them on early on. So kind of in a limited capacity, one practitioner that was kind of the lead for us and so was part of that evaluation. And then as we transitioned into negotiations and then ultimately into signing the contract, and then what we did was so we had this lead OCM practitioner contract and then what we did was so we had this lead OCM practitioner and then we

added a core team to basically then be basically representatives boots on the ground for us within the agencies. And so we actually had this core team of OCM practitioners that were assigned an individual agency, actually prior pre-COVID, back in the early implementation up to March of last year. They were actually embedded in the agency, so they had a workstation within an agency and what they did was be able to be that pulse, keeping the pulse on what was happening in that agency.

Kelly Sanders: 33:10

So you know, many times you'll say, okay, if you run into a problem, submit a ticket. People, they grumble in the field. So there's many times you'll say, okay, if you run into a problem, submit a ticket, they grumble in the field. So there's all these rumblings and you know dissatisfaction with the solution or the way things are working, but nobody will tell us, like in the formal matter of us being able to capture it, work it, and you know and adapt training or the solution to support, you know, a better experience for everyone. And so our organizational change practitioners were basically out there keeping that pulse, so really getting in the trenches with the team, understanding the dynamics of that agency, what that agency is going through. You know we had the opportunity to transition administrations during this implementation.

Kelly Sanders: 33:55

Shortly after signing the contract and initially implementing some of the functionality, we went through an administration change which impacted the agencies. Too Many of them had new leadership within the agency. So really just trying to keep that pulse of what's happening and bring things back to our project team to say things that we would have never heard had we not had boots on the ground out there. Maybe things might come around eventually, but you know they'd be boiling and basically to the point of overflowing and erupting by the time we hear about it. So you know they've played that critical role in being out there, like helping the agency.

Kelly Sanders: 34:34

So we'd have some standard communications and messages that we wanted, but then helping to adapt how do you need to communicate that within your agency and divisions and districts and things like that, and so understanding and really supporting that agency to understand what their agency users need, how to be successful, and really just understand what's the readiness, what's that readiness path look like for them. And so really that kind of handholding of I am here to support you, I'll take things back to the project team, I'll help you coordinate comms and strategies to support your agency-specific users. So can't say enough of just what an awesome investment and and just they've they've been a great, great piece of our of our project team and really foundational to making sure that that not only the project team but, most importantly, the agency and our central procurement users were supported and heard so.

Kevin Minor: 35:31

so, after all is said and done, what would be your advice to some other States that are starting on their journey to getting into e-procurement?

Kelly Sanders: 35:41

I'll start. I would say understand that it is going to be a journey. You are going to have to just understand that you're going to run into things that you didn't plan for, but if you can really work closely collaboration communication that has been, you know, kind of the key elements as I reflect back on where we've been and where we continue to go Just understanding it's a journey work very closely with the stakeholders you know the agency collaboration we covered a lot of today. Supplier community is another key stakeholder in understanding because they're going to be using the solution just like your agency users. And so just collaboration and understanding what those needs are and making sure that you and the team are prepared to and understand you're going to need to adapt Pivot you know our main word that we've heard so much over the last year but really just understanding that you're going to need to really keep a pulse of what your users are, to make sure that you can develop and provide a great user experience, because that's going to impact your adoption.

Andrew Cochran: 36:55

The one thing I would add, I think, is think is understand the system's not going to be perfect, not when you start out of the gate and maybe not for some period of time after that either and we're still working on a lot of things here as well. And, I think, kind of going along with that, be careful about how you define success right. It's easy to kind of say, well, we're going to solve world hunger here, we're going to boil the ocean, we're going to fix all these problems or address all of these opportunities at once, and I think that's an easy trap to fall into. So kind of scope it you control your destiny to some extent there. Like I said, if you can kind of define success first as just getting people into the system and getting them to do a part of the process again, don't use all the bells and whistles. Can you just get a basic record in the system, get a transaction through, then, you know, start to kind of build on that over time, like the system's going to sell itself, you know, as folks get more familiar with it and they start to recognize, okay, that's what that's meant to do, that would be really great. So I think, just you know, having that understanding going in and not trying to to, to override or try to strive for for getting everything right the first time, it's okay to kind of go at it in iterations and say you know what, we're going to kind of do a basic transaction first, we're going to kind of just hit the high points and then we're going to come back and we'll start to build out these other things later.

Andrew Cochran: 38:19

Um has been, has been, really important Um, and I think the last thing that I would just kind of you know say, going in line with that is when we talked about it doesn't have to be perfect.

Andrew Cochran: 38:35

I think one of the reasons that we've been able to kind of get to that point is we've had incredible executive support throughout this, this journey Um.

Andrew Cochran: 38:39

You know, not only obviously from from Kelly um and and her position, but the director's office, the, the administration as a whole throughout it has always been very supportive of the concept Um, and you know that's been really important for us as well, because when, when you do get the agencies that have an issue, they talk with their peers as well, and to have a director and leadership that's primed and aware of what we're working on and why we're doing it has been very helpful and kind of helping to just sort of tone down some of the issues that are gonna inevitably pop up, and so I would say those are really kind of the two takeaways that I would kind of offer for other states that are getting into this journey is just, you know, make sure that, understand it's going to be a journey. You're not going to get it all right the first time, that's okay, you know. Just be continuing to work at it and continue to collaborate with with your partners.

Kevin Minor: 39:29

Well, we thank you very much for stopping on your journey to speak with us and hopefully we can check in with you maybe in 2022 and see where you guys are on your journey. Kelly Sanders is the Chief Procurement Officer for the great state of Ohio and Andrew Cochran is the State E-Procurement Manager for the great state of Ohio. Guys, thank you so much for joining us today on the Pulse.

Amanda Valdivieso: 39:52

Yes, thank you.

Kelly Sanders: 39:54

Thanks for inviting us and OH.

Amanda Valdivieso: 39:57

I-O Woo, so much for joining us today on the pulse, yes, thank you. Thanks for inviting us, and OH, and as they say, the wheel in the sky keeps on turning.

Kevin Minor: 40:01
Uh journey reference.

Amanda Valdivieso: 40:03
Of course it is. What else?

Kelly Sanders: 40:04
would it be?

Amanda Valdivieso: 40:05
But personally I thought it was interesting to listen to Andrew talk about the design sessions and how to balance every agency being unique with an enterprise perspective.

Kevin Minor: 40:14
Yeah, you know, but like they were saying, once they got the ball rolling and broke that silence, they really found common ground pretty quick and it seems to be working well for them.

Amanda Valdivieso: 40:24
Agreed. There's a really great example of just collaboration amongst all the agencies.

Kevin Minor: 40:29
Yeah, I really hope that it sparks some good ideas for our other listeners. Now, before we sign off, we have some very exciting but sad news. Amanda, this is your last episode of the Pulse. Amanda is pursuing a new career opportunity and we are so excited for you, but we are also sad to see you go.

Amanda Valdivieso: 40:53
Yes, thank you, Kevin, and I am also sad to be leaving all of you, not only just the you know procurement you team, the R&I team and the rest of NASPO, but also the members. But I am very excited about this new opportunity and I'm really grateful for all the you know knowledge and skills that I have been able to learn from everyone at NASPO and looking forward to where they take me on this next journey in my own life.

Kevin Minor: 41:18
Right, but mostly working with me, right, yeah, of course, of course, Kevin, working with you 100%. Duh Amanda, what was your favorite Pulse podcast interview?

Amanda Valdivieso: 41:29
Yeah, I think my favorite interview actually was with Rachel from Minnesota, just because of her enthusiasm for procurement. Good choice. Yeah, it's so refreshing to see someone so invested and so enthusiastic about the state of procurement, the future of procurement and where it's headed, and the project that they were working on and what she brought to the table was fantastic, so I'm really looking forward to seeing more from her in the procurement world in the future.

Kevin Minor: 41:54
Excellent, yeah, girl power.

Amanda Valdivieso: 41:56
That's right. Spice girls all the way.

Kevin Minor: 41:58
Do you want to take us out one last time?

Amanda Valdivieso: 42:00

Yes, so thank you for listening to this episode of the NASPO Pulse podcast. If you haven't already, make sure you subscribe to us on Apple Podcasts, Spotify, Google or wherever you get your podcast listening pleasures or wherever you get your podcast listening pleasures. Also, make sure to check out the NASPO blog at pulsenaspo.org and catch up on some procurement articles written by your very own NASPO staff. And once again, it was a pleasure to speak to all of you about procurement on this podcast and I look forward to talking with some of you and more of you in the future. Good journey.