

Julia McIlroy: 0:04

Hi everyone and welcome to NASPO's Pulse, the podcast that focuses on current topics in public procurement. I'm your host, Julia McIlroy. Today's guest is Amanda Otis. Amanda is the Chief Procurement Officer for the great state of Oklahoma. We'll be discussing how she organized and streamlined the procurement office. Hi Amanda, welcome to Pulse.

Amanda Otis: 0:26

Hello there. Thanks for having me.

Julia McIlroy: 0:28

I'm so glad you're here. So to start, I'd love to hear about your professional background and what led you to public procurement.

Amanda Otis: 0:36

Absolutely. So I am an attorney by trade. So uh started in the private sector for about a year and then found myself in the attorney general's office where I kind of got up to speed with state agency law and uh tried my best to become an expert. Um, procurement was kind of always around, but certainly was not my focus until um I came to our central services agency. And so I've been in a few different divisions, but landed uh as the general counsel to our central purchasing director or pre my predecessor. Um and then when he resigned, I was offered the interim position and then found myself here permanently. So I've been here ever since. It's been wonderful.

Julia McIlroy: 1:11

And how long has that been?

Amanda Otis: 1:13

So I've been in my position about two and a half years now.

Julia McIlroy: 1:16

Great. And so since your background was not public procurement, what was your biggest surprise about learning about procurement?

Amanda Otis: 1:24

Man, probably just how little I knew, honestly. Like I was very good at the negotiating contracts and like I knew that side of it. And so I really thought I knew more than I did, right? I knew nothing about sourcing and bids and what was confidential and who could talk to

who. And so um, it's just this whole other world that I really had to kind of become a student of.

Julia McIlroy: 1:44

So imagine you walk into an organization that has very little written down, such as policies, procedures, organizational manual, you know, the important stuff. So what's the first thing you do to get things on track?

Amanda Otis: 1:57

So this is exactly how I felt getting into my role. And I used to say I felt like I was in the jungle. Like I didn't know if it was day or night and it was hot and there was bugs. Um, and so really I I didn't know where to start. So I started asking questions because I'm a firm believer that you can't uh solve a problem that you don't really understand. Um, and so I started trying to learn some of the teammates. You know, I was fortunate to be their attorney before, so I'd kind of been a peer to some of them. And so um had some people I knew could ask questions too. Um, and I tried to track down my subject matter experts so I could really kind of lean heavily on them to ask questions and you know, what all of our workflows are, our processes, and kind of lean into um not only those subject matter experts, but focusing on the subject matter experts with great attitudes, you know, that are willing to change and that are excited about uh doing things differently and better. Um, and then I found myself at some points where, you know, there was no one that was a subject matter expert. And so I myself kind of had to become a student of it and start asking questions outside of our agency and doing my own research and kind of uh becoming a student of procurement myself.

Julia McIlroy: 3:01

Well, it sounds great that you didn't walk in with a bunch of assumptions, but instead said, who can help me? Who's the subject matter expert? And if there isn't one, as you found in some cases that you became that person. That's great.

Amanda Otis: 3:15

Yeah, absolutely. Yeah, it was quite an experience, but I've learned so much in so many different ways in my last two and a half years here.

Julia McIlroy: 3:22

I bet. I love the analogy about walking into a jungle. I always you see a movie where there's a jungle setting and I think it's so lovely and beautiful and lush. And then I think about the bugs.

Amanda Otis: 3:33

Yes, exactly.

Julia McIlroy: 3:34

Nope.

Amanda Otis: 3:35

Yeah, exactly. That is many days there were more bugs than others, so it's quite a time.

Julia McIlroy: 3:41

I bet. So when resources are tight, what's a smart way to structure a procurement office and define roles so the work gets done efficiently?

Amanda Otis: 3:50

So I think again, going back to, you know, you have to understand the problem. And so for us, it was um, you know, the first thing I asked for was an org chart to try and figure out who's who, who's on what team. We did not have that. So we had to create that. Um, and then it was also learning and documenting, you know, the input, the process, and the output of each of those teams to try and understand the structure and is that the right way to do it. Um, and so once I kind of knew how things were currently working, um, I kind of leaned on, you know, my legal compliance background and and read the law. Like, what do we actually have to do? Start from scratch. Let's start from the basics and then kind of build up from there. And so I can kind of identify like this is the group of things we do because we have to do it, you know, here's the group of things we do because someone 10 years ago thought it would be a good idea. Um, and so I think, you know, once I was to identify, you know, each of those kind of piles of work, I was asking myself, why are we doing this? You know, what value are we bringing? You know, is there a huge risk? Is there a little risk? You know, is there a better way uh to do this? Um and so once I kind of, you know, broke us down to the bare minimum, I was I used the current people we had and we did reorg. And so kind of into um, I I think I'm a pretty good, you know, I'm good at puzzles, I'm a good problem solver. And so once I understood things, I felt like I had a great idea. And I was very fortunate that we had EY come in actually and do like a full assessment of us and kind of give us some recommendations and best practices. And so at that point, we shifted into a category management model. Um, and so I think sometimes, you know, to find efficiencies, one, you have to understand it, and two, you have to not be afraid to make changes and take a little bit of risk. Um, and so I said this a lot when we first started, and I think it's true in a lot of state agencies, but you can't be too busy failing to improve. And so we had a couple teams that were kind of like that when I came in, where they were the transaction

numbers were so high and they were great at what they were doing, but they were so busy doing it that they never stopped to ask why and is there a better way to do it? And so I think um a lot of the time the key to finding efficiencies and really being successful is setting aside time to dream about how to do it better. You know, you have to give yourself even 30 minutes a day just to sit down, you know, use your brain and try to problem solve a little bit.

Julia McIlroy: 6:14

It sounds like a great idea to look at the overall structure and say, what are we required to do? The law says this, the policy says this, and what are we doing because literally we've done it that way since the beginning of time. Yes.

Amanda Otis: 6:28

Absolutely. Yeah, we found out. So we um had transitioned to using an e-procurement requisition within our ERP, and they had customized it to put a signature block on the digital documents, and so they were sending it through DocuSign. And so we kind of had to unwind that. And it turns out it was just because that's how it was when it was written down, you know? And so even as simple as that, um, there was a lot to kind of unwind there.

Julia McIlroy: 6:51

And do you currently use an e-procurement system?

Amanda Otis: 6:54

So we use PeopleSoft is our ERP, and that's what we use for e-procurement as well. And we use their sourcing system for our solicitations also.

Julia McIlroy: 7:02

So, what are some simple tools or tech solutions that can help streamline processes from day one?

Amanda Otis: 7:09

So I always say that me and my friend Chat GPT are unstoppable. So uh in all seriousness, so I do think that free um AI tools can really be beneficial, obviously with human check on the back end. Um, what I found it incredibly beneficial for was kind of feed information saying, hey, analyze this 500-page document and give me an executive summary or asking a direct question. And so I found that to be an incredibly effective way to digest huge amounts of information. Um, and then also previously I, you know, I guess my volume of work was just had never before been what it is today. Um, and so I had to find a way to

completely reorganize. I used to, you know, use my inbox and my email as a to-do list and um maybe I use an Excel document to track larger term projects, but I the volume was too high. And so I actually started using OneNote, which is just a Microsoft product. I had never been exposed to it. And it was such a great way for me to kind of clear my mind and keep up with tasks and feel like even if I wasn't touching something, but once every three months I could really quickly catch up and uh be on the same page. And so I would say those were two of my three easy tools that really, really helped me uh get to where we're at now.

Julia McIlroy: 8:17

That's great. So there was a time when you were the new kid on the block. So for other procurement leaders who are also relatively new in their positions, how can they earn the trust of internal stakeholders and suppliers when they're implementing a new system or a new way of doing things?

Amanda Otis: 8:36

So I have found I have a customer service background. So it did help me a little bit, you know. Uh so I think the first thing is to be responsive. So even when you don't know, respond, assure them that you're gonna find it out. Um, and then, you know, also be reliable. So actually follow up with them and do what you say you're going to do. Um, and so I think people, the more open communication you have, the more they will trust you. And even if you don't know, they know you're gonna go figure it out. Um, I also found that we were kind of some people described it as an ivory tower. Some people, you know, we were very closed off from our agencies. And so um, I think the more we opened up and we have these sessions called CP Listons, Central Purchasing Listens. And so it's just a Teams meeting. We invite all of our agency procurement officers to come in and ask questions. And we intended to only do it for a couple months. And we've it's been, I think, two years now, and it's we do it every month, and it's been wonderful. Um, and so I think really, you know, we had to kind of make ourselves vulnerable. And there was a lot that was wrong, right? There was a lot that people weren't happy with. And so I think active listening with those complaints and saying, I hear you and I know it's bad and I'm aware of that, and here's what we're doing to fix it, you know, and then also not just saying you're gonna fix it, but actually go go work on it, you know, tell people your plan. Um, and I was very optimistic when I came in. I was like, man, if I just work this hard for six months, it's gonna be a well-oiled machine. And then the more you learn how things actually work, you know, we're it's uh it's more about the journey, right? And not the destination. So we're slowly climbing the mountain, um, but not sure if we'll ever quite reach the peak. I guess that's kind of state government. Um another thing I faced a lot of uh was people doubting, you know, I didn't know as much as they did. It's a fact. And so I would want to try something and they would

assure me, oh, we tried this 10 years ago, or oh, this has never worked. We used to try it. They won't want to do it. And so I um I do want buy-in from my team, but if we can't get there, I would just assure them, like, hey, I I hear that you think this isn't gonna work. We are going to try it, we're gonna implement it. And if it doesn't work in six months, we will revisit this. And if it's broken, we'll change it. And so kind of just letting them know like my ego is not gonna get in the way of us succeeding. So if I say, hey, let's try this and it's terrible, like we're gonna change it again and we can have another conversation about how to fix it better.

Julia McIlroy: 10:55

Yeah, I'm sure it's challenging for folks like yourself that have a legal background and come into procurement, and you're working with people that have been buyers for 20 years and have seen it all and done it all, and you know, earning their trust and saying, Yeah, I don't have a procurement background, but I get it. I'm uh I'm learning. Yes. And let's try some new things.

Amanda Otis: 11:17

Yeah, and I do think I really think it helped that I knew the statutes because I could quickly think like, well, you know, Central Pursuing Act says we can't do this. And I'm like, actually, what it says is, and so try and like say, like, hey, I'm listening to you, I trust you, but you know, here's the actual facts, here's the guidelines that we can play within. And so I think it definitely helped uh get some trust from them.

Julia McIlroy: 11:39

Absolutely. That it's always fun when you get to start with actually dot, dot, dot. Here's the statute, and this is what it says. So that's great.

Amanda Otis: 11:47

Exactly.

Julia McIlroy: 11:48

So, what quick wins or metrics should a procurement office focus on to prove its value and gain support from leadership?

Amanda Otis: 11:56

So I think a good thing for us to focus on was fighting the myth that we were the holdup, right? A big problem in everyone's procurement is that it's never fast enough for anybody, right? I mean, this isn't the real world where we just go on Amazon or go to Target and buy

whatever you want and it's at your house tomorrow. You know, we have rules, and so that takes time, right? Compliance and oversight takes time. Um, but so, you know, if when you look at the whole picture, maybe a solicitation took six months, but what you shine a light on is well, it was with the agency for a month here, you know, we had it, it was with us for five days, then it was back with the agency. And so we kind of made like swim uh swim lane graphs to kind of show the the real story, right? The full picture of that full six months and and who was responsible for which holdup. Um and I think one thing we communicated to our teams through that was like, hey, we can't promise the legislature, we can't promise our director that it's gonna be three months for every solicitation. But what we can promise is that it'll never be in our hands longer than three business days. So every time we get it, we're gonna bounce it back within three business days. And then we can hold ourselves accountable to where we were never more than 26 days of the whole process or whatever it ends up being, you know? And so I think um kind of educating them, uh, not too much, right? Because you can get really in the weeds with procurement. So I don't think they want to know too much, but just kind of the basis of like there's a lot of people involved, there's a lot of back and forth. And so I think really just uh kind of opening up any visibility you can into what that workflow and turnaround time looks like uh to try and assure, you know, leadership in the legislature that you're aware that people think it's too slow. Here's what you're doing to improve it.

Julia McIlroy: 13:33

Well, there's a reason why in the Dilbert cartoons, the procurement officer was a dinosaur, Bob the dinosaur. I always I always loved that. That's right, right? But I love the fact that you've shined a light on this is actually the entire process. This is when central procurement have has it, this is when it's out in an agency, and no one wants to hold anything randomly for 30 days, right? We want to get stuff done as well.

Amanda Otis: 14:05

Right. Absolutely, yeah. And so once we started tracking our work, because we didn't even have like, hey, do you have a spreadsheet of all the solicitations we were running? We did not. So I think even for our people to have, you know, give them tools they need to track their work and then set expectations for them so they know, you know, where where the goal line is, right? How to be successful for themselves. So that was very helpful for us.

Julia McIlroy: 14:25

Oh, that's terrific, especially so you can see all projects side by side.

Amanda Otis: 14:28

Absolutely.

Julia McIlroy: 14:29

And where where you're at on the different projects. That's great. Okay, so last question. Please tell me about your most memorable procurement.

Amanda Otis: 14:39

So um, I have a lot, and I was trying to pick out one that my lawyers wouldn't be mad at me for talking about. Um, I would say so our cloud migration RFP, um, it was incredibly complex. And so we have a physical data center that's owned by the state, and then we have a backup location in a different state, but very costly. And, you know, with the way technology evolves, it's changing every five years, very expensive to replace all that. So um our CIO wanted to move um everything we had to the cloud and kind of get rid of the physical space of the data center. And so, as you can imagine, that's a huge lift. Um, and so the way we did the solicitation, we had two categories. And so we did it for cloud providers and we did it for um service implementers. So kind of the people boots on the ground that were going to work hourly to actually, you know, shift and migrate the data. Um, on top of it being incredibly complex, our CIO wanted to wrap it up before legislative sessions started because you know, we wanted to avoid the circus that can potentially happen with a huge visibility RFP like that, um, along with all the new laws and the lobbyists and all the excitement. Um, so we were on a pretty short timeline. And so um we actually utilized some um, I think NASPO exposed me to the procurement innovation lab. I think it started at DHS, the federal level or something, but we kind of uh used some of those tools, so some consensus evaluations, um, some down select. And so we kind of had to get creative with how we could do that quickly. But um, I think it was like record speed and record quality, honestly, like all the people we had at the table, the conversations we had. It was just uh really cool to be a part of that and see it across the finish line.

Julia McIlroy: 16:17

Sounds like you had some outstanding collaboration on that project and how complex, right?

Amanda Otis: 16:22

Absolutely. Yeah, I've never seen 20 people work together so well.

Julia McIlroy: 16:26

That's great. So, Amanda, thanks again for joining me today. I appreciate it.

Amanda Otis: 16:31

Absolutely. Thank you so much for having me. It was a pleasure.

Julia McIlroy: 16:34

And to our friends in public procurement, remember we work in the sunshine. Bye for now.