

Julia McIlroy: 0:08

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 guests are Stacia Dawson and Michael Stroud from the state of Missouri. Michael is a research and data analyst, and Stacia is the assistant director in the Division of Purchasing. We'll be discussing their 2024 Cronin submission titled Operational Improvement Through Turnaround Time Management. Hi, Stacia and Michael. Welcome to Pulse. Hey, Julia. Thanks for having us today.

Michael Stroud: 0:41

Thanks so much for having us on.

Julia McIlroy: 0:43

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. Stacia, let's start with you.

Stacia Dawson: 0:52

Absolutely. So I've actually been with the division of purchasing here in the state of Missouri for 20 years now. And um as a like a lot of the procurement professionals in the state, procurement's one of those professions that actually found me. I didn't find it. Um started here in purchasing right as I graduated from college. So nothing too spectacular, but that's me.

Michael Stroud: 1:17

I've been with the state of Missouri Division of Purchasing for just about two years. And in the Division of Purchasing, I'm a research and data analyst. So my job is um to use data to analyze trends and create data visualizations that showcase um the division's improvement to legislator. Um I came to the division of purchasing from a process improvement background in a healthcare setting.

Julia McIlroy: 1:45

Thanks. So would you please give our listeners a summary of your Cronin submission?

Michael Stroud: 1:50

Absolutely. Our Cronin Award is really about using data to better serve our customer agencies. What we did is we managed our turnaround times by creating goals for several of our procurement types and for our phases for each procurement. Then we developed a color-coded system to identify where this project is relative to our goals. Um we used two

low-cost and low-code tools. Those tools are called Smartsheet and Tableau. Um and by using these tools, we could give data visualizations to all of the projects and have meaningfully, meaningful weekly review meetings. Um and then through these weekly review review meetings, we we had section managers and buyers really cooperate, and we saw immense operational improvement with a large reduction in our overdue bids, and also our turnaround times decreased, meaning that we meaningfully improved our speed. Um all of this added up and it created a massive culture shift. So it created because buyers could now see their turnaround times, it could create it created a competitive and a positive environment where staff owned the outcomes and it let uh managers see into the buyer's daily routine.

Julia McIlroy: 3:13

Great. And so what was the catalyst? I mean, I you mentioned that the data helped improve customer service, but was there any one sort of key moment where you decided to uh embark on this journey?

Stacia Dawson: 3:27

I think it's I think it's important um as we explain the catalyst to really go back and talk about where we were before we we implemented Smartsheet and Tableau. So before we went down this journey, we had large Excel files with rows and rows of data about our procurements. Um typically we run somewhere between 120 to 140 procurements at a time. And so by time you would go through and sort what is the status of this one, what's going on, you got tired. It may take a couple days to get to the end of all that data. Um, so we realized we didn't have a lot of visibility into where all of our projects were, what their turnaround times were. We were tracking some of the metrics, but we weren't doing anything meaningful with it. And so we really knew we couldn't go forward like this. And we knew what we wanted to do, but it internally we're just a bunch of procurement folks. So we lacked really those resources to be able to dig into that data and make something meaningful with it. So I really feel like the turning point for us is in fiscal year 24, we got an extra position in our budget, which was our data position, which this is where Michael enters the scene for us. And he really helped us put what our vision was into all of these tools and really give us a data mindset to procurement, which was always something that seemed really foreign. I know we've struggled with that. We would go to NASPO conferences and be like, what are you doing to track your metrics? And it seemed like we were all kind of in the same place. So for us, that was really the turning point is getting the data analysts to really take our vision to the next level and do the do the data things that we needed to do to put it all together.

Julia McIlroy: 5:26

That's great. So you introduced both Smartsheet and Tableau as low-cost, high-impact tools. What made these platforms the right fit? And how do you secure buy-in from the staff to use them?

Michael Stroud: 5:40

So Stacia just explained the need. We needed a way to manage all of these bids and all of these contracts. And it was just too much to use to manage using Excel. And so we needed some better tools. We used Smartsheet and Tableau because they were both the state standard and they're low, low cost and low-code solutions. I know there are other alternatives to these two particular tools. For example, if your if your state uses Power BI instead of Tableau, that works perfectly. But what we really liked about both of these tools is their in-house control. We didn't have to rely on IT or Oracle to make a simple change. And it allowed for such an adaptive style to change the way we were collecting and using this data when we needed to right away. And so these tools really fit a triangle of cheap, and then they were useful for our use case, and they're also very easy to build. So, for example, I met with Modot the other day, and it only took about three hours to get their Smartsheet up and running. So I'm gonna go in and explain what these two tools are. So, Smartsheet is is basically a data collection process. It is basically a spreadsheet that lives online. It's a superpower spreadsheet. And there's a lot of buy-in from the staff because because it is sheet-based, staff were already very comfortable with using this type of this type of program. Now, Tableau, we needed a way to visualize the data. So Smartsheet collected the data, and Tableau was a way to visualize the data or explain the data to make it useful. And so using Tableau, we we made dashboards that simplified all these pages of Excel into an at a glance at a at-a-glance dash.

Julia McIlroy: 7:33

And that's critical, isn't it? Easy to use, easy to explain, and then easy to look at and say, oh, I see that we're procuring this widget at this rate. And so maybe we could uh benefit from having a contract with that supplier. So that's great. I'm glad that you were able to introduce both of those. So culture change can be the hardest part of any reform. How did the slogan say no to Tableau Reds help foster a more positive and competitive environment in your office?

Stacia Dawson: 8:08

So ultimately, everyone in our office wants to serve our agency customers in the work that they do. I mean, our vision statement for our department is excellent customer service every time. So we we all want to do good. And so the establishment of these turnaround

time goals helped identify time frames to work towards to help achieve the goals for our agency customers. The buyers knew every week we would have our status meetings where we could go through our every procurement and understand what status it was in. So they knew Monday mornings, we sat down, we went through those, and nobody wanted a red, you know. So we would have staff that would um maybe their supervisor had their bid to review. And so it had taken a little bit for them to review, and they would kindly be like, hey, are you gonna get that review done soon? Because it's gonna turn red in three days, and I don't want it to turn red. So we really, through through establishing those red, yellow, green statuses, it really helped foster that positive and competitive environment. And in the end, we all like a little bit of competition, right? That's right, right. Little friendly competition never hurts.

Julia McIlroy: 9:26

Exactly.

Stacia Dawson: 9:27

And it's it's sort of it's fun too because we have three buying teams um IT, commodities, and service, and and none of the teams want to be the one with the one that's been the longest either at the top of the list. Like get it off of there.

Julia McIlroy: 9:43

That's great. So, what does a typical review session look like? And how do you ensure the data discussed actually drives decisions?

Stacia Dawson: 9:52

Yeah, you bet. So um, so there's two types of meetings that happen each week. Um, one of the meetings we have weekly that's with the director and the assistant director. And we use both Smartsheet and Tableau to do those reviews. Um, Tableau sorts all of the procurements in order from oldest to newest. Um, and then Smartsheet gives us the buyer's notes that they have in the exact same order as Tableau. And we go through those one by one, understanding what the status is on each procurement to try to understand if there's any bottlenecks that we can help break down. And we're looking for things like is has the agency's review taken a little bit longer? Are they not getting it back? Maybe they've had it for four weeks. Do we need to reach out to that agency to see if there's anything we can do to assist with getting that back? Um, is that maybe a manager's overwhelmed? Do we need to provide some assistance with them to help break through that? And typically Brent and I, we're both assistant directors here in purchasing. We take notes from that and then we reach back out to the section managers for each of those three buying teams I

discussed. And and they'll reach out to their team if there's something that what do we need to do here? What do we need to break through to try to get some momentum to move these through? And it's really impactful because then we know every status of every procurement, whether it's a whether it's a team I am the assistant director over or Brent is, we hear it both. So then it really helps us both know what's going on on each other's teams. We learn a lot of lessons again from what goes on. When we started these review meetings, they would take close to 90 minutes. And I think now we we kind of cruise through these. These take about 45 minutes because we've we've just seen so much process improvement from doing these meetings. And then in addition to the meetings we do as a director and assistant director, each of the buying teams does their own weekly tableau review meetings as well, where they meet. Um, some of them meet as a group together, some of them meet with just um the section manager and the two managers, and they go through every procurement as well, trying to get action to really drive progress, to really help. Sometimes it's helping new staff too, to make sure they're not stuck knowing not maybe they didn't know what the next step was or how to be proactive in the steps to really keep the procurement moving. So it really breaks down a lot of those barriers as well.

Julia McIlroy: 12:43

The results are impressive. A 62% reduction in overdue bids. What other service improvements or unexpected benefits have you seen since adopting the turnaround time management?

Stacia Dawson: 12:55

Yeah, Julia, I was I'm really excited about this question. Um, and to give our listeners a little bit of insight into we didn't just do turnaround time goals, but we we we didn't stop there, we kept going. And so some of the great things we've done with these tools is when it comes to tracking our bids, um, we developed what we call reason codes. And so, because in procurement, there are a lot of times we do things that are outside of our control, whether it's maybe a review by the federal government that has to take place on a procurement, um, a lot of times for a social services type procurement before it can be issued. Well, that review time is 30 days. Well, that's we don't have that baked into our turnaround time goals. So we developed what we call reason codes that buyers can code where there was a time frame that was beyond the time allowed on our turnaround time worksheets that they can track that data. And that's been really helpful information for us to track because it lets us know where where maybe an agency is taking longer to review a draft, maybe where we have some training issues that might expose something for us. Um, so, or where we even have evaluator reviews, like evaluators maybe weren't ready when they came into the process. So it elongated that process and the meetings spread out over

months instead of trying to compress that into one month. And so it's allowed us to track that to see if there's any trends happening there. Um, so we can better provide training or resources out to the agency when it comes to what do you need to be ready for when you submit a procurement to us. And then after you know, we made that enhancement to the bid work log, we worked and we implemented um using Smartsheet as well, a contract work log that has it houses all of our active contracts that we have. It also includes any that have expired off as well, so we keep that history of them. And then we also um implemented an amendment tracker so that houses all of the active amendments that we are currently working on to any contracts. And what's really cool is all of those three different smart sheets: the bid work log, the contract work log, and the amendment tracker, um, Michael has made them so they talk to each other. So um you can, it knows what the former bid number was to that contract. It knows the turnaround time for that. Um, when you put a contract into the amendment tracker, certain fields will just automatically populate from the contract work log. So you don't have any data integrity issues or errors in the data. Um, and that's been really valuable to us. And it's really making a difference in our new goal, not just our turnaround time goal, but we have a new goal of making sure that all of our contracts are renewed 30 days in advance of their expiration, and then making sure any contracts that are being rebid are awarded 30 days prior to their contract expiration. And so we're doing that so we can avoid expirations. We avoid, you know, the agencies having a period there where they don't have the needed products or services. So these tools have let us do so much. And then another area more on these tools is it's it's allowed us to develop an outwardly facing dashboard for our customer agencies where they can use the data to see bids in progress, the amendments in progress, any expiring contracts. Um, and it's been, they can have this right at their fingertips and they can see it anytime at any point. We refresh it daily for them. So they can just go in and and um do a couple filters and see exactly what everything we have we're working on for them. So then they don't have to reach out to us and be like, what's the status of this? They can see that. So it's been really amazing what Smartsheet and Tableau have led us to and and where where our minds have taken us with what we can do in procurement and putting metrics to it all. It's been really great.

Julia McIlroy: 17:36

So it's clear Missouri's model is designed to be transferable. So for other states or agencies listening, what's the first step they should take if they want to replicate your approach but lack a big budget?

Michael Stroud: 17:50

Absolutely. So this project actually has super, super high transferability. And the biggest advice I could give if you're trying to get a smart sheet and tableau up and running is that you should start small and that you don't need an e-procurement system to do this. Um all it takes is um a little the costs are minimal. It just takes a little bit of license software licensing fees and then some data analysts support, and you can set that up um without e-procurement. And so these tools work and as have high transferability because they are um quick to implement and they're very user-friendly, they're very people-centric. And so there you don't need um a lot of technology experience, and especially if your if your staff um has trouble adapting to do to new technologies, these technologies are are very user-friendly, and it's easy to get people on board with using these tools. And so I just wanted to give some key steps to start collecting this data and to start seeing some results immediately. And I'm gonna be focusing on bid turnaround time management. Um, and so here's what here's what you should do. We need to create a sheet, a bid worklog that defines the bids and uh and creates these turnaround time goals. These turnaround time goals should should you should have an overall goal and also a phase-specific goal. What this means is that you should have an estimated number of days that you think that this procurement should take to complete that. Next, what you're gonna be doing is record the actual dates versus the goal dates. And an important aspect with this one is you have to be consistent with it. You you need uh good data quality and to be consistent in collecting these dates so that you get good, um, you put good data in so you good you get good analytics out. Um finally, you're gonna apply a simple color coding technique for clarity. This is just conditional formatting, and it really highlights to buyers and stakeholders to to identify those bids that are running a little behind schedule. Um we used the stoplight color schema, which is red if the bid is overdue, yellow as a warning, and green if it's on track. Um finally, we need to take action on the data. It's not just enough to set this up. We need to actually hold these weekly reviews so that the data drives decisions and makes an impact. Um these reviews help managers manage all of these projects. Um so the tool provides the view, but you still need to make the decision, you still need to do the work yourself.

Julia McIlroy: 20:46

That's great. And I love that motto data drives decisions. Okay, so lastly, what's the one thing you hope listeners take away from this project? Stacia, let's start with you.

Stacia Dawson: 20:59

Yeah, you bet. So, you know, the one thing that I want to make sure that it's probably many things actually that listeners get as they listen to this, um, is these are really budget friendly. We all don't live in a place where we have unlimited budgets. So it's it's budget

friendly, it's easily transferable for anybody that you know wants to use the Missouri model of what we put together. And it's gonna help provide those metrics to the procurement process. Because as state procurement offices, we are always faced with the question and the challenge of why does procurement take too long? Um, but this really finally gave us the data to put behind and gave us phase data, gave us reason code data to understand what's driving those procurement turnaround times, which has been beautiful because it shows we really aren't taking that long. It's giving the true data of what we're taking. But if we are taking long, there's usually some sort of why to it. And we can explain that once we see the data. For us, a lot of things that drive our turnaround times is we've had staff turnover. So training new folks that takes time. But at least you know, hey, in fiscal year 25, your your turnaround times increased by 10%, maybe. But we also turned over seven new staff, you know. So that explains that why. It helps give a reason. And the other thing, the the big thing I would say is you can put all the tools you want into place, um, but don't get complacent that the tools are going to do the work for you. You still have to have that human aspect of reviewing what the metrics tell you. So you can understand and you can you can pivot and you can make changes in the process, or you can say, oh, maybe that's not working out so well. Um, we're seeing some negativity in our turnaround times there, or that's working out great. Let's focus on that. Let's highlight that, let's share that with staff because that that's a great thing we can share. So that's what I would want listeners to know.

Michael Stroud: 23:14

Thanks, Michael? And I would just focus on well, you need to continuously refine the way that you collect the data. So, for example, in Smartsheet, it's this isn't a tool that you can just set up once and forget about it, and it's gonna be perfect the first time. The tools are really adaptive, but you need to be really adaptive. These tools have high flexibility, and it's very important and as a huge advantage, it's good to use that flexibility. And so as you keep refining these tools to your particular use case, as you as you analyze the data and notice these things, you can you can double-click on certain aspects, such as building in reason codes, or all these ideas that you can do, it's kind of like your playground to collect the data and analyze the data that you need. And and I think that's what I really want people to take away from this.

Julia McIlroy: 24:06

So it sounds like a focus on continuous improvement. Very much, very much.

Michael Stroud: 24:12

Absolutely.

Julia McIlroy: 24:14

So, Stacia and Michael, thanks again for joining me today. I appreciate it. And to our friends in public procurement, remember, we work in the sunshine. Bye for now.