Best Practices in Procuring Enterprise-Level Software Solutions

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Director Simplar Sourcing Solutions



Wide Array of Experience

IT & Software Industry Construction Industry Business Services Facility Services Healthcare Services Utility Services





IT Industry

- In a study conducted with 593 business and IT professionals:
 - 80% admit they spend at least half their time on rework, which is the result of unclear objectives, confusion of roles and responsibilities, and lack of stakeholder involvement.
 - 75% of respondents believed that their IT projects are either always or usually "doomed" from the start
 - 78% feel that team is 'out-of-sync' when it comes to project objectives
 - 61% of the projects take longer than anticipated
 - 57% of the projects are not considered a success
 - 55% were confident that they objectives of their IT projects are clear
 - 38% are confused about their team roles and responsibilities
 - 31% believe there is a lack of common vision on project success criteria



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 - 57% of the projects are not considered a success
 - 55% were confident that they objectives of their IT projects are clear
 - 38% are confused about their team roles and responsibilities
 - 31% believe there is a lack of common vision on project success criteria



IT Industry

Research conducted on 5,400+ IT projects:

- 56% delivered less value than predicted / expected.
- Had a cost overrun of \$66 billion
- 50% of all large IT projects (\$15+ million), massively blow their budgets
- The average cost overrun is 45% over budget
- Black Swans = Budget overrun of +200%



IT & Software Industry Has An Extremely High Failure Rate

Case Study – University ERP Upgrade

• The University is seeking to increase the effectiveness and the added value of these administrative activities, underpinned by a core Enterprise Resources Planning (ERP) platform.

• The University has estimated that the overall size of this contract is approximately up to \$32 million over the 10-year term. This includes all integration costs, software costs, hosting costs, licensing costs, maintenance costs, etc.



Existing Challenges

- Finance and HR functions are highly decentralized, resulting in:
 - Several solutions have been built or acquired to address business needs
 - Skillsets that are highly variable across business units
 - Channels to support employees & students vary and are confusing to end-users
 - Increased frustration from faculty, researchers, employees, and students
 - Due to the number of solutions and lack of standardization, there is a lack of formally defined information and data needs of key users, which contributes to challenges in obtaining timely & accurate standardized data for decision-making.



How To Structure the Procurement Approach

Major Decisions

- County of San Mateo
- Multiple software solutions (HR/FIN) OR 1 overall solution?
- Specific core modules OR everything?
- One contract OR multiple contracts?
- On-premise OR cloud?



1-Step vs 2-Step Process

- The "Traditional" approach is to procure the ERP as a 1-step process
 - Issue one solicitation (RFP)
 - Teams (made up of Integrator & Software Solution) compete
 - Evaluation considers both integrator and software solution at same time

• University Core Team elects to use a 2-step process

- Issue two solicitations (RFSQ and RFP)
- 1st: RFSQ = Qualify the top Software Solutions
- 2nd: RFP = Select best integrator (based on the qualified software solutions)







Purchasing Software Solutions

- Most software procurements focus primarily (heavily) on the software product/solution (the product that you will be using for the next 10-20 years)
- Rarely does the performance and quality of the System Integrator significantly factor into the overall award
- But does the System Integrator <u>really</u> matter when they are only involved for 1-2 years (out of a 10 year contract)?



Think About Purchasing A Vehicle

You are purchasing a vehicle that you will use for next 10 years





 Traditional procurement approaches will have you focus specifically on the vehicle itself (will you select the Honda or Toyota)?



...But What Makes Software Procurement Different Is...



...You Are Not Just Buying A Car...





....But You Are **ALSO** Purchasing **Someone To Be Your Daily Driver** For The First 2 Years Of **Ownership**



....But You Are **ALSO Purchasing Someone To Be Your Daily Driver** For The First 2 **Years Of Ownership**





....But You Are **ALSO Purchasing Someone To Be Your Daily Driver** For The First 2 **Years Of Ownership**







No Matter How "Good" Your **Software Product** Is...If You Hire A "Bad" Integrator...You Will Have Major **Regrets!**





So Why Use A "2-Step" Approach...

 2-Step approach allows the evaluators to focus on the two critical elements <u>separately</u> (software solution vs the integrator). Allow you to get the "best" of both parties.



• Step 1: Focus on the Software (Qualify and select the top 2-3 software solutions / Allow evaluators to 'see' the systems)



 Step 2: Focus on the Integrator (evaluate the integration teams that can install the qualified software solutions)



Schedule

Traditional Schedule



 Traditional procurement approach would have taken 2 years (estimated) for this type of service / magnitude of scope





Traditional Schedule



 Traditional procurement approach would have taken 2 years (estimated) for this type of service / magnitude of scope

Procurement Phase

Integration Phase

• A lot of time is spent developing scope-of-work, needs assessments, evaluating proposals from multiple options/solutions, demoing multiple options/solutions, having discussions with multiple options/solutions.



Schedule



 Traditional procurement approach would have taken 2 years (estimated) for this type of service / magnitude of scope

Procurement Phase



- A lot of time is spent developing scope-of-work, evaluating proposals from multiple options/solutions, demoing multiple options/solutions, having discussions with multiple options/solutions.
- ... We then rush the integration phase to make up for time



Stated Challenge

We would rather spend more time in the Integration Phase than Procurement. Is there anyway to shorten the procurement phase (speed this up), so we can awarded as quickly as possible...so that we can really start talking about the project and laying things out?

Traditional Approach





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Traditional Approach



Could 2-Step Process Be Performed In Under 1-Year?



Could 2-Step Process Be Performed In Under 1-Year?

Planning Phase (2 Months)	 12/12/19: Procurement planning workshop 		
Qualify Software (2.5 Months)	• 2/14/20: Issue RFSQ		
	 4/22/20: Shortlisting of Qualified Software Solutions 		
Select Integrator (4.5 Months)	• 5/3/20: Issue RFP		
	-0/47/20, Calastian Commulate		

8/17/20: Selection Complete

9 Months!





Final Schedule (Due to COVID)

	Planning Phase (2 Months)	Planning Phase (2 Months)		
Original Schedule	Qualify Software (2.5 Months)	Qualify Software (5.5 Months)	Adjusted Schedule	
	Select Integrator (4.5 Months)	Select Integrator (6 Months)		

9 Months!

13 Months!



The RFN Stage

Time Extension

 Due to executive instruction to 'slow' procurement down (to allow executives to address COVID-19 concerns), the Core Team was afforded with an opportunity to re-visit the overall scope-of-work (that was being developed).







GEORGE CRONIN ★ awards for ★ Procurement Excellence

ТΜ



Results

- After the RFN discussions, the University was able to very quickly:
 - Confirm that the Scope was not missing any critical information
 - Confirm that there was nothing unusual or unique about the scope that would be a major issue or concern for Suppliers
 - Confirmed that the pricing template was reasonable to industry standards
 - Confirm that Suppliers were unclear with our expectations of the "fitgap" phase ("Fit-Gap" was an industry term that meant different things to Suppliers, so Core Team realized that they needed to address this in the RFP)



The RFSQ Process

Stage 1 RFSQ Focus on Software Products / Solutions

 Objective: Prequalify 2 software solutions that are capable of meeting the expectations of the University.

• Only these systems can then be proposed by Integrators in the next stage (Stage 2)


RFSQ Solicitation

Request for	Supplier	Qualifications	

For

Enterprise Resource Planning (ERP) Software Solution

Request for Supplier Qualifications No.: 202003-RFSQ-ERP

Issued: February 14th, 2020

Submission Deadline: April 3rd, 2020 at 3:00 pm (EST) local time

37 Pages (147 Pages With Exhibits)

1.4 RFSQ Timetable

The Dista

Activity	Date	Time
Posting of the RFSQ	February 14th 2020	3:00 pm EST (local time)
Information Session Web Conference - optional	February 24th, 2020	10:00 am local time (EST)
Deadline to submit guestions/Inguiries	March 10 th 2020	3:00 pm EST, local time
Responses to guestions/Inquiries	March 18 th , 2020	3:00 pm EST, local time
Deadline for Issuing Addenda	March 18th 2020	3:00 pm EST, local time
Deadline for Bid Submission	April 3 rd , 2020	3:00 pm EST, local time
Rectification period		2 business days
Shortlisting of Respondents for Stage III	April 22 nd , 2020	

	Activities for Shortlisted Respo	ondents
Activity	Date	Time
ERP Solution Demonstrations	May 4 th – May 8 th 2020	9:00 am - Noon (EST)
Anticipated notice of selected respondents		

The RFSQ timetable is tentative only and may be changed by the University at any time. For greater clarity, business days means all days that the University is open for business.

1.4.2 Information session web conference

The University will conduct an information session via web-conference on February 24th, 2020 at 10:00 am EST. The duration of the information session will be 2 hours maximum. This session is optignal, please, contact. Daniel. Tessier at distance@uottawa.ca. io. pre-resister., for the information of the informatio



c) Number of Qualified Software Solutions (RFSQ Phase) The University anticipates that the top 2-3 Software Solutions will be shortlisted and qualified to participate in the subsequent RFP Phase.

d) Schedule expectations The University anticipates that the top 2-3 Software Solutions will be shortlisted and

The University ancipates that the top 2-3 scientifies Southors to particular to the southors in the southors i

Budgetary Expectations The University has estimated that the overall size of this contract is approximately up to \$32 million over the 10-year term. This includes all integration costs, software costs, hosting costs, licensing costs, maintenance costs, etc.

Criteria	Weighting	Minimum Threshold
1. Stage II Rated criteria total score (See Section 6)	40 %	(70% see section 6)
 Stage III – ERP Solution demonstration (see section 7) 	40%	N/A
 Stage IV – Price and licensing model 		
3.a. Core modules pricing	15 %	N/A
3.b Optional modules pricing	2%	N/A
3.c Future Growth	3%	N/A
Final score	100%	

The Respondents runal table complete in Schedule BJ the workshort Table sheat 'type proving the day rules for and hype of resource. For evaluations propose only, the University will do an average of all thin rates proposed and use 100 hours at that average less and include 1 in the "Optional models proring" weight hours. These rates will be university does not aparatelli any volume of business and reserves the right to go to other works for the spancard in any volume of business.

If qualified, the Respondents cost proposal will be carried forward into the Integration Stace (RFP Phase).

8. RANKING AND SELECTION

Upon completion of Stope //. the University will evaluate and provides the shortleads responsible based on the final score based on the clinicaturable laided in Section 7. The University will select the top 2 EBP Solution that will then be qualified to participate in the KPP phase. The University researce the right to qualify the Solution that will be phase. The University of the Solution that will be phase to the University of the Solution that will be phase. The University of the Solution that will be explored at the society of the solution of the SPP Phase.

Only the qualified pathenese solution will be allowed to participate in the subsequent FUP process. Additional information regriting the RPP Phase all be related in the subsequent RPP. However, the entire proposed qualification (from each "Qualified" Respondents) will be carried forward in the RPP Phase. Callidade Respondents will not be permitted to adjust the per charging is due to built be approximately and the pathenesis of the second solution per charging is to be builted because private and constraint proversity. Any impacts departition of the second solution of the second solution proversity in the second departition.



Evaluation Factors

CRITERIA	STAGE	OVERALL WEIGHT	STAGE WEIGHTS
(1) Mandatory Requirements	(Stage 1)	Pass/Fail	Pass/Fail
(2) Proposal: Functional Requirements - Core	(Stage 2)		40%
(3) Proposal: Functional Requirements - Other	(Stage 2)		10%
(4) Proposal: Functional Requirements - Optional	(Stage 2)	40%	10%
(5) Proposal: Experience and Qualifications	(Stage 2)		20%
(6) Proposal: Surveys and References	(Stage 2)		20%
(7) Demo: Completeness of demo	(Stage 3)		20%
(8) Demo: Usability for regular users	(Stage 3)	40%	40%
(9) Demo: Usability for light users	(Stage 3)		40%
(10) Cost: Core Module Pricing	(Stage 4)	20%	17%
(10) Cost: Future Growth	(Stage 4)	20/0	3%



CRITERIA	STAGE	OVERALL WEIGHT	STAGE WEIGHTS		
(1) Mandatory Requirements	(Stage 1)	Pass/Fail	Pass/Fail	×∎	53 items
(2) Proposal: Functional Requirements - Core	(Stage 2)		40%		
(3) Proposal: Functional Requirements - Other	(Stage 2)		10%	×≣	295 items
(4) Proposal: Functional Requirements - Optional	(Stage 2)	40%	10%		
(5) Proposal: Experience and Qualifications	(Stage 2)		20%	w	4 items
(6) Proposal: Surveys and References	(Stage 2)		20%	w	5 surveys
(7) Demo: Completeness of demo	(Stage 3)		20%		-
(8) Demo: Usability for regular users	(Stage 3)	40%	40%		
(9) Demo: Usability for light users	(Stage 3)		40%		
(10) Cost: Core Module Pricing	(Stage 4)	20%	17%		
(10) Cost: Future Growth	(Stage 4)	2070	3%		



CRITERIA	STAGE	OVERALL WEIGHT	STAGE WEIGHTS	
(1) Mandatory Requirements	(Stage 1)	Pass/Fail	Pass/Fail	X 3 items
(2) Proposal: Functional Requirements - Core	(Stage 2)		40%	
(3) Proposal: Functional Requirements - Other	(Stage 2)		10%	×∃ 295 items
(4) Proposal: Functional Requirements - Optional	(Stage 2)	40%	10%	
(5) Proposal: Experience and Qualifications	(Stage 2)		20%	4 items
(6) Proposal: Surveys and References	(Stage 2)		20%	5 surveys
(7) Demo: Completeness of demo	(Stage 3)		20%	
(8) Demo: Usability for regular users	(Stage 3)	40%	40%	 10,000 line items does not result in
(9) Demo: Usability for light users	(Stage 3)		40%	performance
(10) Cost: Core Module Pricing	(Stage 4)	20%	17%	• We want to change our process to
(10) Cost: Future Growth	(Stage 4)	20%	3%	follow software (and not customize
				the software to follow our

processes)







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(8) Demo: Usability for regular users	(Stage 3)	40%	40%	Validate during Demo
(9) Demo: Usability for light users	(Stage 3)		40%	
(10) Cost: Core Module Pricing	(Stage 4)	20%	17%	
(10) Cost: Future Growth	(Stage 4)	2070	3%	



Results

- 3 proposals were found to be responsive
- 8 Evaluators (HR, Finance, & IT)



Results





Results

		FINAL POINTS			
CRITERIA	NORMALIZED WEIGHTS	FIRM A	FIRM B	FIRM C	
(1) Mandatory Requirements	Pass/Fail				
(2) Written Proposal	40%				
(3) Product Demonstration	40%				
(4) Costing	20%				
	100%	70%	79%	76%	

Top 2 Software Products were selected/shortlisted



The RFP Stage

Stage 2 RFP

• Focus on Integrators

 Objective: Select the best overall team (focusing on the integration team) that can install one of the two qualified software solutions



Recognize Evaluator Bias



Case Study – Software Upgrade

- State Agency Statewide Tax System
- SME conducted research to determine the 'right' solution for their needs
- Understood that 'data warehousing' was most important item
- Educated other evaluators that only one firm really had the capacity
- 3 vendors proposed and all 3 were interviewed



Case Study – Software Upgrade

 IT Security specialist identified that a proposal did not meet current industry standards = disqualified



Evaluator Bias

- Bias is not always so "forward" or "shocking"
- Usually, bias comes from Evaluators who:
 - Think they <u>"already know</u>" the best vendor
 - Look at <u>logo</u>/brand more than resources/approach
 - Have pre-conceived notions about the <u>"right"</u> approach
 - Are not open to new ideas







Be Cautious With Executives

• Can "sway" the rest of the committee

• Typically very busy = can put timeline in jeopardy



Evaluator Training

• 7 Evaluators

3 were executives (required to have an alternative/backup)



Notable Differences

• Anonymous



Schedule	Description	Anonymous Document	Maximum Page Limits
1	Mandatory Bid Submission Form	no	Pre-set
2	Pre-qualified ERP Software Certification	no	Pre-set
3	Mandatory Requirements	no	Pre-set
4	Team Experience & Qualifications	YES	Pre-set
5	Approach & Methodology	YES	3 pages
6	Obstacles, Challenges, & Risks	YES	4 Pages
7	Alternatives, Opportunities, & Innovation	YES	2 Pages
8	Cost and Financial Proposal	no	Pre-set



Wireless Network

CRITERIA	WEIGHT	FIRM 1	FIRM 2	FIRM 3	FIRM 4	FIRM 5	FIRM 6	FIRM 7	FIRM 8
Cost	25%	25.0	18.5	18.2	11.7	18.5	20.1	21.0	17.2
Proposal	40%	35.6	35.6	35.2	33.8	27.0	26.5	20.4	25.4
Past Performance	5%	5.0	4.9	3.0	4.9	4.8	2.6	4.7	2.6
Interviews	30%	30.0	22.2	9.4	0.0	0.0	0.0	0.0	0.0
TOTAL PC	DINTS (100)	96	81	66	50	50	49	46	45

- Best Value Results:
 - Highest Interview
 - Highest Proposal
 - Best Past Performance
 - 28% Below Average Cost

Notable Differences

• Anonymous

• Limited proposal size



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When Projects Go Great...



Greatest Correlation **To Project** Success...

Contract



Greatest Correlation **To Project** Success...





Notable Differences

Key personnel interviews

(PM, HR Lead, FIN Lead, Integration Lead)















Overshadow those with low experience & expertise Becomes difficult to see capabilities of all team members

Advanced Interview Techniques

Key personnel interviews

- PM
- HR Lead
- FIN Lead
- Integration Lead
- Performed individually

• 30-Minutes per interview





Interview Comments

- Interesting Interview Comments:
 - "I am not currently employed by [Proposing Company]. So in essence, I am interviewing for them and for you" – A Project Manager
 - "I have not reviewed the proposal" A Project Manager
 - "I was not involved in compiling our proposal" A Project Manager
 - "I don't see any risks at all on this project" An Integration Lead



Lessons Learned

	FIRM A	FIRM B	FIRM C	FIRM D
PM	9.4	8.8	8.5	9.2
HR LEAD	3.4	5.8	9.7	6.5
FIN LEAD	4.7	9.1	7.3	6.2
SA LEAD	6.6	8.6	8.3	5.6



Lessons Learned



Same Integration Firm, But Different Personnel



Overall Criteria

Written Proposal Points (20%)

Team Presentation Points (15%)

Interview Points (40%)

Cost Points (25%)



Lessons Learned
Team Alignment (Industry Average)





Team Alignment – University Project Team





We Are Not "Perfect" (User Counts)

- Page 23: "The University is one of the largest employers in the City with over 5,000 employees."
- Page 26: Total number of unique users in the current ERP is 6,566.
- Page 26: Certain users have multiple roles within different functions.

	Number of Users				
Role Type	Finance	HR	IT Security	Research	
Super User			29		
Regular User (day-to-day actions in the system)	518	143			
View Only / Light User (view data / reports, make requests, approve requests)	4184	3264		3051	

Page 49: Metrics to be used for Pricing Evaluation only

184?

Metric	Value	Projected Growth	
FINANCIAL METRICS	-		
Budget/Expenditures	\$1,044M	49%	
Total Assets	\$3,221M	123%	
Pervenues	¢1 126M	60%	
ORGANISATIONAL METRICS	_		
Number of Employees (excluding faculty)	2,974	11%	
Number of Full-time Faculty 5.205	1,410	9%	5 659
Number of Part-time Faculty	821	0%	3,033
USER METRICS			
Power Users (IT Security)	29	0%	
Regular Users (day-to-day actions in the system)	520	0%	
Light users (view data/reports, submit requests, approve requests) 5 084	4,200	0%	
Maximum distinct users connected in the same day	235	0%	
Maximum simultaneous users connected	100	0%	
Transactional			
Accounts payable invoices paid annually	109,500		
Accounts payable cheques printed annually	35,500		
Purchase orders issued annually	14,700		
Number of T4s issued	15,000		
Number of leave requests submitted annually	30,000]	



Impact of Consensus

- 12 Surveys from past clients
- 7 Evaluators

CRITERIA	SUPPLIER #1	SUPPLIER #2	SUPPLIER #3
Past Customer Average Score:	7.9	9.0	7.7
Evaluator Score (Initial):	7.5	8.2	7.3
Committe Evaluation Score (Final):	7.3	8.4	7.4
Impact of Consensus Meeting:	-0.2	0.2	0.1



Was This An Efficient Use of Time?

CRITERIA	SUPPLIER #1	SUPPLIER #2	SUPPLIER #3
Past Customer Average Score:	7.9	9.0	7.7
Evaluator Score (Initial):	7.5	8.2	7.3
Committe Evaluation Score (Final):	7.3	8.4	7.4
Impact of Consensus Meeting:	-0.2	0.2	0.1

• 7 Evaluaτors

- Time already spent evaluating the 12 surveys
- Meet as a team for 2 hours to discuss ratings



Consensus Meetings

• 7 evaluators

- 3 non-evaluators (procurement and observers)
- Total: 20 hours for 1.7% impact to ratings



Lessons Learned From A Client Perspective

Client Perspectives

- Written Proposal: Max pages were amazing!
 - Amount of information provided was higher than expected
 - Evaluation team members loved it!
- Team Presentation: Showed team cohesion/if they've worked together before
- Interviews: Terrific sense of each key personnel / predicted future capabilities
- Cost of software came back lower than RFSQ!!!



Overall Client Perspective

- I would redo it again (with minor adjustments)
- Initially a lot of resistance (2-step process, lack of in depth requirements review, number of pages, anonymous, etc.)
 - Senior leadership support: "This is a transformation project, so don't do the same approach as past projects"
- Easy to defend the process
- Fast and gave more time to work with selected supplier (6 months!)
- RFN process was most innovative approach I have seen
- Increased the confidence of the evaluation team that the right conclusion/decision was reached



Lessons Learned From A Buyer Perspective

- After 20+ years in procurement, I was surprised how many new tools/tricks I learned
- Note: It was really important to have Simplar team available throughout this effort
 - They offered answers/solutions to every challenge that we encountered
 - They provided real examples/scenarios from previous projects
 - Provided daily communication to validate my decisions
 - Provided me with scripts
 - Mentored me throughout the process



- Not only was this one of the largest/complex procurements I had managed, but Covid added additional pressure.
- Covid required us to make adjustments on the go (travel bans, social distancing, remote work, etc.).
- We were able to quickly shift from 'in-person' activities to virtual. We also created video tutorials for critical items (i.e. vendor training and evaluator training). This provided greater flexibility to individuals since they could watch these videos when it was convenient for them.

Videos Provided Greater Flexibility

0

Pre-Proposal Presentation

Human Resources & Financial Management Business Technology Systems Solutions

September 2020

Hint...

SIMPLAR

- What are the major issues that you have run into with similar ERP implementations?
 - Major reasons for schedule delays
 - Major reasons for cost increases
- Major reasons for dissatisfaction
- Think about what is unique/special
- Who is best suited (in your organization) to do this?

Pres Tax In part full screep

Scoring (1-3-5-7-10)

Evaluator Guide

Scoring The Interviews & Presentations

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"10" represents 'excellent'. The evaluator is extremely satisfied with the interview/presentation being evaluated. "7" represents 'above average'. The evaluator is satisfied with the interview/presentation, but there is some room for improvement

• "5" represents 'average or neutral'. There is insufficient information to make a clear decision (can't tell, not sure, about the same)

• "3" represents 'below average'. The evaluator is not satisfied with the interview/presentation, but the interview/presentation is not poor.

• "1" represents 'poor'. The evaluator is extremely dissatisfied with the interview/presentation and would not be comfortable hiring this Proposer

Note: Evaluators can NOT use any rating between 1-10



GINSTITUTE

 Didn't realize how significant and powerful a properly formatted excel matrix could be



Traditional Example

 Try to squeeze as much as possible onto the sheet, but becomes difficult to quickly assess



Best-Value Example

Helped us to simplify

		RAW DATA				RESULTS			
CRITERIA	WEIGHT	FIRM 101	FIRM 102	FIRM 103	FIRM 105	FIRM 101	FIRM 102	FIRM 103	FIRM 105
(STAGE II) Written Proposal Score	30	88.9	85.8	85.4	79.4	30.0	29.0	28.8	26.8
(STAGE III) Team Presentations	15	4.2	8.5	9.1	7.4	6.9	14.0	15.0	12.2
(STAGE III) Key Personnel Interviews	30	4.8	7.8	8.7	6.1	16.6	26.9	30.0	21.0
(STAGE IV) Cost Proposal	25	\$ 32,000,000	\$ 28,500,000	\$ 29,000,000	\$ 32,500,000	22.3	25.0	24.6	21.9

Total Points: 100

Consensus Meetings

• Were able to use newly formatted spreadsheets to focus on 'differentials' between ratings

 Allowed the consensus meeting to be performed quicker and more efficiently (compared to traditional meetings)



 Once you have "seen the light", it is hard to go back to traditional ways of doing things

 Struggle is real, and not every client/project will want to run things in this manner, which can become difficult for you as a procurement agent (after you have seen more effective ways).
Part of our job is to help mentor clients on becoming better, but this isn't as easy as it may sound

