

# E-PROCUREMENT OPERATIONS

Post-launch capabilities to ensure your success

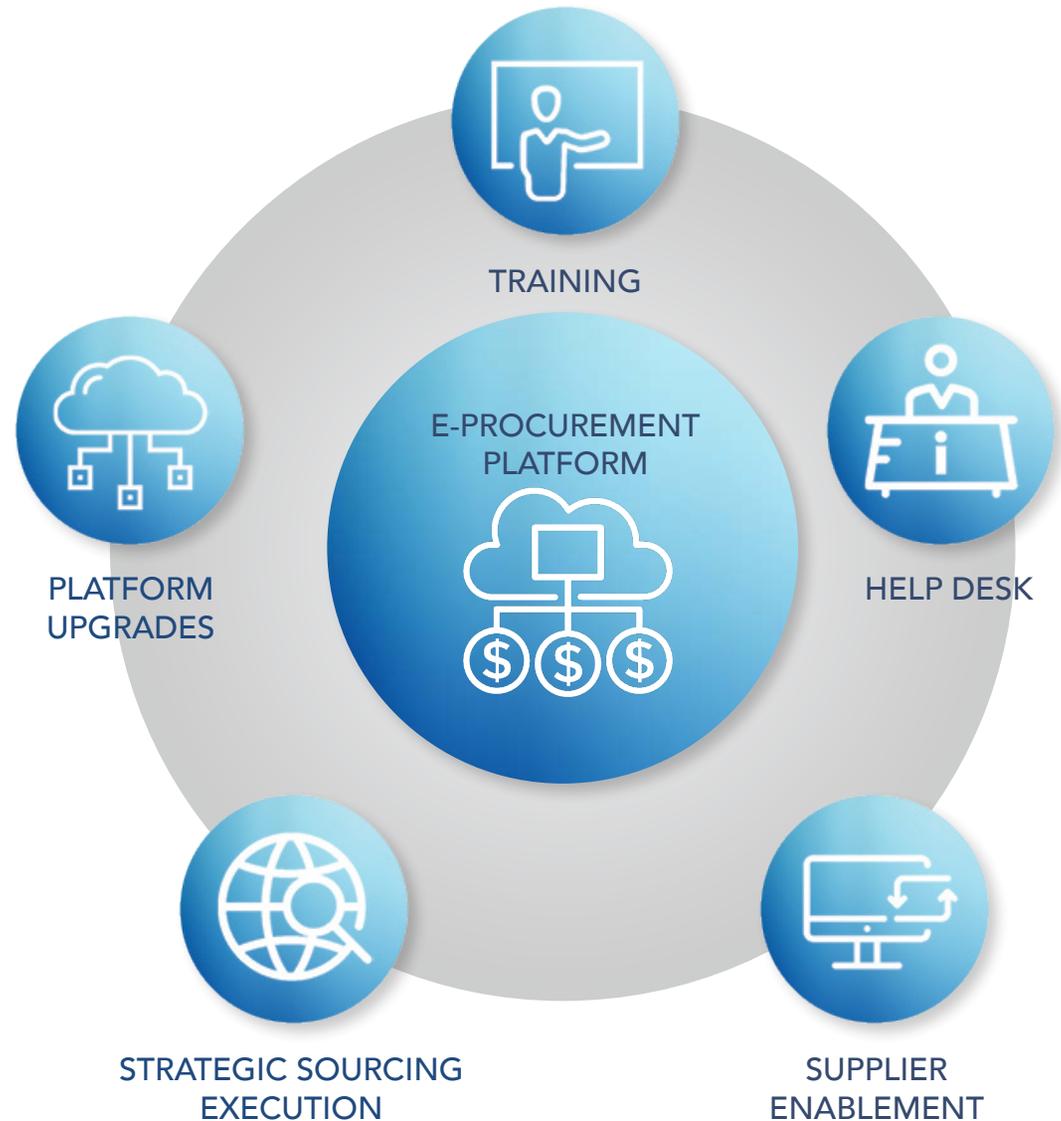


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# Introduction: E-procurement operations capabilities that will enable your success

Automating the processes your organization uses to buy, approve and pay for goods and services will deliver substantial business benefits that impact every facet of the enterprise. Today's e-procurement platforms embed best practices and processes to help continually improve your ability to maximize savings, increase spend visibility, reduce cycle times and enable users to focus on what they do best.

This eBook addresses a fundamental question: Once you launch your platform, what new capabilities will you need to support ongoing operations and the evolution of your procurement program? On the following pages, you'll find insights on the capabilities needed to support successful e-procurement operations through training, help desk, supplier enablement, strategic sourcing execution and platform upgrades.



# Training: A vital and dynamic support function for new users and program expansion



Training for internal customers and suppliers drives platform adoption and helps to ensure adherence to procurement policies and procedures. Training also provides a valuable opportunity for advancing the role of procurement within your organization, helping each new internal customer and supplier benefit from increased efficiency and effectiveness in the performance of daily job functions.

However, the training function needs to extend beyond accommodating new users. While today's e-procurement platforms are intuitive and easy to use, the importance of ongoing training for all users is often underestimated. Unlike legacy software systems, which remain relatively static, your e-procurement platform will continue to evolve in ways that will drive the need for ongoing training operations:

**Program Expansion and Maturation:** An internal buyer group, from procurement or finance departments, likely drove your initial phase of platform implementation.

As you move to subsequent phases of program expansion toward a fully automated procure-to-pay (p2p) environment, training will play a critical enabling role.

**Platform Upgrades:** Depending on your platform provider, you will need to accommodate several upgrades throughout the year that incorporate best practices and improvements from a broad base of enterprise customers. Training will be required to help users understand and take advantage of these improvements.

Training provides a valuable opportunity for advancing the role of procurement.



## Help Desk: Critical insight for advancing program adoption and addressing challenges.



Traditional help desk operations are generally reactive in nature, managing tickets and responding to system issues in order to address day-to-day procurement operations problems. But leading procurement organizations have discovered, with modest planning and investment, help desk operations can provide the proactive application management support needed to advance adoption and increase the business impact of procurement programs.

Today, the lines between business process, system configuration and core technical support have become increasingly blurred, especially with the prevalence of cloud platforms. Why can't an invoice be submitted? How can I get an approval flow changed? I want to purchase X commodity and it's not in the system. Your company's ability to quickly resolve these kinds of application management issues, and the user experiences associated with them, is the key to building a better procurement brand within your enterprise.

In planning for ongoing Help Desk operations, you will need to provide three different levels of support:

- End-User Support
- Technical Support
- Supplier Support

Analysis of Help Desk ticket activity from each of these functions will provide valuable insight for enhancing your training program, making needed changes to business processes and addressing root causes for reoccurring technical problems.

A key consideration will be whether to staff the Help Desk function with internal resources or to utilize an outsourced services provider.

**Proactive Help Desk capabilities are key to building a better procurement brand.**



# Supplier Enablement:

## Onboarding new suppliers for current and future programs

As with each of the other support functions discussed in this eBook, advance planning for supplier enablement capabilities after your initial “Go-Live” launch will be critical for ensuring the success of your procurement transformation initiative.

At its very core, ongoing supplier enablement represents a “make or break” capability. Without suppliers onboard, processes can’t be automated.

However, many organizations fail to plan for the resources required to onboard new suppliers and ensure successful participation from existing suppliers.

Your supplier enablement capabilities will need to encompass onboarding, accommodating and facilitating new suppliers, staffing changes at participating suppliers and the enablement of subsequent phases of rollout and program expansion.

Key questions to answer in planning for your ongoing supplier enablement capability include both strategic and resource planning considerations:

**Strategic Planning:** Who will own the strategy that drives supplier enablement decisions? What are the transaction and spend “bucketing” mechanisms that will be used to categorize and prioritize suppliers for enablement? How have you determined the scope for subsequent phases of deployment and how is this tied to your overall plan for advancing program maturity?

**Resource Planning:** What resources, full or part-time, will you utilize for supplier enablement, and who will they report to?

Supplier enablement is a “make or break” capability for determining program success.



# Strategic Sourcing Execution: Ongoing support for RFP and RFx events

Strategic sourcing represents an important opportunity for capturing savings and creating value from your organization's e-procurement platform investment. While the scope of your support will depend on the focus and maturity of your internal sourcing operations, your e-procurement platform can provide sourcing analytics and event management tools that quickly optimize your resources and provide the rich capabilities needed to source indirect goods, direct materials, goods for resale, complex services and more.

**Assessing current sourcing capabilities:** In planning for support of strategic sourcing, it is important to assess current capabilities. Mature sourcing organizations have:

- Identified major savings opportunities
- Conducted analysis to determine categories
- Established budgets and savings targets
- Executed programs to drive down costs

Support capabilities you will need to provide for sourcing events include:

**Supplier Education:** Suppliers need to understand your criteria for evaluation and success, and how the sourcing event fits into your organization's long-term strategic goals.

**Event Set-Up and Management:** Your sourcing team will need to learn how to set-up an event using your e-procurement platform and will require support for starting the event and ensuring that any questions from suppliers are answered through the system.

**Tracking Savings:** Ensure that clear metrics are established for measuring and tracking savings as a result of each event.

Sourcing events provide an important opportunity for maximizing savings.



# Platform Upgrades: Ongoing technical and operational support



Software as a Service (SaaS) platforms have created a new paradigm for business process owners and IT teams. On one hand, cloud-based platforms significantly reduce the cost of ownership for business applications and speed time to realization of business benefits. However, the e-procurement platform you're installing today will continue to evolve as your platform provider releases upgrades that embed best practices and improvements from a broad cross section of customers that improve the utility and functionality of the software.

To ensure and enable platform accessibility and performance, you will need to be prepared to support upgrades through release testing of the new small fixes, regression testing of the larger versions and end-to-end testing. Roles and submissions also need to be re-tested with each new release to ensure legal and regulatory compliance.

In addition to technical considerations, newly released functions must be evaluated and, in some cases, addressed in training and help desk support to maximize user benefits.

## Key questions to ask in planning for ongoing support for platform upgrades include:

Who will own technical responsibility for managing upgrades? What SLAs will apply to ensure platform accessibility and performance? Who will own responsibility for adoption of platform improvements?

As with all support functions identified in this eBook, an experienced e-procurement partner can provide outsourced services to support ongoing operations.

Integration management is a  
vital part of e-procurement  
operations support.



# Accelerate procurement success with platform-enabled solutions from Shelby

Procurement departments everywhere face a common challenge. How can you increase transparency, control and compliance in order to deliver measurable business benefits to your organization? Today's cloud-based procurement platforms offer powerful and flexible tools to integrate best practices into daily operations. However, a low utilization of features and misalignment with business processes can negatively impact your success.

The Shelby Group is the global leader in platform-enabled procurement optimization. With hundreds of platform implementation and support engagements to our credit, Shelby can help accelerate your success through each step of your journey with Platform Implementation, Program Optimization and Procurement Operations solutions.



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