

IT PURCHASING PLANNING IMPROVEMENT PROJECT

**Formalizing a Process
to Help Users with IT Purchases**



UNIVERSITY OF
South Carolina

BACKGROUND

SPONSORS

- Brice Bible, VP for Information Technology/CIO
- Ed Walton, Executive VP for Administration and CFO
- Donna Arnett, Executive VP for Academic Affairs and Provost

TEAM

- Co-Lead – Elizabeth Shirkey, Executive Director, IT Transformation, Division of Information Technology
- Co-Lead – Gary Moore, Assistant Dean for Academic Technology, Joseph F. Rice School of Law
- Scott Kaplan, CFO, College of Hospitality, Retail, and Sport Management
- Ashley Maciaszek, CFO and COO, College of Arts and Sciences
- Kristen Moss, Purchasing
- David Mullaney, IT Director, College of Arts and Sciences
- Ken Parks, IT Director, Student Affairs
- Michael Philipp, Core Applications Program Manager, Division of Information Technology
- Sue Porter, Data Stewardship Manager, Division of Information Technology
- Joyce Shealy, Demand and Resource Manager, Division of Information Technology
- Ronni Wilkinson, IT Director, College of Engineering and Computing, and Chair of unITe

BACKGROUND

TEAM LAUNCH (March)

- Decision to focus on IT purchases \$10K or greater
- Process that ensures collaboration, consultation and coordination

DISCOVERY PHASE (April, May)

- Identify and interview SMEs - IT Directors and Business Managers
- Survey stakeholders regarding current state, needs, etc. (input from +100)
- Review all input to identify most important actionable insights

DESIGN PHASE (June)

- Work-group sessions to develop potential solutions
- Team sessions to unify and reach consensus on a set of recommendations

GUIDING PRINCIPLES

- **Simple**
- **Standard**
- **Quick and Efficient**
- **Optimal**
- **Transparent**

RECOMMENDATIONS

- 1. Create an online portal with an interactive workflow to give USC a user-friendly way to think through IT needs, identify an optimal decision, see required and recommended next steps, and link users with their college/department/DoIT IT experts for further guidance.**
 - One standard starting point for everyone.
 - Will result in better-informed decisions very early in the process.
 - Will reduce calls to Purchasing from customers who don't know how to start the process.
 - When the decision is made to buy a new solution, Purchasing will receive better-prepared requisitions
 - Better-prepared requisitions will reduce the number of times Purchasing has to loop back to requesters to make corrections, supply missing docs, or resubmit using a different method – which will increase customer satisfaction and reduce Purchasing work hours spent on ill-planned, incomplete submissions.

RECOMMENDATIONS CONTINUED

2. Build a **searchable database** of available IT solutions and vendors at the University.

- Will make it easier for people to find and leverage software and hardware.
- Greater use of existing solutions will reduce purchases/spending.

3. Provide **expert IT consultation** at the beginning.

- Will further strengthen front-end planning and result in better decisions (on whether to leverage an existing solution or seek a purchase) and higher-quality requests going to Purchasing.

4. Reassess **TRB's role** with a more strategic focus in mind.

- The proposed interactive workflow and front-end IT consultation (above) would address much of the detail work that TRB sometimes gets involved in – freeing them up to focus on strategy.

RECOMMENDATIONS CONTINUED

5. Establish **visibility** into the IT Purchasing Process.

- People can better understand the timeline and where their request is in the process prior to reaching the procurement office. Visibility will reduce frustration and time taken to answer emails that could be spent working on the acquisitions themselves.

6. Institute a simple **scorecard** of meaningful measures to monitor the efficiency and effectiveness of this process.

- Will enable us to gauge the impact of these improvements – and show us if and where refinements are needed.
- Will be important for tracking the long-term health of the process in terms of efficiency and effectiveness – and pinpointing where fine-tuning or additional improvement might be needed.

PROCESS SCORECARD

Below are **potential measures** for the scorecard.

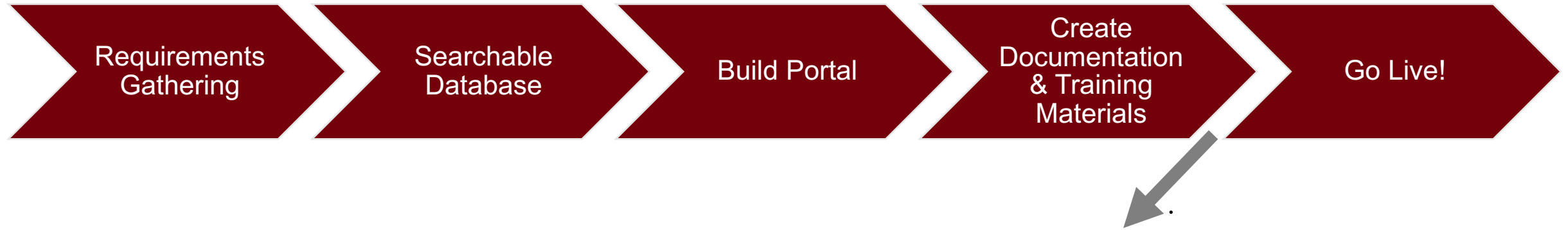
Some of the measures that are ultimately used might depend in part on the tool that is used to automate the front-end workflow.

- **Time:** Process time from requesting a solution to implementing a solution
- **Loopbacks:** Relative frequency (expressed as a percentage) indicating how often requisitions are sent back for corrections of missing information/docs.
- **Process Effectiveness:** Customer feedback (likely via rating scale) on the degree to which the item/service met business objectives
- **Savings:** Cost savings realized via reduced duplication

ROADMAP



RECOMMENDATIONS CONTINUED



7. Revise **policies** as needed to reflect the new approach.

8. **Communicate** the new approach in a way that is easily understood by non-IT people.

**WELCOME TO THE IT
PURCHASING PORTAL**

Please enter your name

Enter your department
or college

Are you acquiring software,
hardware or professional
services?

Software

Hardware

Professional Services



Please enter a short
description

Have you completed a Security Evaluation?

No

Please complete the
required SOC2 Security
Evaluation here

Yes

Please upload here



THANK YOU!

IT Purchasing Planning Project Team

Co-Leads: Liz Shirkey (Division of IT) and Gary Moore (Rice School of Law)



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