

## **e-Procurement**

### ***Critical Steps in Your e-Procurement Implementation***

*By Wade Lyons, Spend Allies*

Managed service providers (MSPs) or third-party administrators offer a range of procurement application support actions, activities, or services to help businesses effectively manage their procurement processes. These services may vary depending on the specific provider and the needs of the client, but here is a list of common procurement application support actions:

#### **1. Application Implementation and Configuration:**

- Business process workshops to understand your business requirements, related system functions, etc.
- Design/Build of the system to align with the requirements defined in the business process workshops.
- Integration design sessions to document the required integrations with other systems (ERP, CRM, etc.) including direction mappings and data migration planning.
- Architectural review and approval by application publisher to ensure the design is sustainable and supportably by publisher post go-live.
- Validation of initial design/build and systems integrations testing.
- Correction of gaps in initial design/build or systems integrations.
- Validation and correction of design/build and systems integrations testing continues until fully validated.
- Day in the life sessions to support the development of scripts to be applied in User Acceptance Testing (UAT).
- UAT sessions - UAT-correction-UAT cycles until build is validated.
- Move to production (MTP) including replicated validated configurations and integrations.
- Go-Live

#### **2. User Training**

- Training materials development to provide user guides, manuals, and documentation.
- Training sessions for users on how to use the procurement application. Training may include end-user, admin, and/or train the trainer.
- Training sessions may be online, onsite, and/or recording sessions.

#### **3. System Support**

- Post go-live hypercare period including immediate support availability and daily sessions to address any questions, concerns, or issues following utilization of the build in the daily business.
- Troubleshooting of incidents or issues submitted by users to ensure system stability.

- Helpdesk support for addressing administrative requests such as user management, roles, permissions, groups, content groups, commodities, punchouts, catalogs, integrations, etc.
- Incident management with application publisher's helpdesk to ensure timely response and resolution to system level issues, errors, bug fixes, etc.

#### **4. System Monitoring and Maintenance:**

- Proactive monitoring of the procurement application to ensure its availability and performance.
- Regular maintenance, updates, and patches to keep the application secure and up-to-date.
- Validation of upcoming release impacts client environment(s), and integrations.
- Periodic mirroring of production instance to the test instance to maintain like instances for accurate testing and troubleshooting.

#### **5. Supplier Onboarding and Management:**

- Assisting in supplier registration and onboarding onto the procurement platform.
- Managing supplier profiles, documentation, and compliance.

#### **6. Catalog Management:**

- Collaboration with suppliers to complete the configuration, validation, and deployment of 'punchout' catalogs.
- Creating and managing catalogs of products and services available for procurement.
- Ensuring accurate and up-to-date pricing and product information.

#### **7. Purchase Order Processing:**

- Reviewing and processing purchase orders.
- Performance reviews and recommendations to improve.
- Success metrics and
- Addressing order discrepancies and exceptions.

#### **8. Invoice and Payment Management:**

- Receiving and processing supplier invoices.
- Matching invoices to purchase orders and receipts.
- Managing approvals and initiating payment processes.

#### **9. Reporting and Analytics:**

- Reporting requirements for end users, admins, and executives.
- Generating reports and analytics to provide insights into procurement activities, spending patterns, and supplier performance.
- Identifying opportunities for cost savings and process improvements.

**10. Supplier Performance Management:**

**11. Compliance and Regulatory Support:**

- Ensuring adherence to procurement regulations, policies, and compliance standards.
- Managing audits and documentation requirements.
- Assisting client during audits as requested.

**12. Sourcing and RFx Support:**

- Assisting in the creation of requests for information (RFIs), requests for proposals (RFPs), and requests for quotations (RFQs).
- Managing the sourcing process and evaluating supplier responses.

**13. Contract Management:**

- Tracking and managing supplier contracts, terms, and conditions.
- Providing alerts for contract renewals and compliance deadlines.

**14. Strategic Advisory Services:**

- Offering strategic guidance on procurement best practices, technology trends, and process optimization.
- Collaborating with the client to develop a roadmap for procurement transformation.

**15. Continuous Improvement:**

- Regularly reviewing and optimizing procurement processes for efficiency and effectiveness.
- Implementing process improvements and technology enhancements.
- Opportunity reviews and related reporting.

Remember that the specific services offered by MSPs or third-party administrators may vary, and organizations should be able to tailor their procurement application support arrangements based on your unique needs, priorities, and budget.