## Better Procurement & Materiel Management Experience by Design

CIPMM Mentorship Program Graduation Craig Szelestowski craig@leanagility.com November 27, 2024



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### Overview

- 1. Three reasons why Materiel Management and Procurement people are so busy:
  - Broken process
  - Personal time management decisions
  - Client experience
- 2. What is the Client/User Experience?
- 3. How does the Client/User Experience reduce our workload as service providers?
  - What is Failure Demand?
  - What causes it?
  - Practical tips to eliminate it and free up our time
- 4. Wrap-up your next steps

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#### The Process

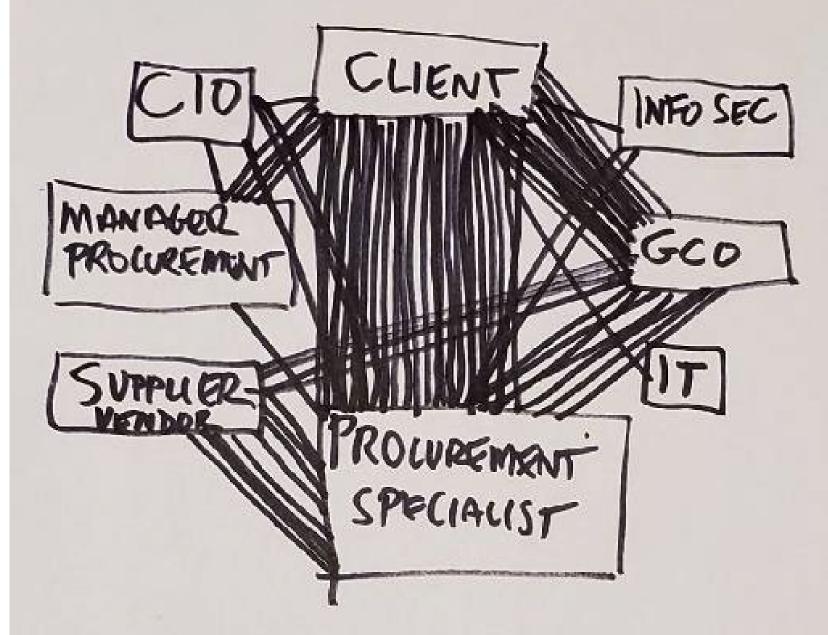
### **Procuring Cloud Software**

#### > \$ 100k value

- Approximately 100 steps/handoffs
- 3-5 months of elapsed time
- Unhappy clients, procurement staff
- Procurement staff overloaded
- Slow process affecting delivery of core business

#### NOW:

- 3 weeks elapsed time from start to finish, by default.
- No heroics.
- Procurement staff happier, less-stressed.
- Clients delighted.



## The Process: How Backlogs Develop

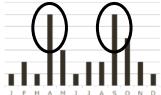
#### VARIATION

#### Variation in:

- volume of work
- # of resources available

Causes

- skill profile
- complexity of work
- effectiveness of tools
- other?





#### UNREASONABLENESS

2. Overwhelmed team, thus reduced productivity

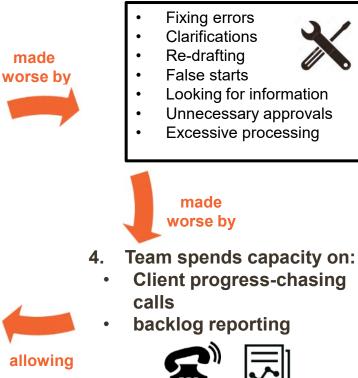


- repeat Steps 2-5, fall further behind
- 5. Fewer files finished, a growing backlog



#### WASTE

3. Team spends its reduced capacity on non-value added, preventable, work



## Personal Time Management

- 1. Boundaries
- 2. Switch-tasking vs focus
- 3. Interruptions
- 4. Meetings
- 5. Unclear Jobs to Be Done
- 6. Unclear requests & commitments
- 7. Sequential reviews/approvals
- 8. Waterfall style instead of focus
- 9. Working by email instead of F2F
- 10. Procrastination

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## The Full Client/User Experience



We see what happens in our own functional silo – but the client/user experiences what happens in each vertical silo – and everything in-between!

The "Client" also experiences things before and after the service is rendered.

#### © LEAN AGILIT Y\*

GDS UK's 12 Question *"How Good is Your Service"* Assessment

	No A bit Yes
1. Our service helps a user do what they need to do, from start to finish	00000
2. Our service makes a user do as few things as possible	00000
3. Our service has no dead ends	00000
4. Our service makes it straightforward to get human assistance	00000
5. Our service doesn't show its internal structures to users	00000
6. Our service is easy to find	00000
7. Our service makes it clear what it is for and what it involves	00000
8. Our service makes it clear how decisions are made	00000
9. Our service is consistent	00000
10. Our service works in a familiar way	00000
11. Our service is one everyone can use and understand	00000
12. Our service treats users and their information with care and respect	00000



## Understand User Behaviours

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## Two Types of Demand



### Value Demand

Contacts that we WANT.

Eg:

• Initiate a transaction

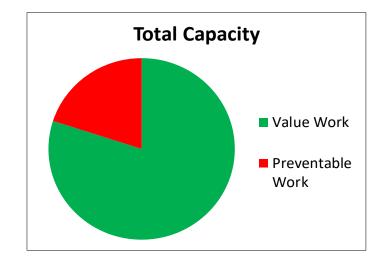


### Failure Demand

- Contacts we DON'T WANT
- Arising from a failure to do something or do something right.

Eg:

- I don't understand can you explain?
- You got this wrong.
- You missed something.
- How do I do this?
- Who do I call?
- Progress chasing where is my stuff?





"Failure Demand" drains capacity but does not add value

Туре	Example	Waste
1. Something not done	Document, information missing – go find it	Defect
2. Something not done right	Wrong information, misplaced info – redo it	Defect
3. Something is not clear	Unclear instructions, requirements – go get clarification	Defect
4. Something takes too long	Chasing progress, answering	Waiting & Excessive processing

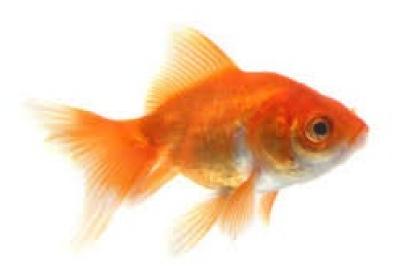
Procurement & Materiel Management examples of 1, 2, and 3 from your world?



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# The "North Star" Design Question – forms, templates, web pages, instructions, etc.

Do

- first-time users,
- busy, distracted, users, or
- your worst-performing users

get it right, on the first attempt, unassisted, 19 times out of 20?

This is the theme of the February 7 follow-up session.



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#### Gover



INSTRUCTIONS FOR PERSONNEL SCREENING CONSENT AND AUTHORIZATION FORM TBS/SCT 330-23E (Rev. 2002/02) Once completed, this form shall be safeguarded and handled at the level of Protected A.

General: If space allotted in any portion is insufficient please use separate sheet using same format.

#### 1. Section A (Administrative Information) Authorized Departmental/Agency/Organizational Official

The Official, based on instructions issued by the Departmental Security Officer, may be responsible for determining, based on five year background history, what constitutes sufficient verification of personal data, educational and professional qualifications, and employment history. References are to be limited to those provided on the application for employment or equivalent forms.

#### SUPPLEMENTAL INFORMATION REQUIREMENTS

Persons who presently hold a SECURITY CLEARANCE and subsequently marry, remarry or commence a common-law partnership, in addition to having to update sections of the Security Clearance Form (TBS/SCT 330-60), are required to submit an original Personnel Screening, Consent and Authorization Form, with the following parts competed:

Part A - As set forth in each question

Part B - As set forth in each question, excluding CRIMINAL CONVICTIONS IN AND OUTSIDE OF CANADA. Part C - Applicant's signature and date only are required

"Other". This should be used to identify if the security screening is for Site Access, NATO, SIGINT etc.

#### 2. Section B (Biographical Information)

To be completed by the applicant. If more space is required use a separate sheet of paper. Each sheet must be signed.

Country of Birth - For "NEW" requests, if born abroad of Canadian parents, please provide a copy of your Certificate of Registration of Birth Abroad. If you arrived in Canada less than five years ago, provide a copy of the Immigration Visa, Record of Landing document or a copy of passport.

 List only criminal convictions for which a pardon has NOT been granted. Include on a separate attached sheet of paper, if more than one conviction. Applicant must include those convictions outside Canada.
 Offences under the National Defence Act are to be included as well as convictions by courts-martial are to be recorded.

3. Section C (Consent and Verification)

A copy of Section "C" may be released to institutions to provide acknowledgement of consent.

Criminal record checks (fingerprints may be required) and credit checks are to be arranged through the Departmental Security Office or the delegated Officer

Consent: may be given only by an applicant who has reached the age of majority, otherwise, the signature of a parent or guardian is mandatory.

The age of majority is: 19 years in NFLD., N.S., N.B., B.C., Yukon, Northwest Territories and Nunavut; 18 years in P.E.I., Que., Ont., Man., Sask. and Alta.

The applicant will provide initials in the " applicant's initials box".

The official who carried out the verification of the information will print their name, insert their initials and telephone number in the required space. - Reliability Sciencing (for all types of screening identified within Section A): complete numbers 1 and 2 and 3 if applicable. - Security Clearance (for all types of screening identified within Section A): complete numbers 1 to 4 and 5 where applicable. - Other : number 5 is used only where prior Treasury Board of Canada Secretariat approxing has been dotained.

#### 4. Section D (Review)

To be completed by authorized Departmental/Agency/Organizational Official who is responsible for ensuring the completion of sections A to C as requested.

#### 5. Section E (Approval)

Authorized Departmental/Agency/Organizational Security Official refers to the individuals as determined by departments, agencies, and organizations that may verify reliability information and/or approve reliability status and/or security clearances. Approved Reliability Status and Level I. Il and III, as well as end is the signature of the authorized security difficial remanager are added for Government of Canada use only. Applicants are to be briefed, acknowledge, and be provided with a copy of the "Security Screening Certificate and Briefing Form (TBS/SCT 330.47)". Note: Private sector organizations do not have the authority to approve any level of security screening.

Photographs: Departments/Agencies/Organizations are responsible for ensuring that three solow photographs of passport size are attached to the form for the investigating agency. Maximum dimensions are S0mm and minimum are 43mm. S4mm. The face length from chin to crown of head must be between 25mm x 35mm. The photographs must be signed by the applicant and an authorized security Oficial. The photographs must have been taken within the last is months. It is required for new or upgrade Level III security clearances for identification of the applicant during the security screening investigation by the investigating agency. The investigating agency may in specific incidents request a photograph for a Level I or II clearances when an investigation is required.

TBS/SCT 330-23E (Rev. 2006/02)

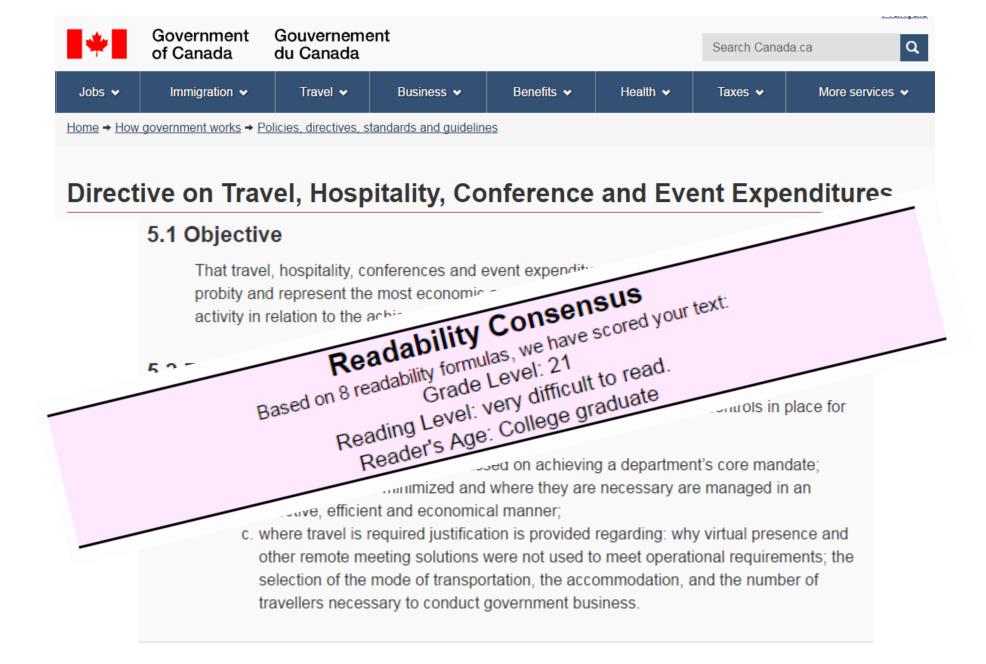
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**Causes of Failure Demand** 

## **COMPLICATED LANGUAGE**





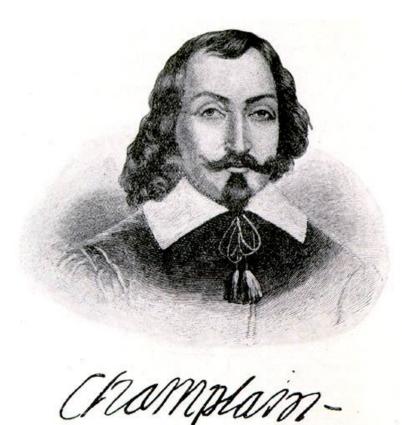


**Causes of Failure Demand** 

## THE CURSE OF KNOWLEDGE



### The Curse of Knowledge: Put yourself in <u>their</u> shoes









**Causes of Failure Demand** 

## LAYOUT



## How Web Readers Read

Most online readers scan first.

Eye-tracking studies show that most people read web content in and F-Pattern starting at the top-left of a web page before moving further down through its content.



http://www.dal.ca/webteam/web\_style\_guide/writing\_for\_the\_web/best\_practices.html



#### Mute your earbuds before crossing the street

The research found that distractions such as texting and talking on the phone impaired participants' ability to cross the street safely, but listening to music posed the greatest risk. As a result Dr. Shwebel recommends encouraging kids to mute their earbuds while crossing the street. Kids should also avoid talking on the phone or texting and instead to pay full attention to the road and other surroundings.

http://www.dal.ca/webteam/web\_style\_guide/writing\_for\_the\_web/best\_practices.html



### **Mute Your Earbuds Before Crossing The Street**

#### What Kids Should Do

- mute their earbuds while crossing the street
- avoid talking on the phone or texting
- pay full attention to the road and other surroundings

#### The Evidence

Distractions that impair children's ability to cross the street safely included:

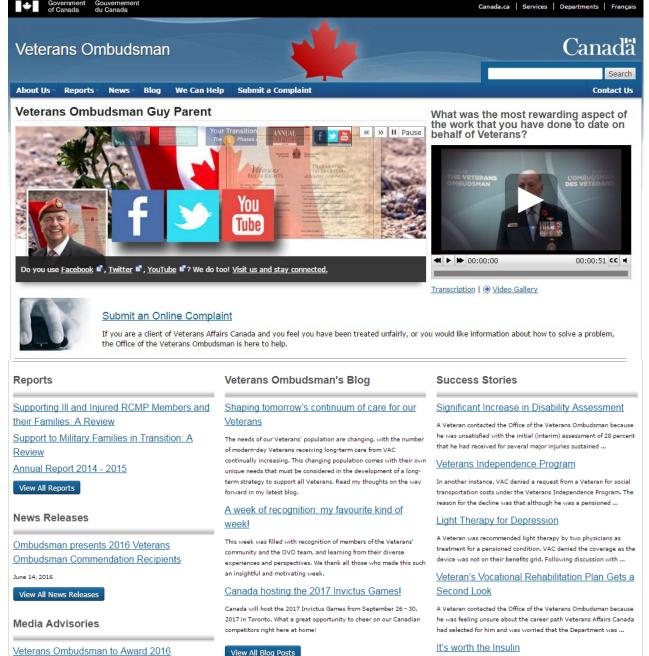
- listening to music
- texting
- talking on the phone



**Causes of Failure Demand** 

## CAN'T FIND IT





An 87 year old Veteran contacted the OVO indicating that he requires a specific type of insulin that is not covered through the VAC drug plan. The client submitted a Doctor's note ...





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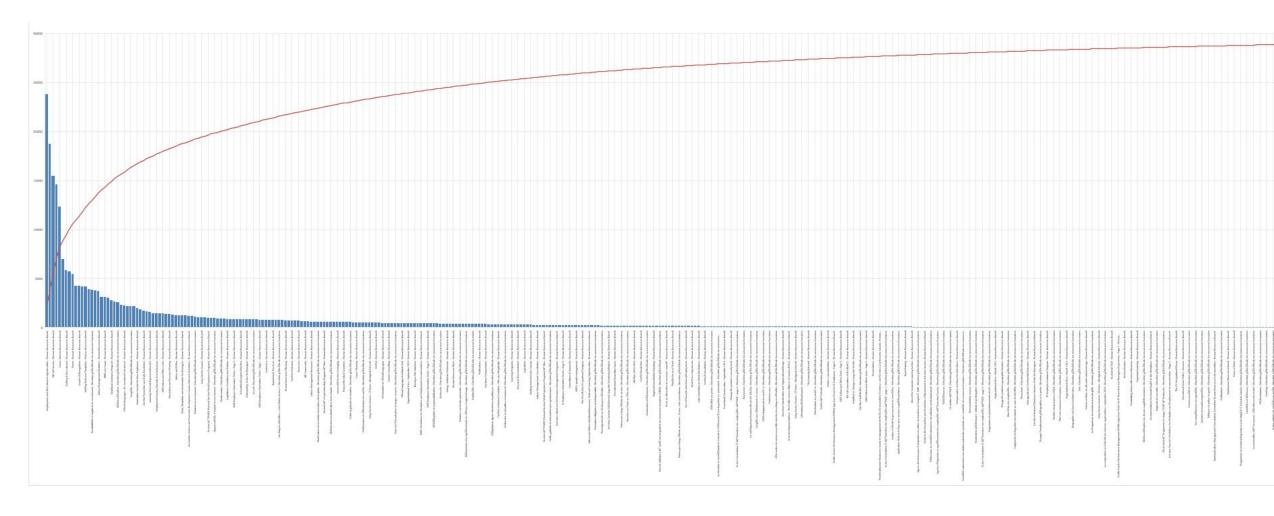
Commendation Recipients

June 13, 2016

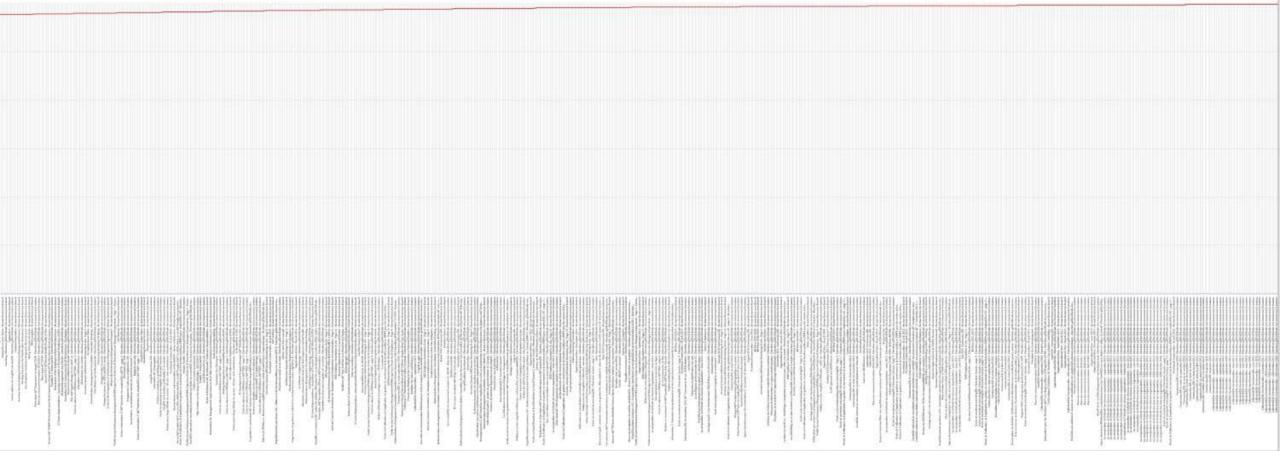
View All Media Advisories



#### Intranet Page Views in Past 12 Months

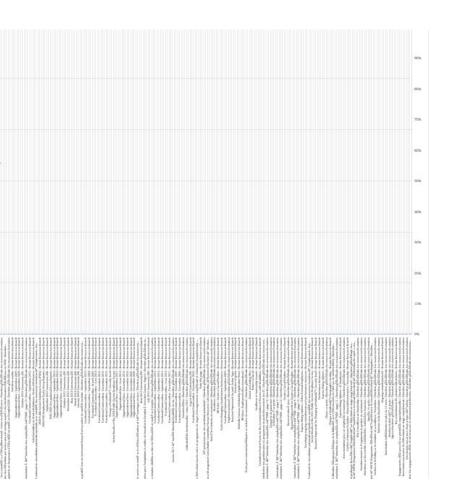








HRIE tritranut Siles Page Views 2018



In past 12 months:

- 1110 pages on Intranet site
- Top 3 pages account for 28% of views
- Top 5 pages account for 32% of views
- Top 18 pages account for 75% of views
- How many pages have almost no views?



**Causes of Failure Demand** 

## **NOT ERROR-PROOFED**





## Overview

- 1. Three reasons why Materiel Management and Procurement people are so busy:
  - Broken process
  - Personal time management decisions
  - Client experience
- 2. What is the Client/User Experience?
- 3. How does the Client/User Experience reduce our workload as service providers?
  - What is Failure Demand?
  - What causes it?
  - Practical tips to eliminate it and free up our time
- 4. Wrap-up your next steps



## Steps to Eliminate Failure Demand

- 1. Measure it
- 2. Drill into it with real-life users and data
- 3. Protype
- 4. Test with real-life users



<ul> <li>Title: <u>Unclear/Incorrect Client Application Forms</u></li> <li>Process Step: Review Client Procurement Application Form</li> <li>What Happens: When Clients submit their application forms, 75% of the time they submit forms with: <ul> <li>Unclear "Action Requested"</li> <li>Action requested and details do not match</li> </ul> </li> <li>This results in Officers going back to clients at least once to obtain clarifications and corrections.</li> </ul>					<ul> <li>Application form asks overly broad questions that do not guide client to provide specific, detailed answers (e.g. justification)</li> <li>No fields in form for certain required information</li> <li>Written in procurement language, not language of client</li> <li>Client does not know what a successfully-completed form looks like</li> <li>Form not understandable "at a glance"</li> </ul>				
What percentage	ge of files	does it happen to?	75% of app	lication forms	Solutions:				
Number of files	s per mon	th:	Avg .100		Update application form to eliminate root causes of unclear and incorrect				
Number of affe	cted files	per month:	75 Intake fo	rms per month	<ul> <li>responses</li> <li>1. Create prototype with clearer, detailed question and example of</li> </ul>				
Who is affected	d and wha	at is impact when this	happens <u>or</u>	nce?	correctly-filled out form				
Officer Client			d how to		<ol> <li>Test prototype on 5 "occasional" clients, obtain their feedback at time of use</li> <li>Adjust prototype</li> <li>Launch new form</li> </ol> Quick Wins:				
Officer		eview re-submitted for	m	15 mins. effort	Include example of properly filled-out form to client in rework email to client				
Total Prevental	ble Effort	(by month)			Prediction:				
			56.25 hours per month 9.4 days per month		If we modify the form THEN we would expect that the percentage of unclear/incorrect forms would drop from 75% to 25%, saving 6 days of Officer				
Client 30 min X 75 files = 37.5 hours per month 2,250 min			37.5 hours pe	er month	effort per month.				
Elapsed Time Impact: Adds 5-10 business days of delay to the typical request					What have we learned from this experiment? • •				



### **Collect Data**

				IT Financial	
What is Reviewed	Procurement Specialists	GCO	Manager Procurement	Procurement Specialist	
Internal Request					
Non-Competitive procurements - cost is beyond threshold				100%	
Duration/term missing or unclear				80%	
Insufficient business rationale (general)				75%	
Draft RFP					
	1 - 80%				
Term, scope, evaluation, pricing, mis-alignment	2 - 60%				
between rated/scope/appendix A	3 - 30%				
Wrong producement vehicle	30-40%				
Wrong procurement vehicle	50-40%				
An element of the Scope of Work/description of product unclear, lacks detail		70-90%			
Evauation criteria and weighting do not fully reflect 1.) business requirements; 2.) pricing response, 3.) term		60-80%			
sheet/service agreement response		00-00%			
Wrong version, not current RFP template		15-30%			
Response Template questions don't reflect scope of work		30-50%			
Changing business terms eg. Price		40-60%			
Proposals					
Completion, missing element in Bravo	10-20%				
Evaluation Template					
Missing comments / rationale	25%				
······································					
Evaluation					
Variance or discrepancy in results	10-20%				
CIF/Memo					
Missing info:					
-No GCO contact	500/				
-Wrong exemption -Addition errors	50%				
Missing history - spend					
No access to project files needed to prepare CIF				70-90%	
Inconsistencies between contract, CIF and memo			10%		
·			10%		
Memo- basic info missing what, why, how much, budget Issues with math, dates, budget, procurement method,					
exemption (Schedule A), type, completeness, signatories			50%		
Contract					
Issues with Appendix A, dates, ceiling, disb/taxes, signatories			5%		
LEGEND					

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#### LEGEND

X= reviewed at this step, no feedback on frequency of errors 30% = reviewed at this step and criteria not satisfied 30% of the time.

## Drill into it with real-life users

### **Power Users**

- + Optimize
- + Learn shortcuts
- + Make it work great for Power Users
- Atypical of larger user base?
- May not work for Worst-Performing Users

### **Worst-Performing Users**

- + Often most typical of user base
- + If it works for them, it will work for anyone
- Miss out on insights of Power Users?
- May not allow Power
   Users to perform at peak anymore?



## Hallway Usability Test

- Ask someone with no background in the VWI's topic to read it and provide feedback
- Ask them to speak their current thoughts as they use the VWI

Can a first-time user get this right 19 times out of 20 without any assistance?



- 1. What part(s) were clear?
- 2. What was unclear?
- 3. How would you change it to make it easier to use and more effective?



## **Observation Test**

Observe a target user performing the task with aid of the prototype.

- 1. Did the user perform the task effectively?
- 2. What parts did they use?
- 3. What parts did they skip?
- 4. Where did they get stuck?

Can a first-time user get this right 19 times out of 20 without any assistance?

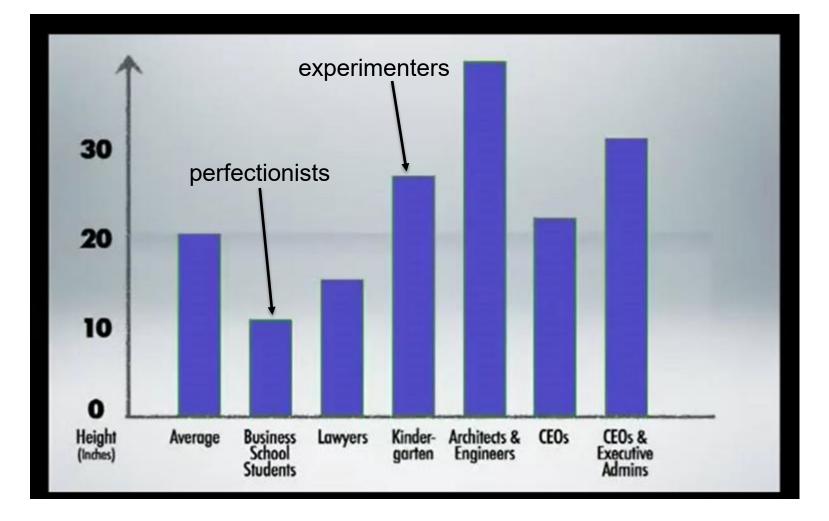




## Prototype It, Then Re-Test

- Create a new prototype based on your initial testing
- Test it with a different set of users





Excellence is not created by perfectionism. It is created through experimentation, learning and iteration.



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## Four Things You Can Do Next

- 1. Get some clients/users to fill in the 12-question Service assessment how can you help make the experience better for them?
- 2. Identify your worst forms of failure demand and the documents/tools that caused them
- 3. Prototype and test solutions with real-life users/clients
- 4. Enjoy your freed-up time!



## Have fun!





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