

Effective Time Management in Procurement

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The logo for PEAK features the word "PEAK" in a bold, white, sans-serif font. A white arrow starts from the bottom left of the letter 'A' and curves upwards and to the right, ending at the top right of the letter 'K'.

PEAK

SMARTER PROCUREMENT
FOR PUBLIC GOOD



Effective Time Management in Procurement

Procurement professionals often face the challenge of managing multiple tasks simultaneously, from vendor negotiations to contract renewals and stakeholder communication. Effective time management is a critical skill for maximizing efficiency, reducing stress, and ultimately driving better procurement outcomes.

Importance of Time Management in Procurement



Meeting Deadlines and Project Timelines: Delays in procurement can significantly impact project delivery and overall business goals.



Cost Savings and Efficiency: Effective time management allows for better planning and forecasting, helping to avoid last-minute rushes that can incur additional costs.



Relationship Management: Timely communication and efficient processing enhance collaboration and build stronger relationships with stakeholders.

Time Management Challenges

Workload: Managing multiple projects in different stages and adapting to changing priorities.

Stakeholder Demands: Balancing the needs of various stakeholders, including internal customers, vendors, Statewide approvers, finance, and legal teams.

Urgent Tasks: Meeting deadlines and allowing for the time needed to complete steps of the procurement process.

Manual and Repetitive Processes: Time spent on administrative tasks can detract from strategic work.

Contract Monitoring: Organizing files to track contract terms and proactively manage renewals or rebids.



Creating Effective Procurement Timelines



Know the players and identify roles



Track Key Milestones (Contract Monitoring)



Know each of the steps/tasks for that particular procurement



Communicate timeline and set goals upfront



Start Backward when building your timeline



Example – IFB Simple Services

PROCUREMENT STEP	DATES	# of Days	RESPONSIBLE ENTITY
Draft solicitation	June 1, 2025 – June 15, 2025	15 days	DOA Purchasing/DOA Division CM
Submit Solicitation to P&C for preliminary review	June 15, 2025		DOA Purchasing
P&C Review and approval	June 15, 2025 - July 15, 2025	30 days	Statewide P&C
Post solicitation	July 15, 2025		DOA Purchasing
Site Visit	July 22, 2025	7 days	
Vendor Questions	July 25, 2025	3 days	DOA Purchasing
Post Answers	July 29, 2025	4 days	DOA Purchasing/DOA Division CM
Bid opening	August 5, 2025	7 days	DOA Division CM
Evaluation	August 5, 2025 – August 19, 2025	14 days	DOA Division CM
Submit Award recommendation to P&C	August 19, 2025		DOA Purchasing
P&C Review and approval	August 19, 2025 – September 15, 2025	27 days	Statewide P&C
Contract Award	September 15, 2025		DOA Purchasing
Contract Close out of current contract, Kickoff and Set up of new	September 15, 2025 – October 1, 2025	15 days	DOA Division CM
Contract Effective Date	October 1, 2025		DOA Division CM

Example – RFP Professional Services

PROCUREMENT STEP	DATES	# of Days	RESPONSIBLE ENTITY
Draft solicitation	June 1, 2025 – June 30, 2025	30 days	DOA Purchasing/DOA Division CM
Submit Solicitation to P&C for preliminary review	July 1, 2025		DOA Purchasing
P&C Review and approval	July 1, 2025-August 15, 2025	45 days	Statewide P&C
Post solicitation	August 15, 2025		DOA Purchasing
Pre-Proposal Conference	August 25, 2025	10 days	
Vendor Questions	August 29, 2025	15 days	DOA Purchasing
Post Answers	September 3, 2025	5 days	DOA Purchasing/DOA Division CM
Bid opening	September 19, 2025	16 days	DOA Division CM
Evaluation	September 19, 2025 – October 17, 2025	28 days	DOA Division CM
Submit Award recommendation to P&C	October 17, 2025		DOA Purchasing
P&C Review and approval	October 17 – November 30, 2025	44 days	Statewide P&C
Contract Award	December 1, 2025		DOA Purchasing/DOA Division CM
Contract Close out of current contract, Kickoff and Set up of new	December 1, 2025 - December 31, 2025	30 days	DOA Division CM
Contract Effective Date	January 1, 2026		DOA Division CM

Examples – Compare Timelines

PROCUREMENT STEP	IFB # of Days		RFP # of Days	
Draft solicitation	15 days	June 1, 2025	30 days	June 1, 2025
Submit Solicitation to P&C for preliminary review				
P&C Review and approval	30 days		45 days	
Post solicitation				
Preproposal Conference/Site Visit	7 days		10 days	
Vendor Questions	3 days		15 days	
Post Answers	4 days	4 MONTHS	5 days	7 MONTHS
Bid opening	7 days		16 days	
Evaluation	14 days		28 days	
Submit Award recommendation to P&C				
P&C Review and approval	27 days		44 days	
Contract Award				
Contract Close out of current contract, Kickoff and Set up of new	15 days		30 days	
Contract Effective Date		October 1, 2025		January 1, 2026

The 10-step Process for all IT projects over Agency Delegation

Estimate to be at least 13 months for DIT Projects

STEP 1 - New IT Procurement **Intake Form** collects key information from Agency Business to help develop **effective sourcing strategies & solicitations** that promote competition & increase opportunity for innovation from vendors

STEP 4 - Procurement, Standards, and Security Exception Requests are now submitted through the Sourcing Tool for review and approval by the applicable NCDIT reviewer groups

STEP 10 - Follow Signature Policy

NCDIT IT Procurement Process (enabled in NC eProcurement Sourcing Tool)



STEP 2 - New optional IT Procurement Planning Meeting improves collaboration between State Agencies and NCDIT at the beginning of the process to confirm approach, resources, and time needed to deliver best-value solutions

STEP 3 - Agency CIO (or designee) now required to approve draft IT solicitation document prior to it being submitted to NCDIT for approval to confirm awareness and approval

STEPS 4, 7, 8, 9 - Pre-defined tasks and workflow in NC eProcurement Sourcing Tool guide State Agencies to facilitate appropriate engagement and approval from NCDIT reviewer groups (e.g., ESRMO, Enterprise Architecture, EPMO, Statewide IT Procurement Office) during each applicable step of the process

Evaluation Team Time Commitment



Let the Team know upfront What to Expect

- Hold kickoff meeting with Team
- Being on the evaluation team is a commitment
- ALL voting team members must attend ALL evaluation team meetings
- The amount of time and meetings depends on the number of responses received.
 - Example: 4 responses x 3 different evaluation criteria = documentation in 12 areas.
- Evaluations go faster if the team is prepared and already reviewed the proposals before the team meetings
- May need additional meeting time for presentations, final evaluations, drafting of award recommendation
- May be called on to defend the recommendation for award

Communication



Set Clear Expectations:

Clearly communicate deadlines, specifications, and requirements to stakeholders and suppliers.

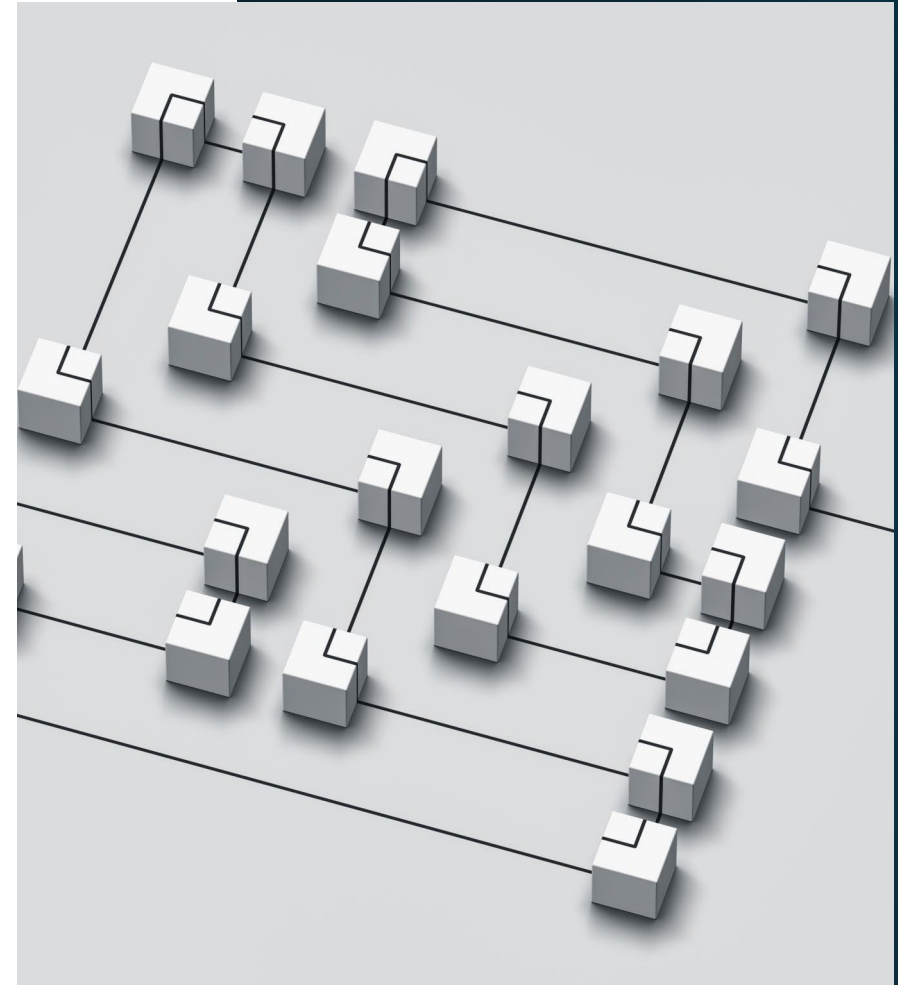
Effective Meeting Management: Schedule meetings with clear agendas and desired outcomes.

Documentation:

Document throughout the procurement process and share among the stakeholders.

Streamlining Processes & Leveraging Technology:

- **Automation:** Automate repetitive tasks
- **Standardization:** Use templates (when are you creating these in the timeline?)
- **Centralized Data:** Establish a unified system for procurement data for faster decision-making.
- **Artificial Intelligence (AI):** drafting scope, communications, data analysis, evaluation
- **Collaboration:** Coordinate with other agencies on projects, share ideas, scopes, challenges and successes.



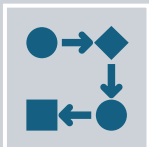
Measuring and Continuous Improvement



Implement New Strategies: Create templates, reorganize, set new processes, provide training to stakeholders



Track Performance: Monitor average time spent on each stage of the procurement process, approval, and delivery. Set KPIs.



Analyze and Adjust: Identify bottlenecks, learn from mistakes, and continuously refine time management strategies.



Effective time management is not about working harder, but smarter.

By implementing strategic approaches and leveraging technology, procurement professionals can enhance efficiency in the procurement process and contribute to meeting organizational goals.



PEAK THANK YOU!

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