

# SpendSense: Turning Data into Direction

DCPOs

Danielle Hearst

Melissa McKoy

Nicole Hunter



PEAK  
SMARTER PROCUREMENT  
FOR PUBLIC GOOD

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## AGENDA

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5 Minute Intro - Questions

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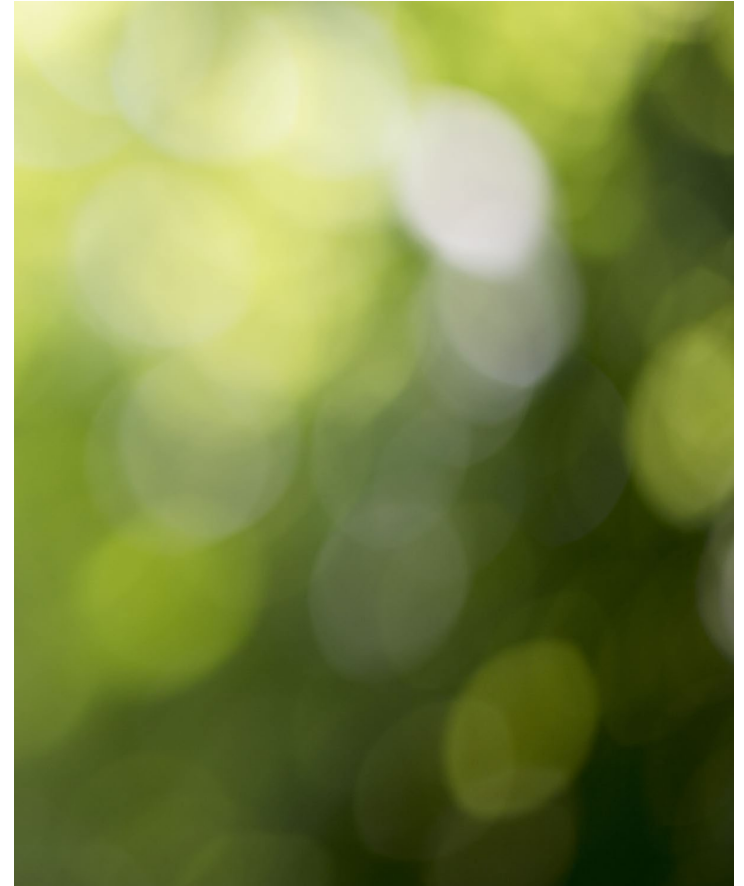
10 Minutes per Danielle, Melissa, Nicole

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10 Minute – Questions

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What are your questions about Data Analytics and Spend Analysis?

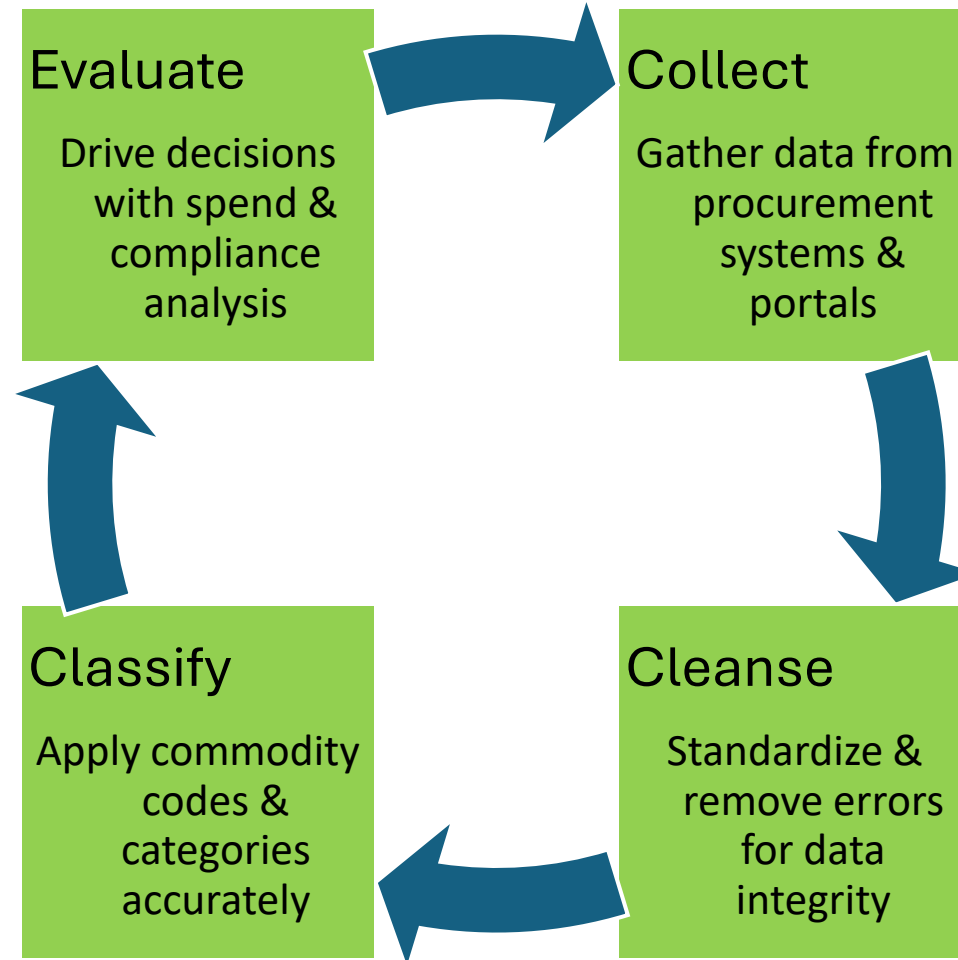


# Learning Objectives

- Understand what Data Analytics is and what tools are available.  
Operations & System Support (Danielle)
- Apply analytics to contract management and contract oversight.  
Contract Management (Melissa)
- Apply analytic insights into actionable sourcing strategies.  
Strategic Sourcing (Nicole)

# Operations & System Support & Data Analysis

“Data analytics and procurement analysis is the systematic process of collecting, cleansing, classifying and evaluating procurement data to reduce costs, improve efficiency, and strengthen compliance.”



# Data Tools & Resources

 NC eProcurement  
**Sourcing**

Powered by Ariba

Manages solicitation events including IFBs, RFPs, and RFQs. Commodity codes drive supplier targeting and award classification.


 [NC eProcurement Reports & eVP](#)

 NC eProcurement  
**Contract**

Powered by SAP Ariba


Houses executed contracts with commodity classifications linking spend to categories for compliance and reporting.


 [OpenBudget & NC eProcurement Reports](#)

 NC eProcurement  
**Buying**


Powered by SAP Ariba


Enables agencies to execute purchases against contracts. Commodity codes route orders and support spend tracking.

 [NC eProcurement & eReporting](#)

 Electronic Vendor Portal  
**Vendor**

Vendors self-register and select commodity codes to receive solicitation notifications and establish eligibility.

 [Browse vendor & data extraction](#)


 Electronic Vendor Portal  
**Solicitations**

Search for business opportunities in North Carolina's official online repository for state advertisements for competitive procurements.

 Power BI Dashboard  
**Open Budget**

Public-facing contract spend dashboard providing transparency, oversight, and accountability for state procurement activity.

 [NC eProcurement – Contracts](#)

 P Card Management  
**BOA Works**

Web-based program for managing purchasing card transactions, approvals, and allocations for agency cardholders.

# What Contributes to Data-Driven Procurement Success



## Staff Training & Competency

Equipping procurement staff with the knowledge to use NC eProcurement tools correctly — from commodity code selection to data entry — directly determines data quality downstream.



## Standardized Processes

Developing a source-to-insight pipeline — drawing from NC eProcurement, Open Budget, and eReporting — so agencies receive consistent, analysis-ready data for benchmarking and vendor targeting.



## Policy & Governance

Clear agency policies — including tool selection guidance, module access rules, and compliance frameworks — preserve data integrity across the procurement lifecycle.



*Operations & Systems Support doesn't tell agencies how to use their data — we make sure the data is there, trustworthy, and ready when they need it.*



# Key Questions

With whom are we spending funds?

Are we getting what we paid for?

Is this procurement necessary?

What are we really spending?

Are there hidden costs?

# Why Spend Analysis Matters

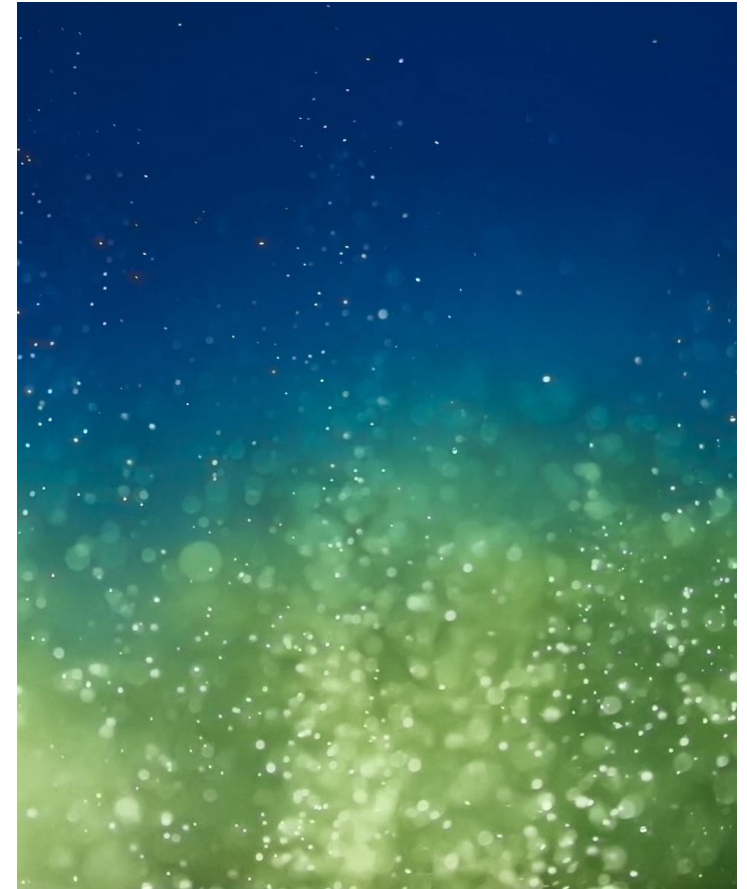
Transforms procurement from a paperwork driven, reactive function, into a strategic, insight driven system that supports transparency, efficiency, and optimal procurement projects.

Supports goods and services contract management, strategic sourcing, budgeting, and planning.

# Contract Management & Spend Analysis

The overarching process used to ensure that a contractor performs in accordance with the requirements of the contract. This includes monitoring performance, enforcing compliance, managing risks, documenting changes, resolving issues, and maintaining all contract-related records.

Spend/Data Analysis identifies information on how much money an entity has spent on goods and/or services under a contract. This includes expenditures recorded from multiple systems. It provides visibility into who spent money, how much, with which vendor, for what, and when. Spend data and key performance indicators are utilized to analyze and understand how the contract is performing overall, how each vendor under the contract is performing, agency purchasing behavior, contract value, usage trends, and cost savings opportunities.



# The What – Data

Reports (Vendor/System)

Number of divisions utilizing commodity

Cumulative amount of identified Contract Savings throughout contract term

Spend associated with contract commodity code but not purchased under the contract

Details about which divisions provide the most spend under the contract

Details about how vendor is performing under the contract

# The Where & How

## Vendor Required Spend Reports

1. CM confirms vendors are providing contractually required reports.
2. Even if there is no spend the vendor should still report \$0
3. Additional reports can be requested from the vendor (ex. Total spend per year during the life of the contract broken down by agency.

## Spend Data in eReporting tool

1. CM researches spend associated with the contract in eReporting
2. Look for spend associated with commodity code and not just spend associated with the contract to determine if divisions are not utilizing the contract
3. eReporting aid: [eReporting links](#)

# The Where & How

## Business Review Meetings

- CM must conduct periodic business review meetings in accordance with the timeframe stated in the contract
- Vendor should be reporting on identified key performance indicators
- Any identified challenges with the contract

**What to do with all the analysis?**

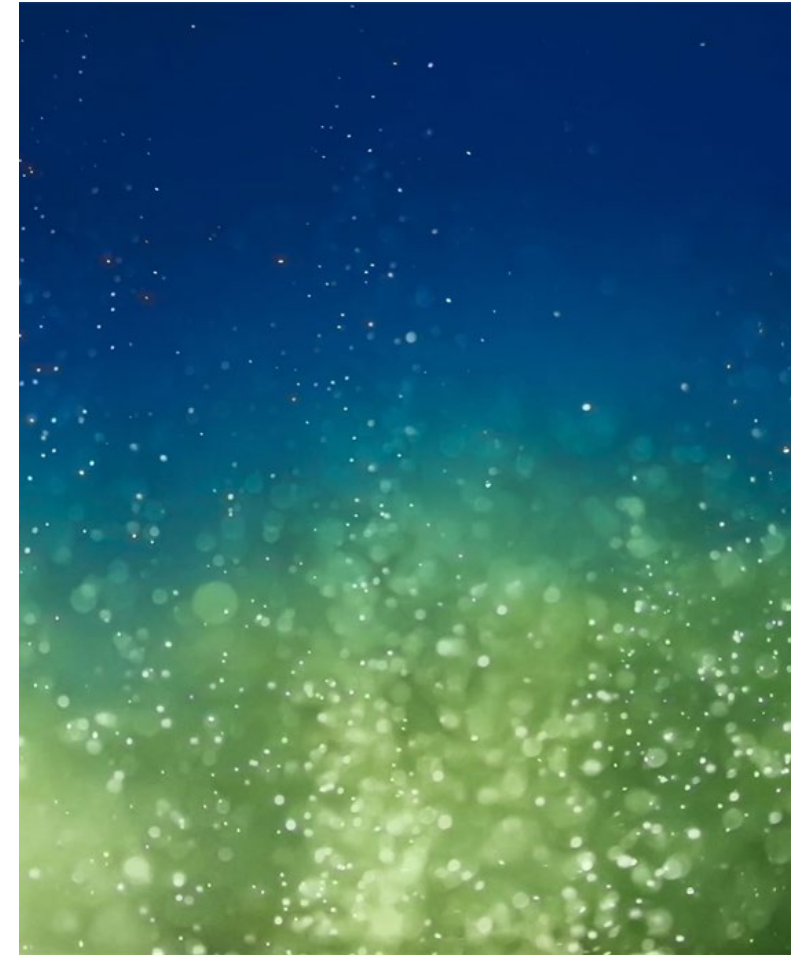
**Strategic Sourcing**

# Strategic Sourcing & Spend Analysis

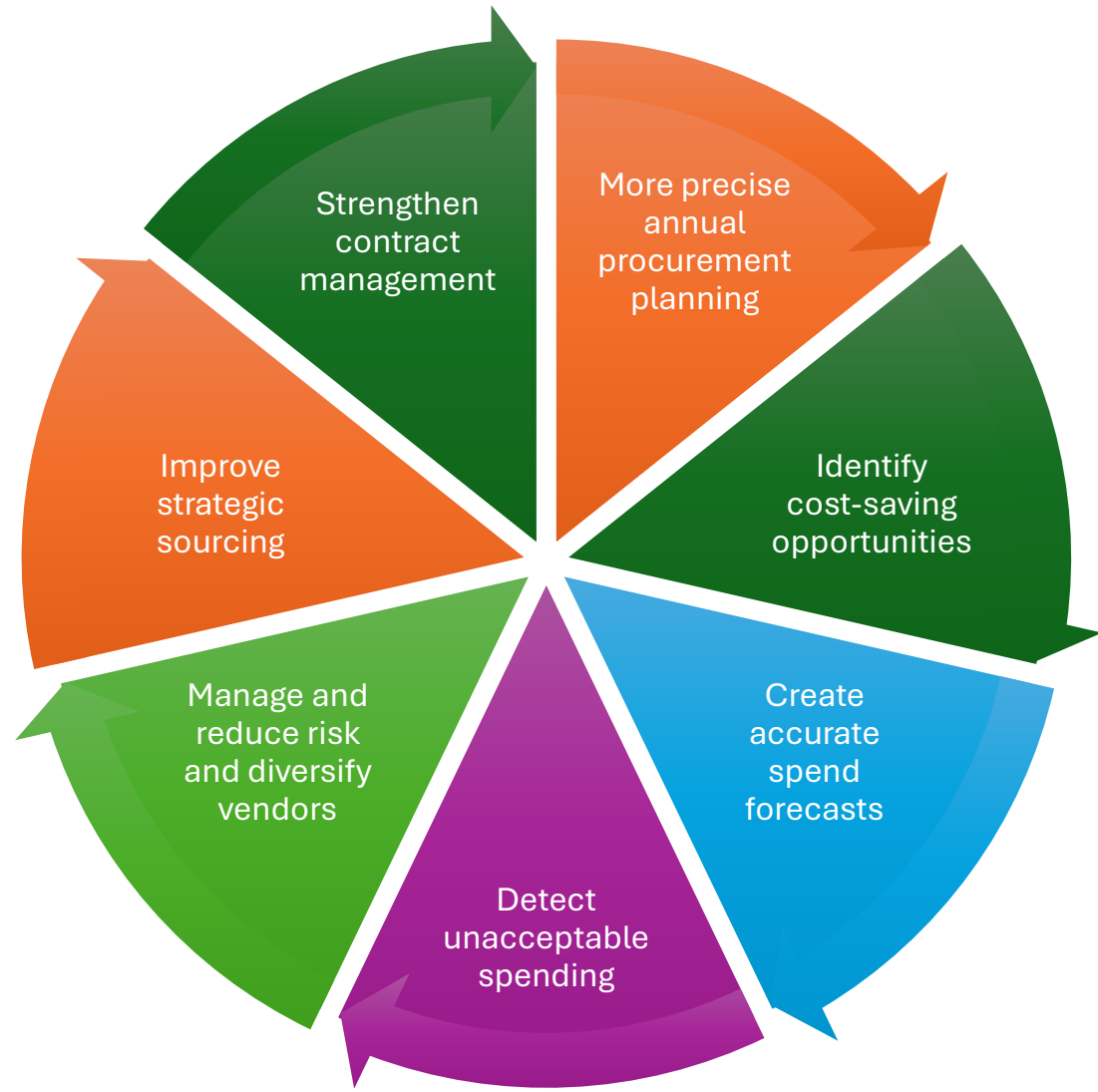
Structured, data-driven approach to planning and managing procurement projects, so that we obtain the most optimal long-term value, while meeting legal, ethical, and transparency requirements. Not reactive, but a coordinated strategy that aligns spending with state goals, improves efficiency, and strengthens accountability.




Cumulative spend data and historical spend data, along with contract performance results identifies priorities, evaluates vendor performance, guides negotiation, and supports Statewide Term Contract opportunities.



# Benefits of Spend Analysis





# Spend Analysis Workflow

1. Data Collection
2. Data Cleansing
3. Data Classification
4. Data Evaluation



# Data Sources



VENDOR REPORTS



EPROCUREMENT  
EREPORTING TOOL



VENDOR-PROVIDED  
DOCUMENTATION



HISTORICAL  
CONTRACT  
MANAGEMENT DATA



MARKET RESEARCH



AGENCY  
PROCUREMENT  
PLANS



VENDOR & AGENCY  
SURVEYS

# Challenges

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Manual processes

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Planning & time-intensive processes

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Variances in reporting

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Slow vendor responses

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Slow to no customer responses

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Incomplete spend data

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Multiple System data gathering

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Resistance to change in procurement practices

# When to Perform Data & Spend Analysis



Term Contracts



Ongoing contract management

Business Reviews



One year prior to contract expiration



No later than 9 months before strategy development

# Questions





# PEAK THANK YOU!

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