Guide for governments procuring digital technology

January 2021
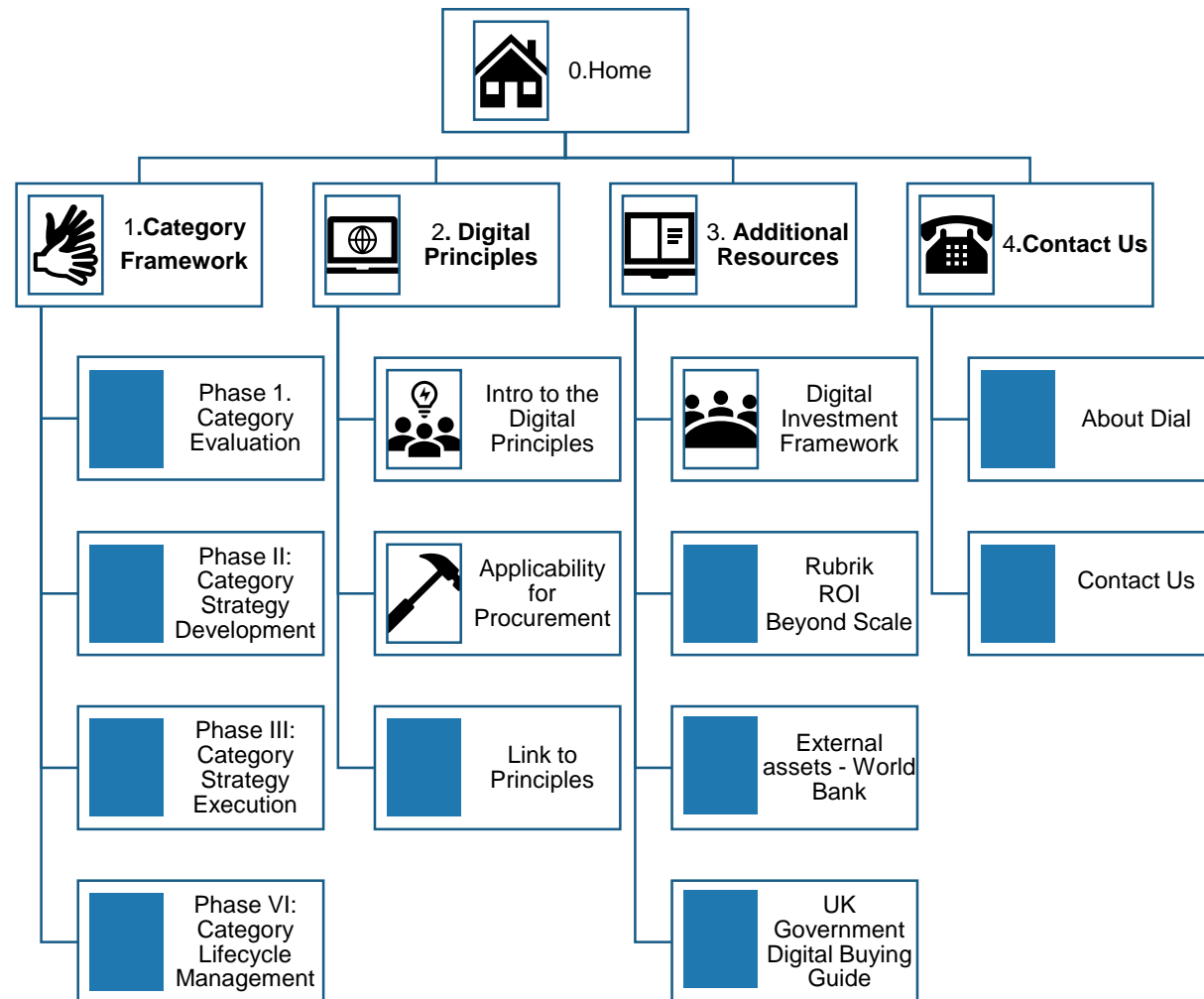
DIAL has created guidance for the procurement of digital

The website includes a Category Management Framework and multiple resources

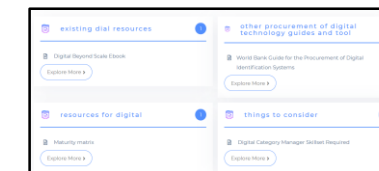**View and use the Guide at Procurement-digitalimpactalliance.org**

0.Home

1.Category Framework
- Phase 1. Category Evaluation
- Phase II: Category Strategy Development
- Phase III: Category Strategy Execution
- Phase VI: Category Lifecycle Management

2. Digital Principles
- Intro to the Digital Principles
- Applicability for Procurement
- Link to Principles

3. Additional Resources
- Digital Investment Framework
- Rubrik ROI Beyond Scale
- External assets - World Bank
- UK Government Digital Buying Guide

4.Contact Us
- About Dial
- Contact Us

Aligned to Digital Principles

Identify existing solutions

Examples of sector specific procurement guides

National strategy of building blocks

Tools and Templates to ensure that the content is practical

Web-format so updates are possible
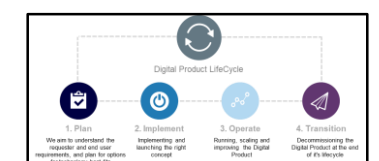
Focus on Digital as a Category

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The Guide is set up to be comprehensive and still allow the user to quickly navigate to the content needed

Guide Overview

The category guide contains a full step by step process for the procurement of digital technologies

The guide has two main components, focusing on overall category and programme planning, and on project execution support.

Category Strategy and Program Deliverables

Project Execution Deliverables

Phase I: Understand the Digital Category	Phase II: Develop a Program Strategy	Phase III: Execute the Individual Projects	Phase VI: Manage the Category and Projects

Follow the process sequentially, or navigate straight to the area you are working on.

5: Establish and Prioritize Category Projects
• Establish key objectives and the individual activities and projects required.

6: Develop Progress Tracking Plan
• Develop metrics and tracking procedures to rate progress on key category projects.

7: Define Resource Needs
• Identify the staff, expertise, and technical needs to execute selected category projects.

Click one the 4 phases that you want to explore

Each phase contains the steps required to complete. Navigate to the step you are working with and use the guide and downloadable tools to support your category planning and projects that you are busy with.

Use the resources tab to find more detailed information or different tools that can help with a particular phase or step

Category Management Guide Framework (Detailed)

Category Strategy and Programme	Project Execution

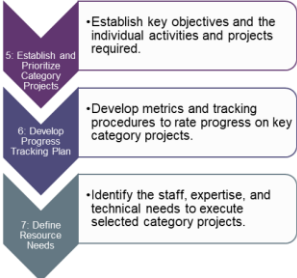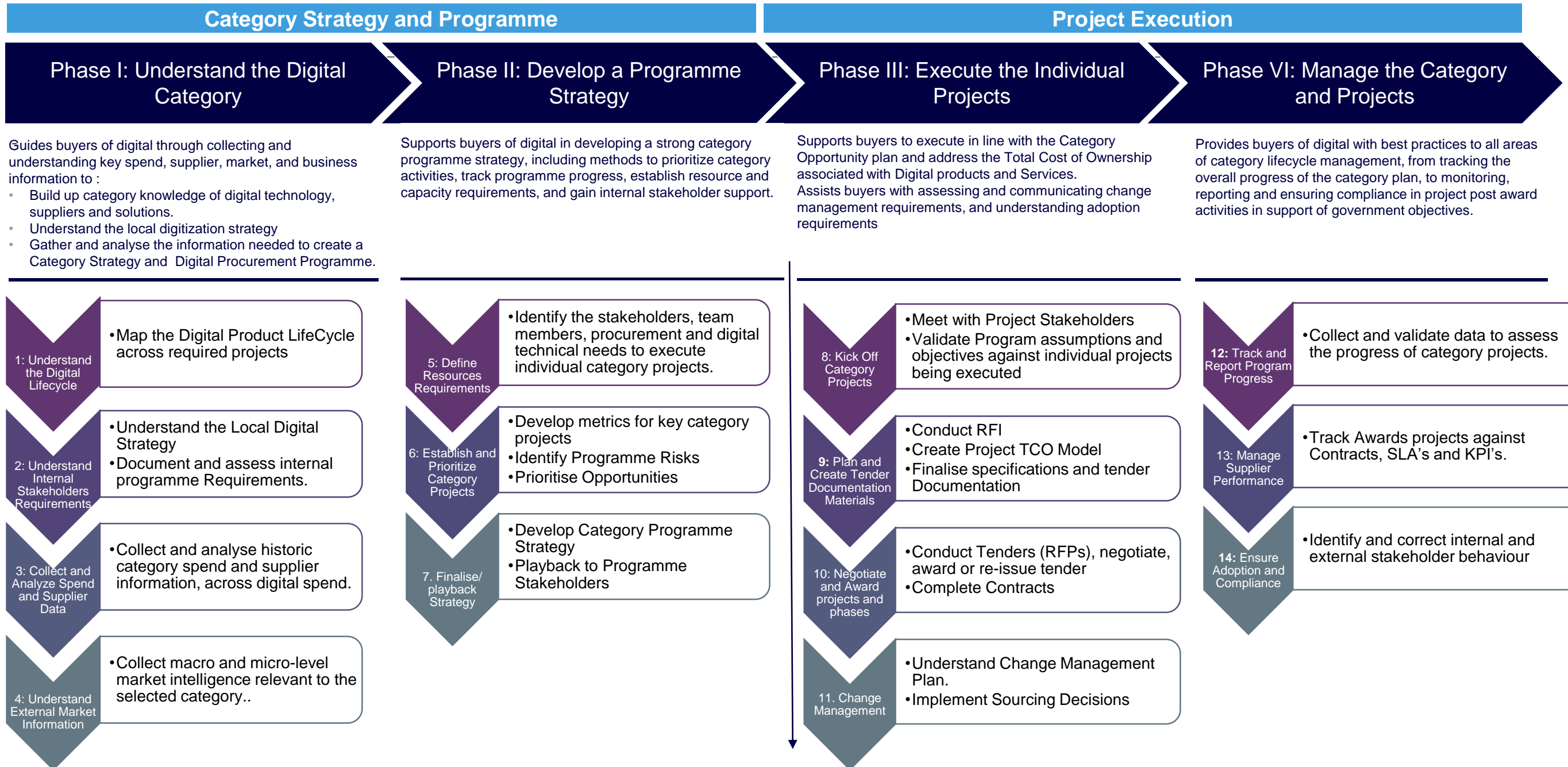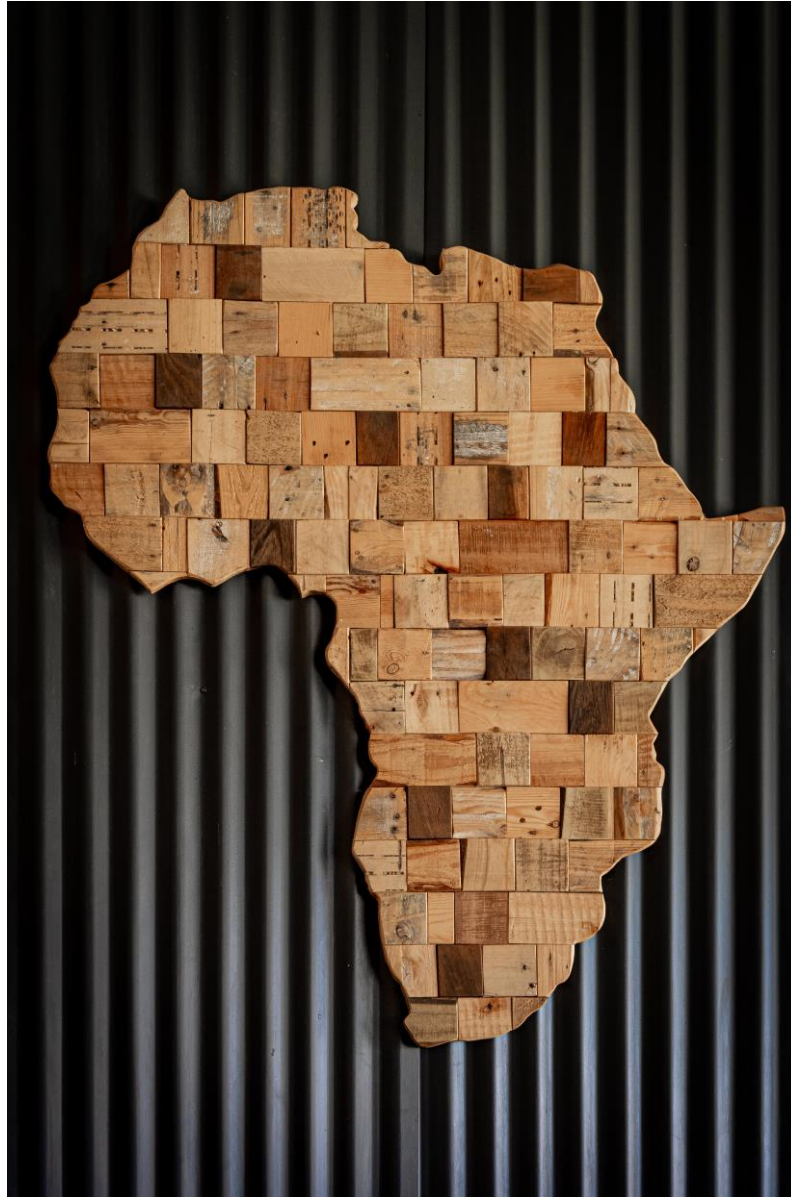| Phase I: Understand the Digital Category	Phase II: Develop a Programme Strategy	Phase III: Execute the Individual Projects	Phase VI: Manage the Category and Projects
Guides buyers of digital through collecting and understanding key spend, supplier, market, and business information to : • Build up category knowledge of digital technology, suppliers and solutions. • Understand the local digitization strategy • Gather and analyse the information needed to create a Category Strategy and Digital Procurement Programme.	Supports buyers of digital in developing a strong category programme strategy, including methods to prioritize category activities, track programme progress, establish resource and capacity requirements, and gain internal stakeholder support.	Supports buyers to execute in line with the Category Opportunity plan and address the Total Cost of Ownership associated with Digital products and Services. Assists buyers with assessing and communicating change management requirements, and understanding adoption requirements	Provides buyers of digital with best practices to all areas of category lifecycle management, from tracking the overall progress of the category plan, to monitoring, reporting and ensuring compliance in project post award activities in support of government objectives.

Phase I: Understand the Digital Category

1: Understand the Digital Lifecycle
- Map the Digital Product LifeCycle across required projects

2: Understand Internal Stakeholders Requirements
- Understand the Local Digital Strategy
- Document and assess internal programme Requirements.

3: Collect and Analyze Spend and Supplier Data
- Collect and analyse historic category spend and supplier information, across digital spend.

4: Understand External Market Information
- Collect macro and micro-level market intelligence relevant to the selected category..

Phase II: Develop a Programme Strategy

5: Define Resources Requirements
- Identify the stakeholders, team members, procurement and digital technical needs to execute individual category projects.

6: Establish and Prioritize Category Projects
- Develop metrics for key category projects
- Identify Programme Risks
- Prioritise Opportunities

7. Finalise/playback Strategy
- Develop Category Programme Strategy
- Playback to Programme Stakeholders

Phase III: Execute the Individual Projects

8: Kick Off Category Projects
- Meet with Project Stakeholders
- Validate Program assumptions and objectives against individual projects being executed

9: Plan and Create Tender Documentation Materials
- Conduct RFI
- Create Project TCO Model
- Finalise specifications and tender Documentation

10: Negotiate and Award projects and phases
- Conduct Tenders (RFPs), negotiate, award or re-issue tender
- Complete Contracts

11. Change Management
- Understand Change Management Plan.
- Implement Sourcing Decisions

Phase VI: Manage the Category and Projects

12: Track and Report Program Progress
- Collect and validate data to assess the progress of category projects.

13: Manage Supplier Performance
- Track Awards projects against Contracts, SLA's and KPI's.

14: Ensure Adoption and Compliance
- Identify and correct internal and external stakeholder behaviour

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Phases 1 and 2 - tools and templates available in the guide

No.	ID	Tool Name	Phase and Step	Description	Excel
1	1.1	Dial Stakeholder Analysis	Phase 1, Step 1	Use to identify and rank stakeholders, and record an action plan to manage each.	Complete
2	1.2	Dial Internal Stakeholder Needs Statement	Phase 1, Step 1	Use to capture programme needs and requirements, assists with programme planning.	Complete
3	2.2	Dial Digital Product Lifecycle	Phase 1, Step 2	Use to brainstorm costs for all phases of the digital product lifecycle. Assists with programme planning, demand aggregation, strategy setting and provides input into TCO Modelling.	Complete
4	3.1	Dial Category Spend Cube Worksheet	Phase 1, Step 3	Use to gather and analyse historic spend to understand the existing supplier, spend and contract landscape.	Complete
5	4.1	Dial Market Trend Analysis	Phase 1, Step 4	Assists with understanding external/supplier market trends. Assists with strategy setting and supplier selection.	Complete
6	4.2	Dial Porter's Five Forces Model	Phase 1, Step 4	Assists with understanding external/supplier market trends. Assists with strategy setting and supplier selection.	Complete
7	4.3	Dial Industry Financials	Phase 1, Step 4	Use to calculate industry cost drivers and assess supplier health and viability.	Complete

No.	ID	Tool Name	Phase and Step	Description	Excel
8	5.1	Dial Risk and Action Log	Phase 1, Step 5	Risk and action log for recording programme risks, actions and decisions. Provides risk reporting, and allows for an action plan and tracking.	Complete
9	6.1	Dial Project Resources	Phase 1, Step 6	Use to identify resources required and rank for criticality and availability. Use for project and programme planning and risk mitigation.	Complete
10	6.2	Dial Programme Plan	Phase 1, Step 6	Use to plan and report on the overall programme. Updates required as the programme progresses and priorities change.	Complete
11	7.1	Dial Category Plan	Phase 1, Step 7	This template is used to consolidate and tie together all the work in the first 2 phases into an overall category strategy for digital.	Complete

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Phase 3 - tools and templates available in the guide

No.	ID	Tool Name	Phase and Step	Description	Excel
12	8.1	Dial Sourcing Project Charter	Phase 1, Step 8	Used as a project charter to initiate a sourcing projects. Used to gain alignment between stakeholders and record agreements. Addresses key areas of timelines, scope, spend and project team.	Complete
13	8.2	Dial Sourcing Project Plan	Phase 1, Step 8	Used to manage a sourcing project, customised for sourcing projects, with all the required steps already populated. Can be used for reporting.	Complete
14	9.1	Dial Tender Checklist	Phase 1, Step 9	Use as a checklist to ensure you have all the required information and documents that suppliers will need in order to respond.	Complete
15	9.2	Dial TCO Estimator	Phase 1, Step 9	Use to gross list all associated costs with the digital product, and then estimate TCO. This is done for the purposes of comparing offers, understanding potential hidden costs, and understanding how many bid packages you need.	Complete
16	10.1	Dial Clarification Preparation Worksheet	Phase 1, Step 10	Used to enable 'fact based' clarification workshops	Complete
17	10.2	Dial Demo Evaluation Sheet	Phase 1, Step 10	Used as a starting point to evaluate, score and collect responses when engaged with product demos – used as input into the overall proposal evaluation.	Complete
18	11.1	Dial Sourcing Outcome Implementation Plan	Phase 1, Step 11	Used to manage stakeholders though the change needed to successfully implement the outcomes of sourcing decisions. Includes a communication planner.	Complete

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Phase 4 - tools and templates available in the guide

No.	ID	Tool Name	Phase and Step	Description	Excel
19	12.1	Dial Programme Status	Phase 1, Step 12	Use to report on programme effort completed and left, using project "burn downs". Can be consolidated with risk reporting to provide overall programme reporting to stakeholders for decision making.	Complete
20	13.1	Dial Digital Supplier Scorecard	Phase 1, Step 13	Can be used as a starting point in developing a scorecard for supplier performance management of suppliers providing digital products. Includes scoring mechanisms and ideas on KPI's. Include an action log for discussion with suppliers in review meetings.	Complete
21	14.1	Dial Procurement Customer Satisfaction Survey	Phase 1, Step 14	Used by procurement to gain a view on how stakeholders perceive performance, and record feedback for improvement actions.	Complete
22	14.2	Dial Category Improvement Plan	Phase 1, Step 15	Used as an internal self assessment prior to using the guide. This will then direct users to useful content in the guide. Also used as a self assessment during a category strategy results review, and provides an action log to record improvement actions.	Complete

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We are interested in your feedback

- The procurement guidance website is currently a beta version and we are interested in hearing from those procuring digital technology and willing to test the framework presented in the guide

- If you or your organization would like to learn more, please contact Angela Kastner at DIAL

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