Strategic Project Management for Procurement Process Automation

G

by Gaurav Sharma

Agenda

1. Project Background
2. Part 1: Project Initiation Strategy
3. Part 2: Challenge Analysis & Recovery Strategy

1

Project Background

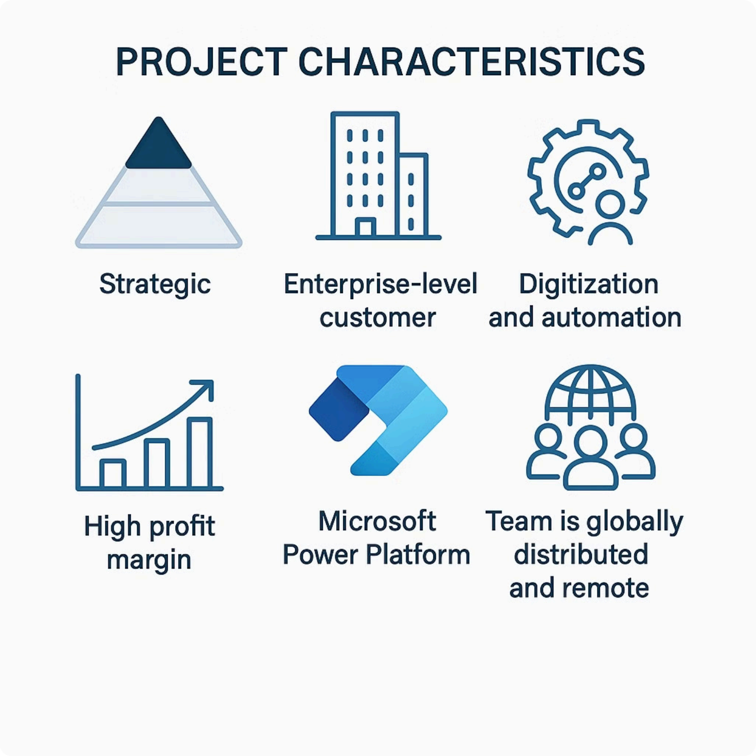
2

Part 1: Project Initiation Strategy

3

Part 2: Challenge Analysis & Recovery Strategy

ProcureSmart: Accelerating Digital Procurement Transformation



1

Project Background

2

Part 1: Project Initiation Strategy

3

Part 2: Challenge Analysis & Recovery Strategy

Project Kickoff strategy

1

Purpose of the meeting

- Align vision, scope, and delivery model
- Establish trust and rapport
- Set expectations for communication, governance, and success

2

Pre-Meeting Preparation

- Review contract, scope, and stakeholders
- Understand client org chart and decision-makers
- Prepare: draft charter, RACI, delivery roadmap, SharePoint/Teams

3

Kickoff Agenda Highlights

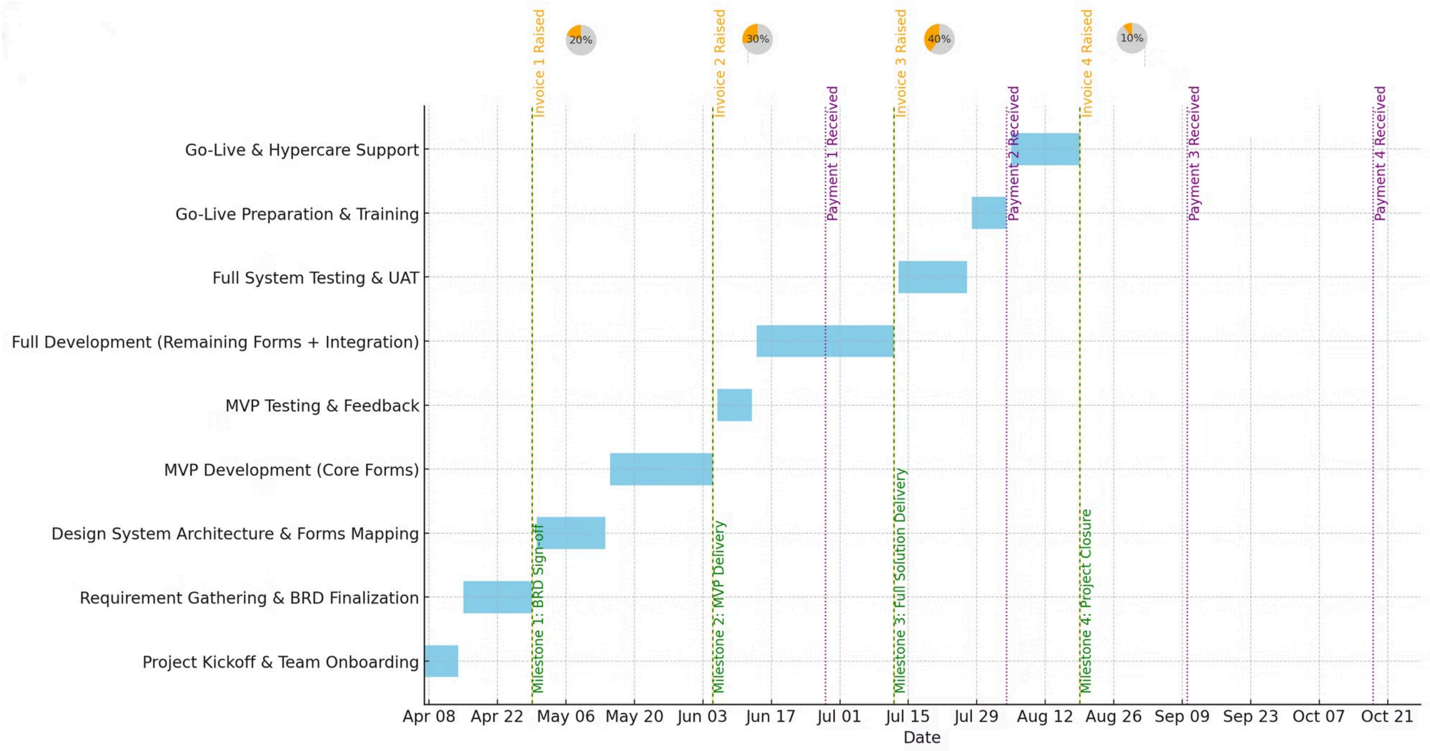
- Introductions & roles
- Project overview & strategic importance
- Delivery plan & methodology
- Roles, responsibilities & escalation
- Communication & cadence
- Key milestones & invoicing
- Open discussion

4

Post-Meeting Actions

- Distribute Minutes of Meeting (MOM)
- Confirm decisions and next steps
- Launch collaboration workspace
- Send invites for regular status reviews

Invoicing Milestone Strategy



Strategy to Win Customer Confidence Early

1 Deliver Quick Wins

- Identify 1–2 high-impact forms or workflows to complete in first 2–3 weeks
- Use working demos to show tangible progress early
- Prioritize areas with visible bottlenecks or user pain

2 Proactive & Transparent Communication

- Set a cadence of weekly status reports and bi-weekly demos
- Share progress dashboards with delivery %, risks, and invoices
- Keep stakeholders looped in, even on delays — show control

3 Establish a Partnership Mindset

- Position the project as “our” success, not just delivery
- Use discovery conversations to understand their “why” — not just “what”
- Anticipate questions, offer solutions proactively

4 Put the Right Faces Forward

- Assign a dedicated SPOC to the client for consistency
- Bring in SMEs for specific sessions (e.g., Power Platform expert)
- Let leadership meet your delivery lead early to show commitment

Project Health & Financial Reporting to Senior Management

Project Health Overview

- Scope – % completed vs baseline
- Schedule – On time / delayed milestones
- Progress – Sprint/phase completion %, burn-down chart
- Risks & Issues – Open vs resolved, high severity flags

Invoicing Status

- Milestones Delivered – vs expected
- Invoices Raised – Amount & date
- Payments Received – With expected vs actual delays
- Overdue Invoices – Highlighted (if any)

Profitability Snapshot

- Revenue Recognized (to date)
- Cost Incurred – Internal burn reports
- Profit Margin – % actual vs planned Resource
- Utilization – Billable vs non-billable hours

1

Project Background

2

Part 1: Project Initiation Strategy

3

Part 2: Challenge Analysis & Recovery Strategy

Project Audit: Key Challenges Identified

Project Delays

- Client introduced critical new requirements
- Existing BRDs on hold pending updates
- Currently 2 weeks behind schedule due to integration issues

Budget Overruns

- 10% overrun reported in first few weeks
- Main cause: Extended hours for resolving integration complexities

Quality Concerns

- Early testing indicates performance issues
- Risks missing client's high-performance benchmarks

Communication Gaps

- Inconsistent updates between teams
- Resulting in duplicate efforts and unclear ownership

Strategy to address challenges

Bringing the Project Back on Track

- Split BRDs into Phase 1 (signed-off items) and Phase 2 (new requirements)
- Use agile sprints to fast-track critical forms and workflows
- Parallelize development and testing efforts where possible
- Add buffer to the new timeline to manage complexity and uncertainty
- Set up sprint-level tracking with burn-down charts

Budget Realignment Without Scope Compromise

- Raise formal change request for newly introduced requirements
- Reassign tasks to best-fit resources to increase efficiency
- Reduce non-billable overheads: fewer meetings, focused reviews
- Track time and effort using time-sheet tools to control burn
- Work with finance to forecast cash flow and margin realization

Quality Assurance Strategy

- Involve QA from sprint 1 (shift-left approach)
- Set performance benchmarks early, align with client standards
- Conduct peer reviews before code merges
- Implement automated regression testing for repeatable validations
- Include UAT checkpoints and performance testing in each sprint

Communication and Documentation Improvements

- Daily standups to align cross-location teams
- Weekly stakeholder updates and steering committee reviews
- Centralize documentation in SharePoint with version control
- Define and implement a RACI matrix
- Use Teams/Planner for real-time visibility and ownership

Q&A

Thank you!