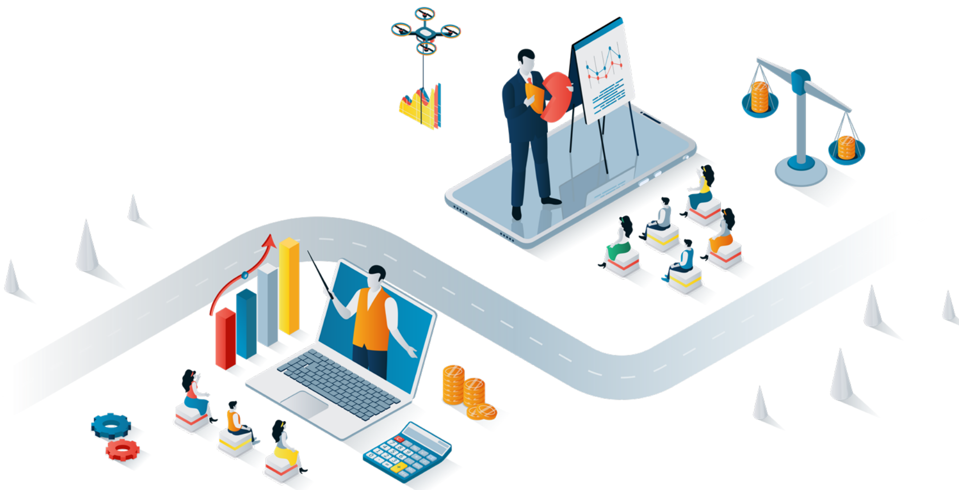
HARVARD Kennedy School
Government Performance Lab

Procurement Excellence Network



# Three Strategies to Design and Deliver Dynamic Procurement Trainings

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## In this How-To Guide you will:

- Understand the difference between training and learning
- Learn how to assess the effectiveness of your current procurement training practices
- Learn how to leverage dynamic training to elevate the status of public procurement
- Build your toolbox of strategies to address common procurement training challenges and create dynamic trainings that support government procurement objectives

## Dynamic Training at the Center of Elevating Procurement

Nearly every procurement office conducts training, from teaching prospective vendors how to navigate solicitation processes to helping department or agency staff learn how to write a robust set of specifications. However, **teaching does not always translate to learning or capacity-building**. This disconnect can happen when there is a lack of alignment on what should be taught, training participants are resistant to change, or the content does not meet the needs of the target audience.

By making procurement training more dynamic and targeted, governments can help their audiences achieve greater learning and competency outcomes. Effective training can also help elevate the overall status of procurement by signaling the importance of adhering to procurement procedures and processes, reaffirming the desire to create a culture of excellence around procurement, and highlighting a transition from a reactive and transactional procurement system towards one that is proactive and strategic.

## Assessing the effectiveness of current procurement training practices

If key stakeholders are not following current procurement processes correctly or are unable to use a procurement-related software platform after a demonstration, that may signal a need to reassess your procurement training. Reviewing key performance metrics (KPIs), can help you determine how you might need to refine your training approach to meet your government's objectives.

You can assess whether existing procurement training materials are effective by leveraging data to answer the "three C's":

1. **Capability:** Do key stakeholders know how to navigate current procurement processes, follow procedures, or use relevant software tools?
   *Red Flag Example:* Department contract managers continue to track milestones via manual forms instead of using a new digital system.

2. **Confidence:** Do relevant stakeholders feel confident about their ability to engage with procurement processes and carry out associated activities?
   *Red Flag Example:* Department staff repeatedly initiate solicitation requests far too late because they are unsure of how much detail needs to be included in the requisition form and don't know who to contact for assistance.

3. **Competency:** Do your staff or colleagues demonstrate a relevant procurement skill and perform it consistently over time?
   *Red Flag Example:* Staff write solicitations in an overly prescriptive manner, leaving little room for vendor innovation, even after participating in multiple results-driven RFP writing training sessions.

If the answer is "no" to any of these questions, it may be time to consider redesigning your procurement training materials to be more dynamic. Additionally, reviewing KPIs about the health of your procurement function can provide valuable insights into where additional training may be needed. *For more examples of metrics that help measure whether your procurement training is effective, please see Appendix A.*

## Adapting Procurement Training for Different Audiences

Depending on the characteristics of your audience, procurement training may vary in length, duration, approach, scale, and scope. For example, when training new hires, you may invest extra time to signal the importance of following the procurement process correctly and sharing why your government sees procurement as such a crucial function.

On the other hand, in engaging vendors, procurement training provides a rare opportunity to build trust and signal your government's interest in working with firms new to contracting with your entity.

*For more information on designing content for different audiences, see our Audience Mapping Tool in Appendix B.*

## Strategies to Address Common Procurement Training Challenges

Procurement Excellence Network (PEN) members frequently point to three challenges when aiming to improve ineffective procurement training:

1. **The process itself is confusing and suboptimal.** "Our process is broken, and so is our training. I left with more questions than answers."
2. **The audience is hesitant to adopt something new.** "There is a lot of resistance to change. It is hard to teach a dog new tricks."
3. **The audience has a strained relationship with central procurement:** "[Trainings should] meet department users where they are at – using real world examples that align to what a department does."

It is important for procurement trainers to diagnose and have a plan for responding to these challenges when developing content. Below are "building block questions" to help design content, along with a toolbox of techniques and exercises to deliver more dynamic procurement trainings.

## CHALLENGE 1: THE PROCESS ITSELF IS CONFUSING AND SUBOPTIMAL

When a procurement process is overly complex, the resulting training will often mirror that confusing process. Your training attendees might walk away frustrated and with more questions than answers.

### Strategy: Break down complex topics and deliver training in a methodical manner

When training on complicated procurement processes or procedures, making your content easily digestible makes all the difference. Even the simplest tasks benefit from thoughtful and intentional knowledge transfer, so taking a moment to check for bias and assumptions can go a long way in creating effective training content.

Neglecting to describe a seemingly small step could be the difference between your audience being able to move through the process independently or ending up stuck and unable to perform their assignment.

When designing procurement training, we encourage you to ask the following three building block questions to assess whether you are making a complicated topic sufficiently accessible:

- **Accurate:** Is your procurement process being explained accurately and clearly so that it's easy to understand and comply with? If not, you may undermine the value of the training and cause significant issues if stakeholders adopt incorrect practices.
- **Scaffolded:** Is your information broken down into digestible, logical, intuitive sections that are easy to grasp and build upon each other?
- **Actionable:** Upon completion of the training, are there clear instructions, protocols, or techniques that relevant stakeholders can apply to their work?

<table>
<tr><th colspan="2">BREAKING DOWN COMPLEX TOPICS TOOLBOX</th></tr>
<tr><th>1. “Micro-Skills Mapping” Technique</th><th>2. Prepare a Run-of-Show</th></tr>
<tr><td>This three-step process helps trainers clarify intermediate skills as discrete components that make up the desired ability at the end of a procurement training:<br><br>1. Map out the end state for the desired skill<br>2. Highlight the micro-skills needed to achieve that end state<br>3. Design exercises to teach each micro-skill<br><br>At the end of the mapping process, trainers should have an organized outline of micro-skills that they can use to build out the complete training module.</td><td>You can prepare for training facilitation by developing a step-by-step plan for delivering your content, plotting out activities, discussions, or necessary timing breaks. You can use this Run-of-Show document to practice and to leave yourself notes for future reference.<br><br>Tip: If you are presenting with others, you can develop a shared Run-of-Show document to help transition smoothly between sections during the live procurement training. See Appendix C for an example.</td></tr>
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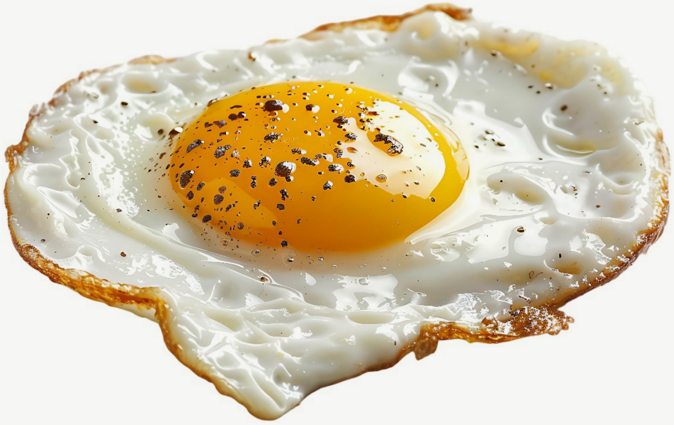
## MICRO-SKILLS MAPPING EXAMPLE: HOW TO FRY AN EGG



Let's imagine you want to train a friend on how to fry an egg. Using the micro-skills mapping technique to teach them, you will need to:

1. **Map out the end state:** By the end of this fictional training, your friend should know how to properly fry an egg without wasting resources and without supervision.

2. **Highlight the micro-skills:** Ask yourself what specific skills are required to reach the desired end state. Micro-skills required to fry an egg may include:
   - ☐ Cracking an egg
   - ☐ Removing a broken shell from an egg
   - ☐ Identifying the correct tools to use: pan or skillet? Spatula or fork?
   - ☐ Turning on the stove
   - ☐ Managing the temperature
   - ☐ Seasoning the egg
   - ☐ Flipping the egg
   - ☐ Removing the egg to a plate

3. **Design exercises to teach each micro skill:** Consider how you can effectively demonstrate these necessary skills using available resources. You may record a video of you frying an egg at home and share it with your friend. Or you may invite them to your house and do a live demonstration, allowing them to ask questions in real time and practice with you.

Even if you perceive a task to be simple, others may not or may not come to the task with the same basis of knowledge. Training staff in procurement concepts that you know well but that are confusing to them is a lot like teaching a friend to fry an egg: you should design training that is thoughtful and intentional in making even small steps go from implicit to explicit knowledge.

For example, if you're rolling out a new policy for submitting procurement requisitions that includes filling out a new digital intake form, you may need to upskill your staff on digital competencies by training them on multiple skills, including how to log into your online resource portal, how to download the form, the appropriate file convention to save it under, and how to submit the form for approval. Training staff on these micro-skills is essential for encouraging compliance with the new policy.

## CHALLENGE 2: THE AUDIENCE IS HESITANT TO ADOPT SOMETHING NEW

Imagine you have worked for a city's Department of Parks and Recreation for decades. You are the go-to person for submitting procurement related-paperwork, and you take pride in helping new staff, who rely on your expertise to navigate the process. The city's central procurement team recently sent a memo stating that you must now switch to a new digital system. You might be confused about what led to the change. You may also feel frustrated by having to adapt to a new way of working.

When training involves teaching attendees to change a major aspect of how they perform their job functions, or to move out of their comfort zone, it can, unsurprisingly, be met with resistance.

### Strategy: Understand your audience's motivations and design your training to facilitate buy-in

Not every training participant will enter the room excited about doing something differently or embracing a change. An effective trainer will anticipate this resistance to change in their curriculum design and make space for discussion about why the change is necessary to achieve the jurisdiction's procurement goals.

When designing training, we encourage you to ask the following building block questions to assess whether your training will get through to a resistant audience:

- **Relevant:** How will this content help key stakeholders in their day-to-day work, and why should it matter to them? Is the training convincing enough in its explanation about why something new is happening?
- **Human-Centered:** Do you understand the targeted audience's needs, experiences, and challenges? Are they afraid that by being "deskilled" as they must learn something new, that might undermine their existing expertise?
- **Data-Driven:** Have you identified quality metrics to measure progress towards key outcomes? How will your team know that their training is having the desired impact on the procurement function?

<table>
<tr><th colspan="2">OVERCOMING RESISTANCE TO CHANGE TOOLBOX</th></tr>
<tr><th>"Know-Wonder-Learn" Technique</th><th>Audience Mapping Technique</th></tr>
<tr><td>This technique helps procurement trainers identify where the audience has a skills gap and creates opportunities to support comprehension of the subject. Once you've identified a skill gap, ask yourself three questions:<br><br>KNOW: What competencies does your audience already possess?<br>WONDER: What will your audience want to know or be curious about?<br>LEARN: What new information does your audience need to do their job?</td><td>This technique helps assess motivations and engagement by analyzing personality characteristics to proactively navigate audience dynamics within a training session using four common personality types:<br><br>1. "The Technoid"<br>2. "The Eager Beaver"<br>3. "The Wallflower"<br>4. "The Skeptic"<br><br>See Appendix B for more information on Audience Personality Types.</td></tr>
</table>

*For additional strategies on tackling resistance to change, check out Why Reforms Encounter Resistance: How to Overcome Immunity to Change.*

## CHALLENGE 3: YOUR AUDIENCE HAS A STRAINED RELATIONSHIP WITH CENTRAL PROCUREMENT

When your audience has an aversion to dealing with the procurement office – perhaps due to challenging interpersonal dynamics or a historical disagreement – you may need to restore trust to facilitate learning. Your audience may also have had a negative experience with previous procurement training where the content was not engaging – making them hesitant to sit through another hour-long presentation.

**Strategy: Use creative techniques to reinforce learning and demonstrate a commitment to customer service**

Creating a good procurement training requires inhabiting the minds of the audience experiencing your content. An effective trainer should take time to reflect on what the participants might already know, what questions they are likely to have, and how they may respond to various messages.

Trainers may also need to build (or rebuild!) a relationship with stakeholders who do not interact with central procurement on a regular basis or those who may intentionally avoid the procurement office altogether. Making content that is fun and engaging can go a long way to reinforce learning and help create an environment where your audience feels comfortable.

When designing training, we encourage you to ask the following building block questions to assess whether you are making procurement training helpful and relatable:

- **Goal-Oriented:** What is the purpose and desired outcome of the training? What should attendees be able to do at the end of the training that they could not do previously? You should have a good case for *why* this training is important.
- **Tactical:** How can you convey policies, procedures, or processes in a framework that nets the optimal results in the most efficient and strategic way possible given your audience's limited time?

**REINFORCING LEARNING AND CUSTOMER SERVICE APPROACH TOOLBOX**

| "Jot Down, Pair Up, Share Out" Exercise | Fun Pop Quizzes | Roleplaying/Simulation Exercise |
|---|---|---|
| Ask audience members to demonstrate command of a procurement skill through completing an individual written exercise, sharing it with a partner, and reconvening to share out in the larger group. | Trainers may pause to confirm that your audience has demonstrated command of the material by using pop quizzes.<br><br>These can also be made fun and interactive by including cartoons or memes on the slide or framing questions with comical scenarios. | Add some activities that illustrate a relevant component of the procurement process or a skill you want your stakeholders to learn; this might involve having the audience respond to a real-life scenario or case study.<br><br>These exercises can often make procurement training more fun and create "aha moments" that stick and help reinforce the perception of central procurement as a partner and not an obstacle. |

## Beyond Procurement Training: Measuring Real Learning and Performance Outcomes

Once you've designed and delivered a dynamic procurement training, it is time to evaluate whether your training had the intended impact.

You can measure impact in two ways: knowledge outputs and practical outcomes. Here's how they differ:

| | KNOWLEDGE OUTPUTS | PRACTICAL OUTCOMES |
|---|---|---|
| **What are you trying to learn?** | What did your audience learn that will equip them to perform their work more efficiently and effectively? | What changes in behaviors, relationships, and resident impact are you trying to accomplish? |
| **What can it help you do?** | **Track progress** and **diagnose** whether you need to revise your training content or delivery | Capture the **WHY** – the reason we're doing these trainings |
| **When can you see results?** | Using Knowledge Checks or other techniques, you can often see results immediately or in the short term after the training | You are likely to see this over the long term, though results are hard measure |
| **Examples**<br>**See Appendix A for more examples.** | The number of:<br>• User departments trained<br>• Follow-up training requests<br>• New processes implemented<br>• Troubleshooting calls | • Reduced cycle times<br>• Increased staff morale<br>• Improved staff performance<br>• Improved vendor relationships with the jurisdiction |

## Conclusion

Designing and delivering procurement trainings that result in learning or capacity-building can be difficult. However, you can transform your procurement training from dry and tedious to dynamic and motivating by breaking down complex topics, addressing resistance to change, and acknowledging the importance of audience buy-in. We hope as you use these strategies and building blocks that you feel inspired to revamp your trainings to help your audiences engage with the procurement process more efficiently and strategically.

## Appendix A: Sample Metrics to Measure Learning

Once you've designed your procurement training materials to be more dynamic, the next step is to check for practical examples that demonstrate comprehension and application of training concepts. This table reflects a few example metrics that trainers can use to gauge the impact of their content and delivery style based on procurement training topic.

| USING DATA TO MEASURE LEARNING | | |
|---|---|---|
| **Training Topics** | **Short-term metrics** | **Long-term metrics** |
| **Following P-Card Utilization Procedures** | • of departments with at least 5 individuals trained<br>• # of P-Card users trained<br>• # of troubleshooting inquiries from P-card users that attended the training vs. those that did not<br>• # of P-card misuse per month, by department | • Quarterly and annual audits reporting little to zero P-card misuse<br>• All P-card users going through the official training |
| **Strategic Contract Management** | • # of solicitations and resulting contracts with clear performance metrics<br>• # of kickoff calls/meetings with vendors at contract start<br>• # of contracts where regular performance check-ins with vendors took place | • Better vendor performance as measured via end of contract vendor performance evaluations<br>• Positive impacts for residents<br>• Improved relationships with vendor community<br>• Cost-savings effects |
| **Vendor Training** | • # of vendor responses to solicitations<br>• # of questions submitted by respondents during Q&A period | • Innovative proposals and solutions to meet original solicitations need<br>• Diversity of awarded contractors |
| **Procurement Forecasting** | • # of procurements identified for official forecasting<br>• # of participating departments<br>• Level of detail of department forecasting submissions | • Increased inter-agency collaboration on purchasing needs<br>• Frequency of forecast planning meetings<br>• Improved allocation of jurisdiction funds<br>• Reduced cycle times |

## Appendix B: The Four Training Personality Types

Once you've designed your procurement training materials to be more dynamic, the next step is to check for practical examples that demonstrate comprehension and application of training concepts. This table reflects a few example metrics that trainers can use to gauge the impact of their content and delivery style based on procurement training topic.

| AUDIENCE MAPPING: THE FOUR TRAINING PERSONALITY TYPES | | | |
|---|---|---|---|
| **WHAT IS IT?** | Crafting procurement training content with your audience in mind | | |
| **WHY SHOULD YOU USE IT?** | To engage people with tools that most resonate with their personality | | |
| **Personality Type** | **Core quality** | **This person is:** | **Recommended preparation** |
| **"The Technoid"** | *Inquisitive* | Extremely data-oriented and may have been a data analyst in their former role | Prepare explanations on functionality, workflows, or metrics related to a process or policy change |
| **"The Eager Beaver"** | *Fast Learner* | Quick to grasp the material, enthusiastic about learning, and proactively engaged | Prepare opportunities throughout your training for engagement and feedback; find a balance between acknowledging their excitement and allowing other participants to engage |
| **"The Wallflower"** | *Introverted* | Likely will not engage unless prompted, and it may be difficult to interpret whether they understand the material | Prepare opportunities for discussion that feel manageable, such as "Jot Down, Pair Up, Share Out," or deploy a knowledge check that requires everyone to engage rather than seeking volunteers |
| **"The Skeptic"** | *Slow to Change* | Will need to know *why* a process has changed before they get on board | Prepare an explanation of the differences between the new policy or process and the previous ones, including expected difference of outcomes and benefits for clients and stakeholders |

## Appendix C: Sample Run of Show Document to Facilitate Training

### RUN OF SHOW

**"[Training Title]" | [Training Date & Time]**

| TRAINING PREPARATION | |
|---|---|
| **Before the Training**<br>**[Name]** to send a targeted invite by **[Day of Week, Date]**<br>**[Name]** to send reminders to registered participants by **[Day of Week, Date]**<br>ALL training presenters to download a local copy of the run of show & PPT slide deck | **Training DAY: Training staff to log in at [10 minutes before Event Start]**<br>☐ **Training Captain** to log in to virtual training/ meeting account (PW is **[Password]**)<br>☐ **Test A/V/screensharing capabilities.**<br>☐ **Confirm that Q&A option is set up.**<br>☐ **Add Co-hosts** as needed |

| TRAINING ROLES & RESPONSIBILITIES | | |
|---|---|---|
| **[Organization] Presenters:**<br>☐ **[Presenter #1]**<br>☐ **[Presenter #2]**<br>☐ **[Presenter #3]**<br><br>**External Presenters:**<br>☐ **[Presenter #1]**<br>☐ **[Presenter #2]**<br>☐ **[Presenter #3]**<br><br>**OR: No external speakers for this event** | **Document Links**<br><br>**Insert Links to:**<br>• **Final PPT Slide Deck**<br>• **Final Run of Show Internal Document**<br>• **Final Notetaking Document**<br>• **Final Scripts for Breakout Groups (if necessary)** | Training Team Support Roles:<br>☐ Screensharing: **[Name]**<br>☐ Record Session: **[Name]**<br>☐ Speaker Spotlights: **[Name]**<br>☐ Attendee Admittance: **[Name]**<br>☐ Launch Polls & Breakout Groups: **[Name]**<br>☐ Breakout Group Leads: **[Name(s)]**<br>☐ Note-taking: **[Name]**<br>☐ Chat Moderators: **[Name(s)]**<br>☐ Posting Chat Questions: **[Name]**<br>☐ Posting [Organization Resource Links in Chat: **[Name]**<br>☐ Launch Post-Training Session Poll: **[Name]**<br><br>Contingency Speaker(s) : **[Name(s)]** |

| SECTION HEADER OR KEY SLIDE | SPEAKER | ALLOCATED TIMEFRAME | SLIDE COUNT | LATEST TIMING [DATE LAST TIMED] |
|---|---|---|---|---|
| Introduction | [Presenter #X] | XX:XX-XX:XX (X min) | [# of Slides] | X:XX |
| Section 1 | [Presenter #X] | XX:XX-XX:XX (X min) | [# of Slides] | X:XX |
| Section 2 | [Presenter #X] | XX:XX-XX:XX (X min) | [# of Slides] | X:XX |
| Conclusion | [Presenter #X] | XX:XX-XX:XX (X min) | [# of Slides] | X:XX |

| | INTRODUCTION SPEAKER: [PRESENTER #X] [XX:XX-XX:XX] | LOGISTICS |
|---|---|---|
| **[Slide 1]**<br>**Start session immediately – do not delay.**<br><br>**[Insert Image of Slide 1]** | • **[XX:XX] Good Morning/Afternoon! We plan to get started momentarily – we will wait a bit to allow more of our attendees to join. [Wait 15 seconds].**<br>• **[Insert Verbal Script for Slide 1]** | Sample Logistics Assignments:<br>**[Name]** to screen share on title slide and start recording + spotlight speakers.<br>**[Name]** will admit people.<br>**[Name]** to spotlight **[Presenter #1]**<br>**[Name]** will post this question in the chat:<br><br>**Sample Question: Welcome! Please post your name and role in the chat so we can get to know who is in attendance!** |
| **[Slide 2]**<br><br>**[Insert Image of Slide 2]** | • **[Insert Script for Slide 2]** | |

| | SECTION 1 SPEAKER: [PRESENTER #X] [XX:XX-XX:XX] | LOGISTICS |
|---|---|---|
| [Slide 3]<br><br>[Insert Image of Slide 3] | • [Insert Script for Slide 3] | |
| [Slide 4]<br><br>[Insert Image of Slide 4] | • [Insert Script for Slide 4] | |

| | SECTION 2 SPEAKER: [PRESENTER #X] [XX:XX-XX:XX] | LOGISTICS |
|---|---|---|
| [Slide 5]<br><br>[Insert Image of Slide 5] | • [Insert Script for Slide 5] | |
| [Slide 6]<br><br>[Insert Image of Slide 6] | • [Insert Script for Slide 6] | |
| [Slide 7]<br><br>[Insert Image of Slide 7] | • [Insert Script for Slide 7] | |

| | CONCLUSION [PRESENTER #X] [XX:XX-XX:XX] | LOGISTICS |
|---|---|---|
| [Slide 8]<br><br>[Insert Image of Slide 8] | • [Insert Script for Slide 8] | |
| [Slide 9]<br><br>[Insert Image of Slide 9] | • [Insert Script for Slide 9] | |
| [Slide 10]<br><br>[Insert Image of Slide 10] | • [Insert Script for Slide 10] | |

The **Procurement Excellence Network** is an initiative of the Government Performance Lab designed to help public sector leaders use government procurement as a tool to improve resident outcomes and advance equity. The **Government Performance Lab**, housed at the Taubman Center for State and Local Government at the Harvard Kennedy School, conducts research on how governments can improve the results they achieve for their citizens. An important part of this research model involves providing hands-on technical assistance to state and local governments. Through this involvement, we gain insights into the barriers that governments face and the solutions that can overcome these barriers. By engaging current students and recent graduates in this effort, we are able to provide experiential learning as well.

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