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# Spread the Word! Successful Communication

Georgia Procurement Conference 2017

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What would you do if ....

You were told that the only way you could spend money is if you could fold it this way?



# Communication Delivery

## Written Word

- Emails
- Reference materials
- Training materials

## Person-to-Person

- Meetings
- Phone
- Group training

## Non-Verbal



# Effective Commination



## # Questions

- 1) Who is your audience?
- 2) What is your message?
- 3) When is the information needed?
- 4) How will it be delivered?

# Email

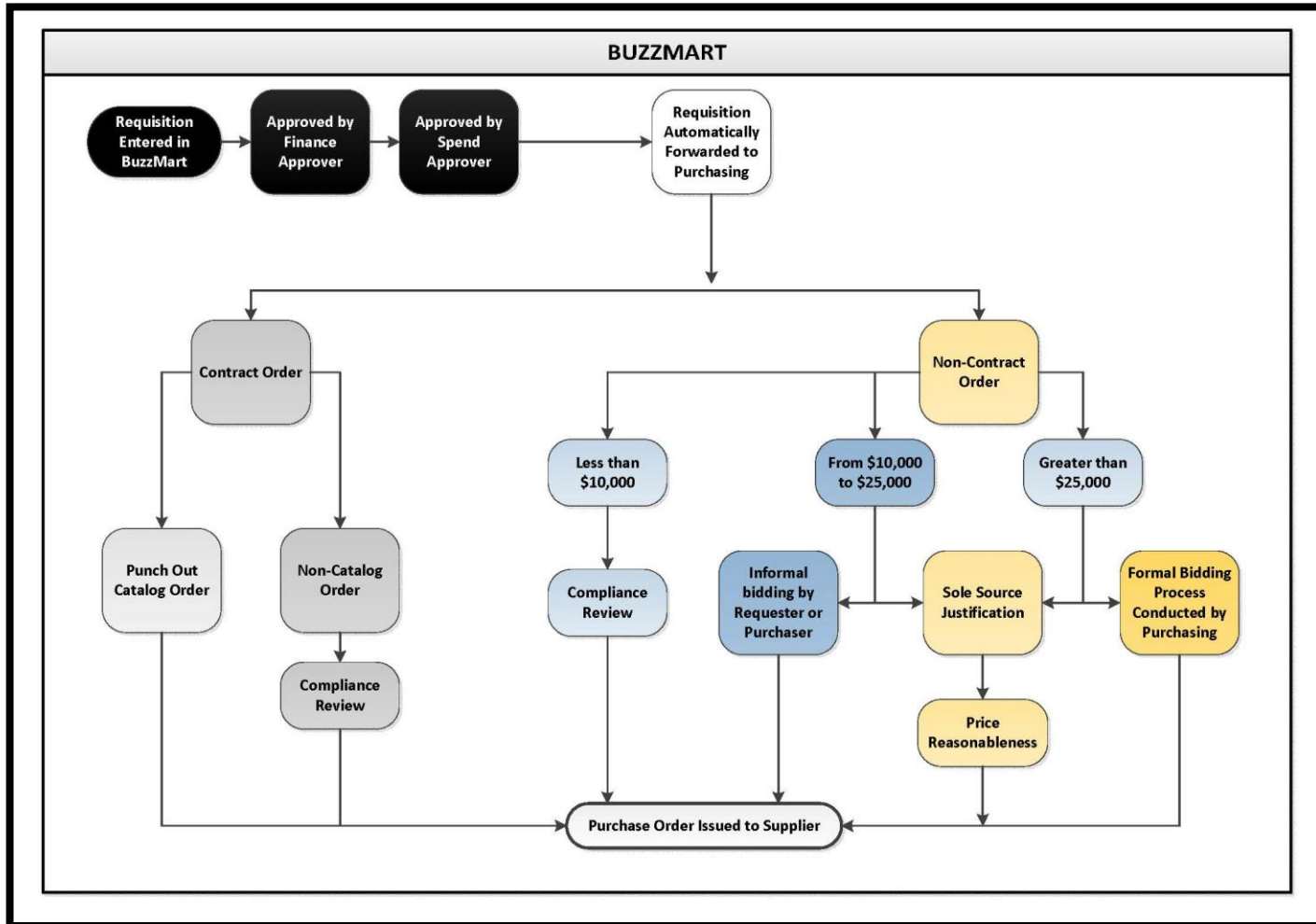
- Use subject line to identify a clear topic
- Keep the message simple
- Create bulleted lists for clarity when applicable
- Be polite (not too abrupt/not too mushy)
- Watch your tone
- Proofread!

# Online

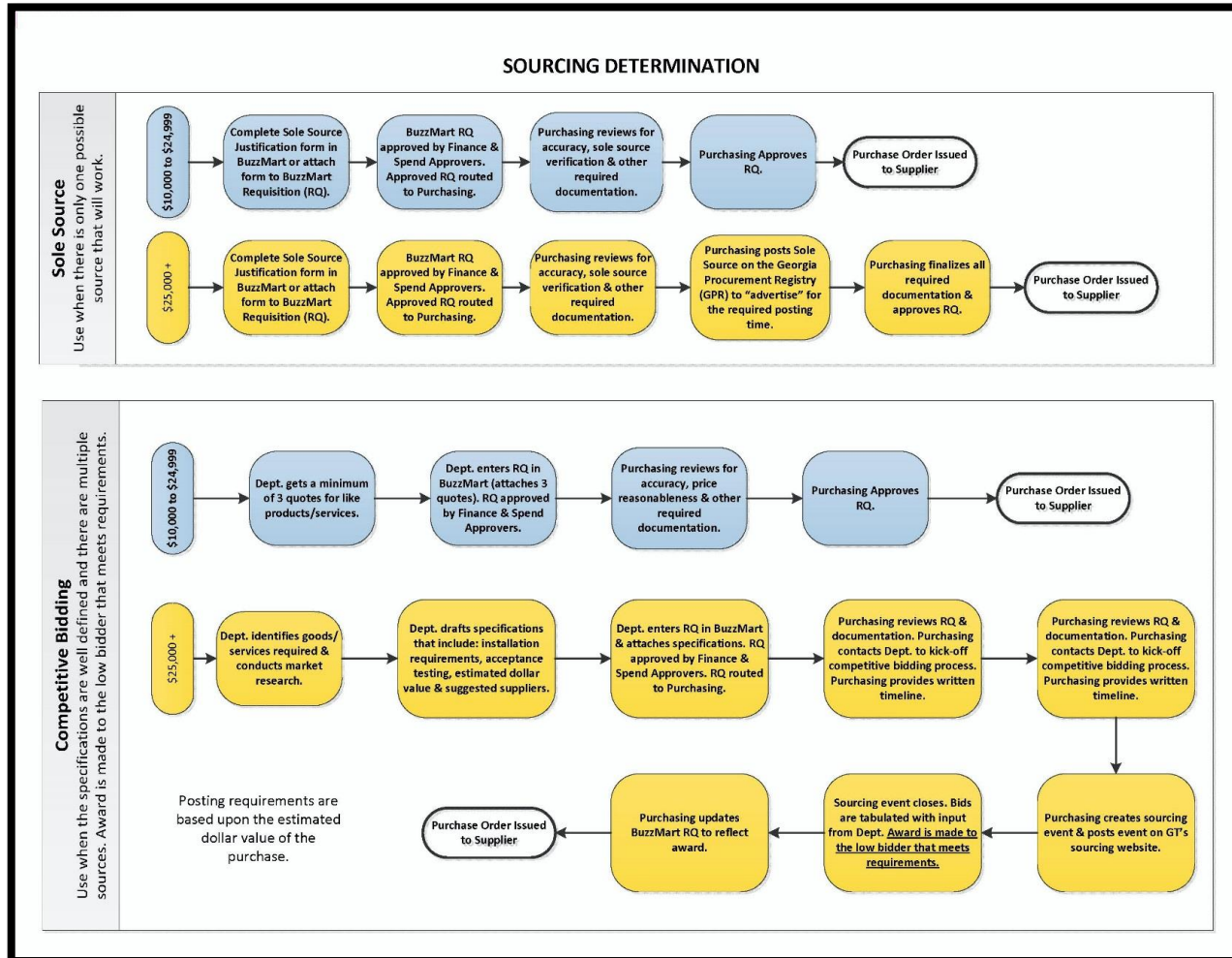
## Qualities of Effective Websites

- Good use of real estate
- Simplicity
- Functionality
- Usability
  - Three-click rule
  - Success clicks
- Descriptive links
- Procurement
- Training
- Forms
- Contact information

# Create Useful Documents

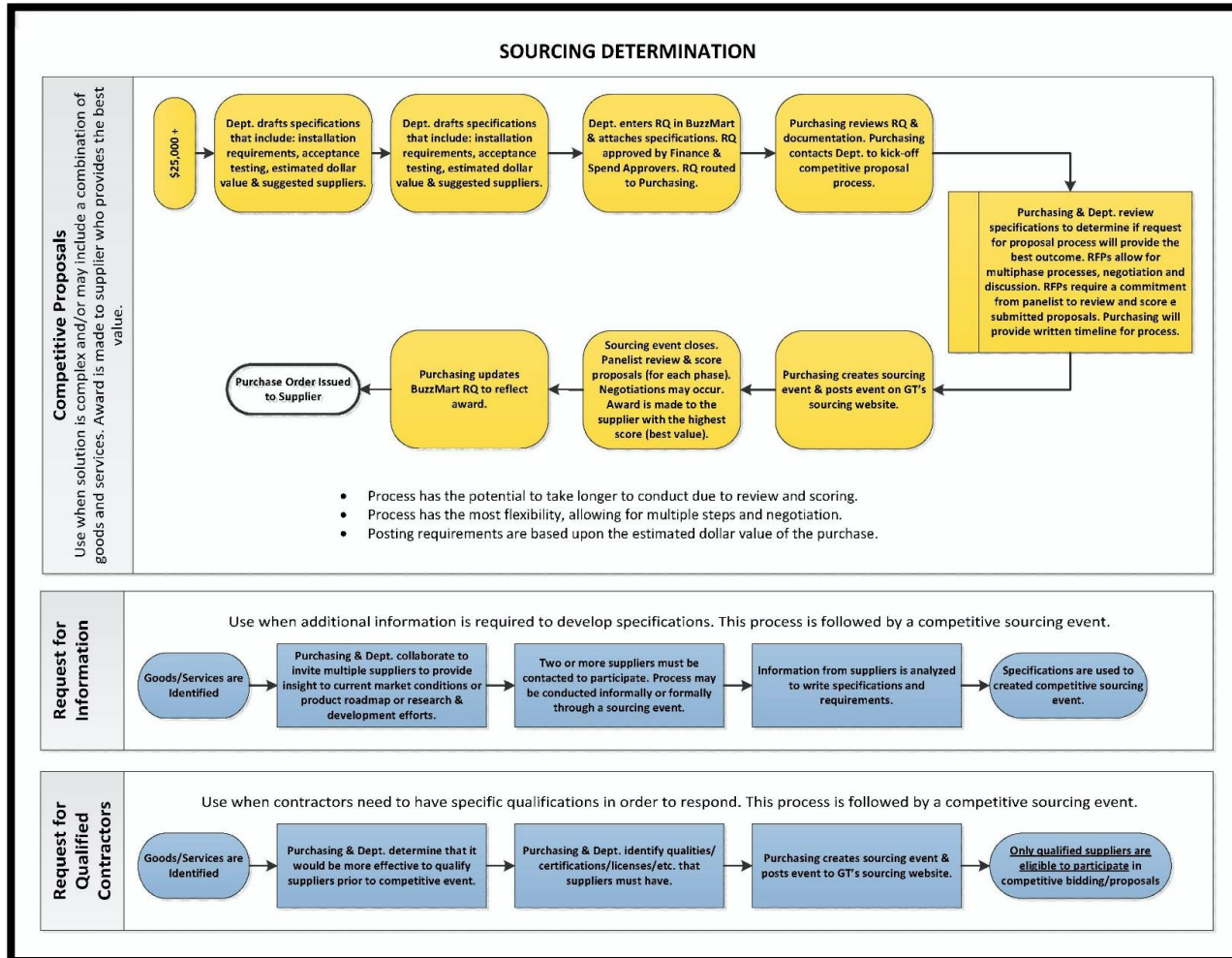


# Sourcing Determination





# Sourcing Determination



# Posting Requirements

## DEPARTMENT OF ADMINISTRATIVE SERVICES – STATE PURCHASING POSTING REQUIREMENTS

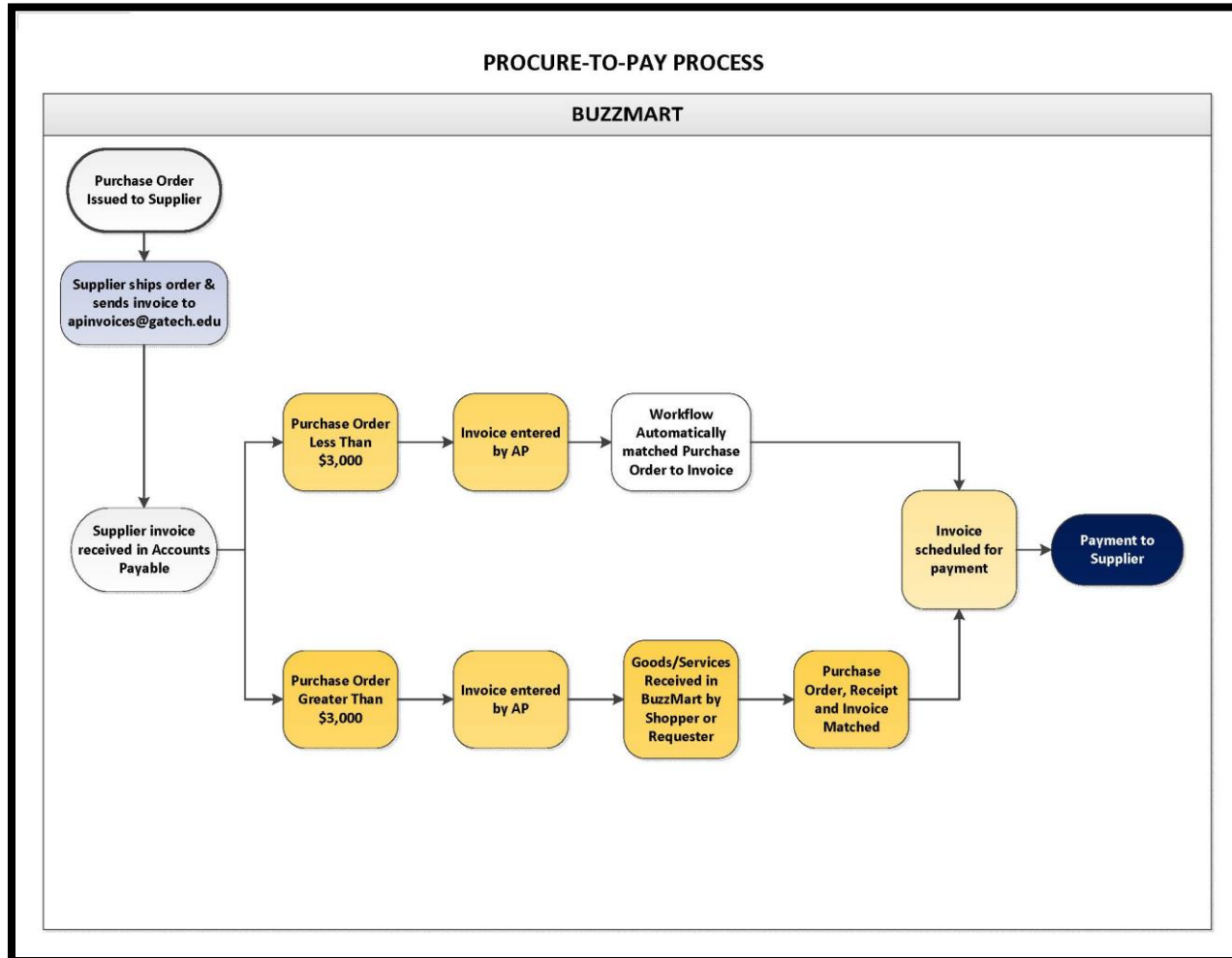
### Requirements for Request for Quotation and Request for Proposals

<i>If estimated contract value is . . .</i>	<i>Then, minimum posting period is . . .</i>	<i>And Notice of Intent to Award (NOIA) posting is . . .</i>
\$25,000 to \$99,999.99	Minimum 3 business days	Recommended, not required
\$100,000 to \$249,999.99	Minimum 5 business days	10 calendar days
\$250,000 or greater	Minimum of 15 calendar days	10 calendar days

### Sole Source & Consortia Purchases

<i>If estimated contract value is . . .</i>	<i>Then, minimum posting period is . . .</i>
\$25,000 to \$249,99.99	5 business days
\$250,000 or greater	15 calendar days

# Procure-to-Pay Process



# Forms

Forms are documents that provide and request information.

- Ask for the information you need
- Consider the value of the information requested
- Create fillable forms that are easy to use
- Use online tools

# Identify the Audience

Avoid global distribution of information that only has value to a small population

## INSTRUCTIONS FOR ENTERING COPY MACHINE REQUISITIONS IN BUZZMART

The following information should be included with copy machine requisitions in BuzzMart. The information may be entered in the line item description.

### Lease Information

Sample  
Contract Number SWC # 90819.05  
Contract Term Number of months contract is for. (Typically 36, 48 or 60 months)  
Payment Period Months: 10 to 22  
Equipment Serial Number XEH1598534  
Equipment Name: 5745APT  
Previous Purchase Order Numbers 6000124578

\*If the lease is paid monthly, enter 12 each at payment amount.

### Copy Information

Payment for copies Enter the total amount to be encumbered for copies to be paid by the unit, e.g., 1000 each at \$1.00  
  
This will allow incremental payments until the encumbrance is depleted.

### Other helpful information:

#### NIGP Codes

98526 Copy Machine (Including Cost-per-Copy) Rental Lease  
(Use this code for monthly lease costs and cost-per-copy)  
93927 Copy Machine Maintenance and Repair  
(Use this code for maintenance agreements and cost-per-copy charges)

#### External Attachments

Contract and any addenda  
Contract renewal information provided by supplier

# Face-to-Face Communication

## Benefits

- Prioritization
- Collaboration
- Creativity
- Interaction
- Interpretation
- Organization

## Risks

- Time
- Money

# Strategies for Successful Business Meetings

- Select the right participants
- Create an agenda (and stick to it)
- Open meeting on time
- Establish a professional environment
- Wrap-up with a review
- Set next meeting date and time
- Close on a positive note

# Learning Styles

## Visual Learners

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- Learns best when images, maps and graphics are incorporated

## Auditory

- Learns best when new listening and speaking either lectures or group discussions

## Read & Write

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- Learns best through words, enjoys reading and writing copious notes.

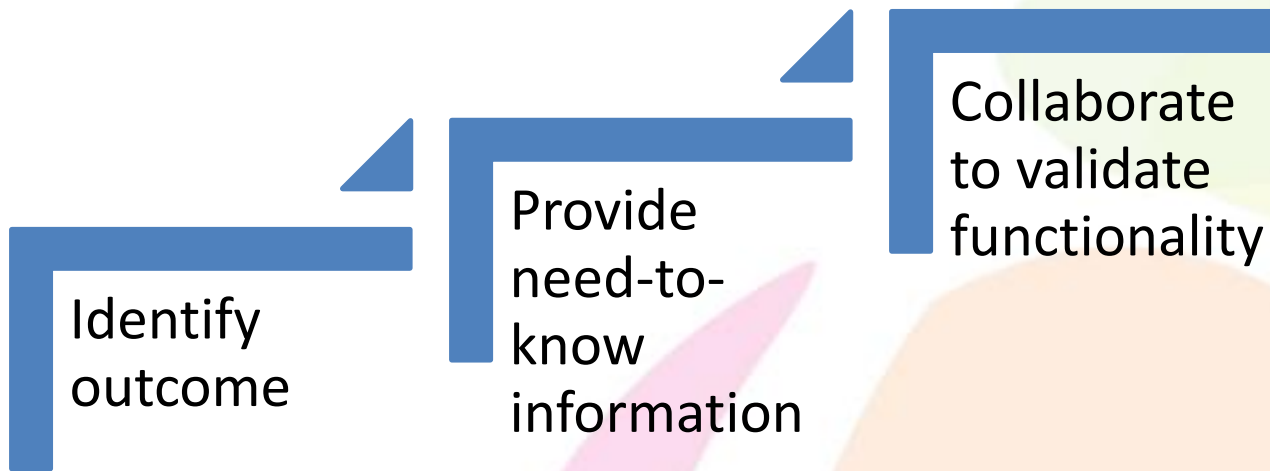
## Kinesthetic

- Learns best in a hands-on type environment, must complete tasks to retain information



# Effective Training Methods

Develop training with the end in mind.





## **Design Training to Audience**

Too much or very detailed information puts your audience to sleep!

## Contracts

All contracts entered into the name of Georgia Tech are subject to the Policies and Procedures of the State Board of Regents.

Georgia Tech's legal name is "The Board of Regents of the University System of Georgia by and on behalf of the Georgia Institute of Technology."

A contract is any document that creates an obligation, right or liability

- Only authorized persons may sign contracts



# Create Tools to Confirm Understanding

## PURCHASING POLICIES AND PROCEDURES TRAINING

1. Where will you find laws, rules and regulations related to purchasing?
  - a. Georgia Procurement Manual (GPM)
  - b. University System of Georgia Purchasing Policy
  - c. Georgia Tech Procurement Policies
  - d. Federal Acquisition Regulations and Office of Management and Budgets (when applicable)
  - e. All of the above
2. What is Georgia Tech's legal name?

The Board of Regents of the University System of Georgia by and on behalf of \_\_\_\_\_


\_\_\_\_\_ of \_\_\_\_\_.
3. Only \_\_\_\_\_ may sign contracts on behalf of Georgia Tech.
4. All purchases made in BuzzMart must be sent to Georgia Tech locations.
  - a. True
  - b. False
5. Georgia Tech is allowed to purchase gift cards as gifts, awards and rewards for employees who go above and beyond at work?
  - a. True
  - b. False
6. Gift cards may be purchased for research participants who participate in sponsored research and students to participate in surveys or activities.
  - a. True
  - b. False

# Training

Concur PCard Cardholder and Delegate Reference Guide

- Login to Concur
- Customize Your Profile
- Capture Receipts
- Open a Report
- Review Transactions
- Attach Receipts and Documentation
- Add a Business Purpose
- Edit Account Itemization
- Edit Project Allocation
- Save Time with Multiple Transactions
- Exceptions, Warnings and Documentation
- Route for Approval

Click a Concur task to review the required steps.



**Cardholder and Delegates**  
Transaction Processing Tasks

Navigation: [Back] [Play/Pause] [Progress Bar] [Refresh] [NEXT >]

# Questions



*Thank you!*