

Who Should Attend: Individuals new or relatively new to analytics; the Institute provides a foundation for a good spend analytics tool and includes hands-on exercises, with participants working with sample data

Dates: The Analytics Institute will be presented immediately after the FL/TAGM Regional Meeting. Offered in two 4-hour sessions presented over two days, Wednesday, October 23rd from 12noon to 5:30pm and Thursday, October 24th from 8am to 12noon.

Location: Perdido Beach Hotel, Orange Beach, AL

NAEP Competency-based Certificate: Earn a competency-based certificate upon successful completion of a post-training assessment

Cost: \$210 per person for NAEP members = 8 hours of education; \$300 per person for non-members

Prerequisites: Attendees should:

- Have basic experience with Microsoft Excel
- Bring a laptop, loaded with Microsoft Excel

Agenda:

| Analytics Institute | |
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| Wednesday, October 23 rd | Topic |
| 12noon – 1:00 pm | Lunch and Registration |
| 1:00 - 1:30 pm | Welcome and Program Introduction |
| 1:30 - 2:00 pm | What is possible with Spend Analytics? Whether you have an existing solution, or you're looking to get started, this session will provide a comprehensive view of the what is possible with spend analytics. |
| 2:00 – 3:00 pm | Preparing for Spend Analytics Before you can be successful with spend analytics, you'll need to make sure you have the right tools and resources in place. This session will cover how to gather your institution's data, and what tools are needed to have a comprehensive analytics program. Having a Spend Analytics solution is good, but making sure it serves the needs of procurement, senior administration, and departments is better. |
| 3:00 – 3:15 pm | Break |
| 3:15 - 5:15 pm | Cleansing, Categorization, & Enrichment Do you really know where your institution's dollars are going? Unleash the power of your data through categorization. In this session you will learn best practices for categorization and how to customize your categories to best serve your institution. Other topics to be covered include cleansing, enrichment, normalization, and parenting. |
| 5:15 – 5:30 pm | Wrap Session/Q&A |
| Thursday, October 24 th | Topic |
| 7:00 – 8:00 am | Breakfast |
| 8:00 - 9:30 am | Identifying Opportunities During this hands-on session, you will leverage your knowledge of Microsoft Excel and utilize sample data to identify opportunities for sourcing and process improvement. |
| 9:30 - 10:00 am | Supporting the RFP Process You've identified a category for sourcing. How can analytics support the RFP process? Leverage your knowledge of Excel to help write the RFP and analyze responses. |
| 10:00 - 10:15 am | Break |
| 10:15 – 11:15 am | Calculating SA ROI You're now a pro with SA. It's time to quantify the value of your SA solution. |
| 11:15 am - 12noon | Wrap Session/Q&A/Your Next Steps We'll conclude the program with a facilitated Q&A reflecting upon how to bridge what we've learned to your personal next steps. |

Facilitators:



Michael Fox
Strategic Sourcing Analyst, E&I Cooperative Services

Mike Fox is a Strategic Sourcing Analyst at E&I Cooperative Services. His career includes roles as the Director of Strategic Procurement for the University of Colorado and Expense Solutions Manager for Mercury Companies.



Crisann McCloy
Senior Financial & Business Analyst, University of Kentucky

Crisann McCloy is the Senior Financial & Business Analyst at the University of Kentucky (UK), where she dives into UK's annual spend data of \$2B. Her passion is finding and explaining the "so what?" behind the data analytics and implementing those actionable insights into relevant process improvement.

Before joining the UK Purchasing Department in August 2018, Crisann worked with Sysco on their Merchandising Team. Specifically, her projects focused on analyzing and interpreting seasonal customer (e.g. University of Cincinnati) inventory trends and developing/implementing steps to save resources for both Sysco and their customers. These efforts led to a 3.8% reduction in monthly shrinkage (food inventory waste).

Crisann received her MBA and Six Sigma Green Belt from the University of Kentucky. She also currently serves as NAEP Kentucky region's Secretary/Treasurer.