GUIDE

GETTING YOUR DECISION MAKERS ON BOARD WITH YOUR PROCUREMENT SOFTWARE PURCHASE

Your guide to making a compelling case for digital procurement in the public sector

When you're ready to modernize your procurement process with software, the biggest challenge isn't always choosing the right system. Sometimes, getting approval is the highest hurdle.

Whether you're seeking sign-off from a city council, board of aldermen, or school board, presenting a clear, compelling case is critical. You need to come in prepared to win.

Here's a step-by-step playbook to help you evaluate the right eProcurement solution and win approval with confidence.

01 DEFINE THE PROBLEM YOU'RE SOLVING

Start by clearly identifying the pain points in your current process. Examples may include:

- Manual, time-consuming, error-prone workflows
- Budget overruns due to poor planning or data
- Missed compliance requirements
- Limited vendor competition, outreach, or communication
- Inconsistent or undocumented procurement records
- High numbers of requests for clarification or bid protests

— **TIP** —

Frame the problem in terms of *risk and cost*, and how a software solution will address those problems. Decision-makers respond well to risk mitigation and financial control. This article highlights the hidden costs of manual procurement, and here are some tools to evaluate your agency's efficiency.

02 OUTLINE MUST-HAVE FEATURES AND GOALS

Before shopping for software, know what you need and what you don't. Figure out what features are must haves, and which ones are nice to have. Prioritize:

- Real-time and historical spend tracking
- Automated bid posting and vendor outreach
- Centralized documentation management and audit trails
- Built-in compliance tools
- Easy-to-use reporting dashboards
- Vendor management capabilities
- Bid creation and specification templates

HELPFUL HINT

Align these features to your agency's broader goals: transparency, cost control, efficiency, and accountability. Don't know what to look for? Check this out.

03 EVALUATE VENDORS THOROUGHLY

When researching providers, look for ones who meet your goals and requirements. Ask other area agencies or peers what systems they use to get more insight, and create a pros-and-cons list of your finalists. Some key features to look for include:

- Experience with public sector procurement
- Strong client retention and references
- Easy and efficient onboarding and training support
- U.S.-based customer service
- Scalable pricing
- Willingness to assist in the approval process

PRO TIP

Some vendors (like PlanetBids) offer resources and assistance tailored to public sector approval processes, from cost-benefit analysis to board presentation materials. Need some case studies? We've got you covered.

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04 BUILD A CLEAR BUSINESS CASE

Now it's time to present your desired purchase and provider of choice to your decision makers. Your proposal should answer three big questions:

1. What's the return on investment?

- Calculate potential savings in time, staffing, and error reduction.
- Compare to the cost of the software (subscription, setup, training).
- Highlight long-term value like time freed up, reduced legal risk, increased vendor participation, smarter project evaluation, and better budget forecasting.
- Include sustainability and environmental impacts like reduced paper usage and commute hours.

> **PRO TIP**
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> Need a quick ROI calculator? Try the one from PlanetBids. It shows how agencies can save an average of $16,500 per employee annually.

2. What's the implementation plan?

- Outline a realistic onboarding timeline, with expected time and effort requirements for each team or member.
- Identify who will manage setup and training and be the point of contact between the agency and the software provider.
- Emphasize ease of use and minimal disruption, if possible.

> **PRO TIP**
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> Set up, customization, implementation, and training times can vary widely from provider to provider. Look for one who can get you up and running fast. PlanetBids can get your agency posting bids and reaching new vendors in a week or less.

3. How does the software provider support compliance and transparency?

- Detail how the system enforces standardization to reduce errors and create more comprehensive bids.
- Demonstrate reporting and audit trail capabilities that allow for better insight into public spending.
- Discuss previous challenges with pulling documentation or records and how centralization will simplify public record requests.

> **HELPFUL HINT**
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> Need some more ammo? Try this article.

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05 ANTICIPATE OBJECTIONS AND PREPARE RESPONSES

Get ready for whatever questions your decision makers or board of approvers will throw your way. Consider a practice presentation where you rehearse and answer these questions on the fly. Here are some suggested objections and responses.

Their Objection	Your Response
"We don't have the budget right now."	"This investment reduces inefficiencies and saves far more over time. We're paying now for delays, manual errors, and increased risks."
"We already have an ERP system."	"ERPs are designed for the post-procurement process, not for the requisition and procurement itself. We're wasting time with band-aids and workarounds in our current processes, while this system is built specifically for public purchasing."
"Is this just another IT system?"	"This system directly affects financial management and legal compliance. It's a fiscal tool as much as a technology one."
"We can't afford the time off for training."	"We're choosing a user-friendly, intuitive solution where we can get started quickly, with procurement-specific support and training included."
"Our vendors won't know how to use it."	"Most vendors are begging for digital bidding systems, and the majority of our vendors are already familiar with the system we've chosen and are using it with other agencies."
"Why can't we keep doing it how we've always done it?"	"Our current system and process exposes us to risks, delays, and unnecessary costs. Doing nothing is costing us more in the long run."

PRO TIP

PlanetBids has more than 550 happy member agencies and over 1000 daily users, and they're happy to provide us with feedback. Here's some you can use.

06 PREPARE FOR THE PRESENTATION

Whether you're speaking in front of a board or submitting a written request, clarity is key. Feel confident in your choice, explain how you came to the decision, and trust your instincts.

Your presentation should include:

- A short summary of the problem and goals
- A side-by-side cost comparison (manual vs. software)
- Key benefits tailored to the agency's values (efficiency, transparency, ROI)
- Testimonials or case studies from similar agencies

BONUS TIP

Ask your chosen vendor if they offer co-presenters or slide decks to help you make your case. PlanetBids regularly supports agencies during council or board presentations. Just let us know what you need!

07 FOLLOW THROUGH AFTER APPROVAL

You got a "yes!" Now it's time to close the deal. Once your desired supplier and budget is approved, reconnect with the software vendor and finalize the details. Here's what's next:

- Confirm contract timelines and implementation dates.
- Schedule a kickoff meeting with your vendor and any required parties.
- Create internal champions for adoption across user teams.
- Track KPIs to demonstrate value early and often.
- Schedule a follow-up presentation with decision makers to demonstrate success.

HELPFUL HINT

Need an idea of what's next? Check out some FAQs from the PlanetBids implementation team.

READY TO MAKE YOUR CASE?

If you're considering procurement software and want a partner that understands how public sector approvals work, PlanetBids is here to help.

We don't just sell software. We're procurement experts ourselves, so we know how to help you make the case for your purchase. From ROI calculators to board-ready presentations, we'll support you every step of the way with whatever you need to get the go-ahead from your decision makers.

CONTACT US TO START BUILDING YOUR BUSINESS CASE