

Category Management Quick Start Guide for Agencies

The Operational Guidance Document was created to be a starting point for the discipline of government-wide category management (CM); it can be adapted to meet the circumstances of any agency. This quick guide provides you with a foundation that can be used to better navigate the Category Management Operational Guidance Document, which is broken into the following six sections.

1 - Gather Data

- Good data is necessary to precisely define the scope of each category grouping. A clean, clear definition of category scope creates clear data and spend standards, ensuring consistency in spend and demand management.

2 - Analyze and Generate Options

- Leadership should thoroughly evaluate the collected data from the perspective of current, historic, and projected spend; leadership should be able to identify potential opportunities for attention based upon the presented data.

3 - Develop Strategy

- To provide a concise summary of the proposed option, post evaluation, with high level but detailed supporting information.

4 - Plan and Implement

- To develop the high level plans necessary for the implementation of the approved category sourcing strategy.

5 - Maintain, Review, and Manage

- The overall reporting aim is to ensure that each individual, whether Stakeholder, Sponsor, Team lead or individual associate has a clear understanding of the functional, category and individual targets and contribution on a monthly basis.

6 - Continuous Improvement

- Lessons learned should be documented throughout the project.

Beginning the Process.

1. Review the [President's Management Agenda \(PMA\)](#), particularly Cap Goal 7 (Category Management - Leveraging Common Contracts and Best Practices to Drive Savings and Efficiencies)
2. [There are five requirements for agencies. Check them out in OMB's Category Management Policy Memo \(M-19-13\).](#)
3. Pull relevant category management data using the Data to Decisions (D2D) [Agency Profile Report \(APR\) under the Government-wide Dashboards. Here you can find information about agency Spend Under Management \(SUM\), Tier 0 Contract Reduction, Best-In-Class and Small Business Utilization.](#)
4. Familiarize yourself with Category Management Agency Key Performance Indicator (KPI) targets, found [here](#) on the D2D Dashboard.

5. Take CM training and/or dashboards demo (calendar: <https://hallways.cap.gsa.gov/app/#!/gateway/category-management/tab/events>)
6. Complete the category management self-assessment posted below, and use your responses to identify the Operational Guidance sections that would be best for your agency to pursue!

Self-Assessment ...

Your Agency's Category Management Program

1. How would you describe the maturity of your agency's CM Program?
2. Does your agency have its own internal CM guidance or policy?
3. Have you reviewed your agency's Category Management Plan?

Your Agency's Personnel / Resources

1. Does your agency have a specific office, team, or group that is responsible for implementing CM?
2. How is the CM office, team, or group structured? (Dedicated agency staff, contractor staff, matrixed team from across the agency, etc.)
3. Are there members of the CM office, team, or group that participate during the bi-monthly Category Management Implementation Group (CMIG) meetings?

Your Agency's Data

1. Are you familiar with your agency profile on GSA's [Data to Decisions \(D2D\) Dashboard](#)?
2. Are there other data sources available at your agency (e.g., financial/budget data, spend data, credit card transactions, mandatory use policies, progress reports, etc.)? If so, has your agency's CM office, team, or group reviewed or analyzed any of data sources listed above including D2D?
3. Are the data sources available at your agency in a format that can be easily accessed and shared across government?

Have questions?

Email category.management@gsa.gov.