CATEGORY MANAGEMENT REPORTING (CMR) WORKBENCH

CATEGORY MANAGEMENT
GOVERNMENT-WIDE

The CM PMO has made dashboards easier to navigate! All of the features you know and love in these tools are moving to a new centralized reporting tool called the Category Management Reporting Workbench ("The CMR"), now available for public and federal-employee access! You will have all the same functionality from our previous tools - and more - in one spot! The landing page will allow for quick access to multiple dashboards, and you will love the new expanded Quick Analytics views for commonly requested data.

Directly Relevant to these Stakeholders
- SAOs/Agency Leadership
- Category Managers & Teams
- CO/Contract Specialist
- Program/Project Manager
- Category Management/Data Analysts
- OSDBUs

Summary of Key Resources (details found in subsequent questions below)

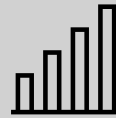### AWARDS EXPLORATION TOOL*

Filter based on tier, managing agency, contract name, etc. to see all relevant contracts; click on any to see details and filter/explore individual awards that may be of interest. Quickly query total awards across CM relevant fields.
Contract Search: find relevant SB contracts and see details
Product Search: see all vendors that provide relevant products and view contract and pricing details

CONTRACT INVENTORY EXPLORATION TOOL*

Research existing contracts for channeling spend; view contract and award details to ensure relevance and fit and usefulness and follow up as needed.

TOP-N-ANALYSIS

Quickly identify the top "N" (selectable number of values) of obligation amount or award count, broken out by a selectable dimension

OBLIGATION TIER SLICER

Quickly compare obligation amounts by Tier and by total Spend Under Management vs. Unmanaged spend.

SMALL BUSINESS-OSB DELTA

Easily identify categories and sub-categories where Small Businesses are successfully able to meet requirements.

SUM CONTRACTS YOY COMPARATOR

Identify opportunities to move upcoming spend to a different contract, and/or point out unexpected performance for better or for worse.

VENDOR MANAGEMENT

Easy have visibility into the number of contracts per Vendor as well as Spend Under Management Performance, both overall and compared to BIC and Tier 2 addressability.
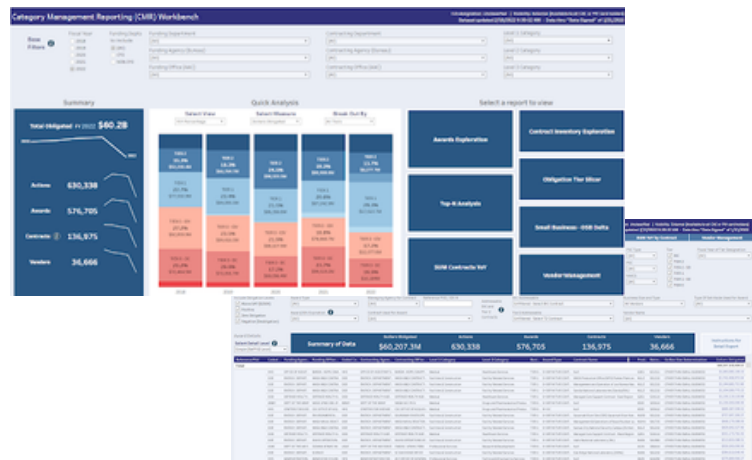
*formerly a standalone tool

GWCM CMR Resource 1: *Awards Exploration Tool*

Access: Click on th Awards Exploration Tool box on the CMR.

Exploration: Filter for your dept/agency/ office, category, etc. as needed. You will see a summary of total dollars obligated, with associated details such as Level 1 and Level 2 categories, Tier, and Business Size Determination. Data is available for export.

Use this report to:
1. Quickly query and export CM enriched agency data at the award level
2. Explore Tier 0 awards that can be targeted to replace with a SUM vehicle

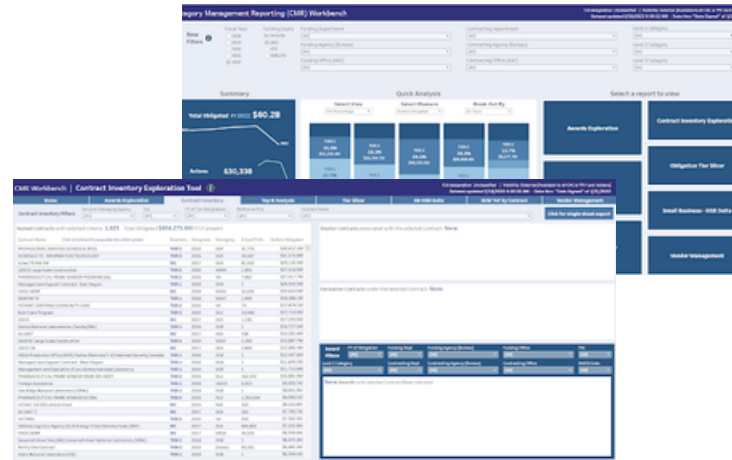## GWCM CMR Resource 2: *Contract Inventory Exploration Tool*

Access: Click on the Contract Inventory box on the CMR.

Select contracts by managing agency, tier, PIID, name

Understand contract details: award dates, contracting and funding offices, etc. to plan and coordinate appropriate actions

Use this report to answer questions like:
1. Where can I find specific types of contracts (e.g., Small Business to use as alternatives?
2. Who are the market leaders in this space? Are we getting competitive pricing? Who offers best prices?
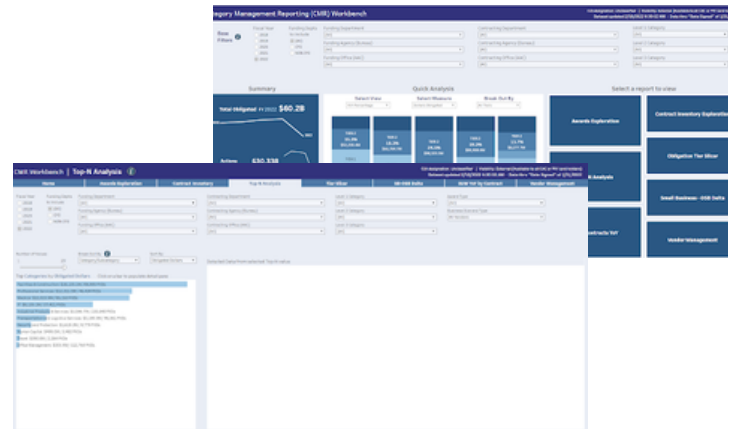
GWCM CMR Resource 3: *Top N-Analysis*

Access: Click on the Top N-Analysis box on the CMR.

Filter for your dept/agency/ office, category, etc.

Choose the number of values to display with the Number of Values slider, then which Dimension with the Break Out By dropdown and finally whether to sort on obligation amount or number of awards.

Use this report to answer questions like:
1. What are the top contracts used by an agency, by tier?
2. Who are our top small business vendors?

GWCM CMR Resource 4: *Tier Slicer*

Access: Click on the Tier Obligation Slicer box on the CMR.

Filter for your dept/agency/ office, category, etc. as needed. Rows can be broken out by various dimensions. Columns will show the various Tiers that have been obligated to each row and subtotals for SUM/Unmanagement spend.

Use this report to answer questions like:
1. What is my SUM total vs. Unmanaged spend?
2. How is my SUM split out across the SUM Tiers?

GWCM CMR Resource 5: *Small Business vs Other than Small*

Access: Click on the Small Business - OSB Delta box on the CMR.

Filter for your dept/agency/ office, category, etc. as needed. A high Small Business Percentage relative to Other Than Small Business (OSB) indicates that small businesses are awarded work at higher rates within a particular category and sub-category.

Use this report to answer questions like:
1. What are the markets where are Small Businesses able to successfully meet requirements?
2. Which Level 1, 2, and/or 3 Category should we focus on to improve our SB utilization?

GWCM CMR Resource 6: *SUM Contracts YoY Comparator*

Access: Click on the SUM Contracts YOY box on the CMR.

Filter for your dept/agency/ office, category, etc. as needed.

Understand the per-Contract delta between obligation amounts from one fiscal year to another.

Use this report to answer questions like:
1. What opportunities exist to move upcoming spend to a different contract?
2. How is my contract performing from one fiscal year to the next?

GWCM CMR Resource 7: *Vendor Management Report*

Access: Click on the Vender Management box on the CMR.

Filter for your dept/agency/ office, category, etc. as needed.

Understand the number of contracts per vendor and SUM performance, both overall and compared to BIC and Tier 2 addressability.

Use this report to answer questions like:
1. How many contracts does my vendor have?
2. What BICs can we better use to boost our utilization? What benefits can we expect from using them?

WE WANT YOUR FEEDBACK

Please help us improve our data and analytics tools and these playbooks. We welcome questions, suggestions, what you like, etc. Please email: govtwidecmdashboards@gsa.gov.