# MyFloridaMarketPlace Customer Round Table Meeting

| Meeting Information | |
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| **Meeting Title:** | MyFloridaMarketPlace Customer Round Table Meeting |
| **Occurrence:** | August 10, 2017 |
| **Time:** | 10:00 a.m. |
| **Location:** | Betty Easley Conference Center, 4075 Esplanade Way, Room 166 |

| Attendees | | |
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| **#** | **Entity** | **Name** |
| 1. | DCF | Kathy Rothman |
| 2. | DCF | Rob Dorman |
| 3. | DEO | Kim Ryals |
| 4. | DEO | Mary Anderson |
| 5. | DEP | Gloriann McInnis |
| 6. | DHSMV | Cricket Lee |
| 7. | DMS | Lance Dyal |
| 8. | DMS MFMP | Betsy Chance |
| 9. | DMS MFMP | Bruce Roberts |
| 10. | DMS MFMP | Jillian Green |
| 11. | DMS MFMP | Tyler Brown |
| 12. | DOEA | Brenda Geddis |
| 13. | DOEA | Kathy Cochran |
| 14. | DOH | Bill Zimmerman |
| 15. | DOH | Doug Black |
| 16. | DOT | Sherill Johnson |
| 17. | FDC | Jacklyn Colson |
| 18. | FDLE | Beverly Malloy |
| 19. | FDLE | Justin Payne |
| 20. | FDLE | Teresa Welch |
| 21. | FWC | Rachel Bozeman |
| 22. | MFMP | Brian Cliburn |
| 23. | MFMP | Crystal Owens |
| 24. | MFMP | Delvis Catchman |
| 25. | MFMP | Felicia Thompson |
| 26. | MFMP | Jeremy Kong |
| 27. | MFMP | Joy Schneider |
| 28. | MFMP | Robert Cooper III |

| Topic # | Agenda Topic Description |
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| 1. | Utilization Support |
| 2. | Using MFMP Catalogs |
| 3. | Vendor Related Updates |
| 4. | Training Update |
| 5. | Communication Assessment Results |
| 6. | VPT Survey Reminder |
| 7. | Trivia |
| 8. | Davis Productivity Award |
| 9. | Utilization Scorecard and Statewide Training |
| 10. | Open Forum |

| Meeting Minutes for Topics | |
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| **Topic #** | **Minutes for Topics** |
| 1. | **Utilization Support – Florida Fish and Wildlife Conservation Commission (FWC)**<br>FWC contacted MyFloridaMarketPlace (MFMP) for utilization support<br>• The MFMP team provided support/recommendations as FWC enhanced their utilization of MFMP.<br>• This effort included:<br>   o On-boarding new requesters/approvers<br>   o Updating their HQ approval flows<br><br>Rachel Bozeman from the Florida Fish and Wildlife Conservation Commission (FWC) commented on how responsive and hands-on the MFMP team was during the utilization support process. MyFloridaMarketPlace began by presenting to FWC's Business Leadership Team to obtain buy-in from the agency. The MFMP team met with FWC on a weekly basis to verify deadlines were being met and the overall process remained on schedule. The Florida Fish and Wildlife Conservation Commission began with the PUI for their headquarters location and will soon be moving onto other regions.<br><br>Utilization support provided by MFMP:<br>• Developed a work plan, customized training materials and communications<br>• Supported on-boarding effort<br>• Updated agency workflows |
| 2. | **Using MFMP Catalogs**<br>Benefits of utilizing catalogs<br>• Reduced data entry errors<br>• Up-to-date information<br>• Simplified and centralized purchasing<br>• Improved productivity with pre-populated information<br>• eCommerce-like shopping experience |

MFMP encourages customers to utilize catalogs when available.

How to Find Available Catalogs
- Perform a keyword search in MFMP Buyer
- View a list of vendors with MFMP catalogs on the Catalogs and eInvoicing page of the MFMP website.

MFMP created a Catalogs Flyer, available on the MFMP website.

MFMP University offers an online training on searching catalogs in MFMP. This training can be found on the MFMP U Online Training page.

**Q:** Have any other customers experienced issues accessing the Mac Papers catalog or the Staples catalog? Customers at the Department of Children and Families (DCF) are being prompted for a username and password by these two catalogs. The issue may be isolated to DCF, many of these customers have recently gotten new workstations or upgraded to Internet Explorer 11. The customers have checked the compatibility settings in Internet Explorer but the issue still persists.
**A:** The MFMP customer service desk has not received any calls specifically about this issue. Please reach out to the customer service desk so the issue can be investigated.

New Catalog Initiative
- MyFloridaMarketPlace partnered with the Department of Management Services (DMS) Contract Managers to engage vendors and target specific contracts to encourage catalog development.
- Initiative began in the beginning of fiscal year 2016-17.
- Added twelve new catalogs since the inception of the initiative:
  - CDW Government LLC, Commonwealth Ammunition, LLC, Elite Office and Business Solutions, Exemplis, Front Row, Gulf States Distributors, Inc., Hewlett Packard Enterprise, Lexmark, Qualpath, SHI, SSD International, Inc., and United Solutions

**Reluctant Vendor Clean-Up**
The Reluctant Vendor Process was retired in late 2011, as part of an effort to streamline registrations to include only active vendors.

The MFMP team began outreach to vendors in early May to encourage vendors to create new vendor-maintained MFMP registrations. Over 50 percent of vendors with an order queued for fiscal year 2017-18 created new vendor-owned registrations to allow them to continue to do business with the State of Florida.

The MFMP team inactivated the remaining 201 reluctant vendor locations on June 23, 2017.

The goal of this inactivation was to reduce failed purchase orders, confirm that agency customers are conducting business with valid vendor accounts, and potentially increase transaction fee collection.

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If any new vendor accounts qualify for transaction fee exemption, agency customers should mark their requisition or contract as exempt in the accounting details section.
- See the MFMP Buyer manual for more information on this process.

## Annual Vendor Inactivation
Each year, the MFMP team reviews vendor registrations and inactivates vendors without activity during the last two fiscal years.

A vendor notification will be posted on the DMS Website prior to the inactivation.

The 2017-2018 inactivation is scheduled for November.

Customers can expect to see communications regarding the annual vendor inactivation in the weeks to come. Updates will also be posted on the DMS website.

Vendor accounts will **not** be inactivated if any of the five criteria below are met:
- Business location has received an MFMP purchase order
- Business location has received a payment from FLAIR, the State of Florida's accounting system, or a PCard payment
- Business location has made an edit to their Vendor Information Portal (VIP) account
- Business location has logged into MFMP Sourcing
- Business location's Office of Supplier Diversity (OSD) Certified Business Enterprise Certificate has not expired before the previous fiscal year

**Q:** A vendor was recently inactivated even though they had an active purchase order. What does MFMP do to prevent active vendors from being inactivated?
**A:** The MFMP team reviews each vendor inactivation request to confirm they are not on an open order. Please reach out to the customer service desk so we can investigate this further.

## Training Updates
All first and second quarter MFMP trainings are posted on the MFMP University website.
- Please let your agency customers know so that they can register in advance.

The MFMP team recently updated training registration webpage to include an interactive calendar.

**Q:** When a new agency customers rolls on at DOH, their PUI's champion encourages them to take MFMP training. Recently, new customers have been receiving emails about MFMP training. Is this communication being sent by the help desk?
**A:** This communication is sent by our training and communications team. Each week, a report is run to provide a list of new customers in MFMP. Those customers receive a *Welcome to MyFloridaMarketPlace* communication with links to MFMP University training opportunities.

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| | **Upcoming IT Staff Aug. Webinar**<br>IT Staff Augmentation Contract webinar is scheduled for August 15, 2017 from 2 – 4 p.m.<br><br>This webinar will cover the following topics:<br>• Correct setup of line items for quoted jobs<br>• Auto-add functionality<br>• Viewing the *Contract ID* field on published eQuotes<br><br>There are two change requests pertinent to the IT Staff Augmentation contract. *CR311 Request to add Contract ID field to the Overview tab on Quick Projects* allows customers to verify that the contract number has been added to the event appropriately.<br>*CR275 Auto-add vendors to eQuote events by contract* allows MFMP to automatically add vendors to an eQuote event by their tax ID. Five vendors will be randomly added to eQuotes created from the IT Staff Augmentation contract. Customers will have the ability to remove the selected vendors if they choose. |
| 5. | **Communication Assessment Results**<br>The team piloted an email analytics tracking and distribution list management initiative from January 1, 2017, through June 30, 2017.<br><br>Of the 22 communications sent, agency customers opened approximately **28 percent** and clicked one of the links approximately **29 percent** of the time.<br><br>Sending emails between **Wednesday afternoon and Thursday morning** will **yield higher open rates.**<br><br>The MFMP team worked with several agencies to prevent internal agency filters from blocking MFMP communications.<br>• Clutter, a new feature in Office 365, is an email sorting tool that moves low priority messages out of your Inbox and into the Clutter folder. At some agencies, MFMP communications were being automatically sorted into Clutter folder. MFMP has worked with the affected agencies to resolve this issue<br>• Please let the MFMP team know if your agency hasn't received standard MFMP communications over the past six months<br><br>During the pilot, the following agencies had the highest open rates:<br>• Department of Veteran Affairs<br>• Department of Citrus<br>• Auditor General<br><br>The MFMP team found that the majority of agencies opened **less than half** of the tracked MFMP communications. |

|   | The MFMP team will be working with all agencies to determine whether or not the correct liaisons are listed on the MFMP distribution list.<br>• Purchasing and F&A liaisons are responsible for forwarding MFMP communications to internal agency customers<br><br>MyFloridaMarketPlace recommends:<br>• Agencies develop internal distribution lists of their MFMP agency customers<br>• Setting Outlook rules to auto-forward emails |
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| 6. | **Completing VPT Surveys**<br>After an invoice is paid, agency customers have 30 days to complete the auto-generated Vendor Performance Tracking (VPT) survey.<br><br>Completing VPT surveys allows agency customers to view average vendor ratings when creating an MFMP purchase order.<br>• This allows agencies to monitor a vendor's performance across the state<br><br>Currently, just over half of VPT surveys are being completed.<br><br>For more information, visit the VPT Website or take the VPT online training. |
| 7. | **Trivia**<br>**Q:** How many **new catalogs** have been added to MFMP resulting from the catalog initiative?<br>**A:** 12 |
| 8. | **Davis Productivity Award**<br>The MFMP DMS team won a 2017 Davis Productivity Award for the work that they did on the pilot of the Utilization Support Initiative<br>• Thanks to AHCA, DEP, DOH and FDLE for being a part of that initiative |
| 9. | **MFMP Utilization Scorecard**<br>The fourth quarter MFMP Utilization Scorecard is available on the MFMP website<br>• **All 5 metrics** met the utilization goal by June 30, 2017<br><br>Agencies can request MFMP Utilization Support by contacting the MFMP team.<br><br>**Statewide Training**<br>All first and second quarter training registrations are available on the MFMP University website.<br><br>The MFMP team will be hosting in-person training in **Tampa** on October 2-3 and in **Orlando** on October 4-5. |

**Open Forum**
- These meetings are intended to:
  - Discuss issues and concerns from agencies
  - Identify and review improvements to MFMP applications, training, and/or communications
  - Allow agencies to discuss internal process/policies with each other
- After each meeting, the MFMP team will
  - Review feedback and determine next steps (create CR, find existing CR #, provide training material, follow-up for additional context, etc.)
  - Communicate status back to original feedback originator

**Communications**

Brian Cliburn, the MFMP project manager, requested feedback or recommendations for improving the current MFMP communications process. The MFMP team has used email as the primary method of communication and relies on liaisons to distribute pertinent communications to the customers in their agency.

A CRT attendee noted that the statistics from the communications assessment may be skewed if an agency has multiple liaisons but only one of those opens and forwards the email. This may appear as only one customer opening the email, but it is unnecessary for all the liaisons to open and forward the email since the goal of having the information passed on to the appropriate customer has been accomplished.

The Fish and Wildlife Conservation Commission utilizes a marketing platform for government organizations called GovDelivery. FWC uses GovDelivery to send all their internal communications and to forward on MFMP communications. A single customer is responsible for forwarding MFMP communications to an internal distribution list of FWC's MFMP customers.

A CRT attendee indicates that their agency does not forward every communication from MFMP. Their liaisons and system administrators determine which communications apply to their customers and only the applicable communications are sent on.

A CRT attendee suggested incentivizing customers to open and read the communications from MFMP.

A CRT attendee suggests assessing the frequency of certain communications like the inactivation notices. The MFMP team will look into the possibility of reducing the frequency of this communication.

**Vendor File**

A CRT attendee asked about developing a relationship between the MFMP vendor file and the DFS vendor file that would provide customers with more choices for remit to addresses. There is an existing relationship between the MFMP vendor file and the FLAIR vendor file. MyFloridaMarketPlace provides DFS with information to populate the FLAIR vendor file. If the question is can we have a remit to address for a vendor that has a FLAIR registration but not

an MFMP registration, then the answer is no. The address must originate in MFMP. There is a strict DFS rule in place to force vendors to register in MyFloridaMarketPlace if they want to do business with the State of Florida. The vendors that are registered in FLAIR but not in MFMP are often PCard vendors. There is a process for vendors to import their FLAIR location information into VIP.

**Remit To Address**
A CRT attendee would like to improve the process of verifying remit to addresses. Currently, customers will go to FLAIR to verify remit to address. The inability to view the remit to address for each sequence can cause issues if a vendor has multiple locations with the same physical address, but different remit to addresses. This issue is addressed by CR 2 *Vendor 'Remit To' address, 'Does Business as' name and 1099 name on invoice and printed PO.* This change request would make the remit to address visible in Buyer on the supplier location information. CR 2 has not been prioritized for implementation at this time. The DMS leadership team has elected to reserve their allotment of service hours in preparation for the expected enhancement to allow MFMP to integrate with the new Florida PALM system. The MFMP team also stressed that the remit to address is currently visible in VIP. Customers are able to access VIP using the 'publicuser' account.

**Multiple Vendor Locations**
A CRT attendee would like the ability to change the vendor locations on IRs to any location/sequence associated with a vendor registration with the same tax ID. This enhancement has been logged, but is separate from CR 2. The system does not currently allow for this functionality due to way the system recognizes unique entities on the back end. MFMP has not fully vetted what that enhancement would look like.

If an agency customer sees a vendor with multiple registrations under the same tax ID, please let the MFMP customer service desk know. MFMP will work with the vendor to consolidate their accounts so all locations are under one parent account. Often times, vendors end up with multiple registrations when a vendor leaves and the remaining vendors do not know the login information to access the vendor registration. As a result, vendors will create a new registration. MFMP has added functionality to indicate that a vendor's company may already be registered in MFMP. However, vendors are still able to process past this message and create a registration if they choose.

**W-9 an IRS Taxpayer Identification Number (TIN) Matching**
A CRT attendee suggested removing all vendors that do not have a valid W-9 on file or if the vendor fails IRS TIN matching. This would restrict agency customers to usable vendors with a valid W-9 on file. The W-9 process is designed to allow an agency customer to select the vendor and go through the requisition process up to when it reaches FLAIR in the approval flow. This was originally designed because of DFS' reliance on the IRS to do the TIN matching. The process gives DFS the ability to manually approve requisitions in the event that DFS' interface with the IRS went down or did not respond. MFMP will analyze the current processes to see how it can be approved. This process may evolve in the future with the implementation of Florida PALM as well.

| | **Annual Customer Survey** |
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| | Please be on the lookout for communications regarding the MFMP annual customer satisfaction survey next month.<br><br>If you have further questions please contact the MFMP team at MyFloridaMarketPlace@dms.myflorida.com |

| Action Items | | | | | |
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| **#** | **Action Item Description** | **Assigned To** | **Status** | **Due Date** | **Comments** |
| 1. | Analyze the current W-9/IRS TIN matching process and look for improvements | MFMP | In Progress | | |
| 2. | Analyze frequency of communications (ex. Weekly inactivation notices) | MFMP | In Progress | | |
| 3. | Contact the DCF regarding issues accessing catalogs | MFMP | In Progress | | |