

# Agile Procurement in a Time of Rapid Change: Playbooks That Survive Audit

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# Introductions



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# Why Agile Procurement Now

**Governments are being asked to move faster *and* demonstrate stronger audit defensibility at the same time.**

Procurement must

- Be fair, open, and transparent
- Demonstrate best value and sound stewardship
- Withstand public, parliamentary, and audit scrutiny

Recent horizontal and departmental audits have emphasized:

- Governance and decision-making
- Documentation and evidence
- Risk-based controls
- Consistency in procurement management frameworks

# Why Agile Procurement Now — Canada Public Sector Drivers

## Challenges of Traditional Procurement

Traditional procurement models face delays and struggle with evolving digital service requirements, risking outdated solutions before delivery.

## Agile Procurement Approach

Agile procurement manages risk with short, time-boxed iterations, acknowledging uncertainty instead of eliminating it upfront.

## Canadian Public Sector Adoption

Canadian institutions are adopting agile procurement through pilots, guidance, and centres of expertise ensuring oversight and probity.

## Targeted Agile Benefits

Agile procurement reduces sunk-cost risk, supports digital transformations, and enhances inclusion of SMEs in government supply chains.

# The Challenge with Traditional Procurement in Digital Transformation

**Structural  
limitations of  
traditional  
procurement**

Assumes  
requirements can  
be fully known  
upfront

Defers risk  
discovery until late  
delivery stages

Locks scope early,  
making adaptation  
costly

Delivers value late,  
often after policy or  
technology has  
shifted

# What Agile Procurement Really Is – and Is Not

## Agile Procurement is **not**:

- Informal procurement
- Relaxed compliance
- Vendor-led decision-making

## **It is:**

- Outcome-driven
- Phased and incremental
- Evidence-based
- Designed to reduce risk earlier, not later

# Comparative Summary — Agile vs Traditional

Stage	Traditional Approach	Agile Approach	Timelines / Artifacts	Decision Point
<b>Planning</b>	Exhaustive upfront specs	High-level problem statement	3-12+ mos vs 2-4 week discovery	Fully defined vs Learned enough to proceed
<b>Market Engagement</b>	Limited, formal, one-way	Early, continuous, collaborative	Draft SoW vs Co-design workshops	Pre-solicitation release
<b>Solicitation Design</b>	Lengthy RFP, rigid specs	Concise SOO, process focus	Exhaustive vs ~12 pages	Proposal submission
<b>Evaluation</b>	Paper-based scoring	Evidence-based, live demos	Written compliance vs Live challenges	Contract award
<b>Contracting</b>	Single Firm-Fixed-Price	Modular, T&M caps, phased	Long-term vs Short options	Major gate vs Sprint acceptance

# Roles and Accountability: What Really Changes

Agile Procurement **does not remove roles**—it changes how they work together.

## Role evolution

Actor	Traditional Role	Agile Role
Procurement	Process gatekeeper Writes exhaustive SoWs, enforces rigid compliance	Governance steward Drafts outcome solicitations, facilitates market engagement
Policy/Product owners	Define once Hands-off after requirements are set	Continuously refine outcomes Actively manages backlog, defines acceptance criteria
Legal	Focuses on penalty clauses and rigid terms	Enables flexible IP/data terms and off-ramps
Finance	Approves single, large upfront budgets	Manages staged, product-based funding
Users	Acceptance testing	Continuous feedback
Vendors	Deliver to spec	Compete, then co-create within guardrails
Audit	End-stage assurance	Continuous traceability

# Distinguishing Agile from Adjacent Procurement Models

While agile procurement shares traits with other modern sourcing strategies, **it is distinct in its execution**. All agile procurement is outcomes-based, but not all outcomes-based procurement is iterative.

Model	Scope Handling	Delivery Cadence	Typical Use	Key Risk
Agile Procurement	Evolves via backlog	Iterative sprints	High uncertainty, digital	Scope creep without governance
Outcomes-Based	Defined end-state	Variable (can be single)	Performance-driven services	Misaligned incentives
Commissioning	Broad portfolio design	Strategic cycles	Health/social sectors	Overly broad scope
Challenge-Based	Problem statement	Prototyping	Discovery and innovation	Scaling past prototype

# Decision Triage: Appropriate and Inappropriate Use Cases

Situation	Why Agile Underperforms	Preferred Approach
<b>Commodities</b>	Unnecessary overhead	Traditional tendering
<b>Safety-Critical Systems</b>	Fail-fast unacceptable	Waterfall with full verification
<b>Stable Requirements</b>	No benefit from iteration	Fixed-price contracts
<b>Large COTS/ERP Core</b>	Limited ability to iterate	Hybrid model

# Technology Enablement: What Current Procurement Platforms Can—and Cannot—Do

## Where leading platforms help

- Strong audit trails and approvals (SAP Ariba, Coupa, Ivalua, JAGGAER)
- Configurable sourcing workflows
- Supplier lifecycle and performance visibility
- Progressive reporting and analytics

## Key limitations for Agile Procurement

- No native concept of “challenge” or “discovery phase”
- Weak linkage across multi-phase procurements
- Limited support for prototype-based or evidence-led evaluation
- Progressive contracts require workarounds
- Learning-based decisions are captured *around* the system, not *in* it
- As discussed earlier, **tools enable agility but do not create it**. Governance design and operating model matter more than platform choice.

# When to use Agile

Agile procurement **excels** where uncertainty is high and user-centered design is critical.

SAMPLE

Criterion	Weight	Scoring Guidance (0-3)	Evidence Needed
Requirements Uncertainty	3	3 = Highly unclear/evolving	Problem statement lacks technical solution
User-Centered Design	3	3 = Success depends on user feedback	Need for continuous user testing
Experimentation	3	3 = Multiple prototypes needed	Lack of proven market solution
Tech Change Rate	2	3 = Rapidly evolving landscape	Cloud/AI/Data dependencies
Modularity	2	3 = Easily phased delivery	Independent component architecture
Market Maturity	2	3 = Vendors experienced in agile	Competitive agile supplier base
Time-to-Value	2	3 = Urgent need for tangible benefits	Mandate for rapid deployment
Regulatory Constraints	-2	-2 = Rigid upfront certification needed	Compliance/safety mandates

# When Not to Use Agile

Agile procurement adds unnecessary **complexity and risk** when applied to the wrong domains

Situation	Why Agile Underperforms	Preferred Approach	Controls if Hybrid
Commodities	Adds overhead to standard items	Traditional competitive tendering	N/A
Safety-Critical	"Fail-fast" is unacceptable	Exhaustive upfront verification	Strict waterfall for core safety
Stable Requirements	Unnecessary iterative overhead	Fixed-price traditional	Agile only for user interfaces
Large COTS/ERP	Core platform cannot be iterated	Traditional for core, agile for config	Clear boundary between core and config

# Roles, Skills, and Organizational Readiness

## Transforming Procurement Roles

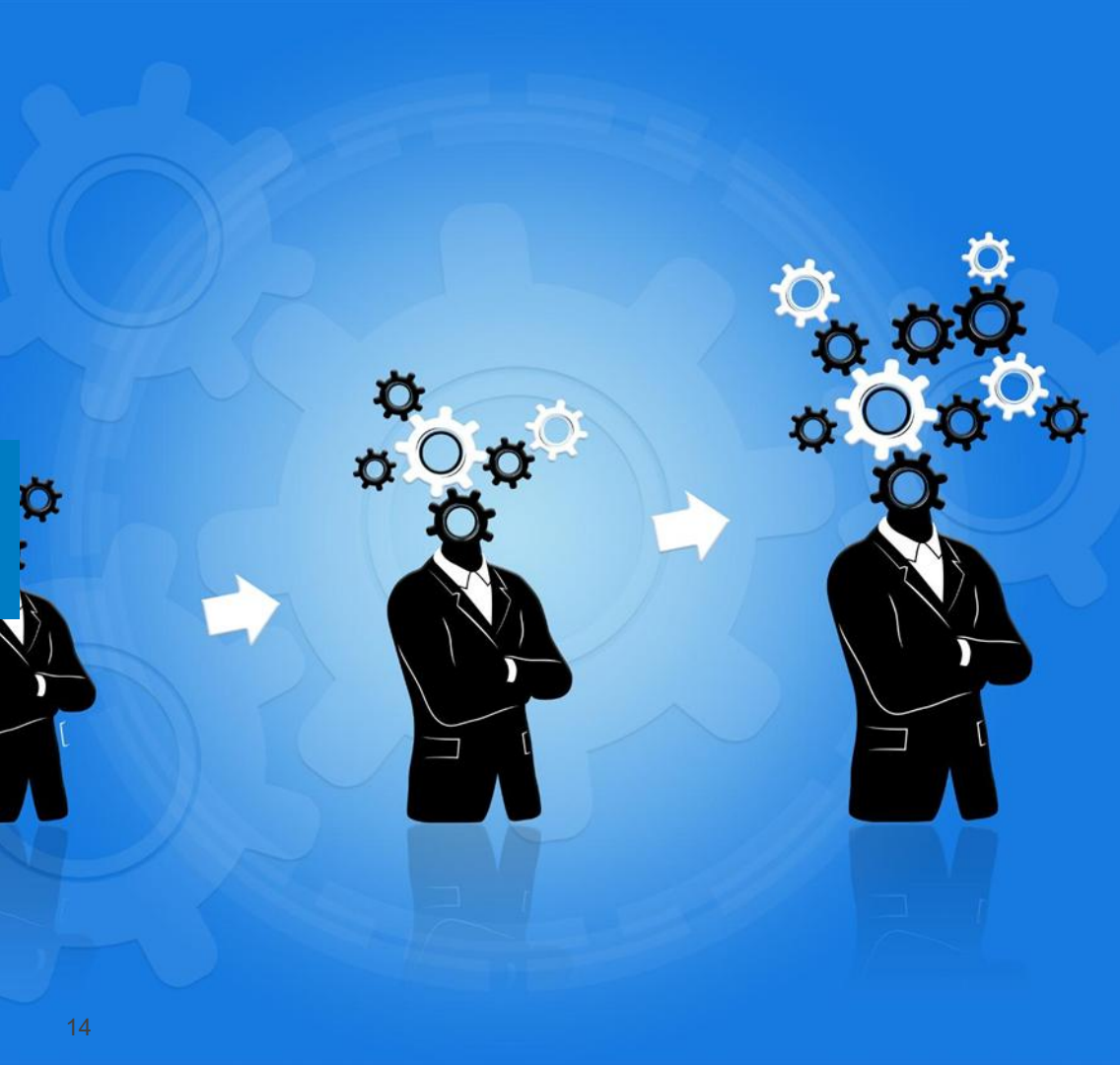
Procurement officers shift from detailed specs to outcome-focused solicitations and early market engagement.

## Evolving Legal and Finance Roles

Legal enables contract flexibility and finance manages staged funding embedded within delivery teams.

## Building Organizational Capability

Organizations invest in expertise centers, training, and rotations to embed 'intelligent client' capabilities.



# Risks of Agile Procurement—and How They Are Addressed

Agile Procurement introduces *different* risks, not fewer ones:

Risk	Where it shows up	Mitigation
Fairness perception	Early engagement	Structured, transparent engagement
Audit defensibility	Iterative decisions	Decision traceability by phase
Budget creep	Incremental funding	Hard funding gates
Capability gaps	New ways of working	Cross-functional teams & training
Political optics	“Non-traditional” models	Clear narrative & publication

# Contracting Models and Commercial Design

## Flexibility with firm guardrails

Agile contracts must balance **flexibility** with **accountability**. Phased or modular contracting breaks complex projects into distinct phases (Discovery, Alpha, Beta, Live) with defined objectives and budgets.

Model	When to Use	Buyer Risk	Supplier Risk	Payment Trigger
Phased/Modular	High uncertainty, complex projects	Low (limited to current phase)	High (must earn next phase)	Phase acceptance
Fixed-Price per Sprint	Predictable velocity established	Medium	Medium	Working software delivered
T&M with NTE Cap	Discovery/Alpha phases	High (quality risk)	Low	Hours worked (up to cap)
Hybrid	Mixed certainty projects	Medium	Medium	Varies by component

# Part 2

# Audience Participation





“  
Speed is the new  
currency of business  
”

–Marc Benioff, CEO Salesforce

# Case Study 1: Swiss Casinos Group - Situation



**Swiss Casinos Group:** Switzerland's leading casino operator, operating in a highly regulated and competitive market

**Business context:** Market disruption drove urgency to digitize and modernize core systems

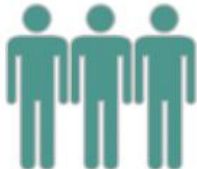
**The challenge:** A fixed regulatory deadline made a traditional ERP RFI/RFP too slow and too risky

# Case Study 1: Swiss Casinos Group - Approach



2 DAYS

+



3 Vendors

+



1 Room

+



2 Public Reviews

=



Kickstart

Source: <https://flowdays.net/en/blog-en/2020/4/20/a-new-world-record-sourcing-an-erp-in-2-days>

# Case Study 1: Swiss Casinos Group - Process



Source: <https://flowdays.net/en/blog-en/2020/4/20/a-new-world-record-sourcing-an-erp-in-2-days>

# Case Study 1: Swiss Casinos Group – Results



- ✓ 400% faster idea to first value
- ✓ 50% less effort
- ✓ 400% faster first info to decision
- ✓ 1,000% faster decision to contract
- ✓ 84% recommendation rate satisfaction

## Case Study 2: Dunedin City Council - Situation

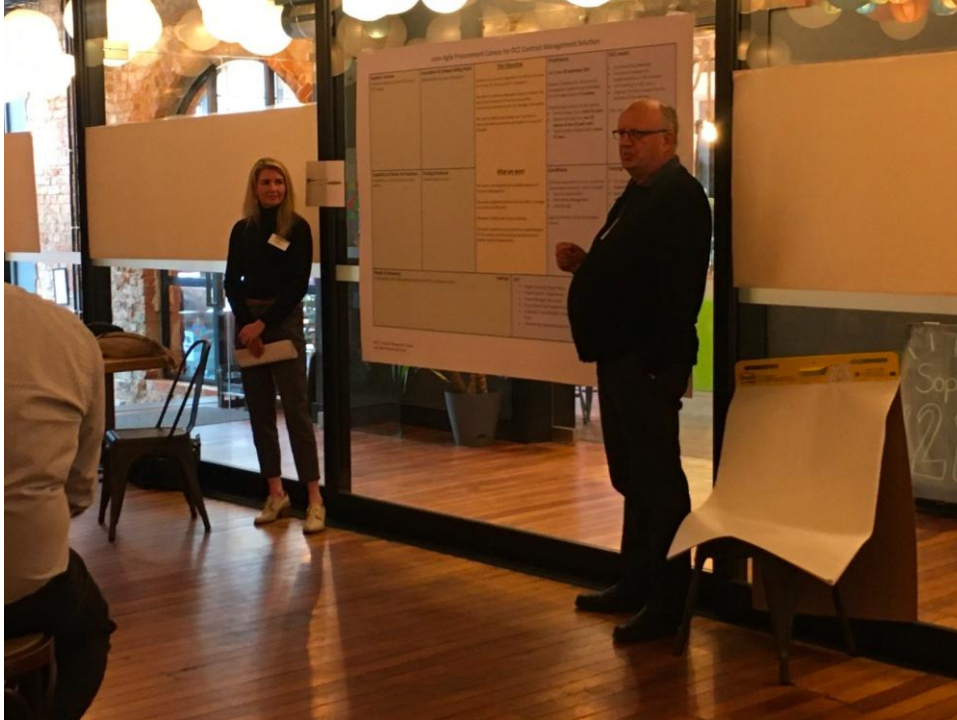


**Dunedin City Council:** New Zealand local government, governed by strict public procurement rules

**Context:** Need to modernize contract management within transparent, open-market processes

**Challenge:** Mandatory competitive procurement timelines conflicted with speed and collaboration needs

## Case Study 2: Dunedin City Council – Approach/Process



Past SaaS procurements via traditional RFPs failed to deliver outcomes

CLM system was central to a critical contract-management transformation

Public-sector rules demanded openness, probity, and competition

Lean-Agile Procurement chosen to reduce risk and improve fit

Source: <https://www.lap-alliance.org/resources/our-blog/f8ts9t944bxv4x1mhxpwhu4vyg2ct>

## Case Study 2: Dunedin City Council - Results



- ✓ On-time, on-budget delivery,
- ✓ Faster, higher-confidence decisions with reduced vendor effort and cost
- ✓ Strong buyer–vendor collaboration
- ✓ International recognition for transparency, probity, and cooperation

*Dunedin City Council wins award for Outstanding Cooperation & Collaboration at the 2023 World Commerce and Contracting (Asia Pacific) Innovation and Excellence Awards*

## Case Study 3: Canadian City - Situation



**Context:** Canadian municipality pursuing housing acceleration through process modernization

**Challenge:** Slow, manual building-permit reviews delaying housing delivery. Also new area with solutions just starting to emerge.

**Goal:** Reduce permit review timelines from weeks to days while maintaining compliance

## Case Study 3: Canadian City - Approach/Process



**Phase 1 – Prequalification:** Narrows the field to 3–5 qualified vendors.

**Phase 2 – Demonstration / Proof:** Short-listed vendors are invited to participate in solution demonstrations/proof-of-concept (paid a fixed amount).

**Phase 3 – Selection & Deployment:** Preferred vendor is selected and solution deployed as stand-alone.

**Phase 4 – Full Integration:** Following successful deployment and on-going training, the solution is fully integrated with City systems and workflows.

## Case Study 3: Canadian City - Observations



1. Success Shifts from “Writing Well” to Executing Together
2. Solutions Are Judged on Practical Fit, Not Theoretical Capability
3. Delivery Readiness Matters as Much as Product Strength
4. Investment Is Higher Up Front—but Risk Is Lower Long-Term

# Surviving Audit: Core Principles

*“Agile procurement survives audit when it trades fixed requirements for fixed accountability, evidence, and transparency.”*

1. Clear accountability and governance
2. Transparency and fairness throughout iterative stages
3. Evidence-based decision-making (not narrative justification)
4. Robust records and information management
5. Proportionate controls (not “Agile theatre”)



# Surviving Audit: Insight from Agile Playbooks

## 1. Agile works when governance is explicit, not informal

*Canada – Procuring Complex IT Solutions;  
UK Sourcing Playbook*

## 2. Design fairness and transparency into multi-phase processes upfront

*Canada – Procuring Complex IT Solutions;  
Skylight Agile Procurement Playbook*

## 3. Use pilots and iterations as evidence, not experimentation

*(UK Sourcing Playbook; Skylight Agile  
Procurement Playbook)*



# Surviving Audit: Insight from Agile Playbooks (Cont.)

4. Treat documentation and data as core delivery artefacts

*Canada – Procuring Complex IT Solutions; OECD Digital Transformation of Public Procurement*

5. Apply stronger discipline as risk and complexity increase

*Canada – Procuring Complex IT Solutions; UK Sourcing Playbook; OECD)*



# Select Agile Procurement Resources

- [Agile procurement - Canada.ca](#)
- Government of Canada: [The Centre of Expertise in Agile and Innovative Procurement](#) (WIKI)
- Report of the Standing Committee on Public Accounts (Canada) – [Procuring Complex Information Technology Solutions](#) (2021)
- GOV UK: [The Sourcing Playbook](#)
- OECD: [Digital transformation of public procurement: Good Practice Report](#) (2025)
- [Skylight Agile Procurement Playbook](#)
- Book: [Lean-Agile Procurement: How to Get Twice the Value in Half the Time](#) by Mirko Kleiner

## Discussion/Q&A





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# Thank You