



Brookdale Senior Living and Coupa: Building a Better Procurement Process

The second quarter of 2021 is “off to a great start” for Brookfield Senior Living, according to CEO Cindy Baier. With **five consecutive months of occupancy growth** and a focus on delivering the highest-quality resident experience possible, Brookdale is well-positioned to capture significant market gains as pandemic pressures evolve into more endemic issues. However, as noted by Brookdale’s Senior Director of Procurement, Brittney Muirhead, building the robust procurement processes necessary to support this growth came with significant challenges. Here’s how Coupa helped close the gap.

Building a Better Community

At Brookdale Senior Living, community is the priority. Focused on building both social and emotional well-being among residents in a post-pandemic world, Brookdale wants to foster a sense of belonging and go the extra mile to help clients feel at home. Achieving this goal means providing industry-leading facilities, food, and entertainment for seniors in care to help them find their place at Brookdale. And all this hard work pays off — Brookdale earned top marks in the **2020 J.D. Power U.S. Senior Living Satisfaction Study** for factors like community staff, resident activities, resident apartment/living unit, and community buildings and grounds.

The Challenge: Building a Better P2P Process

Procurement expert Brittany Muirhead recalls when she joined Brookdale five years ago that she “was expecting POs, supplier processes, and mature catalog structures, but none of that existed. They had Coupa but were only using some of its functions for basic tasks.” And with 35,000 employees across more than 600 locations, this posed a significant problem.

“There was no process and no control,” she says. “I started trying to assess why are we afraid of no PO, no pay? I’ve spent the last five years working with the Coupa team to make changes. I took all the things from my past experience and started asking questions, and we started updating the old policies to capture the limits of authority.”

Establishing a better procure-to-pay (P2P) process was especially critical since there were no clear definitions around who had the authority to approve spend or how that spend was itemized. Muirhead uses the example of chemical companies, which often ship their products in sealed boxes: Once the boxes are open, the product belongs to the customer. She says that invoices would often arrive without POs for chemicals or other products from suppliers that weren’t part of P2P systems.

These questions led to contract and compliance review, which Muirhead says “led to supplier vetting: Who said what, who made these agreements? We had to break bad processes. Despite good intentions in approving spend without POs, we were setting field associates up for failure.”

The result was a ripple effect, says Muirhead. “How should we spend our money? Who can spend our money? Who needs to approve spending? First, it was contract policies, then PO policies, and now it’s a combined policy that lays out everything you’re allowed to do. We’re really focused on continuing to enhance it to cover all aspects of spend. We went from a very narrow to a much wider focus on procurement.”

The solution: Expanding Coupa’s impact with DataMap

“From a procurement perspective,” says Muirhead, “you want to make use of the tool every day, for every purchase. You want 99% of purchases backed by POs.” By working with technology integration and services company DataMap, Muirhead was able to expand Coupa’s impact across the organization.

“Working with DataMap is phenomenal,” she says. “They know how to make the different processes work with different ERP systems, which helps up fill in the gaps. When we first started talking about SIM, we sat down with DataMap and talked about our end goal, which was to shut the front and back door and eliminate errant spend. We wanted everything set up the same way to empower self-service.”

DataMap offered great direction on the steps in the process to help staff, suppliers, and AP, and according to Muirhead, the team was really helpful with identifying both the steps and the rationale behind them. Muirhead makes it clear: “Working with DataMap brought a different view supported by structure and data.”

Encouraged by DataMap, Muirhead says, “We started talking to Coupa about what offerings they had, and this led to the implementation of self-service supplier information management (SIM) process,” says Muirhead. “Now, every new supplier request is reviewed. For example, we have entertainers, and while we don’t regulate what type of entertainers field associates can bring in, we do expect that their supplier records will be maintained using the Coupa platform to ensure compliance.”

The Results: Capturing KPIs

According to Muirhead, Coupa is helping Brookdale meet procurement key performance indicators (KPIs). “I want to be at 99% in Coupa from both a PO perspective and an invoice perspective,” she says. “And this is possible because it’s very user-friendly and supplier-friendly. There’s little to no reason why we can’t figure out how to get spend in Coupa. We just rolled out operational expense POs, and for the next step, we’re working on issuing the POs up-front.”

“We can hit our benchmarks using Coupa. It’s very flexible, and it fits the purpose. Once you design the process, it will do what you want it to do.”

— **Brittany Muirhead,**
Procurement Expert,
Brookdale Senior Living

Brookdale is also using the Coupa catalog for technology supplier CDW to streamline technology and peripheral purchasing while also improving the oversight and approval process and enhancing shipment control, in turn providing greater visibility end-to-end.

Muirhead makes it clear that while this is an ongoing process, she's committed to reaching KPI goals with Coupa. "99% means 99%. I don't want to see spend with a supplier that is not on catalog or on contract. I want to be 99% compliant with the use of purchase orders. I want to be 99% compliant using the Coupa supplier portal and SIM for supplier setup to deliver clear visibility and clear processes."

What's Next?

For Muirhead, the next step for procurement at Brookdale is bringing more suppliers and vendors into the Coupa environment. She points to the example of bread buying. "This is typically vendor-managed inventory," she says, "and it's difficult to get bread suppliers into spend management platform. This is one challenge I had my eye on, and we've managed to flip one bread supplier — Bimbo — into Coupa. They're the first bread supplier that's made the move."

She's also looking to boost compliance across catalog and contract spend, increase the use of purchase orders, and streamline the adoption of supplier portals for supplier setup — all of which is possible with Coupa technology and DataMap advice. Muirhead puts it simply: "We can hit our benchmarks using Coupa. It's very flexible, and it fits the purpose. Once you design the process, it will do what you want it to do."

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