VENDRNOVA / NORTHSTAR ENTERPRISE THEATER

Procurement Automation Requirements and Business Case Template - Instructions

Define process requirements, quantify scenarios, and preserve the assumptions behind an investment decision. The download includes editable worksheets, a print-ready decision view, instructions, and fictional Northstar Industrial Systems sample data.

Toolkit instructions · V4.1 creative review edition

Review context

Audience: Procurement transformation leaders, enterprise applications, finance, operations, and executive sponsors

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Review: Reviewed by VendrNova Product and Procurement Leadership

> *This public-only review resource contains no submission, analytics, tracking, or production legal activation.*

Define process requirements, quantify scenarios, and preserve the assumptions behind an investment decision. The download includes editable worksheets, a print-ready decision view, instructions, and fictional Northstar Industrial Systems sample data.

What is included

- An editable workbook with visible formulas and validation notes.
- A print-ready summary designed for decision meetings.
- Field definitions, ownership prompts, and evidence dates.
- A fictional worked example that can be deleted before use.

Estimate coordination cost

How to use the workbook

1. Map the present operating thread before writing feature requirements. Record actors, evidence, systems, delays, rework, and exception paths.
2. Write requirements as a user, decision, evidence, and outcome statement. Avoid naming a preferred interface or implementation before the need is validated.
3. Mark every requirement Must, Should, Could, or Deferred and name the approving owner.
4. Model conservative, expected, and high-opportunity cases. Do not add spend, labor, and working-capital benefits unless finance confirms they are independent.
5. Keep implementation cost and recurring cost editable. Treat payback and ROI as decision scenarios, never guarantees.

Editable workbook structure

00_Start_Here

Purpose: Instructions, scenario policy, ownership, and version control.

Fields: Business-case owner, Finance reviewer, Technical reviewer, Scope, Currency, Version, Decision date

01_Current_State

Purpose: Records process evidence and friction.

Fields: Stage, Trigger, Actor, System, Evidence, Manual minutes, Queue time, Rework rate, Exception rate, Pain statement, Source

02_Requirements

Purpose: Defines testable business, workflow, integration, security, reporting, and accessibility requirements.

Fields: Requirement ID, Domain, User, Need, Evidence/output, Acceptance test, Priority, Owner, Dependency, Status

03_Integration_Map

Purpose: Defines object ownership and handoff patterns without pre-committing a mapping.

Fields: Object, Authoritative system, Direction, Trigger, Cadence candidate, Key identifiers, Validation, Failure owner, Reconciliation evidence

04_Assumptions

Purpose: Makes scenarios editable and traceable.

Fields: Assumption ID, Description, Conservative, Expected, High opportunity, Unit, Source/type, Owner, Validated date

05_Benefit_Model

Purpose: Calculates scenario opportunities using transparent formulas.

Fields: Benefit, Volume/base, Rate/time assumption, Conservative, Expected, High opportunity, Overlap flag, Finance-approved counted benefit

06_Cost_Model

Purpose: Captures one-time and recurring decision costs.

Fields: Cost item, Type, Timing, Conservative, Expected, High opportunity, Owner, Evidence

07_Decision_Summary

Purpose: Shows net annual benefit, payback, dependencies, risks, and approval conditions.

Fields: Scenario, Counted annual benefit, One-time cost, Recurring cost, Net annual benefit, Payback months, Key assumptions, Decision, Conditions

08_Print_Brief

Purpose: Printable executive decision brief.

Fields: Problem, Scope, Outcomes, Scenario summary, Dependencies, Risks, Recommendation, Owners

Field-definition rules

- Owner means the person accountable for the field or decision, not a shared inbox.
- Evidence source identifies the system, document, interview, or approved record supporting the entry.
- As-of date is the latest date represented by the evidence, not the date the cell was edited.
- Not assessed is a valid state when evidence is absent; it must never be silently converted to zero.
- Assumption is an editable planning input and must be visually distinct from a sourced fact.
- Illustrative marks fictional Northstar Industrial Systems data and must remain visible in examples and exports.
- Decision records the authorized outcome, approver, conditions, and date.

Northstar Industrial Systems example

Northstar Industrial Systems models 18,000 annual requests and records 14 manual minutes per request as a user input. The expected scenario assumes that 45% of that manual time is addressable. Michael Grant validates the loaded labor cost and chooses which benefits are non-overlapping. The worksheet labels every result as an estimate.