Procurement Strategy Workbook - Instructions

Turn enterprise priorities, category evidence, and stakeholder needs into a governed procurement plan. 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 leaders, category managers, finance partners, and operating 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.*

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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.

Review ProcessFirst planning

How to use the workbook

1. Begin with the Decision Charter. Record the business question, decision owner, planning horizon, constraints, and evidence date.
2. Import or summarize spend only after documenting scope, source systems, exclusions, currencies, and data quality.
3. Segment categories with the original two-axis matrix in this workbook: business consequence and supply uncertainty. Explain each placement; the matrix is a prompt, not an automatic decision.
4. Define no more than five outcome objectives for the first cycle. Pair each objective with a baseline, target, owner, evidence source, review cadence, and guardrail.
5. Use the stakeholder plan to make consultation and approval responsibilities explicit.
6. Review the strategy at the stated cadence and maintain a change note whenever a target, assumption, or ownership field changes.

Editable workbook structure

00_Start_Here

Purpose: Instructions, version control, roles, and evidence boundaries.

Fields: Workbook owner, Executive sponsor, Planning horizon, Currency, Prepared date, Next review date, Version, Confidentiality

01_Decision_Charter

Purpose: Frames the decision before analysis begins.

Fields: Decision statement, Business context, In scope, Out of scope, Constraints, Required evidence, Decision owner, Approvers, Due date

02_Spend_Evidence

Purpose: Documents category spend and the quality of its source evidence.

Fields: Category, Addressable spend, Currency, Source system, Coverage period, Completeness, Exclusions, Evidence owner, As-of date

03_Category_Portfolio

Purpose: Assesses business consequence and supply uncertainty on a transparent 1-5 scale.

Fields: Category, Business consequence (1-5), Supply uncertainty (1-5), Rationale, Evidence, Portfolio treatment, Review trigger

04_Stakeholders

Purpose: Maps decision rights and engagement.

Fields: Stakeholder, Role, Business unit, Interest, Influence, Required input, Decision right, Engagement cadence, Owner

05_Objectives_KPIs

Purpose: Connects desired outcomes to auditable measures.

Fields: Objective, KPI, Definition, Formula, Baseline, Target, Guardrail, Evidence source, Owner, Cadence

06_Initiative_Roadmap

Purpose: Sequences initiatives by value, readiness, dependency, and risk.

Fields: Initiative, Outcome link, Value (1-5), Readiness (1-5), Risk (1-5), Dependencies, Owner, Start, Target finish, Status

07_Governance

Purpose: Defines forums, exceptions, and change control.

Fields: Forum, Purpose, Chair, Participants, Cadence, Inputs, Decisions, Evidence retained, Escalation path

08_Print_Summary

Purpose: A compact, printable strategy-on-a-page assembled from approved fields.

Fields: Decision, Top objectives, Priority categories, Near-term initiatives, Owners, Next review

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 uses the workbook for the indirect-maintenance category. The team records $18.4 million of addressable illustrative spend, scores business consequence 4 and supply uncertainty 3, and assigns a 'secure and standardize' treatment. Maya Chen owns the strategy; Michael Grant verifies the baseline and formula; Ethan Brooks validates plant-service constraints. All names and values are fictional.