



# Agentic Sourcing

## Readiness Checklist

### 5-Step Evaluation

From task automation to sourcing execution...

A simple way to review how your sourcing workflows are structured today, and where gaps may exist.

# Current State

A snapshot of how sourcing workflows are structured today

**Most procurement teams already use AI tools in some form.**

**These tools support drafting, summarization, and basic analysis.**

**But sourcing workflows still rely on manual coordination across systems and stakeholders.**

**Information exists across spend, contracts, and supplier data. Decisions still require pulling these inputs together during evaluation.**

**Execution depends on people aligning inputs at each step.**

# Where Workflows Break

Across sourcing workflows, a few patterns show up repeatedly:



**Data sits across multiple systems without a shared view**



**Supplier evaluation varies depending on who is reviewing**



**Trade-offs are discussed after proposals are reviewed**



**Decisions are not captured in a consistent format**



**Execution depends on coordination across teams**

**These gaps affect how consistently decisions are made.**

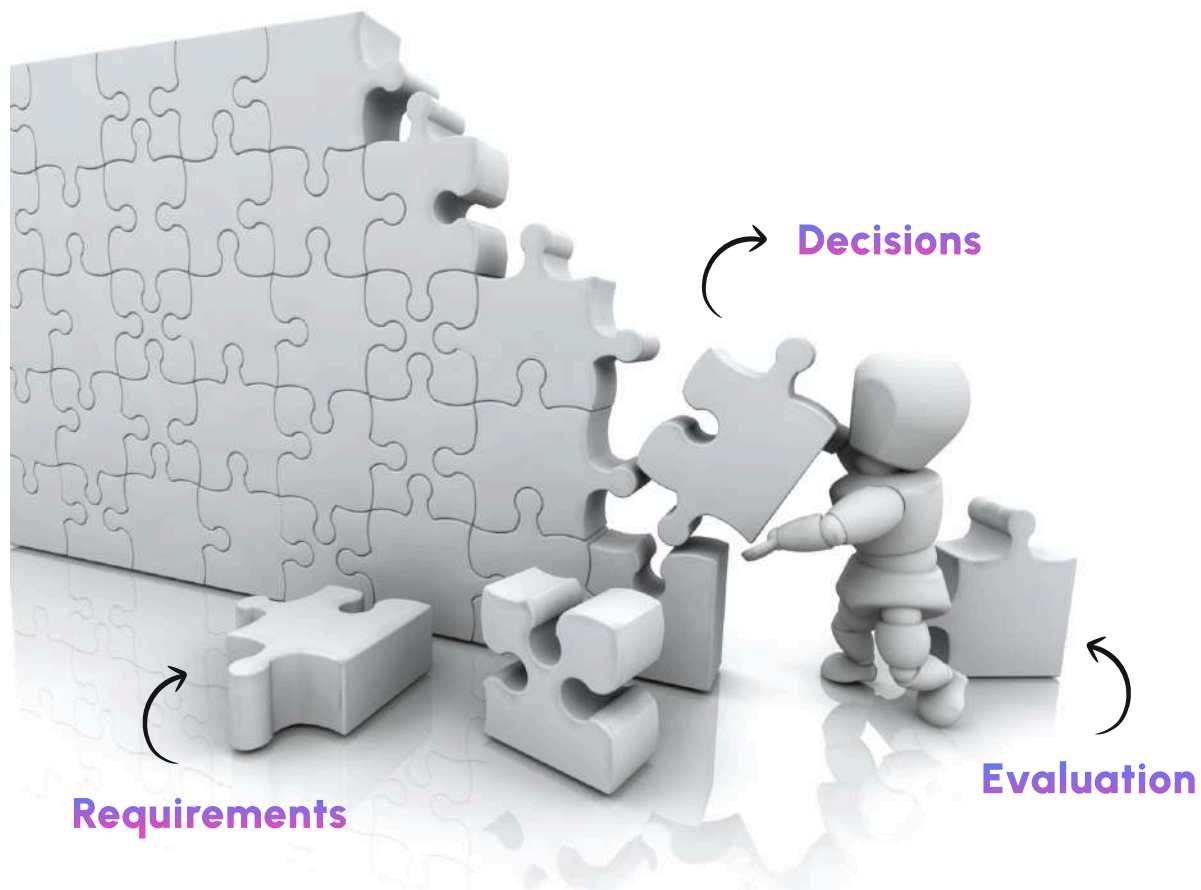
# What Changes with Structure

When each stage builds on the one before it

**When workflows are structured, inputs carry forward from one stage to the next.**

**Requirements, evaluation, and decisions stay connected within the same process.**

**Inputs are defined before execution begins.  
Trade-offs are visible during evaluation instead of after.  
Decisions follow a consistent and reviewable path.**



# Step 1: Structured Requirements

Requirements are defined before sourcing begins

**Check if your workflow includes:**



**A clear business objective tied to the sourcing need**



**Defined scope and expected deliverables**



**Constraints documented upfront, including timelines and budgets**



**Trade-offs between cost, quality, and risk considered early**

**When these are unclear, evaluation depends on interpretation later.**

## Step 2: Connected Data

Data is available and usable across sourcing stages

Check if your team can access and use:



**Spend history across relevant categories**



**Contract terms, including pricing and renewal conditions**



**Supplier performance from past engagements**



**Pricing benchmarks or prior sourcing outcomes**

**Data supports decisions when it can be used together, not reviewed in isolation.**

# Step 3: Standardized Evaluation

Supplier evaluation follows a consistent structure across stakeholders

Check if your process includes:



**Predefined evaluation criteria aligned to business goals**



**A clear scoring approach applied consistently**



**Comparable supplier responses in a structured format**



**Stakeholder inputs captured alongside scoring**

**Consistency depends on how evaluation inputs are defined and used.**

## Step 4: Structured Execution

RFX and sourcing workflows follow a defined and repeatable path.

Check if your workflow includes:



**Standard templates for RFPs and supporting documents**



**Defined timelines across sourcing stages**



**Centralized Q&A for vendor communication**



**Consistent communication across all suppliers**

**Execution becomes more predictable when steps are clearly defined.**

# Step 5: Decision & Approval Logic

Decisions are structured and traceable within the workflow.

**Check if your process includes:**



**Defined approval thresholds based on deal size or risk**



**Trade-offs visible during evaluation, not only at the end**



**Decision rationale captured alongside scoring**



**Approval workflows mapped across stakeholders**

**Decisions are easier to review when the logic behind them is visible.**

# How ready is your workflow today?

## ★ 15–20 checks,

Workflows support structured execution Inputs, evaluation, and decisions are connected across all stages

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## ★ 8-14 checks,

Some structure exists, but gaps remain. Evaluation or decision logic may still require reconstruction in certain areas

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## ★ 0–7 checks,

Workflows rely heavily on manual coordination  
Structure needs to be defined before scaling further

## Explore how this works in practice



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