



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.

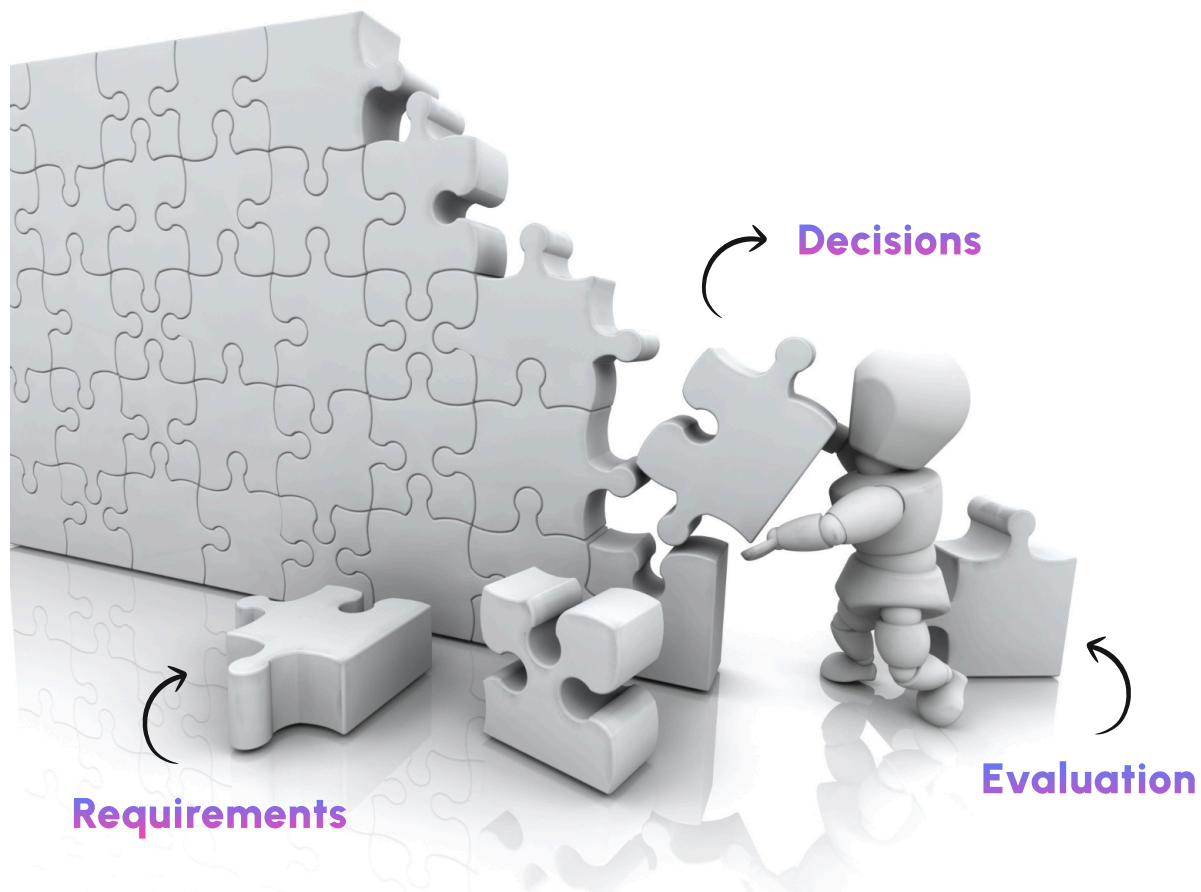
What Changes with Structure

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

★ **8-14 checks,**

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

★ **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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