Procurement Management: Principles, Processes and Best Practices Course

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Washington (USA)

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Procurement Management: Principles, Processes and Best Practices Course

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Introduction:

Over 1 week, you learn procurement management principles, processes and best practices so procurement, finance and HR colleagues run one purchasing cycle together. You build and take back a cross-departmental procurement plan with a needs register, supplier scorecard, budget control sheet, risk register, RACI matrix and KPI dashboard. You need experience of raising, approving, budgeting or paying for purchases; no procurement qualification is required. You practise through case study, working on real requisitions, tenders, contracts and budgets from several sectors and defending your decisions to your peers.

Course Objectives:

- Map your organisation's purchasing cycle and needs with a procurement needs register and a specification template.
- Score suppliers on your current contracts with a weighted evaluation matrix and a supplier scorecard.
- Draft contract terms and a negotiation plan with a walk-away position worksheet for one of your live purchases.
- Build a procurement budget control sheet that tracks commitments, total cost of ownership and invoice matching for your department.
- Run a procurement risk and compliance review of your own process with a risk register and a segregation-of-duties checklist.
- Present a cross-departmental procurement plan with a RACI matrix and a KPI dashboard to your procurement, finance and HR leads.

Target Audience:

- You raise, source or process purchase requests and manage supplier paperwork day to day.
- You prepare budgets, approve commitments or match invoices to purchase orders and goods receipts.
- You buy services for people, such as recruitment, training, outsourced staffing or benefits providers.
- You review contracts or supplier performance as part of your operational role.
- You coordinate purchases between departments and need clearer roles, approvals and hand-offs.



Course Outline:

Day 1: Set Procurement Principles and Plan Purchasing Needs

- Defining Procurement Principles with an Ethics and Value-for-Money Checklist
- Mapping the Purchasing Cycle from Requisition to Supplier Payment
- Assessing Departmental Needs with a Procurement Needs Register
- Writing Requirements with a Specification and Scope Template
- Build: Procurement Needs Register and Annual Purchasing Plan

Day 2: Standardise Procurement Procedures and Select Suppliers

- Documenting Procurement Procedures with a Process Flowchart and Approval Matrix
- Choosing Sourcing Routes Using RFQ, RFP and Tender Templates
- Evaluating Supplier Offers with a Weighted Scoring Matrix
- Managing Supplier Relationships with a Segmentation Grid and Review Calendar
- Build: Procurement Procedure Map and Supplier Evaluation Matrix

Day 3: Negotiate Contracts and Control Procurement Costs

- Structuring Contract Terms with a Clause Checklist and Obligations Log
- Preparing Negotiations with a Walk-Away Position and Concession Plan
- Building Procurement Budgets and Commitment Tracking in a Spreadsheet Model
- Comparing Purchase Options with Total Cost of Ownership Analysis
- Build: Negotiation Plan and Procurement Budget Control Sheet

Day 4: Manage Procurement Risk, Compliance and Cross-Departmental Roles

- Identifying Procurement Risks with a Risk Register and Heat Map
- Checking Compliance with Segregation-of-Duties and Approval Controls
- Matching Orders, Receipts and Invoices with Three-Way Matching
- Assigning Procurement, Finance and HR Responsibilities with a RACI Matrix
- Build: Procurement Risk Register and Cross-Departmental RACI Matrix

Day 5: Work a Case Study on Digital Procurement and Performance

- Mapping the Procure-to-Pay Workflow in an E-Procurement System
- Setting Procurement KPIs for Cycle Time, Savings and Supplier Performance
- Testing Your Budget and Supplier Choices Against a Multi-Sector Case
- Reviewing Risk and RACI Decisions Through a Peer Case Challenge
- Build: Cross-Departmental Procurement Plan with KPI Dashboard



Skills You Will Gain:

- Purchasing Cycle Mapping
- Specification Writing
- Sourcing Route Selection
- Contract Obligations Tracking
- Total Cost of Ownership Analysis
- Three-Way Invoice Matching
- Procure-to-Pay Workflow Design
- Procurement KPI Design

Why Attend This Course:

- Map your own purchasing cycle on the first day and take it into your next team meeting.
- Score one of your current suppliers with the weighted matrix and share the result with your budget holder.
- Leave with a cross-departmental procurement plan ready to agree with your procurement, finance and HR leads.
- Practise negotiation and approval decisions in case reviews so you handle supplier and internal pushback calmly.

Conclusion:

In your first week back, open your cross-departmental procurement plan and replace the case data with your own needs register, suppliers and budget lines. Then walk your procurement, finance and HR leads through the RACI matrix and approval steps, and agree who signs off each stage of the next purchase. After that purchase is ordered, received and paid, check cycle time, budget variance and supplier performance on your KPI dashboard, and adjust the procedure, roles or controls before the next purchasing round.

Frequently Asked Questions FAQ:

What will you be able to do after the procurement management principles, processes and best practices course?

You will be able to plan purchasing needs, run sourcing and supplier selection, negotiate and manage contracts, control procurement budgets and risks, and coordinate roles between procurement, finance and HR using shared templates and KPIs.

What do you need to know before starting training in procurement management principles, processes and best practices?

You need working experience of requesting, approving, budgeting or paying for purchases. No procurement qualification is required; you learn the methods and templates step by step and apply them to your own department's purchases.



What do you build during the procurement management principles, processes and best practices course?

You build a cross-departmental procurement plan: a needs register, procedure map, supplier evaluation matrix, negotiation plan, budget control sheet, risk register, RACI matrix and KPI dashboard, assembled and reviewed on the last day.

How does procurement management principles, processes and best practices training differ from a foundation procurement course?

A foundation course introduces the purchasing role to procurement staff. This course brings procurement, finance and HR together on one purchasing cycle, focusing on shared procedures, budget control, compliance and the responsibilities each department holds.

