

Pre-Onboarding Strategy Checklist

- Establish supplier requirements and expectations**
Educate suppliers on your policies and procedures to increase efficiency while reducing confusion and any potential snags.
- Determine primary stakeholders and their roles**
Assign a specific person or team with excellent organization and communication skills to oversee the supplier onboarding process.
- Set up a supplier evaluation and approval process**
Develop a supplier evaluation process that regularly measures performance, whether through questionnaires, scorecards, or third-party standard certifications.
- Implement a platform to exchange and verify information**
Create a way for suppliers to enter their own information so you can quickly vet them and get down to business.
- Create a workflow of your onboarding process**
Determine the specific steps in your onboarding workflow. For example, the process may begin with a business department submitting a request for a new supplier and end with the supplier being vetted, approved, and ready to work with you.
- Introduce a communication system**
Developing a reliable way for your internal teams and suppliers to communicate will improve efficiency, reduce delays from human error, and strengthen the relationship with your partners.

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