

Supplier Onboarding Checklist

- Evaluate supplier and risk**

Review the company's track record for service and products, financial health, regulatory compliance, and industry reputation.
- Discuss rules of engagement**

What are the two parties' expectations as far as lead time, pricing, payment terms, the order and delivery process, and any training requirements? Does the supplier have the capacity to meet your needs?
- Gather information**

Gather information including supplier name, licenses and documentation, primary contacts and their roles. The easiest way to accurately and consistently collect this data is through an online portal that allows suppliers to input and update their own information.
- Share information internally and externally**

Once you've gathered the necessary data, share it with all involved stakeholders – accounts, purchasing, and warehouse managers. Share the final approved contract with the supplier to review before activation.
- Perform routine evaluations**

Assess each supplier at least 2 times per year; best-in-class organizations perform an evaluation every 3 months. Each time, determine whether your suppliers got a better score than previously.

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