# **C:\Users\stewaro\AppData\Local\Temp\4\7zO03D7E230\E-INV_Long_Dark Blue.jpgSupplier Readiness Checklist**

|  | **Focus** | **Considerations and Actions** |
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| **Understand** | **Know your Suppliers** | * Define your supplier list (Obtain Supplier Master from Procurement to serve as a guide)
* Analyse your suppliers (how many invoices do they send and how - paper, PDF, EDI -, how often, what types of purchasing arrangements or contracts are in place with them etc.)
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| **Know your Business** | * Determine your agency’s Accounts Payable and Procurement touchpoints/contact details with your suppliers.
* Outline your business requirements for invoice processing and validation, in addition to the mandatory eInvoicing electronic invoice data elements.
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| **Know the changes and impacts** | * Build relevant supplier-related actions into the Change Management and Communications Plans; Manage and monitor delivery of these actions.
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| **Segment & Prioritise** | **Segment and prioritise suppliers** | * Segment suppliers (E.g. by invoice volume, transaction frequency, digital readiness, common government suppliers, organisational size, purchasing arrangements, accounting software such as Xero and MYOB etc)
* Identify priority suppliers to on-board (E.g. high-volume / value / frequency; eInvoicing and / or digitally enabled; on Government panels etc.)
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| **Plan** | **Plan supplier on-boarding** | **Progress supplier on-boarding in parallel with technical implementation.** * Include sufficient funding allocation in Business Case includes for supplier on-boarding.
* Include supplier on-boarding as a Phase 1 deliverable in the Project Plan to ensure benefits can be realised early.
* Allocate a project resource to focus on supplier on-boarding planning.
* Incorporate supplier on-boarding into Change Management and Communications Strategies and Plans and in Business and Technical Readiness Assessments.
* Determine a phased supplier on-boarding approach.
* Establish a mechanism to monitor and measure on-boarding activity (E.g. how many suppliers have agreed to adopt eInvoicing and have started sending eInvoices).
* Consider outsourcing supplier on-boarding for larger suppliers. If you do this, include supplier on-boarding as a business requirement when selecting an access point. (This will ensure a smooth on-boarding process delivered by an experienced provider).
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| **On-board** | **Engage and communicate** | * Collaborate with key stakeholders to inform and guide tailored supplier engagement and communications (E.g. Finance (AP), Procurement (Contract Mangers), Project Team, Comms Team, Supplier Account Mangers).
* Address key changes, including any new invoice data or formatting requirements, or actions required that will be different to how things are currently done, in supplier communications.
* Define supplier-specific key messages, communication artefacts and engagement channels. Ensure these are reflected in the Communications Plan. (Leverage communication toolkit on einvoicing.govt.nz) Communicate with and engage suppliers as early as possible; including working through Contract Managers and suppliers’ Account Managers.
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| **Test** | * Test specific requirements with a test group of suppliers as part of on-boarding.
* Communicate any organisation specific, additional eInvoice requirements to suppliers to ensure these are met when they send an eInvoice.
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| **On-going procurement activities**  | * Update relevant procurement documents and templates to reflect the eInvoicing inputs and requirements.
* Incorporate eInvoicing preference into new procurement requests (E.g. RFPs) and Supplier Panels / Standing Offer Arrangements
* Discuss eInvoicing capability with suppliers at contract review and/or renewals. Build in eInvoicing preference into all renewed or new contracts.
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