



**STREAMLINING SUPPLIER ONBOARDING WITH
DYNAMICS 365 & POWER BI**

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31.OCT.2024**





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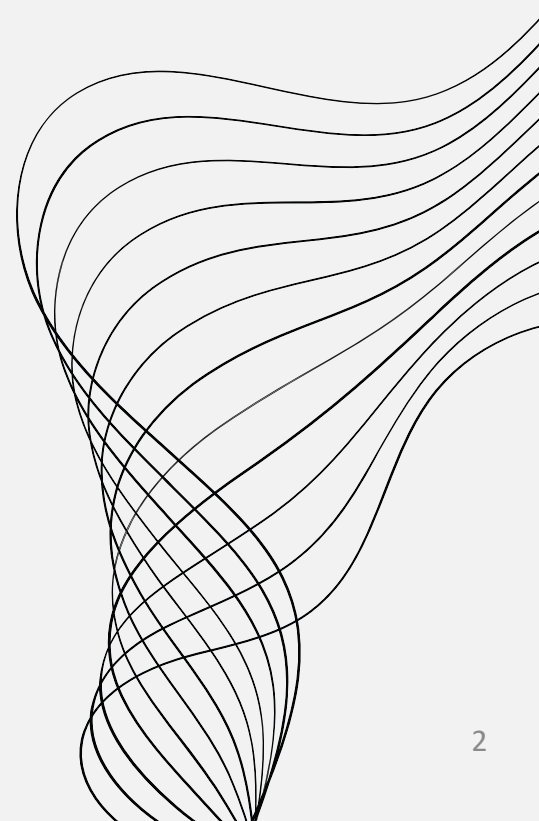
COMPLIANCE AND CONTRACT MANAGEMENT

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01. USE CASE OVERVIEW

OBJECTIVE : Onboard new suppliers efficiently, ensuring compliance and seamless integration.

Scope n° 1

Assess supplier qualifications

Evaluate suppliers to ensure they meet quality, compliance, and reliability standards.



Scope n° 2

Establish contracts and compliance standards

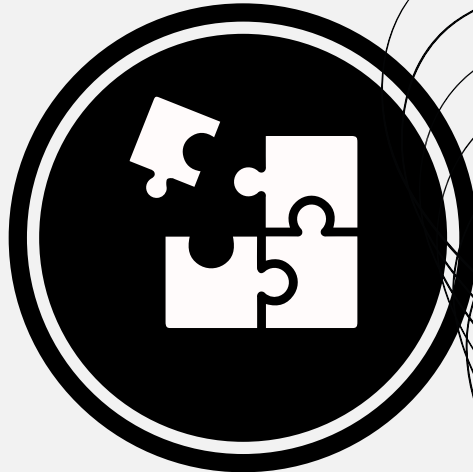
Set clear agreements and compliance rules to guide supplier relationships.



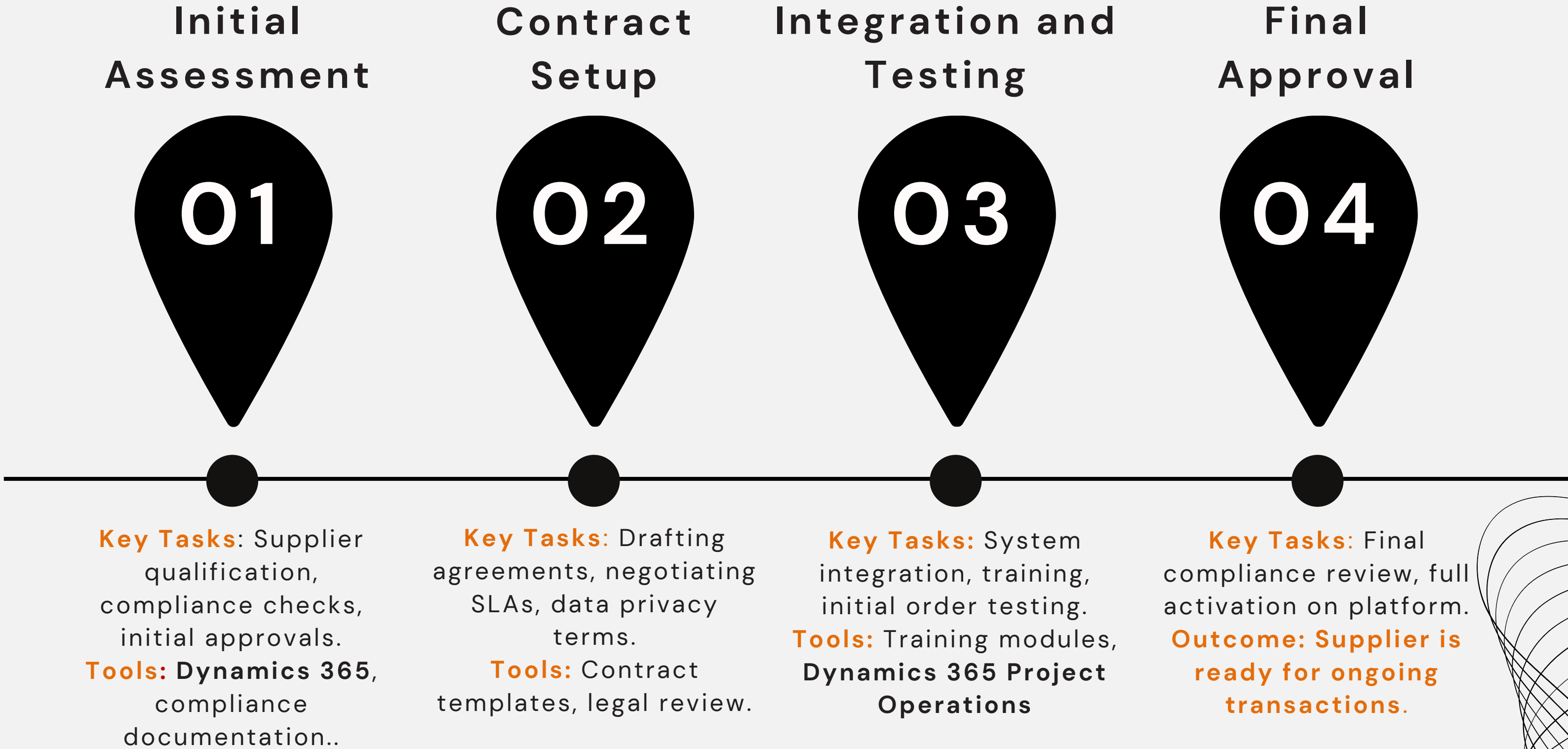
Scope n° 3

Track and report

Monitor performance metrics for accountability and continuous improvement



02. SUPPLIER ONBOARDING WORKFLOW



02. INITIAL ASSESMENT

Supplier Qualification Assessment - Saved

Project

Project Service - Project ... Active for 24 hours

New (24 Hrs)

Quote Plan Deliver Complete Close

Summary Tasks Team Resource Assignments Resource Reconciliation Estimates Tracking Sales Expense Estimates Material Estimates Calendar Related

Description: Evaluate supplier capabilities, quality standards, and compliance requirements before onboarding

Customer: Lorem Ipsum

Currency: US Dollar

Contracting Unit: t202410241906z2071a3039594c124

Project manager: Elena Gurgulescu

Status

Overall Project Status: Green

Comments: ---

Status Updated On: 10/28/2024 7:11 PM

Schedule Performance (Current Plan): Ahead

Cost Performance (Current Plan): On Budget

Finish Date: 11/20/2024 4:00 PM

Effort (Hours): 100.00

Estimated Labor Cost: \$5,000.00

Estimated Expense Cost: \$1,500.00

Estimated Material Cost: \$0.00

Estimated Total Cost: \$6,500.00

Actual Finish: ---

Actual Labor Cost: \$0.00

Actual Expense Cost: \$0.00

Actual Material Cost: \$0.00

Actual Total Cost: \$0.00

Effort Completed (Hours): 0.00

Calendar

Schedule mode: Fixed duration

Hours per day: 8.00

Hours per week: 40.00

Days per month: 20

Timeline

Search timeline

Enter a note...

Highlights

There's not enough information to generate highlights.

Pinned (1)

Modified on: 7:27 PM

Note modified by Elena Gurgulescu

Project in progress, covering qualification, compliance, integratio

Recent

EG Modified on: 10/29/2024 8:03 PM

Note modified by Elena Gurgulescu

Edit note

Template Overview Note

Project Overview Note

Project Purpose:
This template is designed to standardize the supplier onboarding process, ensuring that each new supplier meets our quality, compliance, and integration standards. This template includes all necessary tasks for qualifying, contracting, integrating, and training suppliers, as well as final approval.

How to Use This Template:

- Duplicate** this project template for each new supplier, renaming the project as "Supplier Onboarding - [Supplier Name]".
- Assign Dates and Resources:** Adjust start and end dates according to the supplier's onboarding timeline. Assign each task to the relevant team members or roles.
- Complete Each Task in Sequence:** Follow the sequence of tasks as outlined below, marking each task as complete once it's done. Use the checklists within tasks to ensure all steps are completed.
- Track Progress:** Use the project status (Green, Yellow, Red) to update the health of the project. Update the % Complete field as tasks progress.
- Review Power BI Dashboard:** Monitor supplier onboarding progress, costs, and compliance through the Power BI dashboard.

Note on Automation:
Tasks are automated through Power Automate, so they will populate automatically when a new project is created. Be sure to check that tasks appear as expected and assign any unassigned tasks to the relevant team members.

Overrides	Role	Resource	Resourcing Unit	Unit	Price calculati...	Markup over ...	Price	Currency
>	Project Manager		Stuttgart Unit	Hour	Price per unit		\$1,500.00	US Dollar
>	Senior Consultant			Hour	Price per unit		\$1,100.00	US Dollar

Assessment and Review

+ Add task

Financial

Contract Drafting and Review

3 days

11/06

EG TJ

Qualifications and ...

Supplier Qualification Assessment

3 days

11/01

EG

Integration and Testing

+ Add task

System Integration and Testing

1 day

11/06

EG

Supplier Training and Compliance Setup

1 day

11/07

TJ

Approval

+ Add task

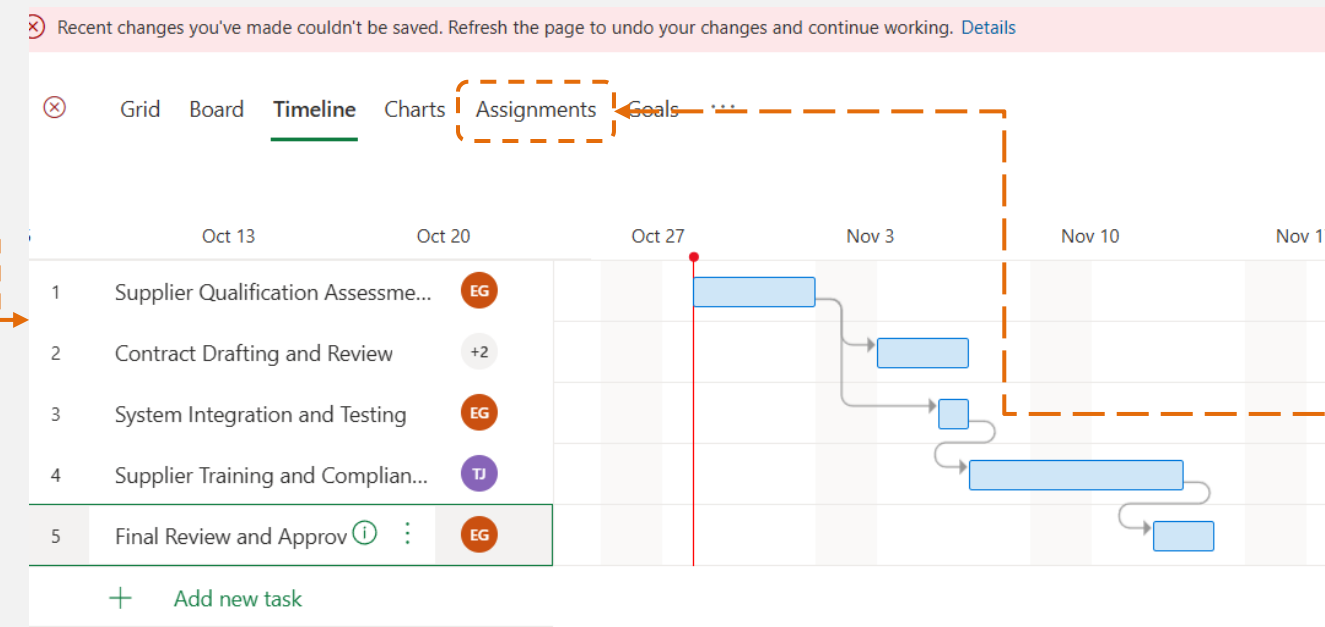
Financial

Final Review and Approval

1 day

11/08


EG



Assigned to	Name	Start	Finish	Effort	10/29/2024	10/30/2024
EG Elena Gurgulescu (4)	Supplier Qualification Assessment	10/29/2024	11/1/2024	16 hours	2.14	3.43
	Contract Drafting and Review	11/4/2024	11/6/2024	13.46 hours		
	System Integration and Testing	11/6/2024	11/6/2024	8 hours		
	Final Review and Approval	11/7/2024	11/8/2024	8 hours		
TJ Tom Johnes (2)	Contract Drafting and Review	11/4/2024	11/6/2024	5.77 hours		
	Supplier Training and Compliance Setup	11/7/2024	11/7/2024	8 hours		
				59.23 hours	2.14	3.43

03. CONTRACT COMPLIANCE AND BREACH HANDLING

BREACH NOTIFICATION



Documenting and notifying suppliers of non-compliance.

PENALTIES



Applying fines for missed obligations, late deliveries, etc

SUSPENSIONS & TERMINATION



Guidelines for suspending access or ending the relationship.

04. PROJECT TRACKING AND REPORTING

MILESTONE TRACKING



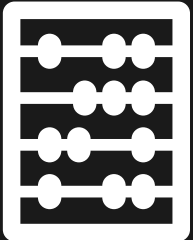
Key milestones in supplier onboarding (e.g., assessment complete, contract signed).

METRICS



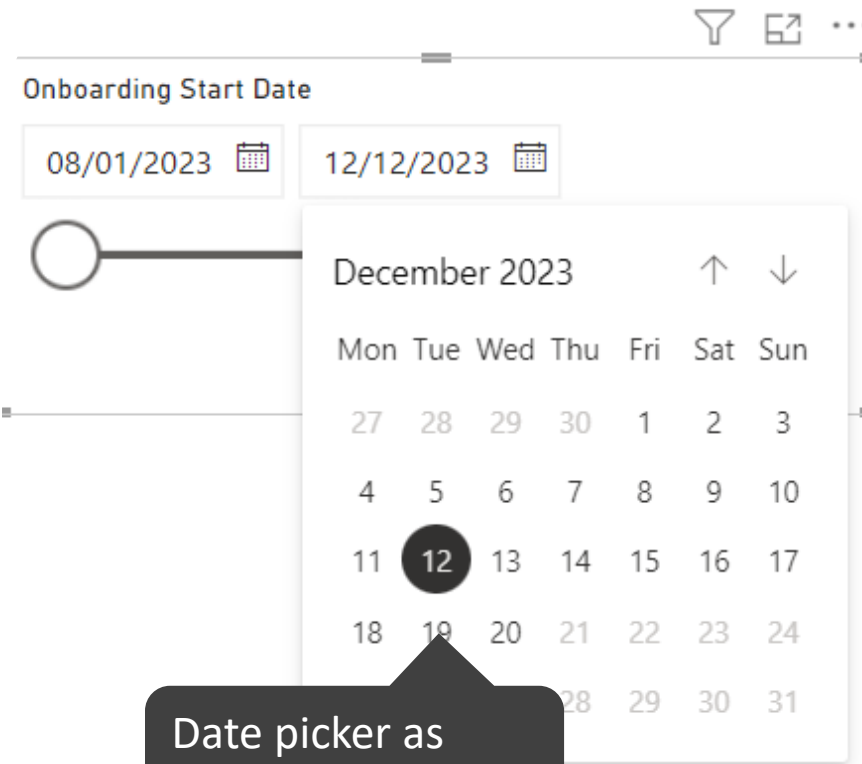
Using **Power BI** to track supplier performance (timeliness, compliance)

DATA INTEGRATION

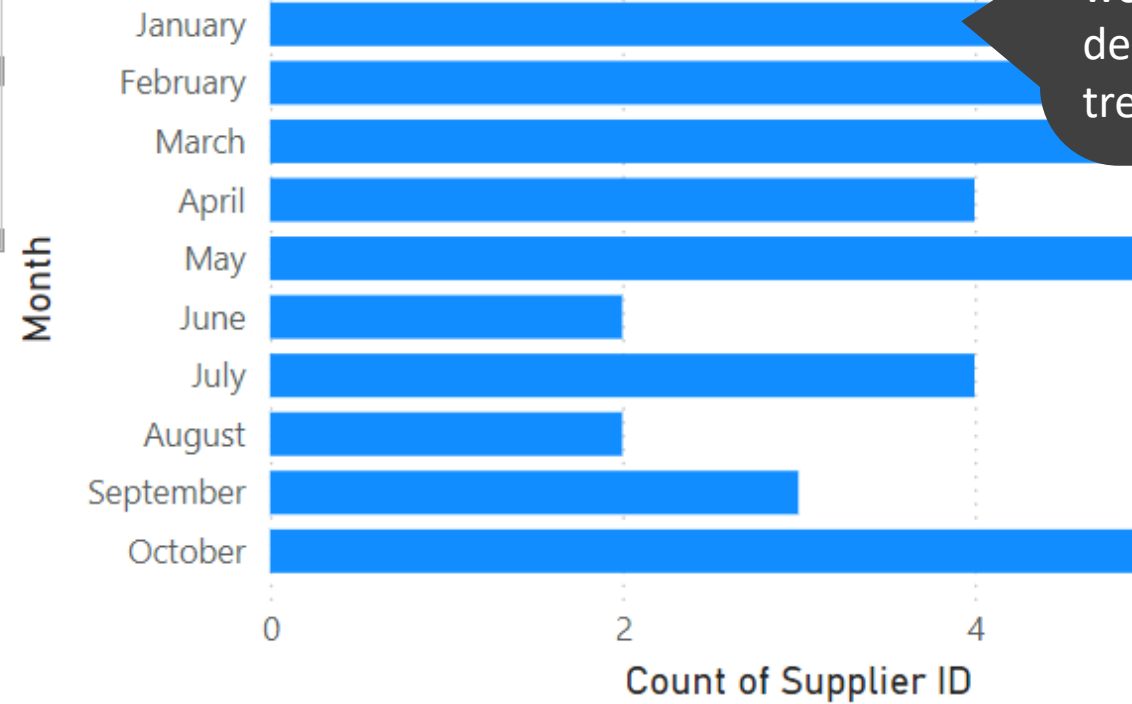


Managing supplier data across compliance, performance, and relationship management.

04. PROJECT TRACKING AND REPORTING

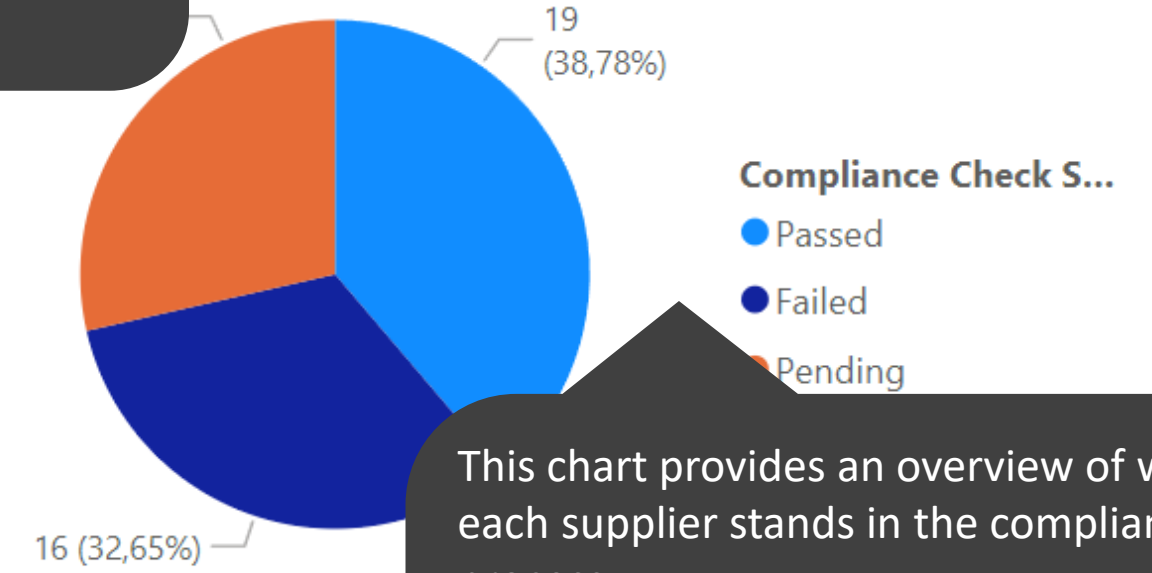


Monthly Supplier Onboarding Count



Understanding how many suppliers are onboarded each month provides insight into team workload, onboarding demand, and seasonality trends.

Compliance Status Distribution



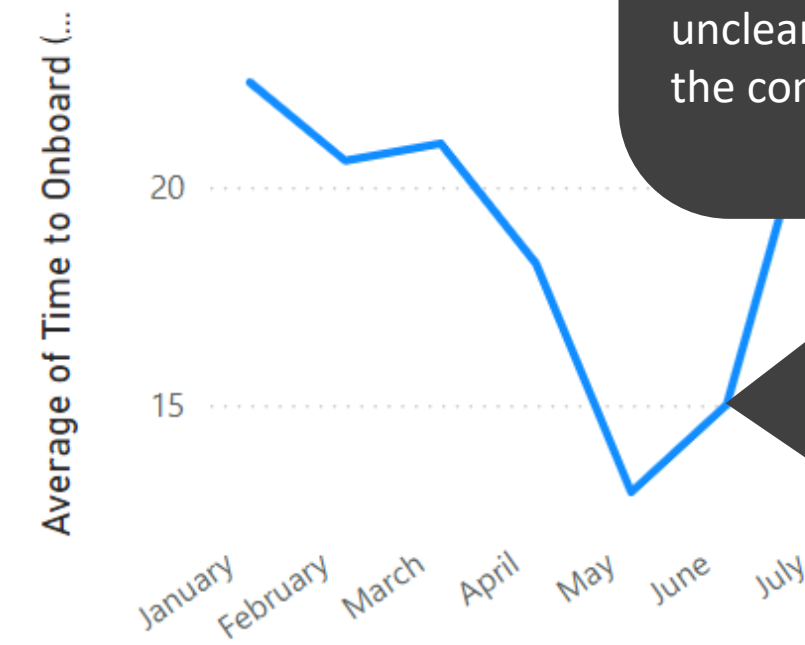
This chart provides an overview of where each supplier stands in the compliance process. High Percentage of Pending or Failed Compliance: If a large portion of suppliers are pending or have failed compliance, this could indicate issues with documentation, unclear requirements, or bottlenecks in the compliance review process.

Onboarding Cost Analysis by Supplier

Supplier Name	Year	Quarter	Month	Day	Year	Quarter	Month	Day	Sum of Time to Onboard (Days)	Sum of Onboarding Cost
Supplier 1	2023	Qtr 1	January	8	2023	Qtr 1	January	30	22	4317
Supplier 2	2023	Qtr 1	February	8	2023	Qtr 1	February	14	6	1864
Supplier 21	2023	Qtr 1	January	17	2023	Qtr 1	February	11	25	1962
Supplier 26	2023	Qtr 1	January	16	2023	Qtr 1	February	12	27	3126
Supplier 3	2023	Qtr 1	January	14	2023	Qtr 1	February	7	24	4966
Supplier 48	2023	Qtr 1	February	5	2023	Qtr 1	February	20	15	4725
									222	153578

If certain suppliers are costing significantly more to onboard, it may be due to additional requirements or inefficiencies.

Average Time to Onboard Supplier



This chart helps evaluate the efficiency of the onboarding process by tracking how long it takes to onboard a supplier. Fluctuations in onboarding time could indicate process inconsistencies or areas for improvement.

CONCLUSIONS

- Efficient onboarding process aligned with company values
- Enhance supplier compliance and accountability



Improved transparency, streamlined onboarding, compliance tracking, and data-driven decision-making.

THANK YOU!

