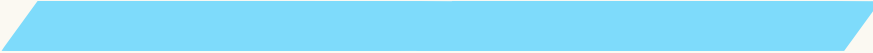




Consulting Quest

SMART. CONSULTING. SOURCING.

Consulting Procurement Playbook *CHECKLIST*



A QUICK-START GUIDE TO
STRUCTURE, GOVERNANCE, AND VALUE IN
CONSULTING SPEND



Why a Playbook for Consulting Procurement?

Consulting spend is unlike any other category. It's:

- **Hidden** under “Professional Services” or T&M contracts.
- **Fragmented** across hundreds of suppliers.
- **Triggered by executives**, often outside procurement's control.
- **High in strategic impact**, but low in visibility.

Without a playbook:

- ⚠ Sourcing is inconsistent
- ⚠ Contracts don't fit intellectual services
- ⚠ Governance is ad hoc
- ⚠ Performance isn't measured

The solution?

A playbook that brings:

- ✓ Clarity on spend
- ✓ Consistency in sourcing
- ✓ Discipline in governance
- ✓ Measurable outcomes

👉 **Use this checklist to self-assess quickly and identify your next steps.**

The 6 Must-Have Elements

1. Spend & Demand Mapping 🔍

- ❑ We know what counts as consulting (vs. other services).
- ❑ Consulting spend is visible and categorized consistently.

2. Supplier Segmentation & Panel Strategy 🌐

- ❑ We have clear supplier tiers (global / regional / local).
- ❑ We balance preferred and qualified suppliers.

3. Sourcing & Evaluation Frameworks 📋

- ❑ We use consulting-specific RFP templates.
- ❑ Evaluation balances expertise, methodology, cultural fit, and cost.

4. Contracting & MSAs 📄

- ❑ We use consulting-specific SOWs and MSAs.
- ❑ Contracts include performance clauses, IP rights, and confidentiality.

5. Governance Across the Lifecycle ⚖️

- ❑ We validate demand before projects start.
- ❑ We manage projects during delivery and capture lessons after.

6. Performance & ROI Tracking 📊

- ❑ We evaluate outcomes and knowledge transfer.
- ❑ Results are captured and reused for continuous improvement.

Quick Wins to Start Today

If you're starting from scratch, don't try to build the perfect playbook. Begin with small steps that create visibility, credibility, and momentum.



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The Golden Rules of a Playbook



✓ **Co-create with stakeholders**
– Build adoption by making it their tool, not just procurement's.

✓ **Keep it modular and flexible**
– Design light vs. full tracks so small teams don't create bottlenecks.

✓ **Update regularly** – Treat the playbook as a living document, refreshed after each project or cycle.

✓ **Focus on quick wins** – Build trust early before scaling complexity.

✗ **Don't overengineer** – 100-page manuals go unread.

✗ **Don't undercook** – Two-page lists change nothing.

✗ **Don't freeze it** – Outdated playbooks lose credibility fast.

✗ **Don't isolate it** – Procurement-only ownership guarantees low adoption.

Follow the do's, avoid the don'ts — and your playbook will evolve into a real operating system for consulting procurement.



Ready to Build Your Playbook?

You've seen the pillars, the quick wins, and the golden rules. Now it's time to turn insight into action.

Here's how to take your next step:

- ✓ **Assess your maturity** – Benchmark where you stand today with the Consulting Procurement Maturity Assessment.
- ✓ **Start small** – Apply the quick wins and build momentum.
- ✓ **Go further** – Book a free consultation with Consulting Quest and design a tailored playbook for your organization.



Don't let consulting procurement run on autopilot. Write the playbook — and own the game.

