

The Procurement Concierge

Concierge Tasks Examples

These are guides ONLY

Light Task Examples

Category	Task Title
Communication & Outreach	Create stakeholder update slide template
Research	Research supplier diversity metrics frameworks
Templates & Documents	Create project kickoff agenda template
Templates & Documents	Create basic savings log template
Templates & Documents	Draft simple RFQ template
Training & Knowledge	Create storyboard outline for training video
Analysis & Reporting	Build simple forecast model for spend next quarter
Analysis & Reporting	Summarize capacity utilization data
Planning & Frameworks	Outline gate review checklist for sourcing
Communication & Outreach	Draft introductory email to potential supplier

Compliance & Risk	Summarize packaging waste regulation changes
Research & Benchmarking	Collect lead times for common MRO items

Medium Task Examples

Category	Task Title
Compliance & Risk	Compile insurance requirements matrix by contract type
Contract & Legal	Draft contract negotiation playbook for indirect spend
Compliance & Risk	Conduct desktop audit of supplier certificates vs requirements
Data & Analytics	Develop savings tracking tool with automated variance alerts
Strategy & Planning	Develop strategic sourcing pipeline tracker template
Process Improvement	Design KPI dashboard for procurement operations
Market Intelligence	Benchmark competitor sourcing strategies for SaaS
Supplier Management	Create supplier risk heat map combining scores from provided data
Contract & Legal	Create change management clause library reference

Process Improvement	Draft user guide for new procurement policy
ESG & Sustainability	Develop supplier sustainability scorecard template
Supplier Management	Compile supplier performance baseline using delivery data
Process Improvement	Conduct bottleneck analysis of contract signature workflow

Heavy Task Examples

Category	Task Title
Advanced Data & Analytics	Model lifecycle cost comparison of electric vs diesel fleet transition
Market Intelligence & Scenario Planning	Analyze impact of shipping emissions regulations on freight costs
Market Intelligence & Scenario Planning	Develop competitor teardown cost benchmarking for product X
Market Intelligence & Scenario Planning	Compile technology adoption curve for procurement AI tools
Supplier Development & Risk	Develop supplier innovation challenge programme charter
Strategy & Operating Model	Create investment appraisal for procurement digital roadmap
M&A & Integration	Prepare integration governance structure with decision rights matrix
ESG & Sustainability	Prepare sustainable procurement policy with measurable KPIs

Strategy & Operating Model	Design target operating model for global buying hubs
Contract & Legal	Draft master services agreement for SaaS including data processing and SLA schedules
Market Intelligence & Scenario Planning	Summarize patent landscape for biodegradable polymer suppliers
Supplier Development & Risk	Draft supplier relationship segmentation governance handbook

Strategic Task Examples

Category	Task Title
Transformation & Operating Model	Draft procurement transformation program charter with KPIs and benefits realization plan
Transformation & Operating Model	Draft procurement transformation program charter with KPIs and benefits realization plan
Transformation & Operating Model	Prepare executive board pack to secure funding for transformation program
Risk & Resilience	Develop supplier exit & contingency planning toolkit
ESG & Sustainability Leadership	Develop supplier diversity strategy with spend thresholds and tracking
ESG & Sustainability Leadership	Model carbon shadow pricing impacts on total cost for top categories
Stakeholder & Governance	Build procurement policy gap analysis against

	leading practices
M&A & Synergy Realization	Quantify synergy savings across duplicate supplier base and categories
Capability & Culture	Create competency assessment survey and analytics dashboard
Advanced Analytics & Insights	Prepare predictive analytics roadmap with technology and talent requirements
Innovation & Ecosystem	Create external ecosystem map of innovation clusters and key contacts
Innovation & Ecosystem	Draft board presentation seeking budget for innovation labs