

Thursday, January 16, 2025

INSIGHTS SUMMIT & PRODUCT COUNCIL

Atlanta Tech Village – Buckhead



Agenda: Part 1

9:00 Welcome

- Scott Macfee, CEO, SpendHQ

9:15 Keynote: Holistic AI: New Ways for Procurement Operations

- Dr. Elouise Epstein, Digital Futurist, Keynote Speaker, and Author

10:00 Future-Ready Procurement: The Path to Procurement Excellence

- Jose Bustillo, Procurement Excellence Lead, SpendHQ
- Jerome Arfeli, Head of Indirect Procurement, Waymo
- Tony Brita, Director of Strategic Sourcing, Compass
- Patrick Crawford, Chief Procurement Officer, Synovus

10:45 Networking Break

11:00 Panel: Supplier Risk Management

- Anne Gusler, Head of Partnerships, SpendHQ
- Eric Evans, Managing Director, Partnerships & Alliances, RapidRatings
- Brad Pittman, VP, Strategic Sourcing & Procurement, Dollar Tree

11:30 SpendHQ Product Roadmap

- Pierre Laprée, Chief Product Officer, SpendHQ

12:00 Lunch

1:00 Workshop 1 (Full Group): How Procurement Teams Can Move Faster and Accomplish More in 2025

- Sean McPartlan, Head of Solutions, SpendHQ



Agenda: Part 2

Breakout Room 1 (EVENT CENTER)

2:00 Global Spend Data: Insights, Dashboards, and Most Loved Features for Procurement Teams

- Brian Gee, Customer Success Team Lead, SpendHQ
- Jared Ackerson, Customer Success Manager, SpendHQ

Do you want your impact to be impossible to miss in 2025? Turn your spend data into usable, visible dashboards for better tracking and reporting on procurement's impact in an easily digestible way. In this session, our Customer Success team will demonstrate out-of-the-box Spend Intelligence dashboards that teams use to drive unmissable results.

3:00 Beyond Spend Data: Tips and Tricks for Moving Procurement Teams from Reactive to Strategic

- Deep Singh, Director, Product Engagement, SpendHQ
- Jared Ackerson, Customer Success Manager, SpendHQ

As the demands on procurement continue to grow, leaders are increasingly being asked to shoulder responsibilities. With multiple systems, siloed data, and evolving regulations, the challenge is immense. The SpendHQ team of experts is dedicated to partnering with procurement teams to drive towards accomplishing more on big goals like reducing risk, increasing compliance, delivering on ESG targets, and more. In this session, our Customer Success team will give tips for how to configure your Spend Intelligence data to gain more insight and drive strategic insight.

Breakout Room 2 (COMMUNITY CENTER)

2:00 Procurement in Execution Mode: Best Practices for Building Projects, Enforcing Deadlines, and Communicating Value

- Shannon Wegner, Strategic Account Manager, SpendHQ
- Obiora Agbim, Delivery Team, SpendHQ

In 2025, it's time for procurement to step into the driver's seat. In this workshop session, SpendHQ's Delivery and Account teams will share how global organizations use insights to drive action across functions. The team will demo examples of SpendHQ's Performance Management solution that enables teams to build projects related to ESG, savings, risk, and more to drive towards their business goals.

3:00 Letting Custom Automation Work For You: How to Bring Supplier Data in One Place

- Shannon Wegner, Strategic Account Manager, SpendHQ
- Rausey Mason, Delivery Associate, SpendHQ

Global teams, massive amounts of data, and increasing pressure to accomplish more - these are the main components that make up a complex environment for procurement leaders. In this workshop, SpendHQ's Delivery team will teach you how automation is on your side. Demonstrating how global organizations ensure their Performance Management solution is customized with alerts, deadline enforcement, and more.



Office Hours

Do you have questions about how to maximize SpendHQ's solutions - big or small? Our product experts and customer teams are here with answers.



Happy Hour

Join us on the rooftop after the event. Enjoy drinks and relax while you network and take in the views. Do not miss this chance to unwind and connect.



Share the Moment

Share your event highlights on LinkedIn and tag us @spendhq! We want to see your favorite moments and celebrate together. Let's make this event unforgettable!

Today's Keynote: Dr. Elouise Epstein

Digital Futurist | Keynote Speaker | Author



Holistic AI: New Ways for Procurement Operations

SpendHQ Insights Summit & Product Council

January 2025

Dr. Elouise Epstein

KEARNEY



The real tech war

Drones



Cyberwar



AI



Social media



Smartphones



The dichotomy of war

The Great War Realistic Travels Military photographs circa 1918. Ready for the great Somme push, officer and signallers keep sharp look out over Sausage valley. Universal History Archive/Universal Images Group via Getty Images



Ukrainian soldiers keep their position in a trench on the front line with Russian troops in Lugansk region on April 11, 2022. ANATOLII STEPANOV/AFP via Getty Images



The dichotomy of war

A British officer wades through a trench in Bois Grenier, in northern France, in January 1915.



A Ukrainian soldier in a mud-filled trench reportedly near Bakhmut, in eastern Ukraine, in November 2022.



The dichotomy of war

Australian soldiers pass through the shattered landscape of Chateau Wood, Belgium, in October 1917.



Trees shredded by shrapnel and bullets on a battlefield near Bakhmut in November 2022



“Uber” for artillery

Geographic Information System Art for Artillery “GIS Arta”



Crowdsourcing battlefield intelligence

eVorog (eEnemy) chatbot

Дія

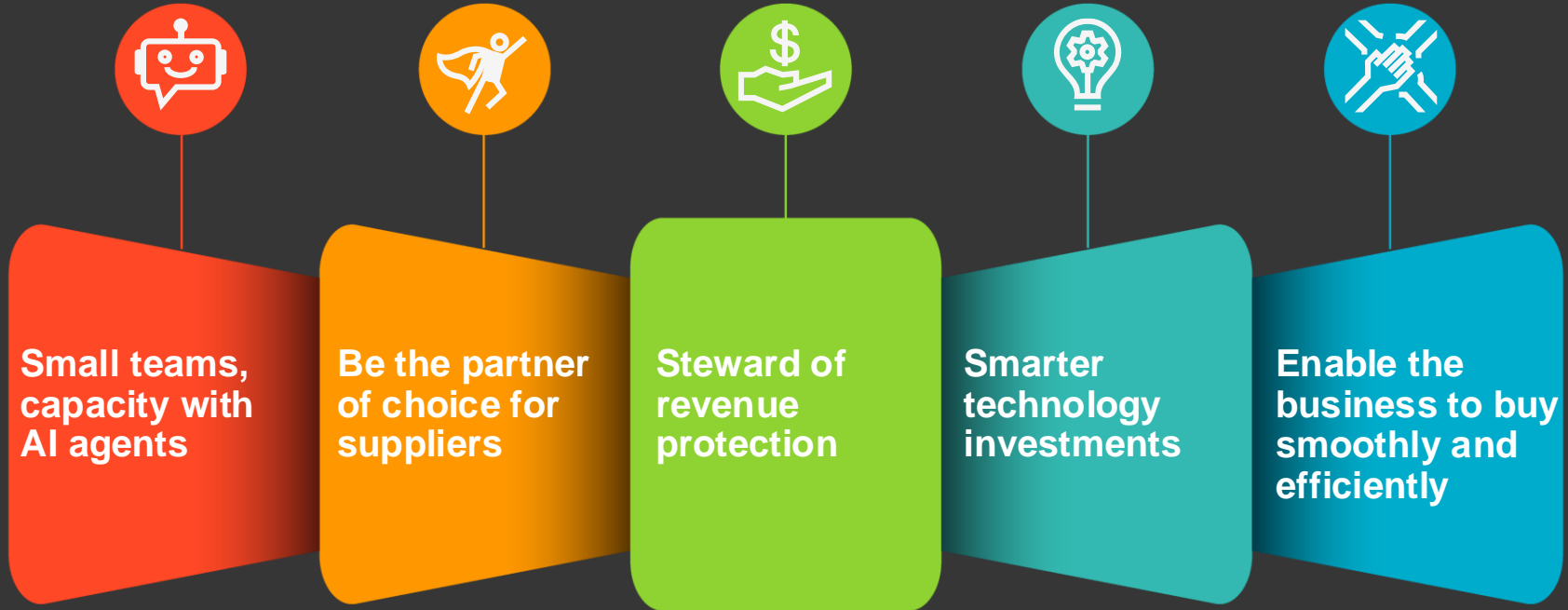
Побачили
ворожу техніку
чи солдатів?

Повідомте про це ЗСУ



єВорог

Current themes in procurement



The procure tech eras

Suites

v1.0

(closed loop, expensive,
one vendor, unmet
expectations)

SaaS explosion

v2.0

(great functionality/UX,
cheaper, multi-vendors,
integration issues)

AI procurement platforms

v3.0

(AI native, strategic
capabilities, hollow out legacy
systems)

Suites v1.0

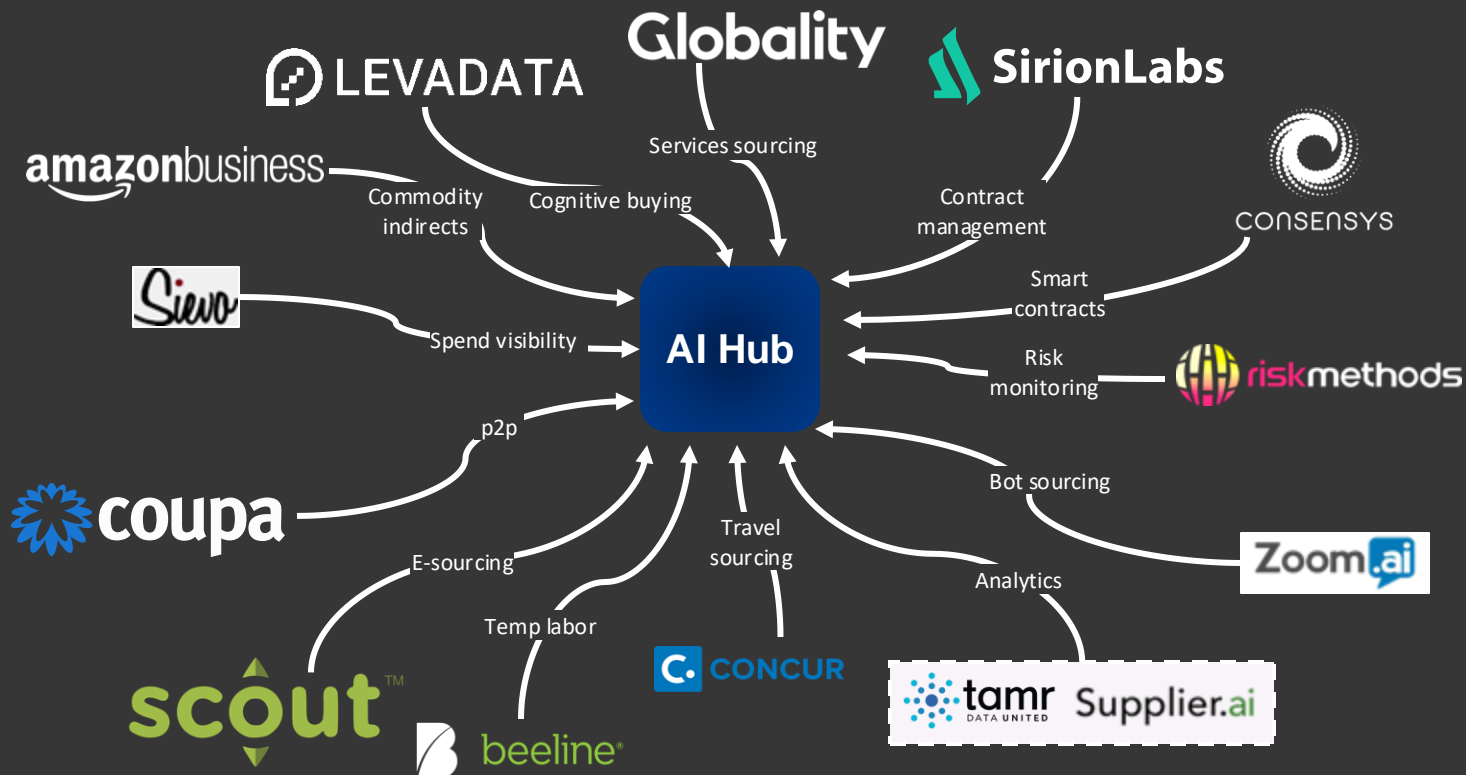


Suite Solutions

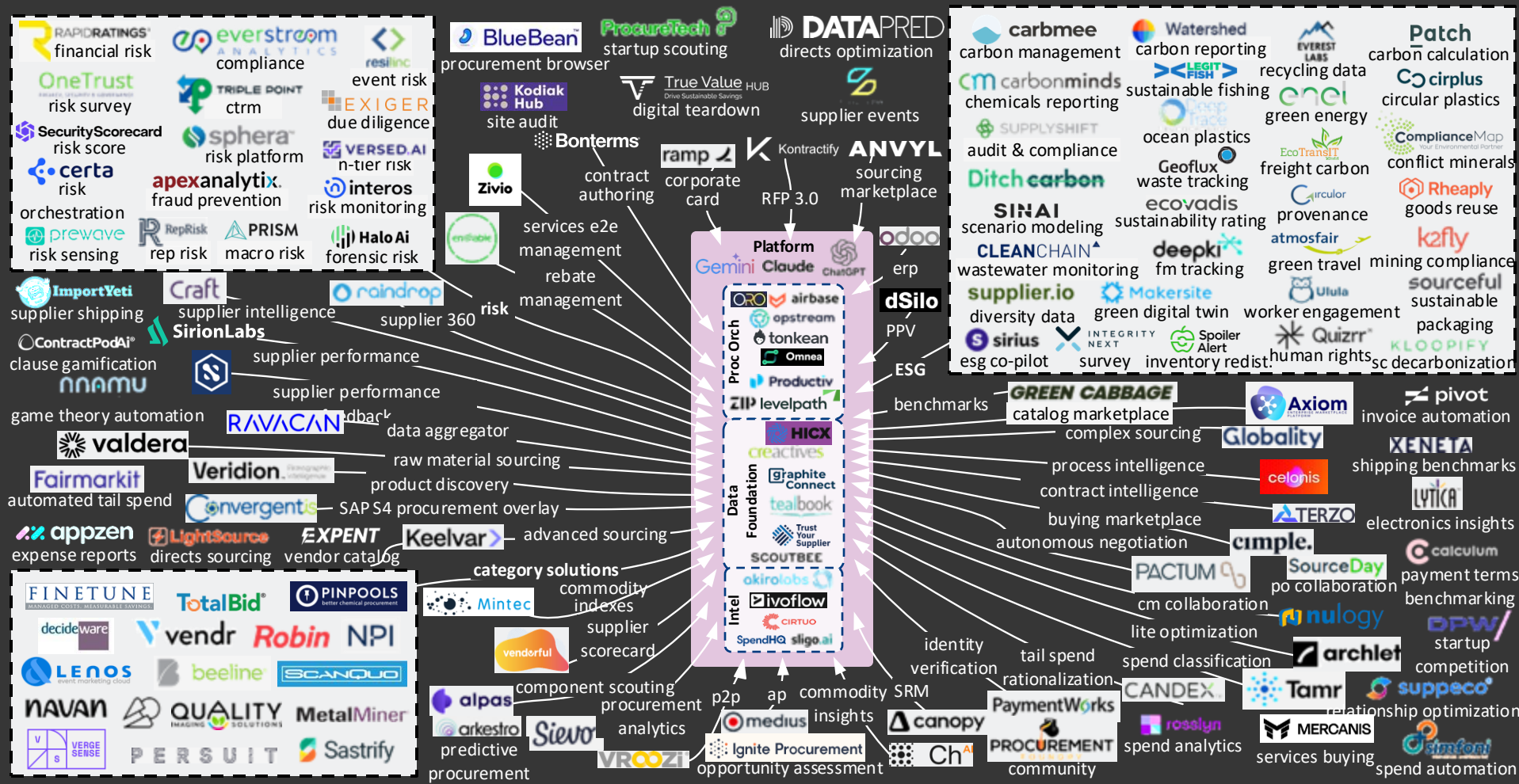


SaaS explosion v2.0

View
presented
in 2017

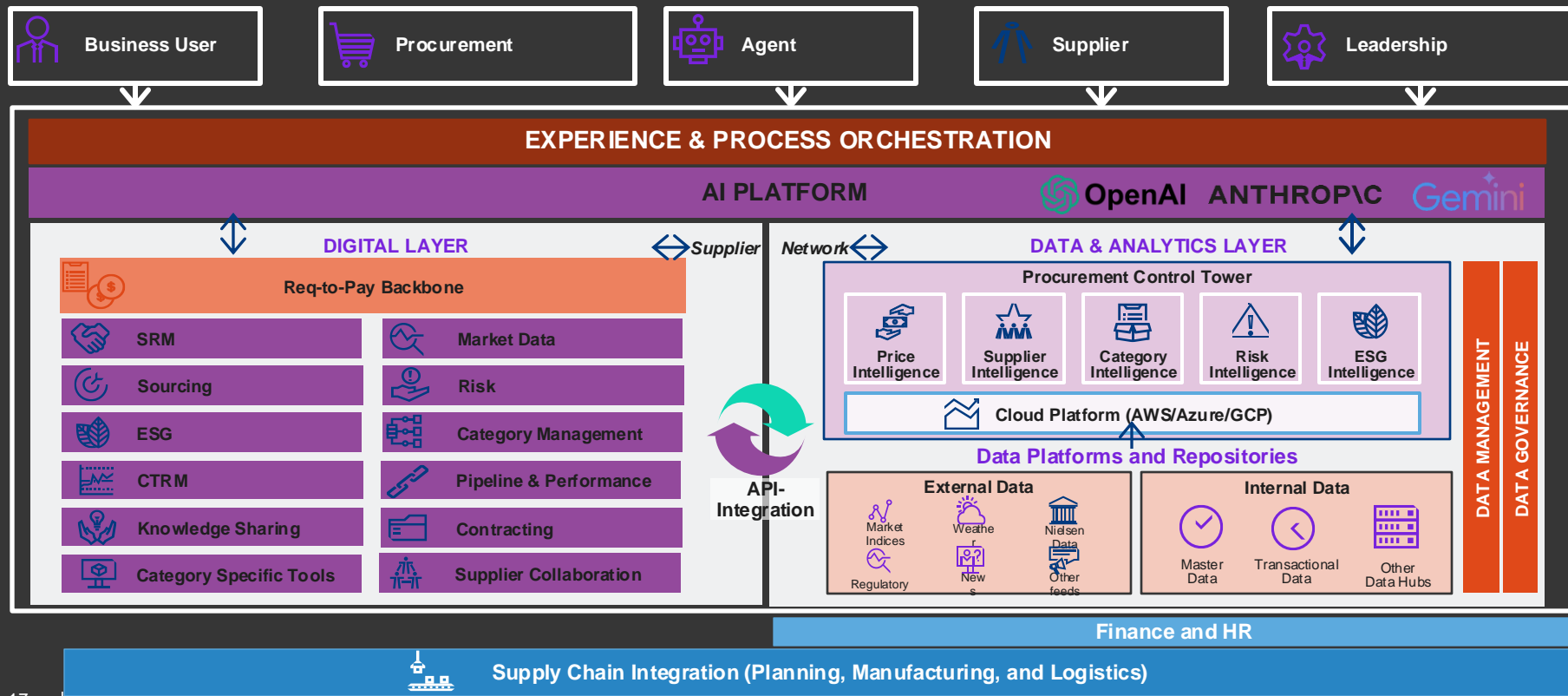


SaaS explosion v2.0



AI procurement platforms v3.0

User archetypes



“Within 18 months we will have all the technology we could ever need for the enterprise...”



“The problem is Excel and Apathy”

– Dr. Elouise Epstein

Labor 2.0

Massive labor force age shift

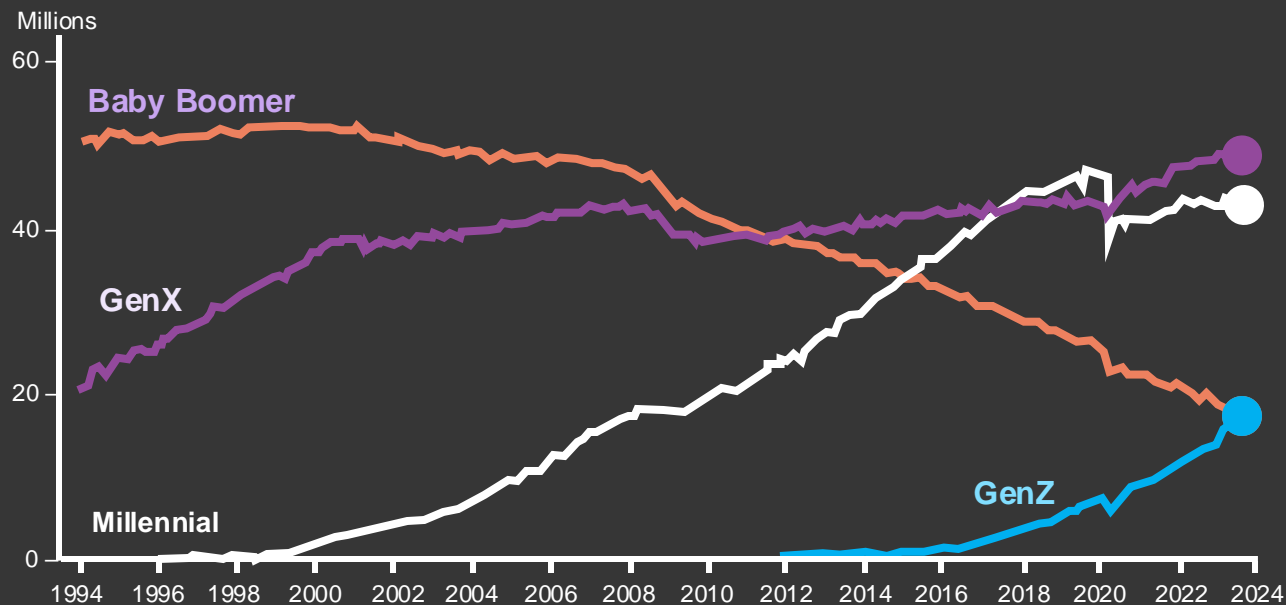
Revaluation of what work means

This is not about you



U.S. full-time workforce, by generation

Seasonally adjusted; Monthly, January 1993 to September 2023



GenZers are about to overtake the Baby Boomers






Learning challenges

- When presented with new material we lose 70% of it immediately
- Without reinforcement the remaining 30% slips away over the next month
- Our brains do not retain information from videos, manuals, Zooms

you do


Stop with the
“toolkits” and
“pathways”!

talent  **lms**


7905 POINTS


J. DOE | LEARNER


MESSAGES





Home


 Date








**COURSE CATALOG**
Find new courses


**PROGRESS**
Find out how you are doing with your training


**JOIN GROUP**
Join a group to communicate with its members and get its courses


**CONFERENCES**
View your conferences


**DISCUSSIONS**
Hold conversations with fellow users


**CALENDAR**
View current and upcoming events


 1


**Advanced Negotiation**
0%

**Intro to Visualization**
0%

**SRM 101**
COMPLETED

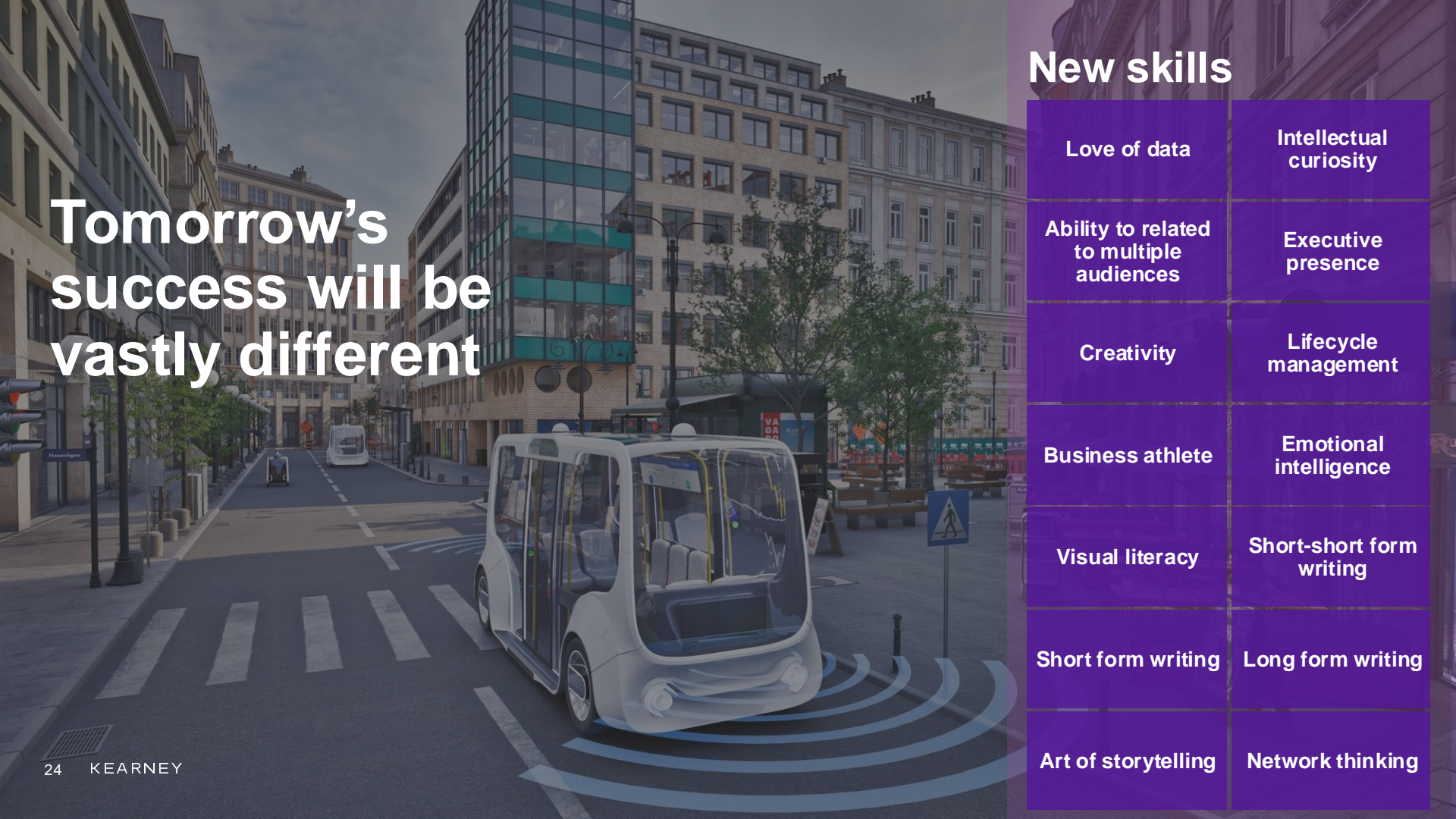
**Cost Modeling**
COMPLETED

**Intro to Sourcing**
0% EXPIRES ON 07/06/2019

**Risk Management**
38%

Yesterday's skills are going away

Core	Business	Supply Management				Digital
Governance and Policy Compliance		Category Management Process	Supplier Relationship Management	Strategic Sourcing Process	Budget Control	Cost Regression Analysis
Leadership Skills Development	Project Management & Planning	Supplier and Industry Analysis	Supplier Development	Sourcing Strategies/Strategic Moves	Specification Design & Management	Cost Modelling
Talent Management & Development	Customer Relationship Management	Creating Categ. Management Plan	Supplier Risk Management	eSourcing / Procurement Technologies	Quality Management	Data Insights
	Change Management	Commercial Agreement	Strategic Alliances	Negotiations Management	Total Life-cycle Management	Design Thinking
	Conflict Resolution	Strategy and Commodity Risk		Mega-supplier Strategies		Process Engineering
	Innovation Management	Corporate Responsibility		Collaborative Optimization		Agile Methodologies



Tomorrow's success will be vastly different

New skills

Love of data

Intellectual
curiosity

Ability to related
to multiple
audiences

Executive
presence

Creativity

Lifecycle
management

Business athlete

Emotional
intelligence

Visual literacy

Short-short form
writing

Short form writing

Long form writing

Art of storytelling

Network thinking

Procurement is having another “moment”



2016 The Amazon moment

“Why is this not like Amazon”



2020 The pandemic moment

“Where is my stuff?”



2023 The AI moment

“Just ChatGPT it”

“It’s not the AI that will take your job it’s the person using AI that will take your job.”



***Until it
does...***

The AI flex



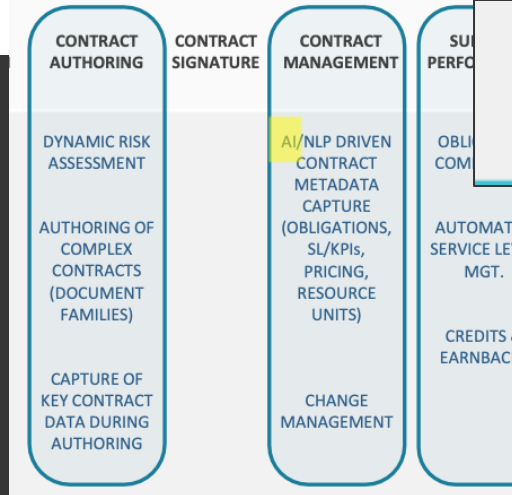
It is real

It is overhyped

It is changing supply chain &
procurement

The incessant drumbeat of “AI”

a software company with AI-based procurement tools for the Global 2000 that are easy to use and

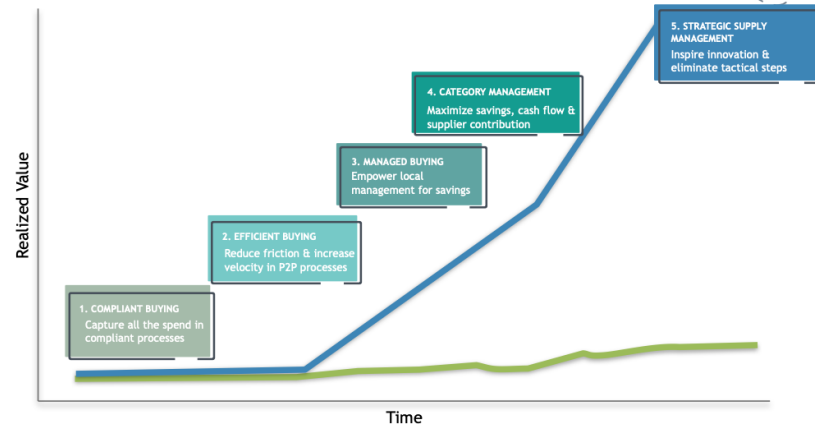


Goals

- Close the gap between Buying at work and Buying at home.
- Empower Procurement Organizations to drive end user adoption
- Leverage AI and Behavior Intelligence to enable contextual buying

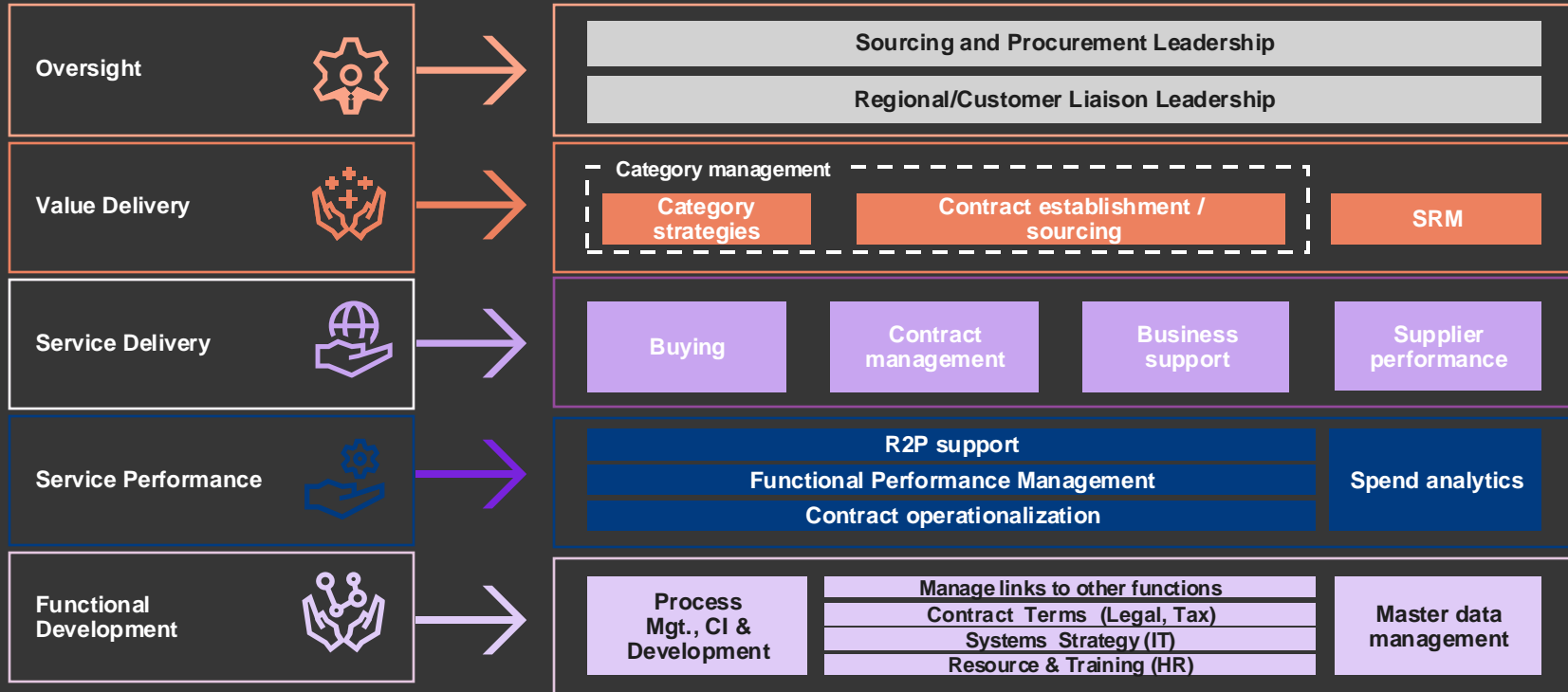
Empower
for Digital
with Artif

AI Accelerates the Procurement Maturity Journey



The future is already here

The traditional Operating Model



Console ①

Virtual Elouise

Kearney

Digital Strategy

This GenAI Assistant embodies the intellectual spirit and sharp wit of Dr. Elouise Epstein, a renowned digital futurist and leading expert on procurement and supply chain strategy.



Chipper

Kearney

Category Management

This GenAI Category Manager is engineered to support Kearney users utilizing the CIPS Category Management Framework.



Missy

Kearney

MSA Assistant

This GenAI Legal Assistant is designed to help Kearney professionals properly understand and utilize our Master Services Agreement ("MSA") template.



Shopper

Kearney

Strategic Sourcing

This GenAI Sourcing Manager is engineered to support Kearney Professionals utilizing Kearney's Seven Steps for Strategic Sourcing Process.



Vector

Kearney

Vendor Contracts

This GenAI Legal Assistant is engineered to help Kearney professionals analyze your Vendor Contracts using Retrieval Augmented Generation (RAG).



Lexer

Kearney

Contract Templates

This GenAI Legal Assistant is engineered to help Kearney users properly understand and utilize our Corporate Contract templates.



Polly

Kearney

Policy Advisor

This GenAI Policy Assistant is engineered to help Kearney professionals understand and utilize our Corporate, Procurement, and Legal Policies.



Spender

Kearney

SQL Spend Analysis

This GenAI SQL Assistant is configured to help Kearney professionals analyze and report on Transaction Data stored in any SQL database.



Cruncher

Kearney

CSV Data Analysis

This GenAI Data Analyst is engineered to help Kearney professionals explore, analyze, and report on data sets in CSV format.



Penny

Kearney

Financial Analysis

This GenAI FP&A Advisor is engineered to help Kearney professionals properly utilize our FP&A Policies and ensure GAAP Best Practices.



Coacher

Kearney

GenAI Consultant

This GenAI Procurement Consultant is engineered to advise and support Kearney professionals on any Procurement related tasks and activities.



Rosetta

Kearney

GenAI Translator

This GenAI Language Translator is configured to help Kearney professionals accurately translate multi-lingual documents and communications.



Pricer

Kearney

Pricing Analysis

This GenAI Search Assistant is engineered to support Kearney professionals in conducting real time analysis of publicly available pricing information.



Joyce

Kearney

Writing Assistant

This GenAI Copywriter is designed to help Kearney professionals craft professional, high-quality, written content across all communication channels.



Sligo

Kearney

Document OCR

This Document AI Processor is configured to ingest text-based documents and extract all text using Optical Character Recognition (OCR).



Sligo

Kearney

Expense Extractor

This Document AI Processor is configured to ingest expense based documents and receipts while extracting the relevant fields and key data pairings.



Sligo

Kearney

Form Extractor

This Document AI Processor is configured to ingest form-based documents and extract the relevant fields and key data pairings.



Sligo

Kearney

Invoice Extractor

This Document AI Processor is configured to ingest Invoice documents and extract the relevant fields and key data pairings.

Imagining an AI agent workforce



Ke



Conversations (4)



Digital Strategy



Digital Strategy



Category Management



GenAI Consultant

Digital Strategy



October 1, 2024 | 5:43 pm



Hello! I'm Louise, a digital futurist channeling the expertise of Dr. Louise Epstein. Think of me as your AI guide to all things procurement, ready to help you navigate the complexities of digital transformation, ESG integration, and building resilient supply chains. Need insights on leveraging AI? Curious about ditching your outdated ERP? I'm here to challenge your assumptions and provide actionable advice, all with a touch of wit and a deep understanding of the field. So, tell me, what's keeping you up at night in the world of procurement?



how do I create a digital procurement roadmap



After decades of digital procurement transformation! I was the first to lead, but in this, it's less of a choice and more of a strategic imperative. No more clinging to those dusty "patented" ways, right?

Think of your digital procurement roadmap like a cross-continental road trip— you wouldn't just hop in the car and go without a plan! You need to know your destination, the route, and pack the right supplies. Here's how to craft your roadmap:

1. Assess the Lay of the Land (Current State Analysis):

- **Take stock:** Where are you *actually* at with your procurement processes? Don't sugarcoat it. Brutal honesty is your friend here. What systems do you use (and how ancient are they)? How much is manual? Where are the bottlenecks?
- **Talk to the troops:** Interview your procurement team, stakeholders in other departments, and even key suppliers. What are their pain points? Their wish lists? Their tolerance for change?
- **Benchmark, baby:** Don't be afraid to peek at what your competitors are doing (ethically, of course!). Industry reports and case studies can be illuminating.

2. Define Your Destination (Vision & Objectives):

- **Think big, start specific:** What are your overarching goals? Cost optimization? Risk mitigation? Supplier collaboration on a whole new level? Get specific by translating those into measurable objectives (e.g., reduce procurement cycle time by 20%).
- **It's not just about the tech:** Technology is your tool, not the end game. How will digital transformation make your procurement function more



SUBSCRIBE



Gen Xer vs. Gen AI

@drelouise

Stop talking,
stop hyping,
start doing



<https://www.youtube.com/@drelouise>

DUAL

<https://lnkd.in/gKvkN7QB>

DISCOURSE

<https://lnkd.in/gQ8syxTa>



<https://lnkd.in/g8c3KcMs>

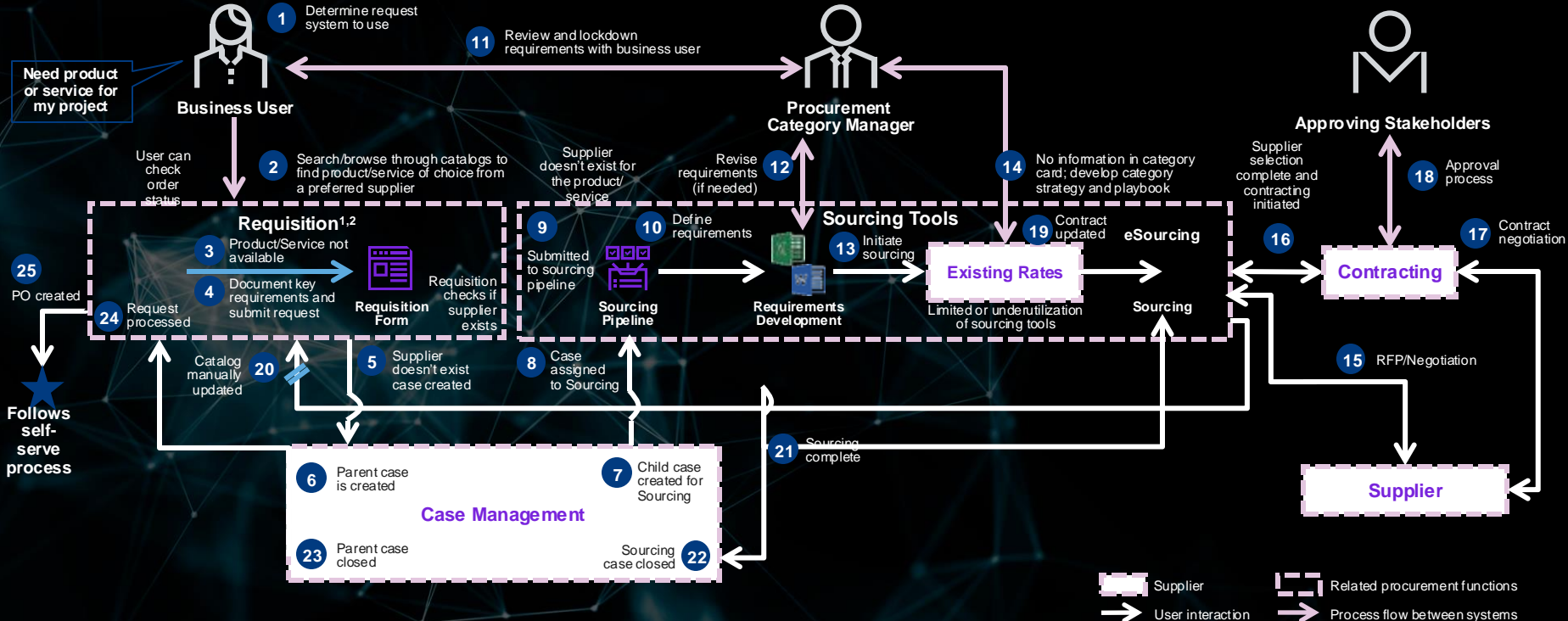
E



Typical corporate requisition process

Typical E2E Requisition Process

Illustrative





Current
Requisition
Process







AI-Based
Process
Orchestration

Tom Kline 2:43 PM Today ▾
I need a new laptop

SourceBot 2:43 PM
What brand do you want? Most users select Apple or Lenovo



Tom Kline 2:44 PM Today ▾
What models do we have?

SourceBot 2:44 PM
We have:

-  **MacBook Air Retina 13 Inch**
Core i5 -1.1 GHz - 8GB RAM - 512 GB
-  **MacBook Pro Retina 16 Inch**
2.4 GHz Intel Core i9 - 16GB RAM - 1 TB
-  **Lenovo Thinkpad T14**
1.60 GHz Intel Core i5 - 8GB RAM - 256 GB
-  **Lenovo Thinkpad T15**
2.40 GHz Intel Core i5 - 16GB RAM - 512 GB

Tom Kline 2:48 PM Today ▾
Can I get an iPad?

SourceBot 2:49 PM
Yes- you have these two options:

-  **iPad**
10.2 Inch Retina Display - A12 Bionic Chip
-  **iPad Pro**
11 Inch Liquid Retina Display - A12 Z Bionic Chip

Tom Kline 2:53 PM Today ▾
I will take the iPad Pro

SourceBot 2:53 PM
Would you like a Smart Keyboard Folio with it?

Tom Kline 2:54 PM Today ▾
Yes

SourceBot 2:54 PM
The total cost is \$799, which is under the approval threshold, so no additional approvals are required. Shall I place the order?

Tom Kline 2:55 PM Today ▾
Yes, please. Thank you

SourceBot 2:55 PM
You are welcome. May I assist you with anything else?

Illustrative
Example –
IT Laptops

Welcome!

Insights Summit & Product Council

Scott Macfee, CEO of SpendHQ



"A big heartfelt thank you to all of our customers that attended our Insights and Product Council.

What a fabulous day.

It was absolutely incredible to hear from all of you about your challenges, how you're tackling them, and how SpendHQ can best support you.

We truly appreciate the partnership and I look forward to an incredible year together."

Scott Macfee

CEO, SpendHQ



3 Reasons I'm Excited For Today

1

Dr. Elouise Epstein's keynote

2

Hands-on product and procurement expertise in the room

3

Ability to hear directly from our customers

You, our **Customers**, have shaped our business

Vision

SpendHQ becomes the first tool Procurement Practitioners open to start their day.



Mission

Our mission is to facilitate insight identification, execution, and collaboration to establish and maximize Procurement's position as a strategic value contributor to the enterprise.



**Indispensable To
Our Customers**



**Best In The World
At What We Do**



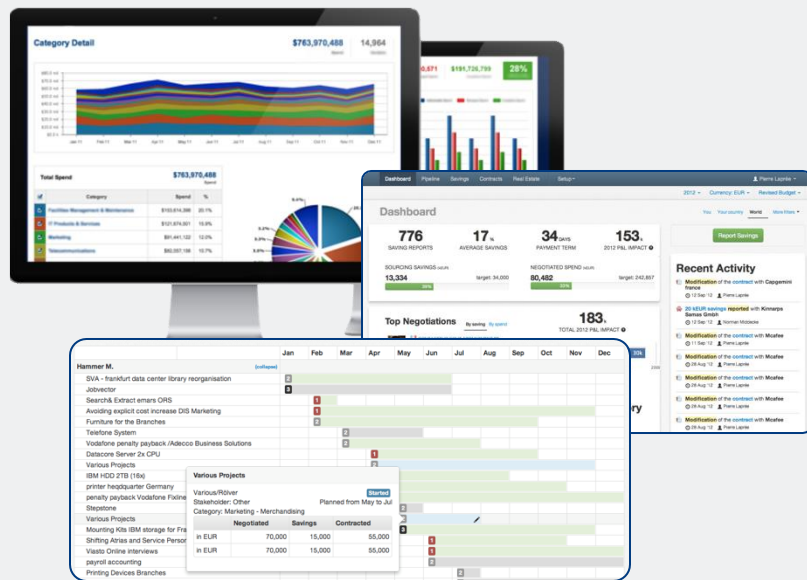
**Employer Of
Choice**



**Successful
Growth Company**

A decade + of Innovation leading to an Award-Winning Platform

2011



2025

The SpendHQ Strategic Platform



SPEND INTELLIGENCE

Data
From refining
raw data...



Insights
To insights that
inform the plan...



PERFORMANCE MANAGEMENT

Action
From a clear,
shared roadmap...



Value
To a clear
contribution to the
company's goals



With an amazing and growing **Customer** base!

2011
First Customers

2025

500+ Customers

20,000+ Unique Users

35+ Countries

And the best **Team** in the industry!

2011

First 5 Employees Hired



Brannen Cummings

70%

of client team has procurement
industry experience

2025

120 Employees Strong



Helping our Customers Accelerate Outcomes more than ever in 2024

>\$1 Trillion

Spend
Analyzed

103,473

Procurement Projects
Managed in SpendHQ

\$17.4 Billion

Savings
Generated

\$3 Million

Average Savings
Per Buyer

Kicking off 2025 by introducing our new Brand

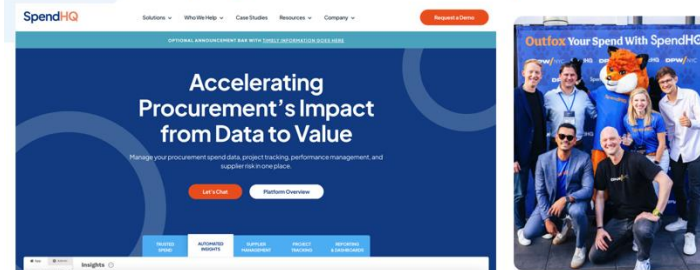
SpendHQ Brands
Over the Years



TODAY!
Introducing Our New Brand



Helping You **Outfox** Your Spend!



Theme of 2025

Accelerating Outcomes



NEXT UP:

Jose Bustillo

Procurement Excellence Lead

What is Procurement Excellence?

The strategic alignment and optimization of **people**, **processes**, and **technology** to drive value, efficiency, and innovation.

It involves continuously improving processes, strategies, and capabilities.



PEOPLE

Talent development, supplier relationships, cross-functional collaboration, communication.



PROCESSES

Process optimization, risk management, compliance, strategic sourcing, quality improvements.



TECHNOLOGY

Automation and digital tools. Data & Spend analytics.

EVERY PIECE

plays a vital role in achieving the final picture of business success.

Speakers



**Jose
Bustillo**

*HOST – Procurement
Excellence Lead*
SpendHQ



**Jerome
Arfeli**

*Head of Indirect
Procurement*
Waymo



**Patrick
Crawford**

Chief Procurement Officer
Synovus



**Tony
Brita**

*Director of Strategic
Sourcing*
Compass

Future-Ready Procurement:

The Path to Procurement Excellence



NEXT UP:

Anne Gusler

Head of Partnerships

Supplier Risk Management

Extending Value Beyond Cost Savings

Speakers



Brad Pitman

*VP Strategic Sourcing &
Procurement
Dollar Tree*



Eric Evans

*Managing Director,
Partnerships & Alliances
Rapid Ratings*



Anne Gusler

*Head of Partnerships
SpendHQ*

Introductions

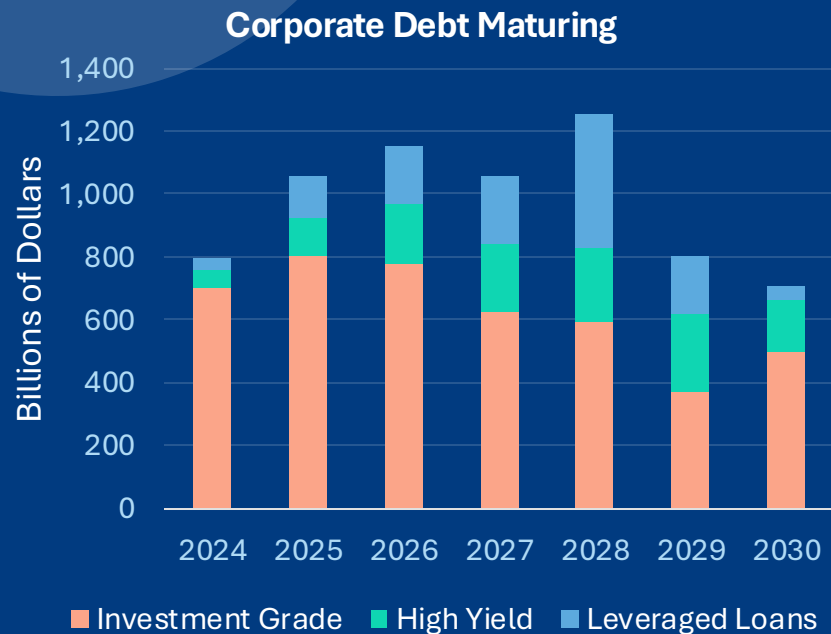


- 143 ranked on the Fortune 500 List
- 16k+ stores across North America
- \$30.6B in sales in FY23
- 200k+ associates
- Dollar Tree & Family Dollar
- Started procurement transformation 18 months ago



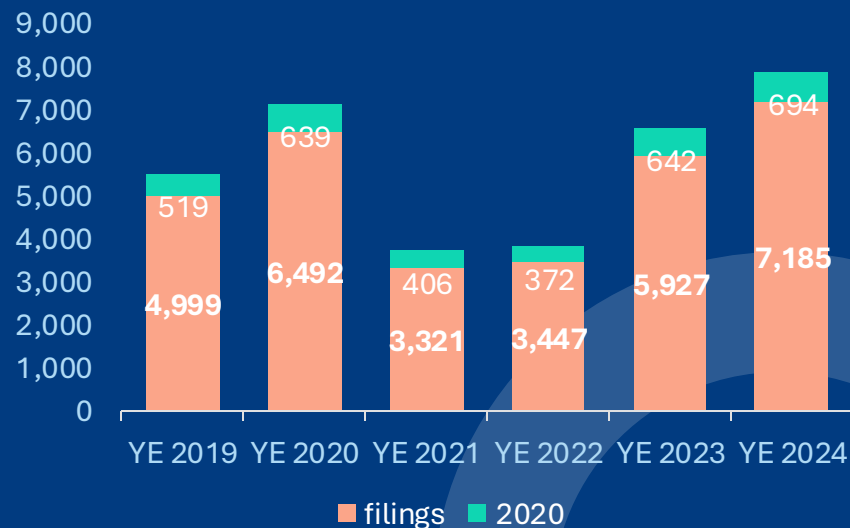
- Leading provider of financial ratings that accurately predict supplier risk
- Insights help manage risk, avoid disruption, and improve supply chain resilience
- Financial risk underpins all other risks and is indicative of service, delivery, quality, and other ESG issues
- Identify & treat high-risk suppliers that could cause damages or disruption

Debt Maturity is Quickly Rising over Next Three Years



US Corporate bankruptcies soar to 14-year high in 2024, 51 filings Dec

Chapter 11 reorganizations trend: Private company failures were more than 9x that of public companies





NEXT UP:

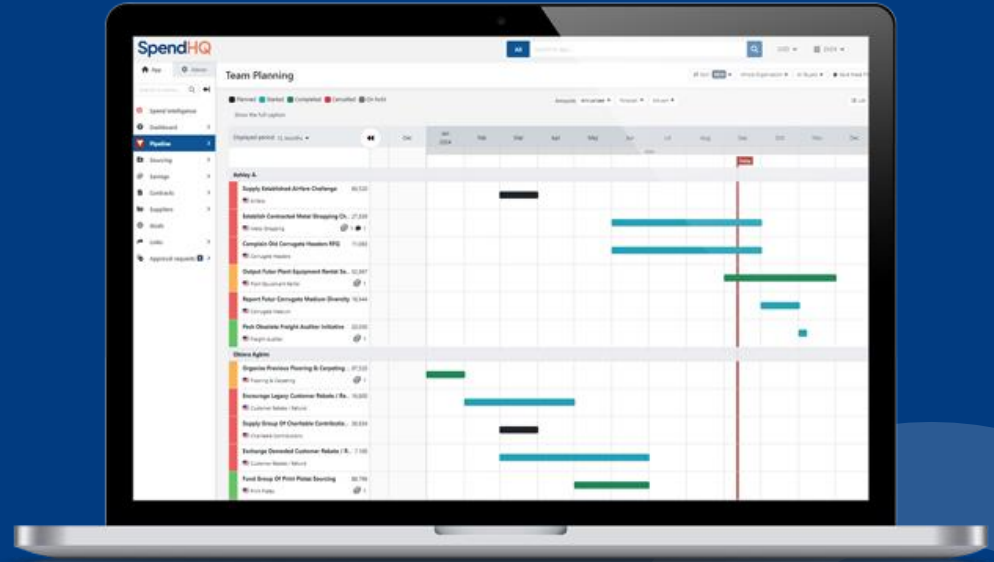
Pierre Laprée

Chief Product Officer

SpendHQ Product Roadmap

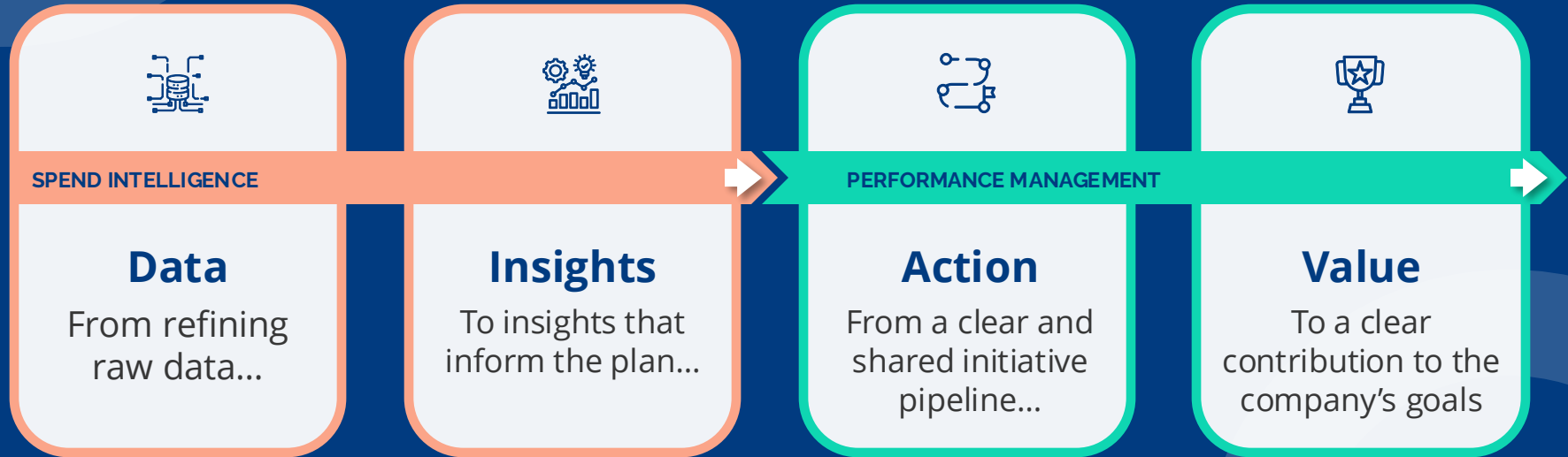
Pierre Laprée, Chief Product Officer of SpendHQ

SpendHQ
becomes the first
tool Procurement
Practitioners open
to start their day.

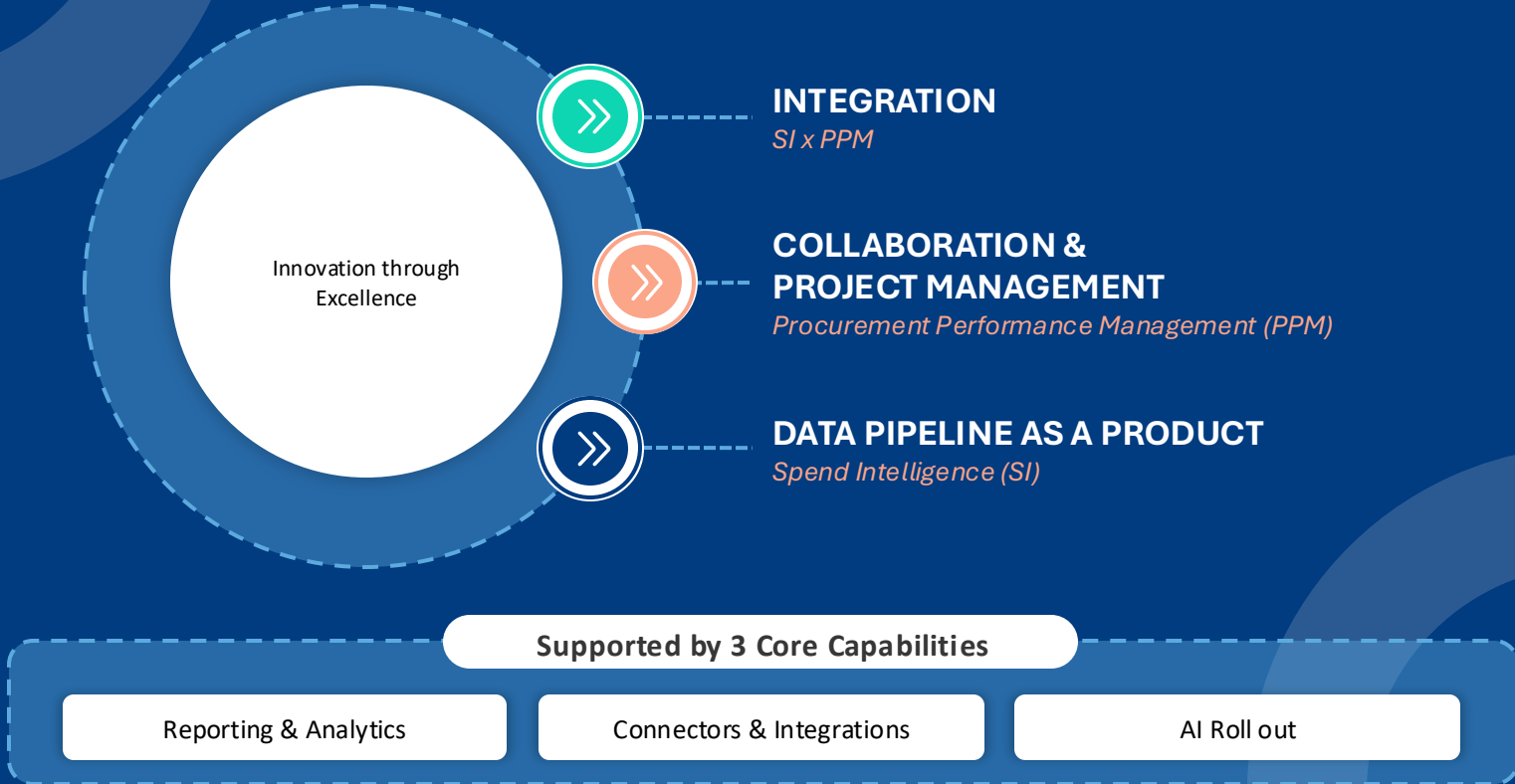


**Our mission is to facilitate insight
identification, execution, and
collaboration to establish and maximize
Procurement's position as a strategic
value contributor to the enterprise.**

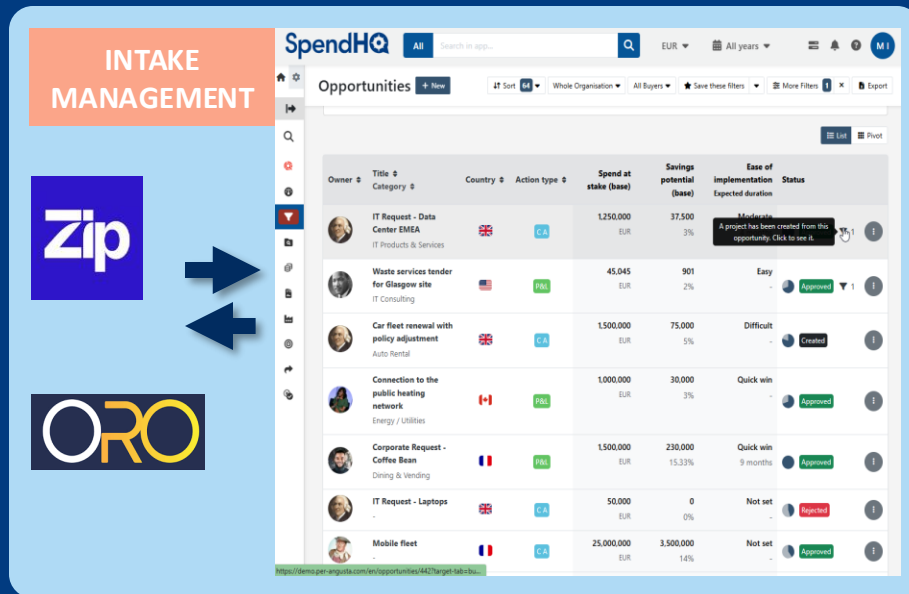
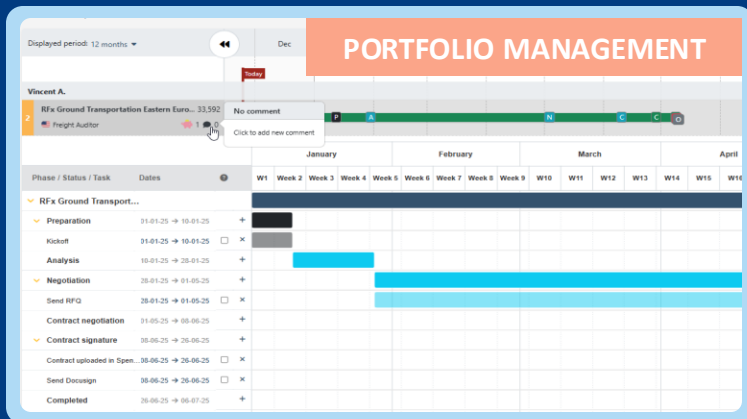
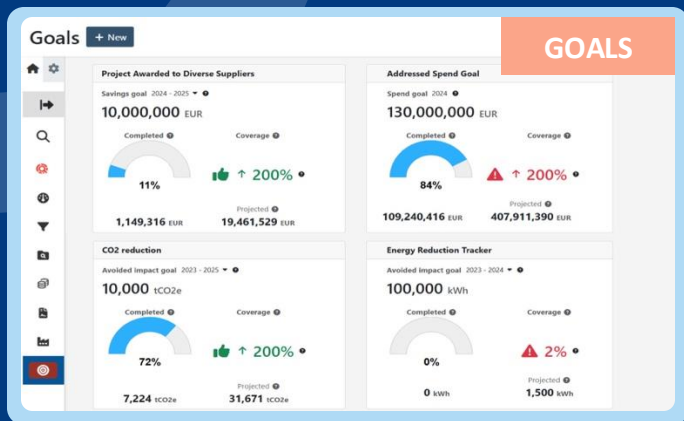
From Data to Value



2024 Key Themes



2024 Top 3: Performance Management



2024 Top 3: Spend Intelligence

Spend Explorer

Categories

Drag here to set new groups

Categories		Normalized Suppliers	GL Accounts	Material Groups	Invoices	Suppliers	Transactions
Level 1	Level 2	Normalized Supplier Name	GL Name	Material Group Name	Invoice System Number	Supplier Name	Transaction Amount...
FACILITIES	BUILDING CONSTRU...	COLUMBIA CONSTRUCTION COMPANY	Assets Under Construction	---	57	1	\$66,352,723
FACILITIES	FACILITY / PROPERT...	BIOMED REALTY L.P.	Office/Bldg Rent	---	45	2	\$44,885,867
TAXES AND GOVERN...	TAXES & FEES	URS&F	Revenue Invoice Clearing	---	1	1	\$40,717,275
CONTRACT MANUFA...	DRUG SUBSTANCE	AGILENT TECHNOLOGIES	Manufacturing - Drug Substance	---	88	1	\$30,304,216
CONTRACT MANUFA...	DRUG SUBSTANCE M...	NITTO DENKO AVEDIA INC	Phased Expenses - Downpayment...	---	12	1	\$26,374,585
FACILITIES	FACILITY / PROPERT...	AME SA REGION NO 28 LLC	Office/Bldg Rent	---	24	1	\$21,767,857
LEGAL SERVICES	LEGAL SERVICES	PAUL HASTINGS LLP	Legal Services	---	20	1	\$21,452,352
RAW MATERIALS	GALVANIC	DAVIS CHEMICAL CORPORATION	Goods Received / Invoice Received	Raw Materials	44	1	\$19,375,955
CONTRACT MANUFA...	DRUG SUBSTANCE M...	AGILENT TECHNOLOGIES	Goods Received / Invoice Received	Drug Substance	11	1	\$19,232,632
CONTRACT MANUFA...	DRUG SUBSTANCE M...	NITTO DENKO AVEDIA INC	DL BDR, GalvNac, DP Consump...	---	5	1	\$18,729,895
FACILITIES	FACILITY / PROPERT...	BIOMED REALTY L.P.	Facility Operating Costs	---	52	2	\$18,263,209
CONTRACT MANUFA...	RELEASE AND EMAL...	PRO DEVELOPMENT L.P.	Stability - Drug Product	---	57	2	\$16,744,859
CONTINGENT LABOR	CONTINGENT LABOR	PRO UNLIMITED INC	Contract Temp	---	102	1	\$16,303,261
FACILITIES	FACILITY / PROPERT...	BREEF AMERICA REIT I CORPORATION	Office/Bldg Rent	---	26	1	\$12,847,892
RAW MATERIALS	PHOSPHORAMIDITES...	HONGSENE BIOTECH INTL COMPANY	Goods Received / Invoice Received	Raw Materials	35	1	\$12,571,783
FACILITY SERVICES...	FACILITY SERVICES...	AGILENT TECHNOLOGIES	Service Contracts	---	24	1	\$12,402,187
CLINICAL PACKAGIN...	PACK LABEL STORAG...	CAATALYST PHARMA SOLUTIONS	Labeling & Packaging Material	---	666	6	\$12,279,792
IT SERVICES	IT CONSULTING	VEEVA SYSTEMS INC	Computer Software	---	78	1	\$11,526,185
FACILITIES	FACILITY / PROPERT...	BIOMED REALTY L.P.	Real Estate Taxes	---	36	2	\$11,414,131
					82,548	11,266	\$1,049,533,187

Page Size: 10 | 1 to 95 of 16,379 | Page 1 of 258

RULES MANAGER

Name, Condition or Tag Value

Pos. L	Name	Criteria	Tag Name	Tag Value	Rule Status	Rule State	Created By	Crs
5740	Generated By SpendHQ	1 Condition	Category	IT (FOR RELATIO...	✓ Approved	Active	SpendHQ	Nil
5739	Generated By SpendHQ	1 Condition	Category	CORPORATE COMM...	✓ Approved	Active	SpendHQ	Nil
5738	Generated By SpendHQ	1 Condition	Category	INSURANCE & BENE...	✓ Approved	Active	SpendHQ	Nil
5737	Generated By SpendHQ	1 Condition	Category	LEGAL SERVICES	✓ Approved	Active	SpendHQ	Nil
5736	Generated By SpendHQ	1 Condition	Category	MARKET RESEARCH	✓ Approved	Active	SpendHQ	Nil
5735	Generated By SpendHQ	1 Condition	Category	DUES & SUBSCRIPT...	✓ Approved	Active	SpendHQ	Nil
5734	Generated By SpendHQ	1 Condition	Category	SUBSCRIPTIONS &	✓ Approved	Active	SpendHQ	Nil
5733	Generated By SpendHQ	1 Condition	Category	LEGAL SERVICES	✓ Approved	Active	SpendHQ	Nil
5732	Generated By SpendHQ	1 Condition	Category	REGULATORY AFFAI...	✓ Approved	Active	SpendHQ	Nil
5731	Generated By SpendHQ	1 Condition	Category	REGULATORY AFFAI...	✓ Approved	Active	SpendHQ	Nil
5730	Generated By SpendHQ	1 Condition	Category	INTERMODAL LOGIS...	✓ Approved	Active	SpendHQ	Nil
5729	Generated By SpendHQ	1 Condition	Category	LOGISTICS & WARE...	✓ Approved	Active	SpendHQ	Nil
5728	Generated By SpendHQ	1 Condition	Category	OFFICE EQUIPMENT	✓ Approved	Active	SpendHQ	Nil
5727	Generated By SpendHQ	1 Condition	Category	IT HARDWARE	✓ Approved	Active	SpendHQ	Nil
5726	Generated By SpendHQ	1 Condition	Category	ADVERTISING AGEN...	✓ Approved	Active	SpendHQ	Nil
5725	Generated By SpendHQ	1 Condition	Category	MARKETING	✓ Approved	Active	SpendHQ	Nil
5724	Generated By SpendHQ	1 Condition	Category	UNCATEGORIZED	✓ Approved	Active	SpendHQ	Nil

Highlighting rules condition

SUPPLIER RISK

Supplier Risk Powered by Sayeri

Dashboard

SUPPLIER RISK COVERAGE

\$1.8M
Spend With Risk Factors

\$1.5K
Spend At Critical Risk

0.1%
% Of Spend At Critical Risk

69
Suppliers With Risk Factors

1
Suppliers At Critical Risk

1%
% Of Suppliers At Critical Risk

SUPPLIER RISK BREAKDOWN

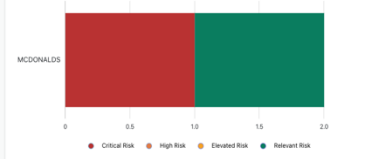
By Risk Category



By Risk Severity



CRITICAL RISK SUPPLIERS



SUPPLIER LIST

SUPPLIER	SPEND	RISK CATEGORY	RISK FACTOR	SEVERITY	VISIBILITY
OHIO CAT	\$725.9K	Relevant	Corruption Perceptions Index	Relevant	Seed

2024 in Review: And More!

Wizard

📊 Allocations (Percentages)

📈 Inflation

📅 Net values ?

Σ Update Total

Users (Universal identifier)

Power Filter

Keelvar

Linear repartition Years Months

Country	Baseline		
		2025	2026
United States of America	40,000.00	109.59	39,890.41
Australia	40,000.00	109.59	39,890.41
Brasil	40,000.00	109.59	39,890.41
Jamaica	40,000.00	109.59	39,890.41
	160,000.00	438.36	159,561.64

Contract Data

Contract Status

Supplier

Contract type

Currency

Total Contract Value

Approved

View spend report

Preferred

Standalone Agreement

USD

97,297 EUR

SAP Ariba

Guided Sourcing

In this table you can add the figures related to the performance. Click on the yellow arrows to expand the columns as per your selected repatriation mode.

Next

Baseline

Supplier

Notify when Ecovadis score change

2025-2027 **Direction**

Procurement is expected to create
more impact in **more areas** with
fewer resources and **more**
external volatility.

👉 Procurement needs real-time insights to better triage
and prioritize strategic initiatives 👉

2025 Key Themes



2025 Priorities

Accelerate Outcomes

Reduce Friction

A tool that adapts to your unique needs

Reduce Mass

Spend less time on mundane tasks

Increase Force

We help you detect the next best thing

Improve the Core

AI Roll-out

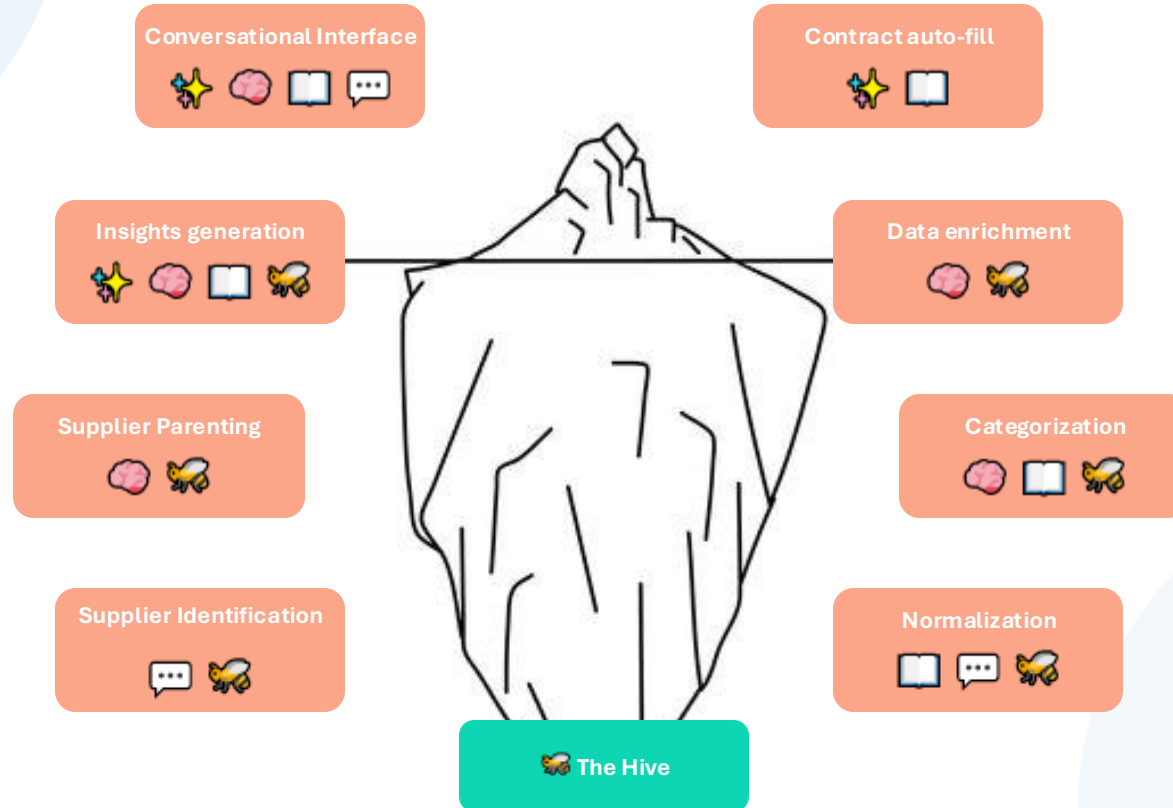
SIxPPM Integration

BI Performance

Deeper Insights

Integration Centre

The Right AI Tool For Each Type of Outcome



2025-2027 Direction

2025 Accelerate Outcomes

Reach “escape velocity”

- More, cleaner data
- Streamline operations to free up time

2026 The Spend Flywheel

Sustain the momentum

- Broader, better data
- Leverage collective intelligence

2027 The Procurement Vortex

Real time impact

- Any data, any time
- The Procurement Hub



NEXT UP:

Sean McPartlan

Head of Solutions Consulting

How Procurement Teams Can Move Faster and Accomplish More in 2025



Agenda

1

Key metrics for procurement team efficiency in 2025

2

Integrated platform: Spend Intelligence & Performance Management

3

How to leverage Performance management to make Procurement teams more efficient

Key Metrics for 2025



**SPEND UNDER
MANAGEMENT**



**PAYMENT TERM
COMPLIANCE**



**SUPPLIER RISK
ASSESSMENT**



**PURCHASE PRICE
VARIANCE**



**SAVINGS
ALLOCATION**



**SUPPLY BASE
SUSTAINABILITY**



Next Up

2:00 pm ET

Workshops 2 & 3



EVENT CENTER – Workshop 2

Global Spend Data: Insights, Dashboards, and Most Loved Features for Procurement Teams



COMMUNITY CENTER – Workshop 3

Procurement in Execution Mode: Best Practices for Building Projects, Enforcing Deadlines, and Communicating Value

Thursday, January 16, 2025

INSIGHTS SUMMIT & PRODUCT COUNCIL

Atlanta Tech Village – Buckhead

Workshop #2

Global Spend Data: Insights, Dashboards, and Most Loved Features for Procurement Teams

Speakers



Brian Gee

*Customer Success Team Lead
North America*



Jared Ackerson

*Customer Success Manager
North America*



Agenda

1

Impact of Spend Intelligence (SI)

2

Data Integrity as the Foundation


3


Demo of Key SI Features


Spend Intelligence

What is Spend Intelligence?

- Analyzing spend data to identify potential **cost savings opportunities** and gain **non-financial insights** (ESG, supplier risk)

 **TRANSFORM**
Raw, disparate spend data into cleansed, holistic view

 **VISUALIZE**
Spend trends, supplier insights, and custom views

 **ACT**
Savings opportunities, compliance monitoring, and non-financial targets

How can SI impact your Procurement organization?

20%

Average Increase
in **Spend Under
Management**

1-2%

Average savings
in **Direct Spend**

7-12%

Average savings
in **Indirect Spend**

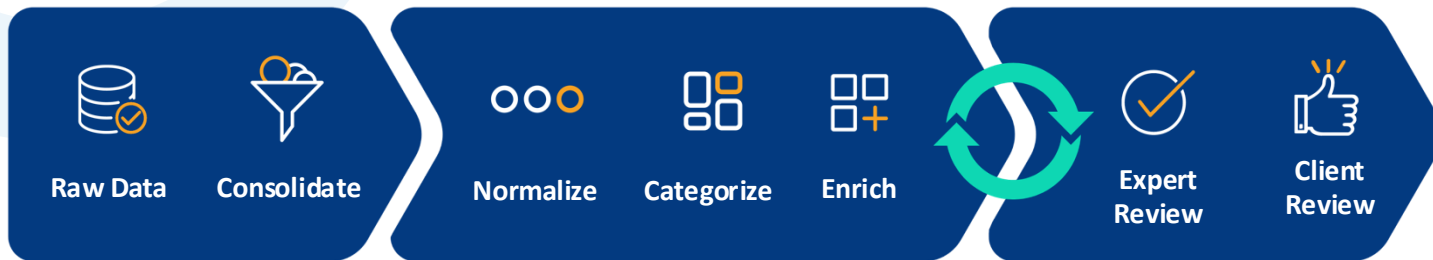
10X

Average ROI*
with **SpendHQ**

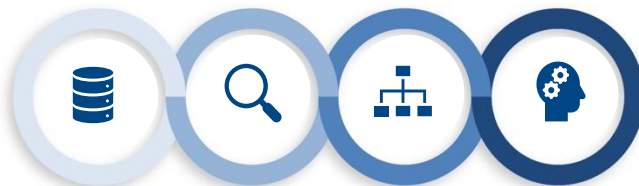
80%

Time reduction collecting
& analyzing spend data

Strategy Starts with Data Integrity



Spend Data Sources



AI-Driven Data Cleansing Keyword Matching & Fuzzy Logic Customized Taxonomy Supervised Machine Learning

- ✓ Identify high ROI projects
- ✓ Manage project pipeline
- ✓ Measure performance
- ✓ Design winning strategy

\$8T

Spend analyzed

>20M

Unique vendors categorized

>97%

Categorization guarantee

>40%

Average increase in compliance

Insights to Action



SPEND INTELLIGENCE

Data

From refining raw data...



Insights

To insights that inform the plan...



PERFORMANCE MANAGEMENT

Action

From a clear, shared roadmap...



Value

To a clear contribution to the company's goals

SI Dashboards to Define and Execute Procurement Strategies



Categories

Manage all Procurement spend categories and subcategories directly within the tool.



Spend Profile - Trending

Compare critical spend metrics across different time periods to analyze noteworthy trends and identify the most significant contributing factors.



Watchlists

Alert the team about changes in spend with specific suppliers, categories and subcategories.



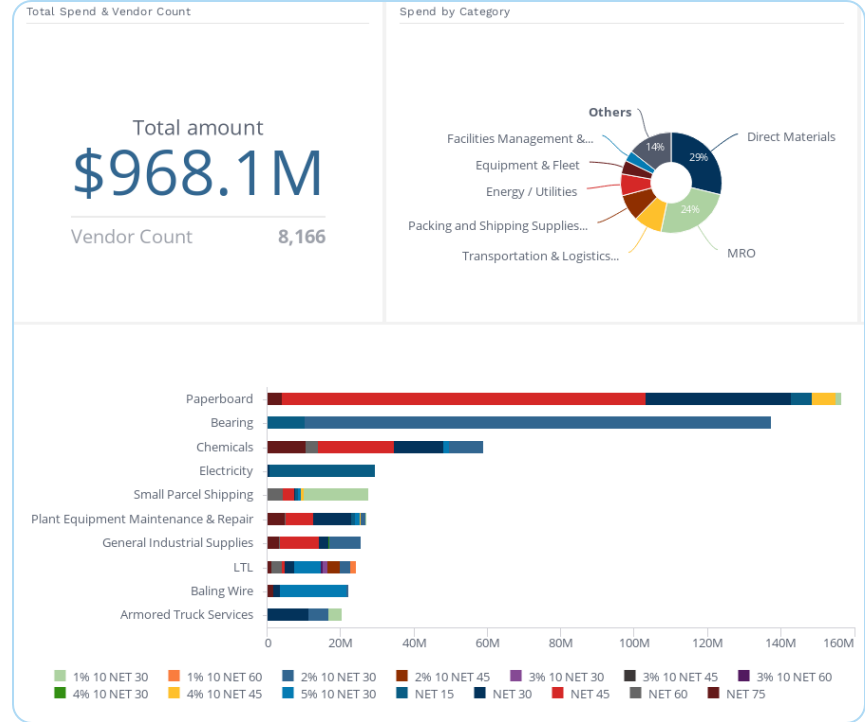
Diversity+

Enrich with supplier diversity designations and track performance.



Analytics

Create powerful custom dashboards using cleansed spend data already available to you in SpendHQ.





Next Up

3:00 pm ET

Workshops 4 & 5



EVENT CENTER – Workshop 4

Beyond Spend Data: Tips and Tricks for Moving Procurement Teams from Reactive to Strategic



COMMUNITY CENTER – Workshop 5

Letting Custom Automation Work For You:
How to Bring Supplier Data in One Place

Workshop #3

Procurement in Execution Mode

Optimizing your Procurement Performance Management Platform



Agenda

1

PPM Additional Values

2

Goals: Savings and Non-Savings Targets

3

Risk Assessment in PPM

Speakers



Shannon Wegner

*Customer Success
Manager*



Obiora Agbim

*Sr. Project Manager,
Delivery Team*



Rausey Mason

*Project Manager,
Delivery Team*

Introduction to PPM Goals

Key Platform Features



Project Tracking

Keep your team and stakeholders up to date



Workflow Management

Request stakeholder and finance approval



Capturing Savings

Financial and non-Financial impact



ESG Tracking

Keep track of Company CSRs



Risk Assessment

Turn supplier risk from vulnerability to advantage

Supplier Risk Capabilities



Identification & Assessment

Know your current spend with risky suppliers, including total amounts across different dimensions



Manage & Track

Take action and drive supplier risk mitigation strategies



Drive Results

Monitor progress towards risk elimination

Thursday, January 16, 2025

INSIGHTS SUMMIT & PRODUCT COUNCIL

Atlanta Tech Village – Buckhead

Beyond Spend Data: Tips and Tricks for Moving Procurement Teams from Reactive to Strategic

Workshop #4

Speakers



Jared Ackerson

Customer Success Manager

North America



Deep Singh

Director, Product Engagement



Agenda

1

Procurement's Impact on PPV

2

Demo of SI Application

Procurement's Strategic Role

The Impact of Measuring PPV



Standard Cost

Standard cost vs actuals provides PPV visibility and root-causes of loss by business, region, or product



Market Index

Market price fluctuations can have major impacts to a business



Tariffs

Measuring external factors to reduce supply chain risk

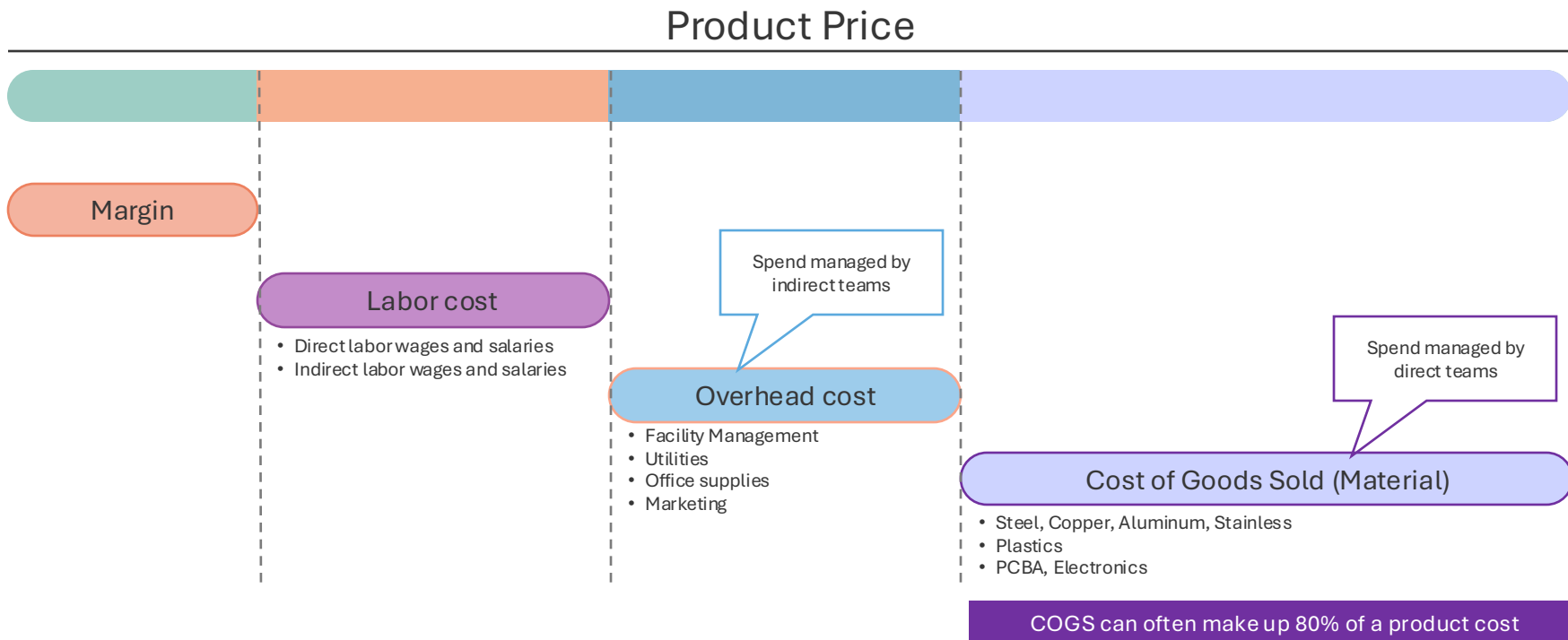


Non-compliant

Businesses buying off contract resulting in increased price

Procurement's Impact on Pricing

Direct and Indirect decisions directly impact the product cost. Here is an example of a product and a high-level breakdown of how the costs are split amongst different teams.



Procurement's Impact on Margin Erosion

Non-compliant spend, market fluctuations, supply chain disruptions, inflation, single sourcing risks, and other external factors can impact profitability.

