CHAPTER 4 WORKSHEET

Vendors & Purchasing

YOUR COUNTERSTEER	POs issued on time, 3-way matches completed, and vendor conversations actually closed out — not just what you paid for the goods.
YOU WALK AWAY WITH	A vendor relationship that protects your margin instead of quietly leaking it.

YOUR NAME	COMPANY	DATE STARTED

Fill this in on screen or print it. Type in any box and save the file to keep your answers. Don't polish it. Fill in what you know, leave the rest blank, and come back to it.

THE CHAPTER IN ONE MINUTE	
COUNTERSTEER	POs issued on time, 3-way matches completed, vendor issues closed out.
MEASURE IT WITH	Percent of POs issued on time; vendor issues closed within ten days.
THE TRAP	Judging vendors by the price you paid instead of how they perform.
THIS WEEK	Build a Vendor Scorecard for your most important supplier.

Your Assignment

Step 3 of the method: Grab the Wheel. Tick each one off as you finish it.

☐	Build one Vendor Scorecard for your single most important supplier — score it honestly.	DONE ON
☐	Confirm your top vendor actually has a written vendor card: terms, discounts, contacts, all of it.	DONE ON
☐	Pick one recurring purchase and decide whether a blanket PO would save you money or time.	DONE ON
☐	Walk your receiving process once this week and check for a real quarantine and inspection step.	DONE ON

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Vendor Scorecard

Score each line 1 to 5. Multiply by the weight to get the weighted score. In Adobe Acrobat or Reader the weighted scores and total fill in for you.

Vendor	
Scored by / date	

Criteria	Wt. %	Score (1–5)	Wtd score
On-time delivery	30%		
Quality / defect rate	30%		
Price competitiveness	20%		
Responsiveness & communication	10%		
Terms & flexibility	10%		
Total	100%		

Result Top tier (4.0–5.0) | Second tier (2.75–3.99) | Third tier (below 2.75)

Scoring guide: 4.0–5.0 top-tier (70%+ of category spend, candidate for a blanket PO). 2.75–3.99 second tier (keep, don't expand exposure until gaps close). Below 2.75 third-tier or non-preferred (requires written justification to continue using).

Gap to close first, and who owns it	

Vendor Card Check

Your top vendor. Is it written down, or does it live in one person's head?

Item	What's on file	Written?
Payment terms		
Discounts and rebates		
Primary contact		
Backup contact		
Lead times		
Date card last updated		

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Blanket PO Decision

One recurring purchase.

Recurring purchase	
How often you order it now	
Annual spend	
What a blanket PO would save (money or time)	

Decision Yes, set one up No, not worth it

Receiving Walk

Walk it once this week. Tick what you actually saw, not what the procedure says.

Check	Seen
A real quarantine area for goods not yet inspected	
An inspection step before goods go into stock	☐
Receiving paperwork checked against the purchase order	
3-way match (PO, receiving record, invoice) before the bill is paid	☐

What I'll fix first

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Find the Driver and Map Your Route

Step 1 and Step 2 of the method. Start with the result you want to move, then work down to the activity someone can change tomorrow morning. Write a person's name, not a department.

Result I want to improve
The number on the statement or report.

Financial driver affecting it
What is pushing that result up or down.

Activity driver my team can change
Something a person does, or doesn't do, every week.

Accountable Owner
One person, by name.

Measure and target
One number you can read in under a minute.

Tuesday review: day and time

Tuesday Test: could someone move this number by doing something differently tomorrow morning? ☐ Yes, it passes ☐ No, pick a different driver

Copy this row to your Countersteer Dashboard (Appendix): Vendors & Purchasing — activity driver, owner, measure and target. Review it for 15 minutes every Tuesday.

Your Commitment

This week
Build a Vendor Scorecard for your most important supplier.

Done by (date)

Who will I tell I've done it?

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