



# MRP Procurement Planning Checklist

## Demand Forecast Alignment

Ensuring procurement plans are aligned with approved demand forecasts.

### Forecast Review Date

### Forecast Accuracy (%)

### Summary of Forecast Deviations

### Forecast Source (Sales, Marketing, Historical)

- ☐ Sales
- ☐ Marketing
- ☐ Historical

### Forecast Adjustment Factor

Justification for Adjustments

Write something...

Supplier Selection & Evaluation

Reviewing supplier performance, capacity, and risk assessment.

Supplier Score (1-10)

Enter a number...

Supplier Capabilities Summary

Write something...

Risk Level (High/Medium/Low)

- ☐ High
- ☐ Medium
- ☐ Low

Supplier Audit Report

 Upload File

Last Evaluation Date

Enter date...

### Supplier References Checked?

Write something...

### Supplier Certification (ISO, etc.)

☐ Yes

☐ No

## Purchase Order Creation & Approval

Verifying PO accuracy, lead times, and budgetary compliance.

### Purchase Order Number

Enter a number...

### Issue Date

Enter date...

### Supplier

☐ Supplier A

☐ Supplier B

☐ Supplier C

### Quantity

Enter a number...

### Unit of Measure

- ☐ Each
- ☐ Box
- ☐ Pallet

### Unit Price

Enter a number...

### Total Amount

Enter a number...

### Delivery Instructions

Write something...

### Required Delivery Date

Enter date...

## Material Sourcing & Negotiation

Optimizing sourcing strategies and negotiating favorable terms.

### Target Cost Reduction (%)

Enter a number...

### Negotiation Strategy Notes

Write something...

### Preferred Supplier (if applicable)

- ☐ Supplier A
- ☐ Supplier B
- ☐ Supplier C
- ☐ No Preference

### Volume Discount Threshold (Units)

Enter a number...

### Terms & Conditions - Key Points Negotiated

Write something...

### Negotiation Completion Date

Enter date...

## Inventory Level Management

Maintaining optimal inventory levels to avoid stockouts or excess stock.

### Safety Stock Level (Current)

Enter a number...

### Reorder Point

Enter a number...

### Average Daily Usage

Enter a number...

### Last Physical Inventory Count Date

Enter date...

### Inventory Turnover Ratio

Enter a number...

### Inventory Accuracy Level (Estimate)

- ☐ < 90%
- ☐ 90% - 95%
- ☐ 95% - 100%
- ☐ > 100%

**Notes on Inventory Discrepancies**

Write something...

**Lead Time Validation**

Confirming supplier lead times are accurate and reliable.

**Standard Lead Time (Days)**

Enter a number...

**Actual Lead Time (Days) - Recent**

Enter a number...

**Discrepancy Explanation (If Applicable)**

Write something...

**Date of Last Lead Time Confirmation**

Enter date...

### Lead Time Source (Supplier Quote, Historical Data, etc.)

- ☐ Supplier Quote
- ☐ Historical Data
- ☐ Internal Calculation
- ☐ Other

### Variance % (Actual/Standard)

Enter a number...

### Lead Time Status (Approved, Pending Review, Rejected)

- ☐ Approved
- ☐ Pending Review
- ☐ Rejected

## Shipping & Logistics Coordination

Managing shipping schedules, carrier selection, and import/export documentation.

### Scheduled Delivery Date

Enter date...

### Estimated Arrival Time

### Tracking Number

Enter a number...



## Shipping Notes/Special Instructions

Write something...

## Shipping Carrier

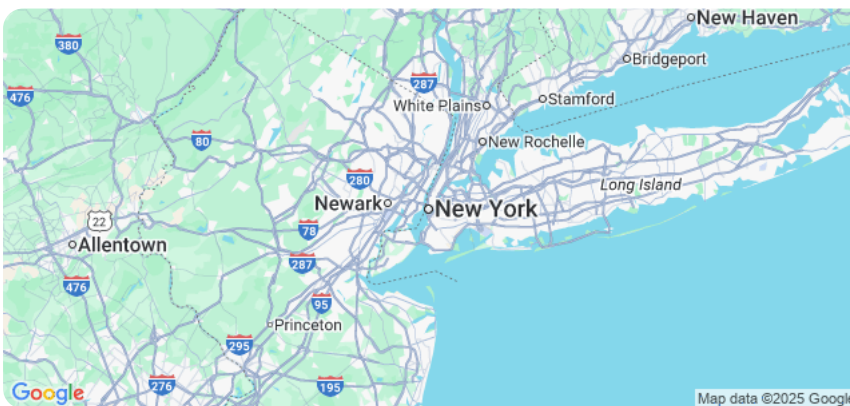
- ☐ UPS
- ☐ FedEx
- ☐ DHL
- ☐ USPS
- ☐ Other

## Container Number (if applicable)

Enter a number...

## Delivery Location (GPS)

[📍 Set My Current Location](#)



# Material Cost Analysis

Tracking and analyzing material costs to identify cost reduction opportunities.

### Current Material Cost per Unit

Enter a number...

### Historical Material Cost (Last Year)

Enter a number...

### Projected Material Cost (Next Year)

Enter a number...

### Explanation of Cost Fluctuations

Write something...

### Variance Analysis (Current vs. Historical)

Enter a number...

### Cost Reduction Initiatives Implemented

- ☐ Supplier Negotiation
- ☐ Value Engineering
- ☐ Alternative Sourcing
- ☐ None

### Estimated Cost Savings (from Initiatives)

Enter a number...

## Supplier Communication & Relationship Management

Maintaining open communication channels and building strong supplier relationships.

### Last Communication Date

Enter date...

### Summary of Recent Discussions

Write something...


### Relationship Status

- ☐ Strategic Partner
- ☐ Key Supplier
- ☐ Standard Supplier
- ☐ Under Review

### Number of Meetings Held (Past 6 Months)

Enter a number...

### Relevant Correspondence (e.g., Contracts, Agreements)

 Upload File

### Satisfaction Level (Supplier)

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

### Key Performance Indicators (KPIs) Discussed

Write something...

## Risk Mitigation & Contingency Planning

Identifying potential supply chain risks and developing mitigation plans.

### Describe potential single-source supplier risks

Write something...

### Estimated financial impact of critical material disruption (USD)

Enter a number...

**Primary backup supplier identified for critical material?**

- ☐ Yes
- ☐ No
- ☐ N/A

**Date of last supplier risk assessment**

Enter date...

**Potential mitigation strategies implemented:**

- ☐ Dual Sourcing
- ☐ Safety Stock Increase
- ☐ Contractual Agreements
- ☐ Geographic Diversification
- ☐ Inventory Buffers

**Details of contingency plan actions in event of disruption**

Write something...