Informatica
from ☁ Salesforce

Workbook

Take Control of Your Supplier Data: A Strategic 5-Step Adoption Guide

Your playbook for building a trusted supplier ecosystem for strategic advantage

Where data & AI come to LIFE

Contents

Executive Summary

Supplier data plays a decisive role in building supply chain resilience and improving operational efficiency. Too often, scattered data and manual procedures slow down supplier onboarding, obscure risk visibility and obstruct compliance efforts.

Informatica's Intelligent Data Management Cloud™ (IDMC) consolidates data management on one unified platform, powering trusted 360-degree views of your suppliers that deliver actionable insights and faster decision-making.

This guide provides clear, practical steps for adopting a unified view, focusing on measurable results, cross-team collaboration and scalable growth. It helps you build a data-driven supplier ecosystem that reduces risk, improves compliance and cuts costs.

Accelerate your supplier data transformation today. Align your strategy with industry best practices and benefit from Informatica's expertise to fast-track adoption and realize business value.

Understanding Supplier Management Challenges

First, let's take a look at what's not working. Many organizations struggle with fragmented supplier data that creates significant blind spots, despite supplier management being critical to success. Supplier information is often trapped in disconnected systems, leading to inconsistent data and poor quality. This fragmentation not only complicates risk assessment but also masks dangerous over-dependencies on single suppliers or geographic regions. Furthermore, without a clear view of the country of origin, organizations are unable to proactively manage the potential cost volatility introduced by tariffs and trade policy shifts, directly impacting profitability.

Manual processes for managing supplier data only worsen the problem. Slow, inefficient workflows prone to human error can lead to costly mistakes, regulatory penalties and operational disruptions. As businesses struggle to adapt to sudden market shifts and ensure compliance, the consequences become increasingly severe.

Recent industry data highlights the stark reality:

- Less than 8% of businesses believe they have full control over their supply chain risks, with many experiencing higher-than-expected losses.[1]

- 86% of organizations name improving internal risk management tools and insights as their top supply chain challenge in 2025.[1]

- Cost pressures also weigh heavily; 64% of businesses report increased costs due to tariffs as their top concern, while 45% highlight direct supply chain disruptions.[2]

[1] WTW Global Supply Chain Risk Report 2025

[2] ICC Pulse Survey 2025

The challenge of visibility persists. Geopolitical instability and economic pressures continue to strain operational teams, making it harder to build resilient and responsive supply chains.

Understanding these challenges is the first step toward building a more robust and agile supplier management strategy. By acknowledging the limitations of siloed data and manual workflows, you can make informed decisions and leverage modern AI-powered data management solutions to reduce risks, improve compliance and drive operational agility.

Access the Informatica Supply Chain Solution Brief and CIO Guide to understand how these insights connect to actionable strategies.

Step 1: Define Strategy, Set Business Objectives, Build Your Team

Set the direction for your supplier management adoption project with a solid strategy. Begin by clarifying your top priorities. Are you focused on reducing supplier onboarding times, strengthening compliance or pursuing more strategic goals? For example, are you considering diversifying your supply base to build resilience and mitigating tariff impacts to protect margins?

- Translate your goals into measurable indicators, such as cycle time reduction, data cleanliness percentage or compliance milestones. It helps to categorize initiatives as foundational (cleaning and integrating data), transformational (automating workflows) or compliance-driven (ensuring regulatory adherence).

- Equally vital is building the right team. Assemble stakeholders across procurement, IT, compliance, finance, data governance and AI specialists with expertise in agent engineering and data science. Define clear roles for data ownership, stewardship and AI governance team members to ensure responsibilities are distributed effectively.

- Consider including autonomous AI agents as a core transformational initiative in your strategic roadmap. These agents can automate complex supplier management workflows and enhance risk assessment by continuously monitoring supplier data and external factors. They also enable proactive decision-making with minimal human intervention.

- Establish a governance framework with defined accountabilities and open communication.

- Plan to engage stakeholders regularly.

Use the self-assessment table below to gauge your program's readiness and identify areas needing attention. This will pinpoint potential risks early and sharpen your launch approach.

Self-Assessment: Strategy and Team Readiness

Instructions: For each area, answer the question honestly based on your current program status. Use the scoring scale below to rate your readiness. This will help you identify strengths and areas needing attention before launching your adoption program.

Area	Guiding Question	Score (0-3)	Notes / Actions (Optional)
Initiative Categorization	Are your initiatives clearly defined, prioritized and aligned with business goals?	0 = Not started 1 = In planning 2 = Partially done 3 = Fully implemented	*Example: List initiatives and their priority levels* **Notes:**
KPI Alignment	Have you established relevant and measurable business KPIs to track success?	0 = No KPIs 1 = KPIs defined but not measurable 2 = KPIs defined and partially measured 3 = KPIs fully defined	*Example: Define KPIs like onboarding time reduction* **Notes:**
Prioritization	Is your resource allocation focused on initiatives with the highest business impact?	0 = No prioritization 1 = Initial prioritization 2 = Partially prioritized 3 = Fully prioritized and aligned	*Example: Allocate resources based on ROI estimates* **Notes:**
Team Composition	Are all key stakeholders across business and IT assigned roles and actively engaged?	0 = No team assigned 1 = Partial team identified 2 = Team assigned but limited engagement 3 = Full team engaged with clear roles	*Example: Confirm stakeholder list and engagement plan* **Notes:**
Communication Planning	Is there a clear and tailored communication plan to keep all teams informed and involved?	0 = No plan 1 = Draft plan exists 2 = Plan partially executed 3 = Comprehensive plan actively followed	*Example: Schedule regular updates and feedback sessions* **Notes:**

Step 2: Select Pilot, Plan Roadmap, Manage Change

Choosing the right pilot project is a critical decision that can determine the trajectory of your entire supplier management initiative. A successful pilot builds momentum, proves value and creates internal champions.

Focus on projects with strong executive sponsorship, a clear business need and a manageable scope that can deliver measurable results quickly. Good candidates for a pilot often include processes plagued by manual work, such as supplier onboarding or compliance verification, where improvements can be easily quantified.

A strategic way to evaluate potential pilots is to score them against key criteria. This helps ensure you select a project with the highest chance of success and impact.

Simple Pilot Evaluation Scorecard

Instructions: *For each question below, rate your pilot project on a scale of 1 to 5, where 1 means "Not Ready/Strong," and 5 means "Fully Ready/Strong." Add the scores to get a total. The higher the total, the better the pilot candidate.*

Evaluation Area	Guiding Question	Score (1-5)				
Leadership Support	Do key executives actively support and sponsor this project?	1	2	3	4	5
Clear Business Benefit	Will this project significantly improve operations or reduce risk?	1	2	3	4	5
Data Readiness	Is the necessary supplier data available and reliable?	1	2	3	4	5
Impact Measurability	Can we measure clear results within a short timeframe?	1	2	3	4	5
Scope Feasibility	Is the project's scope realistic, given resources and time?	1	2	3	4	5
Agentic AI Fit	Does the pilot enable autonomous AI agent collaboration and decision-making within supplier management?	1	2	3	4	5
Total Score:						

Construct Your Phased Adoption Roadmap

A phased roadmap breaks down a large transformation into manageable stages, allowing your organization to build capabilities progressively. This approach minimizes risk and helps teams adapt more smoothly.

1. Foundation: Establish a Single Source of Truth

The first phase focuses on centralizing and cleansing your core supplier data. Using AI-powered tools within Informatica IDMC, you can automate the process of identifying duplicates, standardizing formats and correcting inaccuracies across different systems. The goal is to create a reliable, trusted master record for every supplier, which serves as the bedrock for all future enhancements.

2. Enrich and Govern: Add Context and Control

Once you have a clean data foundation, you can begin to enrich it with additional data layers. This includes integrating third-party data for risk screening, compliance verification and ESG (environmental, social, and governance) performance. Additionally, establish data governance policies, stewardship workflows and data trust frameworks that are critical to supporting reliable performance of autonomous AI agents operating at scale.

3. Automate and Scale: Drive Efficiency and Insight

With trusted and enriched supplier profiles, automate key business processes. Design your automation with agentic AI principles in mind, enabling multiple autonomous agents to collaborate, communicate via open standards (e.g., model context protocol) and make real-time decisions. Embed agent orchestration capabilities and continuous monitoring within your roadmap from the start to ensure transparency, governance and scalability.

In Practice

⚠ **Challenge**

A global consumer goods company faced significant delays and operational risks due to fragmented supplier data maintained across multiple ERPs and spreadsheets. Supplier onboarding was manual and took several weeks, while risk and compliance visibility were limited, exposing the company to potential supply chain disruptions and regulatory penalties.

💡 **Solution**

To address these challenges, the company launched a pilot leveraging Informatica's Supplier 360 within the IDMC. The pilot adopted a phased roadmap approach:

- **Unify & Cleanse:** Consolidated and cleansed supplier records from disparate systems using Supplier 360's master data management capabilities to create a unified, trusted supplier profile.

- **Enrich & Govern:** Integrated third-party data for automated risk and compliance screening, and established stewardship workflows to ensure ongoing data quality and regulatory compliance.

- **Automate & Scale:** Automated supplier data consolidation and risk monitoring processes, enabling enhanced operational efficiency and proactive identification of supply chain risks.

◇ **Outcome**

Within three months, the pilot achieved a 75% reduction in supplier onboarding time and significantly improved risk visibility. Automated data quality controls minimized errors, ensuring compliance with industry standards. The pilot generated strong executive sponsorship and cross-functional enthusiasm, paving the way for a successful enterprise-wide rollout.

Step 3: Execute Pilot and Drive Adoption

The pilot phase is where your strategy meets reality. Success depends not only on technology but also on how well your teams use the new tools. This is your chance to demonstrate real value, build confidence and create advocates for a wider rollout.

Best Practices

Equip and Engage Your Team

Effective adoption requires targeted enablement. Deliver role-specific training for data stewards, procurement teams and executives so each group understands how Supplier 360 improves their work. Keep the pilot group engaged with consistent communication. Share weekly progress updates and host Q&A sessions to build momentum. Two-way communication is critical for making users feel heard and invested in the outcome.

Manage New Workflows in Real-Time

Your pilot will introduce new activities like managing data product requests and applying data classifications. Data stewards are on the frontline and must be empowered to respond quickly. Their responsiveness builds trust and proves the system's efficiency. A slow process can derail user confidence before the program shows its full value.

Monitor Adoption and Gather Feedback

To measure success, you must track both what is happening and why. Use IDMC dashboards to monitor concrete metrics like user activity data, requests fulfilled and issue resolution times. These numbers provide hard evidence of performance. At the same time, gather qualitative feedback through short surveys and interviews to understand the user experience. Ask about changes to daily workloads or remaining challenges. This feedback is invaluable for identifying hidden issues before a full-scale deployment.

Your Pilot Scorecard

Use this self-assessment table to track your pilot's performance against its primary goals. It will serve as a clear, data-backed record of your progress.

Metric	Goal	Current Status	Notes / Actions
Supplier Onboarding Time	Reduce by 50%		*Track average time from initiation to final approval.* **Notes:**
Data Quality Score	Above 95%		*Use IDMC data quality dashboard to monitor accuracy and completeness.* **Notes:**
Compliance Adherence Rate	Meet targets		*Confirm adherence to new risk and compliance checks.* **Notes:**
User Satisfaction	High (e.g., >8/10)		*Measure via post-pilot surveys and direct feedback.* **Notes:**
Cost Savings	Quantified ROI		*Calculate savings from reduced manual effort and error correction.* **Notes:**

The **Experience Lounge** lets you explore Informatica's capabilities through interactive demos of features like automated onboarding and real-time data quality dashboards, demonstrating how they drive success and support solutions like IDMC for supplier management and **supply chain optimization**.

Step 4: Measure Success, Optimize and Scale

Measuring the success of your pilot is essential for validating your investment, securing broader support and guiding your expansion strategy. It's not just about hitting targets; it's about learning and adapting. Use a combination of hard numbers and human feedback to create a complete picture of your progress.

Turn Measurement into a Conversation

Instead of just reporting numbers, use them to start conversations. Informatica's dashboards can help you visualize trends in key metrics, making it easier to spot both wins and potential problems quickly.

Key Performance Indicators to Track:

Quantitative Metrics (The "What"):

- **Onboarding Time:** The average time to onboard a new supplier, from initial contact to fully transactable.

- **Data Quality Score:** The percentage of supplier records that are complete, accurate and free of duplicates.

- **Compliance Adherence:** The rate of compliance with key regulations (e.g., ESG, financial screening).

- **Operational Cost Savings:** Reduced manual effort, fewer errors and lower operational overhead.

- **Supplier Concentration Risk:** Percentage of spend tied to a single supplier or region for critical components.

- **Tariff Impact Reduction:** Quantified cost avoidance by shifting sourcing away from high-tariff regions.

- **Time to Find and Qualify Alternate Supplier:** The average time it takes to identify and onboard a viable alternative for a high-risk supplier.

Qualitative Metrics (The "Why"):

- **User Confidence:** How much do your procurement, finance and compliance teams trust the supplier data they use?

- **Stakeholder Engagement:** Are users actively using the new system and providing feedback?

- **Team Satisfaction:** How has the new process impacted the daily work and morale of the teams involved?

Interactive Success Review

Use this checklist during your pilot review meetings to facilitate discussion and identify next steps.

Success Area	Discussion Prompt	Action / Next Step (Your team's notes)
Pilot Goals	Did we meet the original goals for the pilot? If not, what were the blockers?	
User Feedback	What is the direct feedback from users? What are their biggest pain points and successes?	
KPI Performance	Which KPIs showed the most improvement? Which ones lagged and why?	
Unexpected Value	Did we uncover any unexpected benefits, such as new insights or process improvements?	

From Optimization to Scaling

Use the insights from your pilot to refine workflows and close any process gaps. Once you have a proven, optimized model, you can prepare to scale. This involves:

1. Establishing a Sustainable Operating Model:

Define clear roles, responsibilities and governance policies for managing supplier data across the enterprise. This ensures consistency and accountability as you expand.

2. Fostering a Data-Driven Culture:

Move beyond the pilot group by creating forums for knowledge sharing, celebrating successes and providing ongoing training.

3. Maintaining Momentum:

Continue to use feedback channels and usage analytics to guide the expansion and demonstrate ongoing value.

> Accelerate your supplier management transformation with tailored scaling strategies, expert guidance, interactive tools and best practices. Access personalized resources to build an actionable roadmap that drives enterprise-wide adoption and measurable business value.
>
> Start your journey now with **Informatica's Success Portal.**
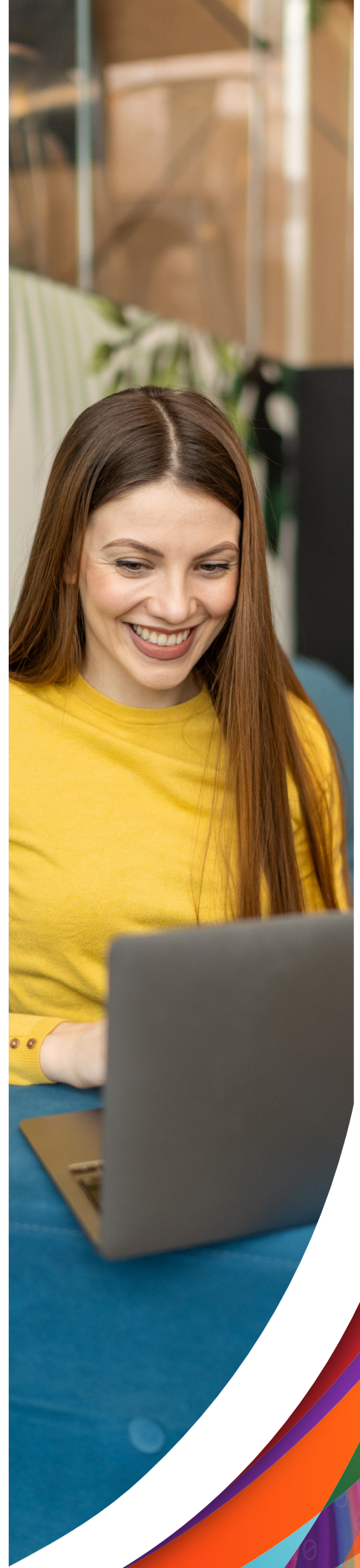
Step 5: Build the Business Case and Secure Executive Support

A compelling business case does more than ask for funding; it tells a story of transformation. It connects your supplier data management initiative directly to strategic business goals like operational efficiency, risk mitigation, and improved profitability. To get executive buy-in, you need to speak their language: value, return on investment (ROI), and strategic impact.

Leverage Informatica's Business Value Assessment (BVA)

You don't have to build your business case from scratch. Informatica's **Business Value Assessment (BVA)** is an advisory service designed to help you identify, quantify and articulate the value of your data management investment. Through interactive workshops, our advisory consultants work with your stakeholders to:

- **Identify and Prioritize Opportunities:** Pinpoint the highest-impact areas for improvement, from reducing supplier onboarding effort to improving spend with preferred suppliers.

- **Quantify Potential Value**: Based on your organization's specific data, develop a financial model that projects low, medium and high ROI scenarios.

- **Build a Strategic Roadmap:** Create a clear plan that outlines short-term wins and long-term value realization.

Make It Interactive: Calculate Your Potential Savings

Use the simple calculator below with your team to create a preliminary estimate of efficiency gains. This exercise helps make the value tangible and prepares you for a deeper analysis with the BVA team.

Part 1: Quantify Potential Efficiency Gains

- **Supplier Onboarding:**
  - *Current State:* How many hours do your teams spend manually onboarding a single supplier?
  - *Your Estimate:* ___ hours/supplier × ___ new suppliers/year = ___ potential annual hours saved.

- **Data Correction:**
  - *Current State:* How much time is spent manually finding and fixing duplicate or inaccurate supplier records each month?
  - *Your Estimate:* ___ hours/month × 12 = ___ potential annual hours saved.

# Step 5: Build the Business Case and Secure Executive Support (Continued)

Part 2: Connect to Strategic Value

Beyond saving hours, think about the strategic impact. Use these prompts to frame the broader business value:

- **Risk Reduction:** "By automating compliance checks, we can reduce our potential exposure to regulatory fines by an estimated ___%."

- **Improved Margins:** "With better visibility into supplier performance, we can improve our negotiating position and potentially increase margins by ___."

- **Spend Optimization:** "By consolidating spend with preferred suppliers, we project we can reduce procurement costs by ___%."

- **Supply Chain Resilience:** "By identifying and qualifying alternative suppliers in different regions, we can reduce our revenue risk from a single-source disruption by an estimated $___ million."

- **Tariff & Duty Optimization:** "With complete visibility into our suppliers' manufacturing locations, we can strategically shift sourcing to avoid an estimated ___% in tariffs, directly protecting our gross margins.

Presenting Your Case

When you meet with executives, lead withstrategic outcomes. Frame the discussion around how mastering supplier data enables the business to become more agile, resilient, and profitable. Use the outputs from the BVA and your internal calculations to provide a credible, data-backed narrative.
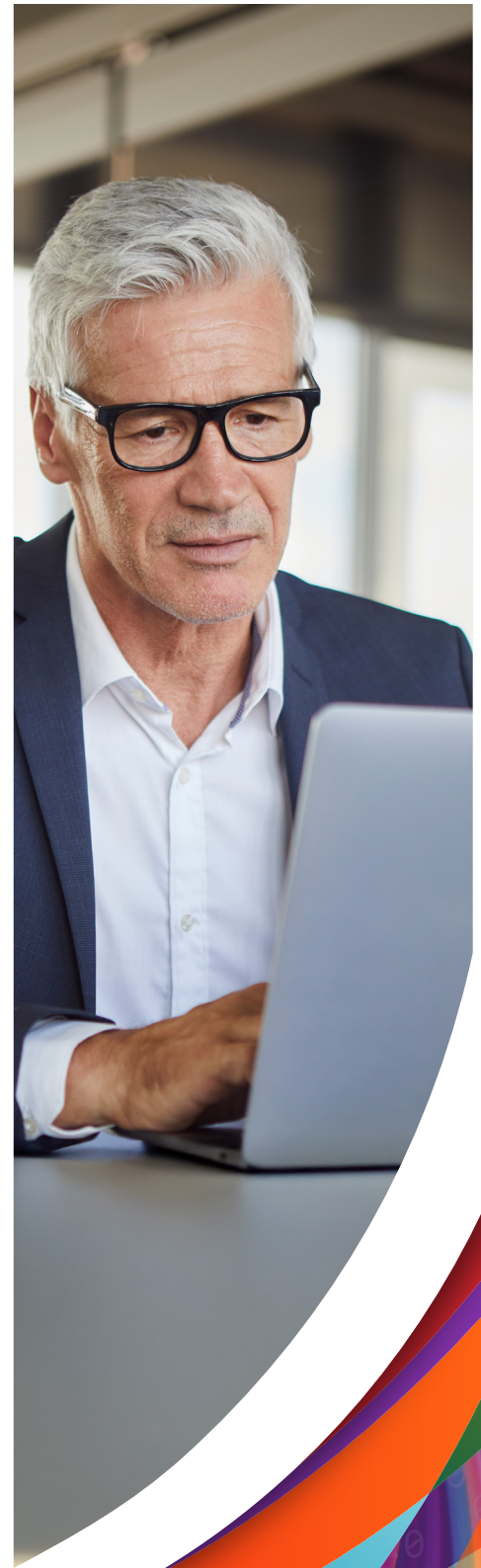
Congratulations!

Congratulations on advancing your supplier data management. This guide has helped you address data silos, improve risk visibility, speed supplier onboarding and build a foundation for a resilient, efficient supplier ecosystem powered by trusted data key to staying agile and competitive in today's supply chains.

Your Supplier 360 journey with Informatica's **Intelligent Data Management Cloud (IDMC)** is underway. The platform scales with your organization, enabling faster decisions and smoother operations. Begin with focused pilots that provide measurable results, engage stakeholders to build momentum and expand your successes confidently.

Accelerate your progress with workshops, personalized demos or pilots guided by Informatica experts. Strengthen supplier management and drive growth with Informatica IDMC and Supplier 360.

Start your transformation today.
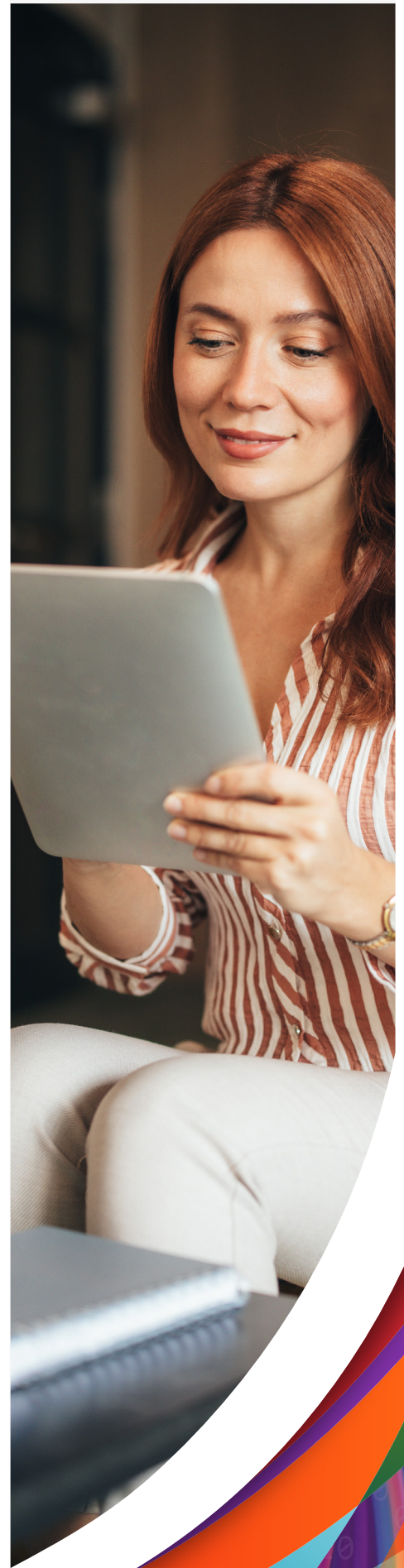
About Us

About Informatica

Informatica from Salesforce is a leader in AI-powered enterprise cloud data management. Its Intelligent Data Management Cloud (IDMC) platform enables organizations to connect, manage and unify AI-ready data across the enterprise. With capabilities spanning data cataloging, integration, governance, quality, privacy, metadata management and master data management, Informatica supports a broad partner ecosystem and helps customers unlock the full value of their data and AI initiatives.

About Salesforce

Salesforce is the #1 AI CRM, empowering companies to connect with their customers in a whole new way through the power of artificial intelligence, data, and trust. For more information about Salesforce (NYSE: CRM), visit: **www.salesforce.com**.

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