

SOW & Vendor Onboarding Workflow

End-to-End Contract, Compliance & Invoice Management

Business Operations · Vendor Management · Procurement

Designed and operationalized for enterprise orgs including Pinterest, Blue Shield of California Foundation, and IndyThink clients. Manages 20+ vendor relationships concurrently with full audit trail and compliance documentation.

1 INTAKE	2 VETTING	3 SOW / CONTRACT	4 ONBOARDING	5 INVOICING	6 COMPLIANCE
<ul style="list-style-type: none">● Receive vendor request● Complete intake form● Assign request ID● Route to stakeholder● Log in tracking sheet	<ul style="list-style-type: none">● Legal review initiated● Security assessment● Finance pre-approval● Check preferred vendors● Compliance check	<ul style="list-style-type: none">● Draft SOW with legal● Define deliverables & milestones● Set payment milestones● Route for signatures● File executed contracts	<ul style="list-style-type: none">● Create vendor in system● Set up PO in Coupa/Procure● Share access credentials● Brief internal team● Set renewal reminders	<ul style="list-style-type: none">● Receive invoice● Match to PO & SOW● Route for approval● Submit to AP team● Reconcile & close	<ul style="list-style-type: none">● Track SLA performance● Maintain audit records● Renew or terminate● Annual vendor review● Archive documentation

KEY STAKEHOLDERS & HANDOFFS

- Requestor / BU Lead:** Initiates request, provides business justification, signs off on deliverables
- Legal:** Reviews contracts, flags risk, executes NDAs and MSAs
- Finance / AP:** Pre-approves budget, processes invoices, reconciles payments
- Procurement:** Manages PO creation, vendor system setup, policy compliance
- Jacqueline (Ops Lead):** Owns end-to-end tracking, coordinates handoffs, maintains audit trail

TOOLS & SYSTEMS

- Salesforce CRM
- Coupa (PO/Procurement)
- Ironclad (Contracts)
- Google Sheets (Tracking)
- Jira / Workfront
- DocuSign
- NetSuite / Oracle
- Slack (Comms)

KEY OUTPUTS

- Vendor master tracker
- Executed SOW + contract library
- PO log with approval trail
- Invoice reconciliation report
- Compliance audit archive
- Renewal calendar with alerts