

Purchase Order Implementation Checklist

Rolling Out POs in a Mid-Market Company



► Step 1: Document & Educate (Weeks 1-2)

What to Do:

- Map your current purchasing process and pinpoint where things go wrong (e.g. surprise invoices, slow approvals, manual costs).
- Collect data on pain points – “mystery” invoices, time lost, fraud risks – to build a case for change.
- Present this evidence to leadership to secure buy-in.

Why It Matters:

Executive backing and a clear ROI story make the initiative strategic, not administrative.

ProSpend Advantage:

Use [ProSpend's ROI calculators](#) and case studies to quantify savings (e.g. cutting invoice processing costs from ~\$30 to ~\$9).

Success Tip:

Appoint a senior sponsor (like the CFO) to champion the “No PO, No Pay” mandate from day one.

► Step 2: Set a Simple PO Policy (Weeks 3-4)

What to Do:

- Define clear rules (e.g. “All purchases over \$500 require a PO”).
- Adjust thresholds to suit your business and avoid over-bureaucracy.
- Outline approval workflows by spend, department, or project.
- Communicate the policy to everyone and make it easy to follow.

Why It Matters:

A clear, balanced policy prevents confusion and ensures accountability before spend happens.

ProSpend Advantage:

Configure your policy directly in ProSpend – thresholds, approval routes, and spend limits are automated and enforced in real time.

Success Tip:

Keep your PO policy one page long. Use simple examples to show how it works in practice.



► **Step 3:** Choose User-Friendly Technology (Weeks 5-8)

What to Do:

- Select a modern, cloud-based tool that's intuitive, mobile, and integrates with your accounting/ERP system.
- Avoid complex legacy systems that slow adoption.
- Involve end users (like department admins) in demos and trials.

Why It Matters:

Adoption depends on ease of use and visibility across all spend – not just finance.

ProSpend Advantage:

ProSpend integrates with 30+ AU/NZ systems (MYOB, Xero, Pronto, etc.), supports unlimited users, and is designed for local compliance (GST, ABN checks).

Success Tip:

Choose the software your team wants to use. If they can raise a PO in under a minute, you've found the right fit.

► **Step 4:** Pilot, Train & Roll Out (Weeks 9-12)

What to Do:

- Start small – pilot one department or purchase category.
- Gather feedback and fine-tune approval flows.
- Train users with short, practical demos.
- Once the pilot works, scale across departments within weeks.

Why It Matters:

A structured pilot helps identify friction points early and builds confidence before full rollout.

ProSpend Advantage:

Most employees can self-learn in one short session. ProSpend's intuitive design, in-app tips, and local support make scaling simple.

Success Tip:

Celebrate early wins – highlight faster approvals or better visibility to drive buy-in company-wide.



► **Step 5: Enforce & Support (Week 12 onwards)**

What to Do:

- Implement “No PO, No Pay” and stand by it.
- Track compliance, highlight improvements, and reward good practice.
- Regularly review feedback and adjust policies or thresholds.
- Reinforce training with quick refreshers and FAQs.

Why It Matters:

Consistency builds a proactive spend culture and reduces invoice exceptions and risk.

ProSpend Advantage:

ProSpend automatically flags invoices without a matching PO, tracks compliance in real time, and manages exception workflows for urgent spend.

Success Tip:

Lead from the top – executives must follow the same process. Combine enforcement with support to make the change sustainable.

► **Final Note:**

Rolling out POs isn't about adding red tape. It's about giving finance leaders **visibility**, **control**, and **confidence** before money leaves the business.

Need expert guidance?
ProSpend helps mid-market teams implement custom PO workflows in weeks, not months.



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