PT Procurement Tactics

Claude for Excel

AI That Actually Understands Your Spreadsheets

8 ready-to-use prompts that turn Claude's Excel add-in into a procurement powerhouse. From spend analysis to supplier scorecards, structured prompts, real results, and zero formatting battle.

For Procurement Professionals Who Want AI That Works Inside Their Spreadsheets

Most procurement teams already live in Excel. Spend cubes, supplier scorecards, bid comparisons, contract trackers, and budget models. The spreadsheet is where procurement work happens. The problem with AI tools so far has been the disconnect. You copy data out of Excel, paste it into a chat window, lose the structure, and get a generic summary back.

Claude for Excel changes that. It sits inside your spreadsheet as a sidebar, reads your entire workbook (every tab, every formula, every dependency), and works with your actual data in place. Ask it to analyse your spend, and it cites specific cells. Ask it to build a comparison, and it creates it in your workbook. Ask it to fix a broken formula chain, and it traces the logic across tabs.

These 8 prompts are designed specifically for procurement professionals using Claude for Excel. Each one follows a structured prompt engineering framework covering role definition, objective, constraints, and output format. Unstructured prompts produce unstructured results. The structure is what makes the difference between a generic AI answer and a procurement-grade analysis.

Every prompt includes bracketed fields for you to customise to your specific situation. Copy the prompt, fill in the brackets, paste it into the Claude sidebar in Excel, and let it work with the data that is already open in front of you.

What Makes Claude for Excel Different

Claude for Excel reads your entire workbook, not just the cell you are pointing at. It understands nested formulas, multi-tab dependencies, named ranges, and pivot table structures. When it explains something, it cites specific cells. When it modifies something, it preserves all formula dependencies and highlights every change.

You can set permanent Instructions in the sidebar covering your role, your company, your preferred output format, and procurement terminology. This persists across all conversations. You can also use Skills, which are saved prompts that run as one-click actions, so your entire team can run the same analysis with consistent methodology.

It works with Excel 2016+ on Windows, Mac, and Excel on the web. Installation takes five minutes.

HOW TO GET STARTED

Install the add-in, sign in, open your procurement spreadsheet, and paste a prompt from below into the Claude sidebar.

REQUIREMENTS

- Claude Pro subscription ($20/month) or higher
- Excel 2016+ (Windows, Mac, or Web)
- Claude for Excel add-in installed

SETUP STEPS

STEP 1

Get the Add-in

Go to the Microsoft Marketplace listing for Claude for Excel and click 'Get it now.'

STEP 2

Activate in Excel

Open Excel. Go to Home → Add-ins (Windows) or Tools → Add-ins (Mac). Find 'Claude by Anthropic' and activate it.

STEP 3

Sign In and Configure

Sign in with your Claude account in the sidebar. Set your Instructions: your role, company, and preferred output style.

STEP 4

Use a Prompt

Open your procurement spreadsheet. Copy a prompt below, fill in the bracketed fields, and paste it into the Claude sidebar.

THE 8 PROMPTS AT A GLANCE

The 8 Procurement Prompts

The 8 Procurement Prompts for Claude in Excel

Each prompt is structured with role definition, objective, constraints, and output format. Fill in the **[BRACKETED]** fields to customise each prompt to your situation, then paste it directly into the Claude sidebar in Excel.

ABOUT DOCUMENT INPUTS

Each prompt card shows a **DOCUMENT INPUTS** label listing the data Claude needs. Just open the relevant spreadsheet in Excel before using the prompt — Claude for Excel reads your open workbook automatically.

PROMPT 1

Spend Analysis & Category Breakdown

USE CASE

You have a spend export open in Excel — from SAP, Coupa, Oracle, or even a manually maintained tracker. You need to understand the distribution: who you are spending with, where the concentration is, and where the maverick spend sits. This prompt asks Claude to analyse the data that is already open in your workbook.

DOCUMENT INPUTS

Spend data (AP export, PO data, or spend cube)

TIME SAVED

2 to 4 Hours

PROMPT (PART 1/3)

```
──── ROLE ────
You are a senior spend analyst with expertise in procurement spend
classification, Pareto analysis, and maverick spend identification.

──── OBJECTIVE ────
Analyse the spend data in this workbook. Identify the total spend, top suppliers
by value and transaction count, spend distribution by [CATEGORY / COST CENTRE /
BUSINESS UNIT], and any transactions with suppliers that are not on the approved
supplier list in [TAB NAME / "N/A if no approved list is available"].

──── CONTEXTUAL DETAILS ────
- The spend data is on the tab called [TAB NAME]
- Columns include: [DESCRIBE – e.g., "Supplier Name in column B, PO Value in
column F, Cost Centre in column D, Date in column A"]
- Time period covered: [e.g., "January 2025 – December 2025"]
- Approved supplier list is on tab [TAB NAME] (or "not available — skip maverick
spend analysis")
- I am particularly interested in: [e.g., "identifying our top 20 suppliers and
whether we have concentration risk," "finding off-contract spend," "breaking down
indirect vs direct spend"]
```

PROMPT (PART 2/3)

——— CONSTRAINTS & ASSUMPTIONS ———

- Work only with the data in this workbook — do not estimate or assume values
- Flag any data quality issues you find (blanks, duplicates, inconsistent supplier names that may be the same entity)
- Cite specific cells and ranges in your analysis
- If supplier names appear inconsistent (e.g., "Acme Corp" and "ACME Corporation"), flag them as likely duplicates

——— OUTPUT FORMAT ———

Create a new tab called "Spend Analysis" with:

1. Summary table: total spend, supplier count, transaction count, average PO value
2. Top 20 suppliers by spend (with % of total)
3. Spend by **[CATEGORY / COST CENTRE]** (with % of total)
4. Pareto chart data (cumulative % of spend by supplier rank)
5. Maverick spend flag (transactions with non-approved suppliers, if list provided)
6. Data quality issues log

——— ABOUT ME ———

I am a **[PROCUREMENT ROLE — e.g., "Category Manager" / "Head of Procurement"]** at **[COMPANY TYPE]**. I manage approximately **[SPEND VOLUME]** in annual procurement spend across **[SCOPE — e.g., "indirect categories" / "all categories"]**. This analysis will be used to **[PURPOSE — e.g., "build a category strategy" / "prepare a savings business case" / "brief leadership on spend distribution"].**

——— AUDIENCE ———

Primary: My procurement team who will use this to prioritise categories. Secondary: Finance, who will want to validate the numbers and methodology. The analysis must be traceable to source data in this workbook.

PROMPT (PART 3/3)

DO'S

Use Pareto analysis to show spend concentration — 80/20 is the starting point. Flag data quality issues prominently — bad data leads to bad strategy. Identify quick wins (obvious consolidation opportunities) separately from strategic opportunities. Cite specific cells, rows, and tab references for every finding.

DON'TS

Do not present generic procurement advice — every finding must reference this specific data. Do not ignore small-value high-frequency transactions — they often signal process problems. Do not average across categories when the distribution is heavily skewed. Do not combine suppliers that look similar but may be distinct legal entities — flag them for me to confirm.

CLARIFYING QUESTIONS

Before producing any output, ask me 5 targeted follow-up questions. Choose questions that surface information you cannot infer from the data in this workbook alone — information that will meaningfully change what you produce. Do not begin the analysis until I have answered.

TONE

Analytical and precise. Cite cells. Flag anomalies clearly.

LENGTH

Full analysis. Summary table concise. Detailed breakdowns comprehensive. Estimated output: new tab with 5–8 structured tables plus commentary.

PROMPT 2

Supplier Bid Comparison Matrix

USE CASE

You have received quotes from multiple suppliers — each on a separate tab or in separate columns. You need a normalised comparison across price, payment terms, lead times, and compliance. This prompt asks Claude to read all bid data in the workbook and build a structured comparison matrix.

DOCUMENT INPUTS

Supplier quotes/bids (separate tabs or columns)

TIME SAVED

3 to 5 Hours

PROMPT (PART 1/3)

```
──── ROLE ────
You are a senior procurement analyst specialising in competitive bid
evaluation and total cost of ownership modelling.

──── OBJECTIVE ────
Compare the supplier bids in this workbook. Build a normalised comparison
matrix across all pricing components, payment terms, delivery terms,
SLAs, and any other evaluation criteria present in the data. Calculate a
total cost of ownership for each supplier and produce a weighted score if
I provide evaluation criteria weights.

──── CONTEXTUAL DETAILS ────
- Supplier bids are on tabs: [LIST TAB NAMES – e.g., "Supplier A,
Supplier B, Supplier C"]
- The RFQ specification or requirements are on tab: [TAB NAME / "not
included – compare based on what suppliers have quoted"]
- Key comparison dimensions: [e.g., "unit price, tooling costs, MOQ, lead
time, payment terms, warranty period, delivery terms"]
- Evaluation weights: [e.g., "Price 40%, Quality 25%, Delivery 20%,
Commercial Terms 15%" / "use equal weights"]
- Currency: [e.g., "all in EUR" / "mixed currencies – convert to EUR
using rates on tab X"]
```

PROMPT (PART 2/3)

CONSTRAINTS & ASSUMPTIONS

- Normalise pricing to a common basis (same quantity, same period, same currency) before comparing
- Flag any line items where a supplier has not quoted or has quoted with exceptions
- Do not fill gaps — mark them as "Not Quoted" or "Exception"
- Cite the source cells for every data point in the comparison

OUTPUT FORMAT

Create a new tab called "Bid Comparison" with:

1. Side-by-side pricing comparison table (normalised)
2. Total cost of ownership calculation per supplier (3-year if data allows)
3. Non-price comparison table (terms, SLAs, delivery, warranty)
4. Weighted scoring matrix (if weights provided)
5. Compliance check (items not quoted, exceptions, deviations from spec)
6. Recommendation summary with rationale

ABOUT ME

I am a **[PROCUREMENT ROLE]** at **[COMPANY TYPE]**. This bid comparison is for **[CATEGORY / PROJECT]**. The award decision will be reviewed by **[APPROVER — e.g., "CFO" / "Procurement Committee" / "Category Director"]**. The total contract value is approximately **[AMOUNT]** over **[DURATION].**

AUDIENCE

Primary: The evaluation team who will scrutinise the methodology. Secondary: Leadership who need a clear recommendation with evidence. The comparison must be defensible and traceable to source cells.

DO'S

Normalise pricing to a common basis before comparing — same quantity, same period, same currency. Flag every gap, exception, and non-standard term. Highlight where one supplier materially outperforms others on a specific dimension. Calculate total cost of ownership, not just unit price.

PROMPT (PART 3/3)

DON'TS

Do not rank on price alone — total value matters. Do not fill data gaps with assumptions — mark as "Not Quoted." Do not produce a neutral comparison that avoids a recommendation. Do not ignore non-standard payment terms or hidden costs in the fine print.

CLARIFYING QUESTIONS

Before producing any output, ask me 4 targeted follow-up questions. Choose questions that surface information you cannot infer from the bid data in this workbook alone — information that will meaningfully change the comparison. Do not begin the analysis until I have answered.

TONE

Neutral and evidence-based. Present findings, flag gaps, cite cells. Let the data drive the recommendation.

LENGTH

Full comparison. All suppliers included. Recommendation section: concise with clear rationale. Estimated: 3–5 new structured tables plus recommendation summary.

PROMPT 3

RFP/RFQ Response Scoring Engine

USE CASE

You have compiled RFP/RFQ responses into a workbook — either as raw data or as a summary you have started building. You need to score each supplier against your evaluation criteria, flag non-compliant responses, and produce output ready for your procurement committee.

DOCUMENT INPUTS

RFP/RFQ response data | Evaluation criteria with weights

TIME SAVED

4 to 6 Hours

PROMPT (PART 1/3)

```
═══ ROLE ═══
You are a senior procurement analyst specialising in RFP/RFQ evaluation,
scoring methodology, and supply risk assessment.

═══ OBJECTIVE ═══
Evaluate the supplier responses to this RFP/RFQ. Apply the evaluation
criteria and scoring methodology provided. Score each supplier on each
criterion, flag failures against mandatory requirements, and produce a
recommendation with audit trail showing how each score was derived.

═══ CONTEXTUAL DETAILS ═══
- RFP/RFQ document or requirements are on tab: [TAB NAME]
- Evaluation criteria and weights are on tab: [TAB NAME / "use the
following weights: [SPECIFY]"]
- Supplier responses are on tabs: [LIST TAB NAMES — e.g., "Supplier A
Response, Supplier B Response, Supplier C Response"]
- Mandatory requirements (must-haves): [LIST — e.g., "ISO 9001
certification, delivery within 30 days, minimum 3-year warranty"]
- Scoring scale: [e.g., "1–5, where 1=Non-Compliant, 5=Exceeds
Expectations"]
```

PROMPT (PART 2/3)

CONSTRAINTS & ASSUMPTIONS

- Score only what is evidenced in each supplier's response data — do not rely on external reputation
- Apply mandatory requirements as pass/fail before applying weighted scoring
- For each score assigned, cite the specific section of the supplier response that justifies it
- Mark "Not Addressed" separately from "Non-Compliant" — they are different findings
- Do not adjust scores to produce a preferred outcome

OUTPUT FORMAT

Create a new tab called "RFP Evaluation" with:

1. Pass/fail matrix on mandatory requirements (all suppliers)
2. Detailed scoring matrix (all criteria, all suppliers, with evidence citations)
3. Weighted score summary per supplier
4. Close-call analysis (where suppliers score within 5 points of each other)
5. Audit trail (for each score, the specific response text that justifies it)
6. Committee recommendation with rationale

ABOUT ME

I am a **[PROCUREMENT ROLE]** at **[COMPANY TYPE]**. This evaluation is for **[CATEGORY / PROJECT]** with an estimated annual value of **[AMOUNT]**. The award recommendation will be presented to **[AUDIENCE — e.g., "procurement committee" / "CFO and COO"]**. I need the scoring to be audit-defensible.

AUDIENCE

Primary: Procurement committee who will make the award decision based on this scoring. Secondary: Internal audit who may review the evaluation methodology. The scoring must be objective, evidence-based, and traceable to the response data.

PROMPT (PART 3/3)

DO'S

Apply pass/fail criteria first and flag failures prominently. Justify every score with a specific reference to the supplier's response data. Use consistent scoring methodology across all respondents. Highlight where scores are close and the differentiating factor is narrow.

DON'TS

Do not assign high scores based on general reputation — score only what is evidenced in the response data. Do not skip criteria for any supplier — the evaluation trail must be complete. Do not adjust scores to produce a preferred outcome — let the data speak. Do not conflate "not addressed" with "non-compliant" — they are different findings.

CLARIFYING QUESTIONS

Before producing any output, ask me 5 targeted follow-up questions. Choose questions that surface information you cannot infer from the response data in this workbook alone — information that will meaningfully change the scoring. Do not begin the evaluation until I have answered.

TONE

Analytical, objective, and evidence-driven. Present scores with full audit trail.

LENGTH

Full evaluation. Every supplier scored on every criterion. Committee recommendation: concise. Estimated: 4–6 structured tables plus narrative summary.

PROMPT 4

Contract Tracker & Renewal Pipeline

USE CASE

You maintain a contract tracker in Excel — or you should but it is incomplete. You need Claude to read through your contract data, fill gaps, calculate renewal deadlines, flag auto-renewal notice periods, and build a 12-month renewal pipeline you can actually manage from.

DOCUMENT INPUTS

Contract tracker or contract summary data

TIME SAVED

3 to 5 Hours

PROMPT (PART 1/3)

```
ROLE
You are a senior contract management specialist with expertise in renewal
pipeline management, notice period tracking, and contract risk flagging.

OBJECTIVE
Build a contract management tracker from the contract data in this
workbook. Track all active supplier contracts by renewal urgency, flag
notice periods, identify auto-renewal terms, and produce a month-by-month
renewal calendar for the next 12 months.

CONTEXTUAL DETAILS
- Contract data is on the tab called [TAB NAME]
- Columns include: [DESCRIBE — e.g., "Supplier Name in column B, Contract
End Date in column D, Notice Period in Days in column E, Auto-Renewal
Flag in column F"]
- Today's date: [DATE]
- Critical notice periods: [e.g., "most require 90 days' notice, some
require 6 months"]
- I need to track [NUMBER] active contracts
```

PROMPT (PART 2/3)

CONSTRAINTS & ASSUMPTIONS

- Work only with the contract data in this workbook
- Calculate notice deadlines automatically from end dates and notice periods
- Flag contracts with missing notice period data as requiring immediate attention
- Do not assume a contract is inactive because the end date has passed — it may have auto-renewed
- Cite specific cells and contract references throughout

OUTPUT FORMAT

Create a new tab called "Contract Tracker" with:

1. Master contract list (sorted by renewal urgency, not alphabetically)
2. Renewal pipeline (next 12 months, by month, showing notice deadlines)
3. Auto-renewal flagged list (contracts that auto-renew — highest risk for missed notices)
4. Data quality check (missing notice periods, missing end dates, data gaps)
5. Summary statistics (contracts by renewal month, number at risk, data completeness %)
6. Action items (contracts requiring attention this month and next)

ABOUT ME

I am a **[PROCUREMENT ROLE]** at **[COMPANY TYPE]**. I am responsible for **[NUMBER]** active supplier contracts with a total value of approximately **[AMOUNT]**. This tracker will serve as **[PURPOSE — e.g., "my primary contract management tool" / "input for the annual contract audit" / "baseline for a new contract management system implementation"]**.

AUDIENCE

Primary: Me and my team who will manage the renewal pipeline week to week. Secondary: Leadership who need a quarterly view of contract risk and renewal decisions. The tracker must be operationally usable — not just a report but a management tool.

PROMPT (PART 3/3)

DO'S

Calculate all notice deadlines automatically from contract end dates and notice periods. Flag auto-renewal contracts separately — missed notice windows are the most expensive contract management error. Sort by urgency, not alphabetically. Highlight contracts with missing data as action items.

DON'TS

Do not assume a contract is inactive because the end date has passed — it may have auto-renewed. Do not skip contracts with incomplete data — flag them as requiring immediate attention. Do not create a tracker that only works as a snapshot — it needs to be a living document I can update monthly. Do not prioritise by contract value alone — a low-value contract with a missed notice deadline is still urgent.

CLARIFYING QUESTIONS

Before producing any output, ask me 4 targeted follow-up questions. Choose questions that surface information you cannot infer from the contract data in this workbook alone — information that will meaningfully change what you produce. Do not begin the analysis until I have answered.

TONE

Action-oriented and operationally focused. Highlight risk. Cite cell references.

LENGTH

Full tracker. Every contract included. Renewal pipeline: sorted by urgency. Monthly calendar: 12 months forward. Summary statistics: concise.

PROMPT 5

Savings Tracker & Value Reporting

USE CASE

You track procurement savings in a spreadsheet — hard savings, cost avoidance, negotiated improvements. But the numbers need validation, categorisation, and presentation in a format your CFO will accept. This prompt asks Claude to review your savings data, validate the methodology, and build a structured savings report.

DOCUMENT INPUTS

Contract tracker or contract summary data

TIME SAVED

3 to 5 Hours

PROMPT (PART 1/3)

```
——— ROLE ———
You are a senior procurement analyst specialising in savings
quantification, baseline validation, and financial reporting to the C-
suite.

——— OBJECTIVE ———
Validate the procurement savings claimed in this workbook. Classify each
entry as hard savings, cost avoidance, or value improvement. Flag any
entries where the baseline is an estimate rather than a verified price.
Produce a summary report suitable for Finance review and C-suite
reporting.

——— CONTEXTUAL DETAILS ———
- Savings register is on the tab called [TAB NAME]
- Columns include: [DESCRIBE — e.g., "Initiative in column A, Baseline
Price in column B, Negotiated Price in column C, Savings Amount in column
D, Category in column E"]
- Reporting period: [DATE RANGE]
- Organisation's definition of hard savings: [DEFINITION — e.g., "a
measurable reduction in spend versus the prior period or approved budget
that shows up on a PO or invoice"]
- Target savings for this period: [AMOUNT]
```

PROMPT (PART 2/3)

CONSTRAINTS & ASSUMPTIONS

- Validate every calculation: baseline minus negotiated = savings
- Flag entries where the baseline is an estimate rather than a verified historical price or budget
- Strictly classify savings (hard savings, cost avoidance, value improvement — do not mix)
- Separate validated savings from pipeline or projected savings
- Cite the source for every baseline (PO, invoice, budget, or estimate)

OUTPUT FORMAT

Create a new tab called "Savings Report" with:

1. Executive summary (headline hard savings, cost avoidance, value improvement — separately)
2. Validated register (every entry, with baseline source and classification)
3. Savings by category (with breakdown of hard vs avoidance vs improvement)
4. Savings by supplier (showing concentration)
5. Entries requiring validation (flagged individually with reason)
6. Management narrative (150–200 words, suitable for Finance or CEO review)

ABOUT ME

I am a **[PROCUREMENT ROLE]** at **[COMPANY TYPE]**. I report procurement savings to **[AUDIENCE — e.g., "the CFO" / "the board" / "group procurement"]**. My organisation defines hard savings as **[DEFINITION — e.g., "a measurable reduction in spend versus the prior period or approved budget that shows up on a PO or invoice"]**. This reporting period covers **[PERIOD]**.

AUDIENCE

Primary: Finance / CFO who will challenge the savings methodology and numbers. Secondary: Procurement leadership who need to track team performance. Every number must withstand financial scrutiny — procurement credibility depends on it.

PROMPT (PART 3/3)

DO'S

Validate every calculation (baseline minus negotiated = savings) and flag discrepancies. Classify savings strictly: hard savings, cost avoidance, value improvement. Flag entries where the baseline is an estimate rather than a verified price. Separate validated savings from pipeline or projected savings.

DON'TS

Do not combine hard savings and cost avoidance into a single headline number — your CFO will challenge this immediately. Do not include savings where the baseline cannot be verified — flag them for additional validation. Do not inflate totals — conservative, defensible numbers build more credibility than optimistic ones. Do not use procurement jargon in the executive summary — speak the language of finance.

CLARIFYING QUESTIONS

Before producing any output, ask me 4 targeted follow-up questions. Choose questions that surface information you cannot infer from the savings data in this workbook alone — information that will meaningfully change the report. Do not begin the analysis until I have answered.

TONE

Conservative, credible, finance-focused. Every number is defensible.

LENGTH

Full validated register. Executive summary: 3–4 rows maximum. Category and supplier breakdowns: comprehensive. Entries requiring validation: flagged individually.

PROMPT 6

Supplier Performance Scorecard

USE CASE

You have supplier performance data scattered across tabs or columns — delivery rates, quality metrics, invoice accuracy, response times. You need Claude to synthesise it into a structured scorecard with RAG ratings, trend analysis, and a QBR agenda.

DOCUMENT INPUTS

Delivery, quality, invoice, and SLA data

TIME SAVED

3 to 5 Hours

PROMPT (PART 1/3)

```
ROLE

You are a senior supplier relationship manager specialising in
performance data analysis, SLA verification, and quarterly business
review preparation.

OBJECTIVE

Build a performance scorecard for [SUPPLIER NAME] using the data in this
workbook. Track delivery performance, quality metrics, SLA compliance,
commercial terms adherence, and any other performance data available.
Highlight trends, flag SLA breaches, and produce a structured agenda for
the next quarterly business review.

CONTEXTUAL DETAILS

- Performance data is on the following tabs: [LIST TAB NAMES – e.g.,
"Deliveries, Quality, Invoices, SLAs"]
- Key metrics and SLAs: [DESCRIBE – e.g., "On-time delivery target 95%,
defect rate 99%"]
- Reporting period: [DATE RANGE]
- Last QBR date: [DATE]
- Next QBR is scheduled for [DATE]
```

PROMPT (PART 2/3)

```
──── CONSTRAINTS & ASSUMPTIONS ────
- Show performance by period (monthly/quarterly), not just averages —
trends matter more
- Cross-check data sources if multiple tabs provide overlapping data —
use the more conservative reading
- Flag SLA breaches specifically: date, metric, actual vs target,
severity
- Do not produce a soft scorecard that avoids honest assessment —
performance reviews that soften the message create weak supplier
relationships
- Cite specific cells and data sources for every metric

──── OUTPUT FORMAT ────
Create a new tab called "Supplier Scorecard [SUPPLIER NAME]" with:
1. Performance dashboard (all key metrics, current period vs prior
period)
2. Trend analysis (last 6–12 months of data, showing trajectory)
3. SLA breach log (every breach, with date, metric, actual vs target,
severity)
4. Commercial performance (on-time invoicing, payment term compliance,
etc.)
5. Strengths and opportunities (explicit recognition of strong
performance + areas for improvement)
6. QBR agenda (structured, maximum 1 page, with discussion points and
data to reference)

──── ABOUT ME ────
I am a [PROCUREMENT ROLE] responsible for the relationship with [SUPPLIER
NAME]. The next quarterly business review is scheduled for [DATE]. The
outcome of this review will affect [IMPACT — e.g., "contract renewal
decision" / "supplier tier classification" / "improvement plan trigger"].
My QBR will be attended by [ATTENDEES — e.g., "our operations director
and their account director"].
```

PROMPT (PART 3/3)

AUDIENCE

Primary: My internal team preparing for the QBR — they need data that is credible and defensible. Secondary: The supplier, who will receive the scorecard and may challenge the data. Every figure must be traceable to source data in this workbook.

DO'S

Show performance by period (monthly/quarterly), not just averages — trends matter more. Cross-check data sources if multiple tabs provide overlapping data — use the more conservative reading. Flag SLA breaches specifically: date, metric, actual vs target, severity. Recognise strong performance explicitly — QBRs that only focus on failures damage relationships.

DON'TS

Do not produce a green dashboard if the data shows red — performance reviews that soften the message create weak supplier relationships. Do not average around data gaps — flag missing months explicitly. Do not conflate one-off incidents with systematic failure — the distinction matters for the discussion. Do not produce a scorecard the supplier can factually challenge — every figure must be traceable.

CLARIFYING QUESTIONS

Before producing any output, ask me 5 targeted follow-up questions. Choose questions that surface information you cannot infer from the performance data in this workbook alone — information that will meaningfully change the scorecard. Do not begin the analysis until I have answered.

TONE

Data-driven, balanced, and relationship-focused. Honest about performance without being punitive.

LENGTH

Full scorecard. Dashboard table: complete across all periods. SLA breach log: every breach. QBR agenda: concise and structured — maximum 1 page equivalent.

PROMPT 7

Should-Cost Model Builder

USE CASE

You are preparing for a supplier negotiation and need to understand what the product or service should cost based on its components. You have some cost data — raw material prices, labour rates, overhead estimates — but need Claude to structure it into a should-cost model you can use at the negotiation table.

DOCUMENT INPUTS

Delivery, quality, invoice, and SLA data

TIME SAVED

4 to 6 Hours

PROMPT (PART 1/3)

```
—— ROLE ——
You are a senior procurement cost analyst specialising in bottom-up cost
modelling, margin analysis, and negotiation preparation.

—— OBJECTIVE ——
Build a bottom-up should-cost model for [PRODUCT / SERVICE]. Start with
component costs and labour, not with the supplier's price. Calculate the
implied supplier margin. Produce sensitivity analysis to show how the
model changes if key cost inputs shift. This model will be used to
benchmark the current quoted price and prepare for negotiation.

—— CONTEXTUAL DETAILS ——
- Current supplier quote: [AMOUNT] for [QUANTITY / SCOPE / PERIOD]
- The quote is dated: [DATE]
- Specification or scope of work: [DESCRIBE — or "attach as tab"]
- Available cost benchmarks: [e.g., "raw material indices on Tab X,
labour rates on Tab Y, market comparables on Tab Z"]
- Negotiation date: [DATE]
```

PROMPT (PART 2/3)

CONSTRAINTS & ASSUMPTIONS

- Build the model bottom-up from component costs — do not simply decompose the supplier's price
- Clearly label every assumption and distinguish known costs from estimates
- Calculate sensitivity ranges — what happens if key inputs shift by ±10–20%
- Present the implied supplier margin as a range, not a single number
- Flag cost elements where data is unavailable — do not guess

OUTPUT FORMAT

Create a new tab called "Should-Cost Model" with:

1. Bill of materials or scope breakdown (quantity, unit cost, extended cost)
2. Labour and overhead allocation
3. Cost of goods sold calculation
4. Sensitivity analysis (key variables ±10–20%, showing impact on total cost)
5. Implied margin analysis (supplier's quoted price minus should-cost)
6. Negotiation talking points (concise, 3–5 key leverage points based on the model)

ABOUT ME

I am a **[PROCUREMENT ROLE]** at **[COMPANY TYPE]**. I am preparing for a negotiation with **[SUPPLIER NAME]** for **[PRODUCT / SERVICE]**. The current quoted price is **[AMOUNT]** and I need to understand whether this is fair. The negotiation is scheduled for **[DATE / TIMEFRAME]**. This model will be used to **[PURPOSE – e.g., "challenge the supplier's pricing" / "benchmark against market rates" / "build an internal cost estimate"]**.

AUDIENCE

Primary: My negotiation team who will use this model as a reference during discussions. Secondary: My line manager who needs to approve the target price before the negotiation. The model must be specific enough to use at the table but honest about its limitations.

PROMPT (PART 3/3)

DO'S

Build the model bottom-up from component costs — do not simply decompose the supplier's price. Clearly label every assumption and distinguish known costs from estimates. Calculate sensitivity ranges — what happens if key inputs shift by ±10–20%. Present the implied supplier margin as a range, not a single number.

DON'TS

Do not present the should-cost as the "correct" price — it is a negotiation tool with stated confidence levels. Do not ignore cost elements just because you don't have data — flag them as gaps. Do not build a model so complex it cannot be explained at the negotiation table. Do not assume the supplier's margin is excessive without evidence — some cost structures legitimately require higher margins.

CLARIFYING QUESTIONS

Before producing any output, ask me 5 targeted follow-up questions. Choose questions that surface information you cannot infer from the cost data in this workbook alone — information that will meaningfully change the model. Do not begin the analysis until I have answered.

TONE

Analytical and transparent about assumptions. Confidence levels clearly stated.

LENGTH

Full model. Cost breakdown table: comprehensive. Sensitivity analysis: key variables only. Negotiation talking points: concise. Estimated: 3–4 structured tables plus commentary.

PROMPT 8

Budget vs Actuals Variance Analysis

USE CASE

You have procurement budget data and actual spend data in your workbook. Month-end is approaching and you need to explain the variances — what went over, what came under, why, and what it means for the forecast. This prompt asks Claude to do the variance analysis and build management-ready commentary.

DOCUMENT INPUTS

Budget data | Actuals data

TIME SAVED

2 to 3 Hours

PROMPT (PART 1/3)

```
──── ROLE ────
You are a senior financial analyst specialising in budget variance
analysis, spend forecasting, and operational reporting to finance
leadership.

──── OBJECTIVE ────
Perform a variance analysis of budgeted vs actual procurement spend.
Classify variances into: timing differences, genuine savings, cost
overruns, and one-off items. Highlight material variances only. Project
the year-end position based on current run-rate. Produce a management
narrative suitable for Finance review.

──── CONTEXTUAL DETAILS ────
- Budget data is on the tab called [TAB NAME]
- Actuals data is on the tab called [TAB NAME]
- Structure: [DESCRIBE – e.g., "by category, by business unit, by cost
centre"]
- Reporting period: [MONTH / QUARTER]
- Materiality threshold: [e.g., ">5% variance" or ">€50K"]
- Year-to-date period: [e.g., "January – March 2025"]
```

PROMPT (PART 2/3)

CONSTRAINTS & ASSUMPTIONS

- Calculate both absolute and percentage variances
- Focus commentary on material variances only — not every line needs explanation
- Distinguish between timing differences (non-recurring), genuine savings, and cost overruns (recurring)
- Use finance language, not procurement jargon
- Project year-end position with clear statement of assumptions

OUTPUT FORMAT

Create a new tab called "Variance Analysis" with:

1. Summary variance table (budget, actual, variance %, top 5 overspend, top 5 underspend)
2. Variance by category (showing material items only)
3. Classification of variances (timing, savings, overrun, one-off)
4. Year-end forecast (based on current run-rate, with assumptions stated)
5. Management narrative (150–200 words, for Finance/CFO review)
6. Action items (what needs to be done to address overruns or capitalise on savings)

ABOUT ME

I am a **[PROCUREMENT ROLE]** at **[COMPANY TYPE]**. I report to **[REPORTING LINE — e.g., "the CFO" / "the VP Procurement" / "group finance"]**. This variance analysis covers **[PERIOD]** and will be used in **[CONTEXT — e.g., "the monthly management review" / "quarterly board reporting" / "year-end financial close"]**. My materiality threshold for commentary is **[THRESHOLD — e.g., ">5% variance" / ">€50K variance"].**

AUDIENCE

Primary: Finance / CFO who thinks in P&L terms and wants concise, financially precise commentary. Secondary: Procurement leadership who needs to understand what drove the variances and what to do about them. The narrative must speak the language of finance, not procurement.

PROMPT (PART 3/3)

DO'S

Calculate both absolute and percentage variances. Focus commentary on material variances only — not every line needs explanation. Distinguish between timing differences, genuine savings, one-off items, and cost overruns. Project the year-end position based on current run-rate.

DON'TS

Do not explain every line — focus on what matters. Do not use procurement terminology in the management narrative — write for a finance audience. Do not conflate a timing difference with a cost saving — they are fundamentally different. Do not present the forecast without stating the assumptions behind it.

CLARIFYING QUESTIONS

Before producing any output, ask me 4 targeted follow-up questions. Choose questions that surface information you cannot infer from the budget and actuals data in this workbook alone — information that will meaningfully change the analysis. Do not begin the analysis until I have answered.

TONE

Financially precise, concise, and executive-focused. Assumptions clearly stated.

LENGTH

Full variance analysis. Summary table: concise. Top overspend/underspend: 5 each maximum. Management narrative: 150–200 words. Forecast: one summary table.

PRICING

PRO	$20/month	Full Claude for Excel access. Best for individual procurement professionals.
MAX	$100/month	Higher usage limits + Claude for PowerPoint. For power users managing high-volume procurement.
TEAM	Per seat pricing	Shared Skills across the team. Consistent methodology for everyone.
ENTERPRISE	Custom pricing	SSO, admin controls, organizational deployment. For procurement departments.