The Simple Way to Smarter Buying:
Guided Buying Implementation
Guided buying is a built-in capability available at no additional cost to customers, using the SAP® Ariba® Buying and SAP Ariba Buying and Invoicing solutions. It provides a smart, easy, and intuitive user interface for employees to create any type of procurement request. These actions can include buying, contracting, sourcing, and making services and noncatalog requests, as well as other types of requests.
Why Use Guided Buying?

The user interface of guided buying enables users to complete their procurement requests in as few as three clicks. Procurement managers gain improved compliance and more user adoption by making procurement easier, more visual, and smarter for everyone.

Guided buying promotes high-touch, low-touch, and no-touch processing. (No-touch processing, associated with low-dollar, high-volume procurement, is also known as straight-through processing.)

To get an overview of key functionality, view this demo of guided buying.

THE VALUE PROPOSITION FOR GUIDED BUYING
Guided buying generates value to customers using SAP Ariba solutions in many ways. Most notably, it:

• Increases user adoption of SAP Ariba Procurement solutions dramatically
• Provides users with a single gateway to complete any procurement request
• Increases compliant spend using smart guidance to steer users to the right item and to preferred suppliers, and helps ensure they work within contractual and corporate policies
• Simplifies procurement operations by making low-dollar, high-volume requests completely self-service
• Increases savings by driving more spend through three bids and a buy, allowing self-service collaboration with suppliers for tactical spend

THE KEY TO ACHIEVING BEST-IN-CLASS PERFORMANCE
Use guided buying to help drive your organization to best-in-class performance metrics. Successful organizations are achieving the following:

93% of spend under management in the SAP Ariba Buying solution

>85% compliance for invoice spend

<5% maverick spend, as a percentage of spend under management

Fastest average requisition-to-order cycle time in the industry, at less than a day with SAP Ariba solutions

20% fewer procurement FTEs per billion dollars of spend for organizations that support self-service requisition for material and service items (using online catalogs with rules-based checks enabled)


Getting Started in Three Easy Steps

So how can you get started with guided buying? By following a simple, three-step process, which is based on our work with SAP customers in industries around the world.

1. Define a clear vision

2. Plan for the implementation

3. Implement

Learn More > Learn More > Learn More >
STEP 1: DEFINE A CLEAR VISION
The first step is to develop a vision of how you will design, plan, and roll out guided buying in your organization. Here are recommendations and best practices that will help you through the process:

- **Identify your target audience.**
  Guided buying is recommended for casual and functional buyers who sit outside of the procurement department. These users typically do not work on procurement full time and may not be up to date with procurement best practices, supplier contracts, policies, and systems training.

- **Establish your objectives to help drive your category approach.**
  Success requires taking a category spend prioritization approach – prioritizing the sequence by which categories appear on the home page. To get started, determine your most important objective. Do you want to reduce spend, simplify the buying process, improve the user experience, or capture spend data? Determining your most important objective at the beginning will help with category prioritization.

- **Analyze your spend data.**
  Who is buying what, and how are they buying it? Identify high-touch transactions that you want to transform to low touch or no touch. Low-dollar, high-volume transactions are outstanding candidates for no-touch, straight-through processing. Low-dollar, high-volume transactions include purchases for office supplies, computer and mobile phone accessories, information subscriptions, and consumer products that are not strategic or routine purchases.
• Note the usage of other internal applications for buying services, facilities, or travel-and-expense reporting. If these areas are outside of your span of control, start conversations with those business owners now to gain their support for a single user-interface approach.
• Review your procurement policies. Identify those policies that can be used in the smart-policy engine during the buying process (see sidebar).
• Start whiteboarding. Lay out the flow for your spend categories and take advantage of flexible tile options in SAP Ariba solutions to tailor the interface for your users. See the section titled “Designing the User Experience: Arranging Pages and Tiles” on page 12 to assist with this process.

Guided buying is fully integrated with the SAP Ariba Buying solution and can make use of existing catalogs, approval flows, and master data.

The smart-policy engine allows you to define rules that users must follow when buying online in order to comply with the policies of your organization. Policy alerts are embedded into the purchasing experience so users don’t need to know or remember the policies. A policy will appear in the context of purchasing if a policy has been violated or, preemptively, to remind the purchaser that a justification is needed. For example, a policy could be this: “Require a justification for purchases of IT equipment.”

Policies can also support users in the process of requesting quotes from suppliers (also known as tactical sourcing). Depending on the spend category and purchase volume, procurement can use policies to guide users on what they should do. An example of a supplier policy could be this: “The purchase of IT equipment requires three quotes from preferred suppliers for products costing US$5,000 or more, and one quote from preferred suppliers for products costing less than US$5,000.”
STEP 2: PLAN FOR THE IMPLEMENTATION

The second step is to define an implementation plan. Guided buying can be implemented either at the same time or after you implement your SAP Ariba Buying solution and have completed step 1, “Define a Clear Vision,” described above. The implementation scope and the time required for implementation will vary by organization.

Most companies choose a **phased approach**, which benefits large companies with multiple geographies and many categories. The timing of rollout phases varies by organization. For resource-constrained and risk-averse organizations, the phased approach to implementation enables them to:

- Conduct a pilot with a small group of users
- Learn from the pilot
- Use the lessons of the first phase to conduct a larger second phase
- Iterate with next phases as needed

Some companies choose a **big-bang implementation strategy** and roll out guided buying to all corporate users at the same time. The advantage of the big-bang approach is that you can:

- Avoid consulting costs during a long-term implementation
- Catch and resolve problems early
- Harvest guided buying’s cost savings and operational efficiencies earlier
- Serve all of your users at one time and avoid confusion over rollout timing
The Phased Approach Strategy
SAP recommends the following best practices for rolling out guided buying in phases to serve multiple geographies and many categories. As shown in Figure 1, the timing of each rollout depends on your organization’s implementation strategy or resources.

Figure 1: Phased Rollout Framework by Geography or Category

First rollout
- Target a small set of casual users
- Use a simple set of categories

Second rollout
- Reach more users
- Cover major spend categories with self-service buying channels

Next rollouts
- Add more spend categories
- Introduce other buying channels, such as low-touch and high-touch processes, with policies

Maverick spend, as a percentage of spend under management in the SAP Ariba Buying solution
First Rollout
For your first rollout, we recommend that you focus on three areas and apply these best practices.

**Audience:**
- Conduct a pilot to get a small set of casual users excited
- Get quick wins and advertise them internally with testimonials from users, the best first step in generating support for guided-buying adoption

**Spend categories:**
- Analyze your spend data and focus on the high-spend, catalog-driven categories where preferred suppliers are in place
- Include categories with a large casual-user base, such as IT equipment, including laptop computers, monitors, and mobile phones
- Test these categories to help you more quickly understand if your implementation is working as intended

**Buying channels:**
- Focus on internal catalogs and supplier-driven catalogs such as punch-outs
- Add the **Spot Buy** capability – a custom B2B marketplace that makes it easy to buy goods from trusted suppliers with built-in control – to introduce a marketplace of rich, nonsourced catalog content
- Incorporate links to other relevant internal systems
- Steer buyers to preferred suppliers to maximize contracted benefits

Future Rollouts
For your second and subsequent rollouts, we recommend that you focus on three areas and apply these best practices.

**Audience:**
- Generate a wide base of excitement for guided buying by involving large and diverse groups and departments within your organization
- Build on the success of the rollouts continuously to keep the company and its employees involved and motivated

**Spend categories:**
- Focus on high-spend categories that are more critical to your internal stakeholders
- Enable tactical sourcing for your business partners so they can easily obtain quotes from preferred suppliers
- Drive spend to preferred suppliers and contracted items

**Buying channels:**
- Add three-bids-and-a-buy forms for specialized and high-touch categories such as consulting services (as shown by the screen shot in Figure 2)
- Add low-touch and high-touch processes later in categories that require procurement agent or buyer involvement
- Identify low-dollar, high-volume items (such as office supplies) that are good candidates for no-touch, straight-through processing
The “Big Bang” Implementation Strategy

For some companies, it makes sense to use a “big bang” implementation strategy rather than a phased approach. With this approach, the solution will be made available to all of your company’s users at the same time. When planning for this implementation, consider the following recommendations and best practices concerning your audiences, spend categories, and buying channels.

Plan for Your Audiences

This strategy assumes that the solution will be extended to all corporate users, so you must define curated pages and a global user experience that work for everyone. The solution needs to deliver the right content, suppliers, and buying channels for all users regardless of their location. This could require the creation of distinct guided buying experiences for each operating region.

Define Spend Categories

As you plan your spend categories, it is important to:

- Think about all the possible spend categories and use the same spend volume to appropriately organize the home page of the guided buying experience
- Review global and local processes with category owners to ensure that the right content will be available to users in each geographic location
- Focus on driving spend to preferred suppliers and current contracts, but also open the door for capturing the low-tail spend by enabling collaboration with local procurement teams during request for prices or noncatalog purchases
Determine Buying Channels
Administrators have the discretion to make any number of buying channels available to buyers. Examples include internal and external online catalogs and marketplaces such as Spot Buy. The goal is to:
- Enable as much collaboration as possible with your procurement teams through the right mix of low-touch and high-touch processes
- Use the smart-policy engine to capture all policies necessary for each of the various categories and geographic locations used by your business
- Use the private online community (explained in the “Create a Private Community” section of this guide) to provide as much support as possible to users
- Complement community support with easy user access to guidelines, Q&As, and other resources

Refine Your Implementation Plan
Regardless of your implementation choice – phased or big bang – you can refine your implementation by taking advantage of important options.

Add In-Context Policies to Guide Users
Guide users to the appropriate procurement channels by adding in-context policies. These policies may include the following:
- **Validation policies** determine if a user is authorized to buy a certain commodity or item and ensures they provide appropriate information prior to submitting the request. For example, many companies have a standard policy governing common purchases such as mobile phones. That policy could state that employees are not permitted to buy mobile phones more frequently than once every two years. In this context, the guided buying software automatically validates a buying request for a new mobile phone if the employee has not purchased a mobile phone in the past two years.

Create a Private Community
Take advantage of a private community, which provides a framework for publishing help resources that your users can see when using guided buying. Procurement experts upload content and links to additional resources, and users can ask questions and post comments to the published content. This private community provides a collaborative online workspace for procurement experts to deliver help to users.

As you do this, be sure to:
- Publish a list of frequently asked questions (FAQs) as a start
- Assign resources to actively manage the community and to keep the content fresh. If content becomes stale or questions go unanswered, users will not see the benefits of the private community and will stop using it as their primary source of help.
STEP 3: IMPLEMENT
The third step is the actual implementation: designing the user experience and configuring user paths to ensure a simple, frictionless, expertly curated, and faster buying experience.

At a high level:
• Designing the user experience involves arranging pages and tiles as described in the following section.
• Configuring guided buying involves populating pages with the appropriate content by using links, catalog items, forms, and other types of tiles to support buying channels.

Designing the User Experience: Arranging Pages and Tiles
You use a category page to curate content that refers specifically to a purchasing category or subsets of categories. A tile in guided buying is a piece of content that you can include in a category page.

As shown in Figure 3, the guided buying home page includes the high-level tiles you want your users to see first, along with its search capabilities. Figure 3 illustrates what a typical category-level landing page looks like (in this case, when people click on the “Marketing” tile on the home page).

Figure 3: A Guided Buying Home Page
This table summarizes the tools available to you to build a simple, basic, and easy-to-use guided buying experience.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action tile</td>
<td>Redirects the user to another internal Web site (for example, an SAP® Fieldglass® solution, an SAP Concur® solution, or a corporate card application site)</td>
</tr>
<tr>
<td>Ad hoc item tile</td>
<td>Takes the user to a noncatalog item creation screen</td>
</tr>
<tr>
<td>Catalog item tile</td>
<td>Displays a single catalog item, which could include a punch-out site for the company’s global IT supplier, for example</td>
</tr>
<tr>
<td>Page tile</td>
<td>Takes the user to a more detailed category landing page (for example, an info tech category tile can drill down to hardware or software or the “Marketing” category page shown in Figure 4)</td>
</tr>
<tr>
<td>Search tile</td>
<td>Brings the user to a predefined search of catalog items (including spot-buy items, if the Spot Buy capability is enabled)</td>
</tr>
<tr>
<td>Supplier carousel tile</td>
<td>Takes the user to a landing page of preferred suppliers for a specific category, where custom forms can guide the user through the rest of the process</td>
</tr>
</tbody>
</table>

Use the **smart-policy engine** to define rules that employees must follow when buying online. Policy alerts are embedded into the purchasing experience so users don’t need to know or remember the policies of your organization.
Figure 4: An Example of a Category Landing Page for Marketing
The tools in this table enable you to create a more advanced guided buying experience for users.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad hoc item tile</td>
<td>Takes the user to a noncatalog item creation screen, which can be configured to enable the capture of service types of spend. Ad hoc item tiles are ideal for unplanned services spend.</td>
</tr>
<tr>
<td>Carousel of tiles</td>
<td>Group tiles that share a common purpose on a single line, where the user can scroll right or left to find more content</td>
</tr>
<tr>
<td>Request form</td>
<td>Triggers user collaboration with suppliers upon completion of the form to get a quote for the good(s) or service(s) to be purchased. Figure 2 shows what a request form looks like.</td>
</tr>
<tr>
<td>Requisition form</td>
<td>Enables the user to add the form to a requisition upon completion</td>
</tr>
</tbody>
</table>

**Configuring Guided Buying**

You can choose between two configuration types: basic and advanced. Both deliver the visual and intuitive user interface and primary features of the guided buying capability. Note that:

• The basic configuration has a smaller feature set and is appropriate for organizations that prefer to keep their guided buying experience simple for users.

• Organizations that frequently use forms, policies, and tactical sourcing will prefer the advanced configuration.

You can also choose a two-phased approach to configuration. In this case, you start with a basic configuration, and after users become comfortable with it, you can upgrade to an advanced configuration.

Because configuring guided buying is so easy, you are free to choose between basic and advanced configurations to meet the current needs and preferences of your business. There is no material difference in resources required to implement either the basic or advanced configuration.

Add the Spot Buy capability – a custom B2B marketplace that makes it easy to buy goods from trusted suppliers with built-in control – to introduce a marketplace of rich, nonsourced catalog content.
This table summarizes the basic and advanced configuration attributes.

<table>
<thead>
<tr>
<th>Attributes</th>
<th>Description</th>
<th>Advanced Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action tiles</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Catalog item and ad hoc tiles</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Forms</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Page tiles</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Policies</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Search tiles</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Supplier carousel tiles</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Tactical sourcing</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Using Administrator Tools
Administrators can configure guided buying using one of two options:
- The self-service administrator tool
- The Microsoft Excel import-export tool

Option 1: The Self-Service Administrator Tool
This option is recommended for ongoing maintenance. You can easily define your guided buying experience by using the administrator tool (see Figure 5), and modify any content by simply adding and editing the tiles and providing the appropriate information.

Figure 5: Example of the Self-Service Administrator Configuration Tool
Option 2: The Microsoft Excel Import-Export Tool
You can easily configure your landing page for guided buying by using the Microsoft import-export feature, which is designed to make configuration of the landing page a one-step process. The guided buying capability includes a Microsoft Excel template that you can use as a data ingestion tool to upload tiles and link data. (Each template is unique to each customer’s solution and comes bundled with it. See Figure 6 for an example.) After uploading the populated Microsoft Excel template to guided buying, the guided buying capability will automatically generate the landing page you defined.

Specifically, you download the Microsoft Excel template and then enter tile information in one column and fill in the other columns with landing page links, descriptions, item IDs, keywords, and other data. Within minutes, you will automatically generate the tiles and links on the guided buying Web pages based on your spreadsheet data. You can iterate or tune the visual display of your tiles by adjusting the data in the columns and rows of the spreadsheet until you obtain the visual display of tiles that works best for you.

Figure 6: Sample of a Completed Template to Upload Tile and Link Information
CONFIGURATION BEST PRACTICES
Here is a list of best practices derived from the deployment experience of our guided buying design partners:

- **Keep your home page simple.** When designing your home page, display commonly used categories only – do not overpopulate. As a standard practice, this should be no more than 9 to 12 tiles so that the user can see all tiles without scrolling.

- **Decide carefully on titles, descriptions, and images.** Make these informative and easy for the user to understand.

- **Consider adding the Spot Buy capability to display a marketplace of rich catalog content.** Guided buying is fully integrated with the SAP Ariba Buying solution and can make use of existing catalogs, approval flows, and master data.

- **Assign resources to actively manage the expert community.** If content becomes stale or questions go unanswered, users will not see the benefit of the community.

LEARN MORE
To find out more about guided buying, check out the following resources:

- [Introduction to guided buying](#)
- [Administration guide](#) – “Guided Buying Administration” (Connect account required)
- [User guide](#) – “Guided Buying: Finding Items and Making Purchases” (Connect account required)

SAP provides delivery services that may be necessary to assist with implementation. Contact your customer engagement executive for more details.