



Purchasing

FY27 Q1&Q2 Strategy and Product Priorities

Powering your world of work



Purchasing Team



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Agenda



01 IQ – Intelligent System of Work

Our IQ Intelligent system of work and Purchasing

02 Purchasing Roadmap

The Roadmap priorities for Purchasing

03 Q1 Deliverables

What was delivered in Q1 (March – May)

04 Q2 Priorities

What are the priorities for Q2 (June – August)

05 Customer engagement programme

Get involved in our Customer engagement programme for Guided Purchasing

06 Q&A



**Pop your questions in
the Q&A box and we
will answer them at the
end**



**Use the emojis to
let us know what
you think**



IQ –Intelligent System of work



The solution for your success



Intelligent

AI in the flow of work, automate repetitive tasks, compliant workflow rules



Connected

Sector-focused workflows, contextual data, sector intelligence, designed for regulated markets



Trusted

Data sovereignty, responsible AI, robust security & cyber protection



Business Services



Intelligent Services



Intelligent Experience



Intelligent Workflows



Intelligent Platform

Powering your world of work



Intelligent System of Work



Intelligent Services

Intelligent Experience

Intelligent Workflows

IQ
CARE

IQ
EDUCATION

IQ
GOVERNMENT

IQ
HEALTH

IQ
HOUSING

IQ
LEGAL

IQ
BUSINESS
SERVICES

IQ
WHOLESALE &
LOGISTICS

FINANCE, SPEND & GOVERNANCE

PEOPLE & WORKFORCE MANAGEMENT

DATA & AI



Intelligent Platform



One intelligent system, many workflows – all governed, all connected to **power your world of work.**

IQ - An intelligent system of work with embedded workflows for the Office of the CFO

One connected platform to deliver finance, spend, supplier and risk management, with control & security by design



INTELLIGENT EXPERIENCE

1. CORE FINANCE WORKFLOWS: The financial backbone of the organisation



Budgeting & Planning
Plan, forecast and manage budgets



General Ledger & Accounting
Record, consolidate and report with accuracy



Accounts Payable & Receivable
Manage payables efficiently and on time



Period Close & Reporting
Close faster with confidence and compliance

Management reporting | Financial Control | Real-time Insight | Multi entity & multi-currency

2. EXTENDED FINANCIAL WORKFLOWS: Processes that start outside finance but impact it



Procure to Pay (guided procurement)
Guided buying, approvals commitment control and invoice to pay



Order to cash
Manage sales orders, contract fulfilment, billing and collections



Contract & Spend Control
Contracts, commitments and spend management across the lifecycle

Integrated with core finance for real-time visibility and control

3. SUPPLIER / THIRD-PARTY LIFECYCLE: One trusted supplier record across the organisation



Sourcing
Run compliant sourcing events, evaluate suppliers, select with confidence



Supplier onboarding
Collect, validate and approve supplier information



Due Diligence & Compliance
Screening, verification and ongoing compliance checks



Performance & Risk Monitoring
Track performance, assess risk and drive continuous

Single Supplier View | Risk Scoring | Financial Exposure | Continuous monitoring

4. CONTROL & COMPLIANCE



Policy enforcement
Policies applied in the flow of work



Risk Management
Identify, assess and manage risk in real time



AI guidance
Intelligent guidance, automation and insights



Controls
Segregation of duties, approvals and thresholds



Compliance assessment
Analyse & track compliance, generate improvement actions



UNIFIED DATA FOUNDATION
Single source of truth across finance, spend, suppliers, contracts and risk

5. UNIFIED DATA FOUNDATION (SINGLE SOURCE OF TRUTH)



Finance Data



Supplier Data



Spend & Contract Data



Risk & Compliance Data

6. INTELLIGENT PLATFORM



Security & Data Protection



Identity & Access Management



Integrations & APIs



AI and Agentic frameworks



Analytics & Reporting



Workflow & Process orchestration

OUR STRATEGY

- Users interact through guided workflows, not silo'd product UI
- Human-assisted AI in the flow of work
- Central reporting and analytics data environment across finance, spend, risk and compliance
- 3rd party applications connected into workflows through modular architecture
- Existing products still run / maintained
- Fixes & small enhancements still applied to existing products
- New features & larger re-development of features in IQ architecture
- *Unified data, interacting with the relevant workflows for the right people at the right time**
- *3rd party data connected into Intelligent Experience & Intelligent Platform*

* Roadmap development

Stronger Financial Control
control spend, commitments and cash on real time

Audit ready by default
Continuous evidence and compliance built in

Improved decisions faster
One version of the truth for confident decision making

Operational Efficiency
Automate, streamline and reduce manual effort

Greater Trust & transparency
Demonstrate value for money and public accountability

Purchasing Strategy





“

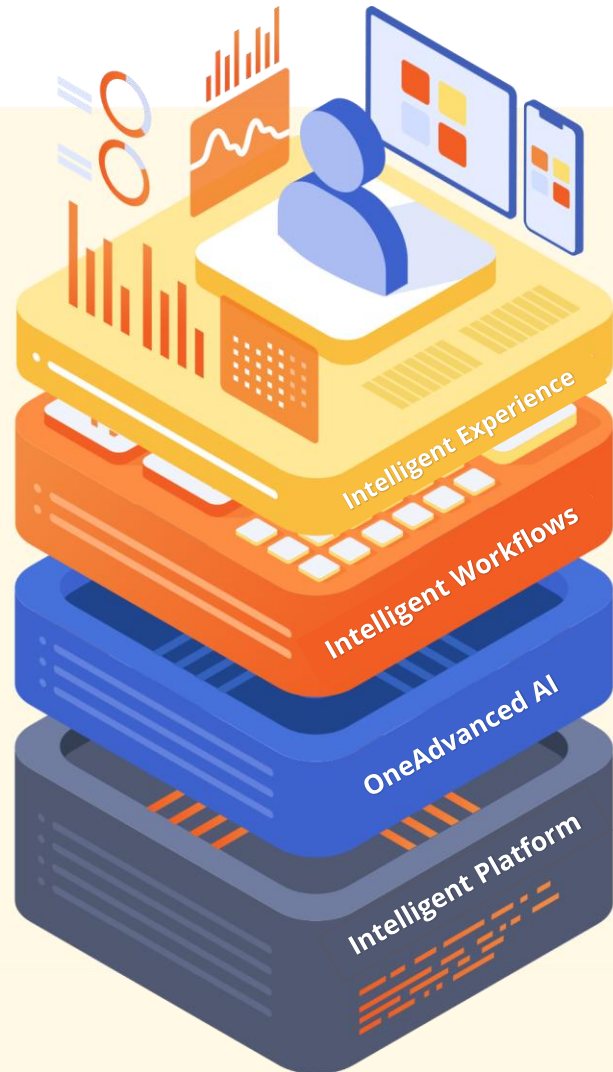
Guided Purchasing - Simplifying Buying with Intelligent guidance

Directing employees to the right items, surfacing preferred options, and driving frictionless, policy-compliant procurement decisions across your organisation

Coming soon | Spend Management and Procurement

Purchasing - Guided Purchasing MVP

IQ's Guided Purchasing workflow is being modernised to simplify and intuitively guide (via embedded AI) how employees procure from approved suppliers and frameworks. Employees can move seamlessly into the IQ Guided Purchasing workflows from either the OneAdvanced Financials workflow or existing third-party finance systems through integrated authentication, reducing login friction and support overhead, and keeping spend on-contract, cutting maverick purchasing.



Intelligent Experience

Re-developed, modernised & accessible UI, delivering a guided procurement experience for end users including an enhanced catalogue search.



Purchasing Agents

- 1) Review requests in context of an organisations contracted live suppliers/items, stock and delivery charges, procurement policy, previous individual and organisational order history,
- 2) Present policy guided options back/makes a decision - Catalogue items, free text order, quotes, contact xx dept



Connected to current product backend database

Workflows and AI interact with the existing product databases for supplier, contract, transactional PO's, Invoices, contracts, catalogues



OneAdvanced Identity

Authentication, user management & permissions ensuring the appropriate data is used by the agent for the users request

Today's Purchasing Challenges



Finding the Right Item

- \ I know we have this in the catalogue, but I cannot find the right item.
- \ Search returns too many results that are not relevant.
- \ The product naming is unclear, so I am unsure which to choose.



Evaluating Options

- \ I cannot tell which option offers the best overall value.
- \ Multiple versions exist, but comparing differences is hard.
- \ I need help identifying a lower-cost compliant alternative.



Confidence & Compliance

- \ I need to know which item is preferred or recommended.
- \ I am not confident this choice meets policy requirements.
- \ I need clearer guidance on standard category purchases.



Next-Step Navigation

- \ I need clear next steps when an item is unavailable.
- \ I need approved alternatives before requesting support.
- \ I need an easy way to request a new product or supplier.



Intelligent Recommendations & Guidance

Intelligent Recommendations, powered by your data

What do you need to do today?

Describe what you need in plain English...

Scientific centrifuge under £8k 3 contractor quotes for electrical repairs

Raise PO for existing supplier Onboard new supplier

Budget Remaining

£42,350

68% of quarterly budget used

% Spend on Contract

94%

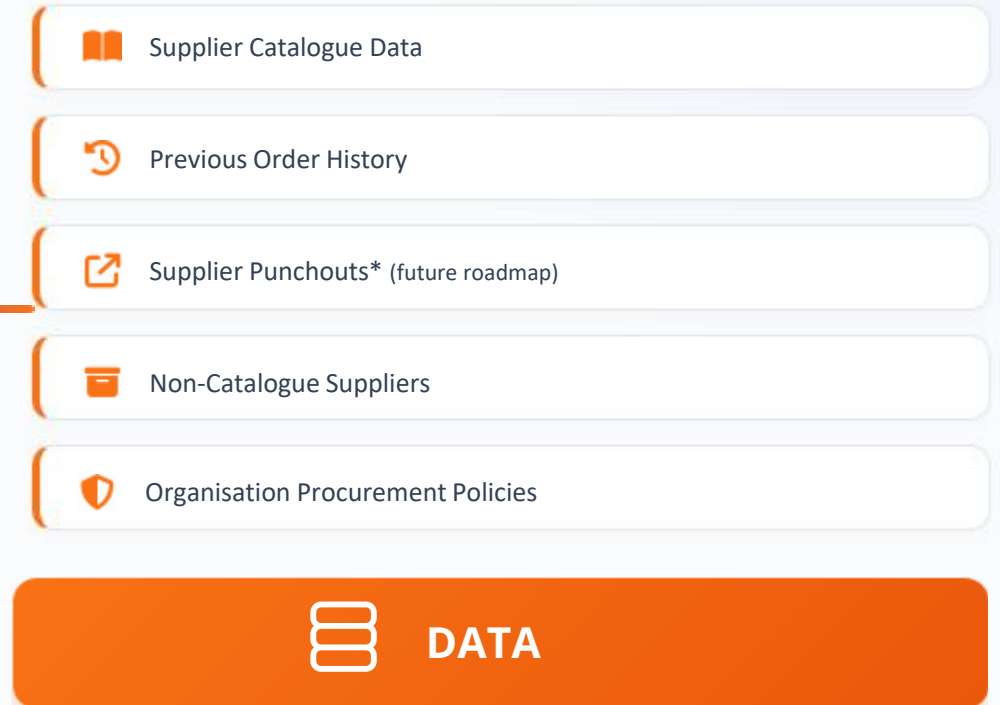
Target: 90% - Above target

Avg. Approval Time

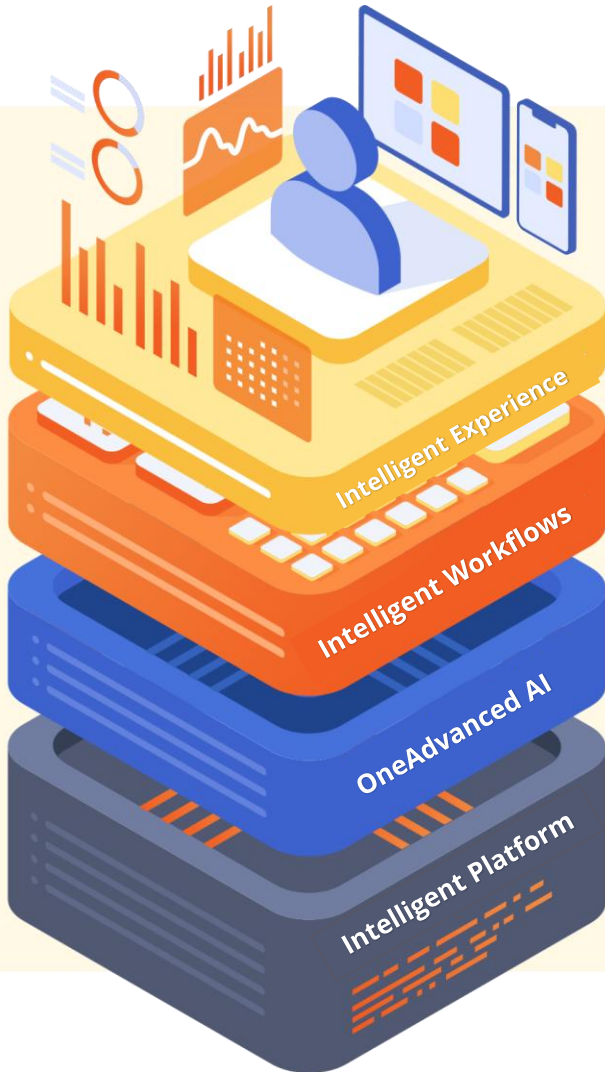
2.3 days

13% faster than department average

Guided Purchasing Assistant



Data – Bring your own BI (BYOBI)



Data Platform

Ingesting your Purchasing data into data platform will enable you to extract data into Power BI with the inbuilt BYOBI



OneAdvanced Identity

Authentication, user management & permissions ensuring the appropriate data is used by the agent for the users request

02

Roadmap Priorities



What's Changing - IQ Quarterly Release Cadence



A new **operating rhythm** for planning, building and delivering **customer outcomes** – through *Metronomic Release Waves* and *Quarterly Internal Press Releases (IPRs)*



Roadmap Priorities



DELIVERED – SUMMER RELEASE WAVE

Live - May 2026



Supplier Visibility in Free Format

Enabling buyers to control which marketplace suppliers are available in the Free Format module. Reducing the risk of what users are purchasing outside of agreed catalogues.

Currently in **Beta** –
Launching to all customers
July/August



BYOBI – Orders and Invoice

Ingesting Purchasing Orders and Invoice data into Data platform to enable accessing data from your Power BI.



Guided Purchasing Foundations

Establishing the foundation for Guided Purchasing, including preparation core page experiences and updated authentication to support punchout via our new IQ experience

NEXT



BYOBI – Product & Price Data, Contracts and Sustainability

Enabling full access to purchasing data—orders, invoices, products, and pricing—so you can analyse, report, and act in your own BI tools, without limitations.



Guided Purchasing - Beta

Guided Purchasing beta, featuring a **newly enhanced Search** and the **Guided Purchasing Assistant** and a designed to provide a more intelligent purchasing journey. Available to beta customers

FUTURE



Guided Purchasing

Re-developed, modernised & accessible UI, delivering a guided procurement experience as well as enhanced catalogue search. Core to the new experience is a Guided Purchasing AI agent which guides and recommends, powered by AI and your data.



Enhanced Insights

Transform data into actionable insights with intuitive analytics, tailored dashboards, and conversational access through natural language queries.



Improving Data Quality

Standardising product data to improve search, comparison, and reporting—making it easier for users to find the right products and for procurement teams to trust and analyse their data.



Quantum leaps in user
functionality and workflows



Unique and bitesize
enhancements



Regular fixes and performance
improvements



IQ Components

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03

Q1 – What was delivered

Control visibility of Suppliers in Free Format



- Control which marketplace suppliers can be ordered from via Free Format, while retaining catalogue purchasing.
- Apply governance at organisation or business unit level to ensure consistent control with flexibility where needed.

any information Products Configuration **Free format configuration**

Company Level

Enable or Disable the supplier in the Free Format module at the organisation level. Remember to click 'Save changes' to apply any updates to your configuration.

Regression Purchase Requisition 2.0 company ☒

Supplier is enabled in Free Format for your organisation. Note that individual business units may have different configurations.

Business unit level

Enable or disable the supplier in Free Format for individual business units. Any changes made to business units here overrides the organisation level settings.

Search business units...At least 3 characters All Status Showing 1 to 5 of 7 results

Business unit	Free format status
BUcreated	☒
Business Unit 1	☐
Business Unit 2	☒
kchbu261023v1	☒
kchbu261023v2	☒

<< < 1 2 > >> 5



Menu

Regression API Requester Client

4 Requests/Network

Automated Test Authentication Headers Supplier 2020-09-05

Registered: 02/15/2019

Collection Status: Completed

Company information

Product

Configuration

File format configuration



Company name

Organization type

SST number

Registration number

Year established

Number of employees

Geographic area

Annual revenue

Addresses

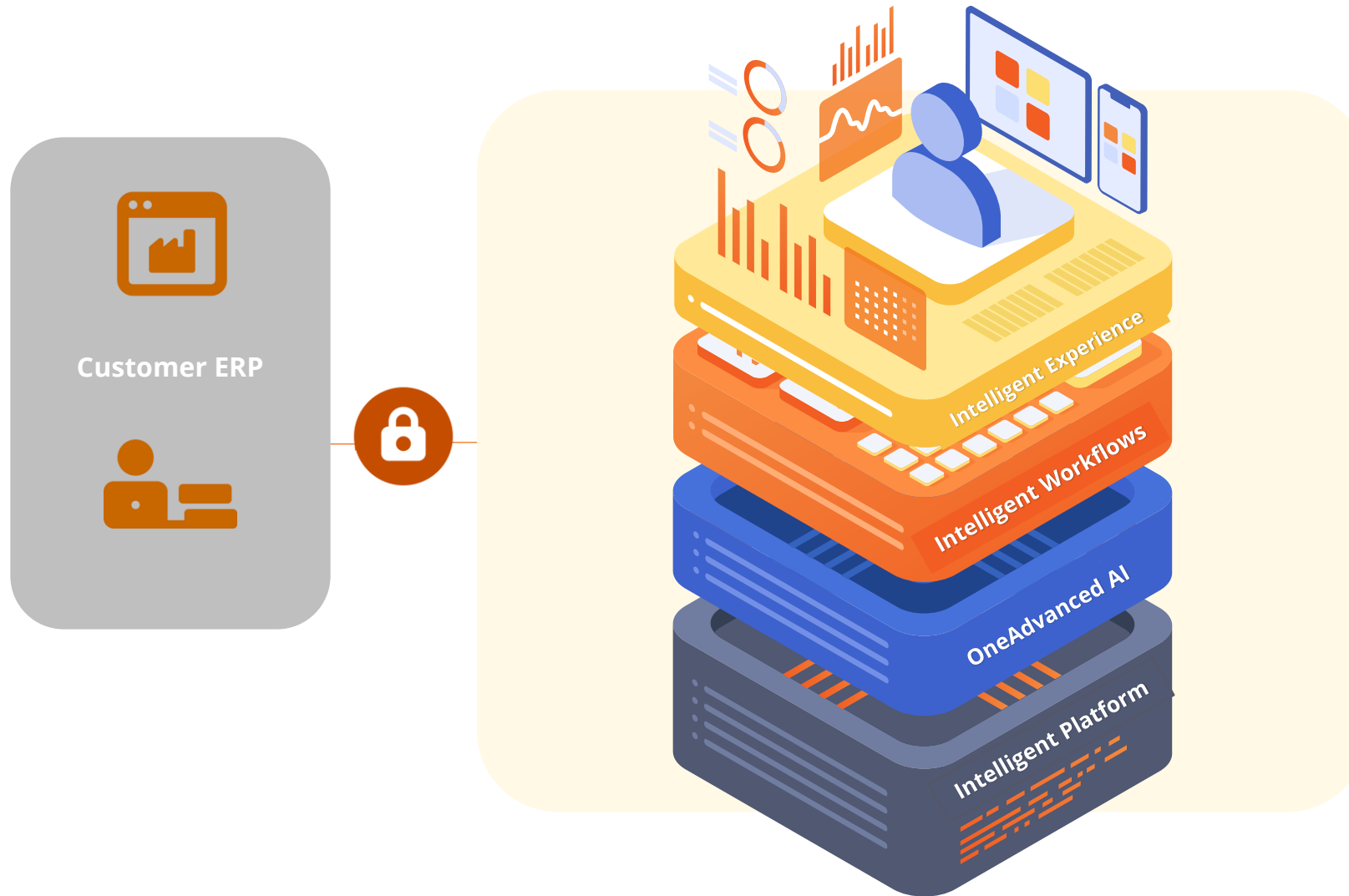
Shipping address: [New Entry](#)

Shipping address: [New Entry](#)

Other: [New Entry](#)

Contacts

Guided Purchasing –Authentication



- Users punching in from a third party finance system into the Guided Purchasing workflow will authenticate through IQ platform Identity services.
- Identity is a comprehensive service that manages user authentication and access control across all our products/workflows
- The punchout experience is updated so users are prompted to log in to Marketplace.
- It enables integration with single sign-on (SSO) for a streamlined login experience.
- These changes provide a more consistent and secure authentication journey across systems.



Untitled - Power BI

FileHomeInsert

PasteCutCopyFormat painterGet data

Clipboard

Table

Grid

Report

DAX

TMDL

Desktop

Mobile

Navigation

Page 1 of 1

Navigator

Display Options

oneadvanced-aws_eu_west_2_prod_reader_shared_1.snowflake...

ONEADVANCED

SNOWFLAKE

SNOWFLAKE_LEARNING_DB

Select Related Tables

No items selected for preview

LoadTransform DataCancel

iggs

Share

Prep data for Copilot AI

Copilot

Visualizations

Build visual

Visuals

Data

Values

Add data fields here

Drill through

62%

Display Options ▾

- ▲ **oneadvanced-aws_eu_west_2_prod_reader_shared_1.snowflake...**
 - ▲ **ONEADVANCED [2]**
 - ▷ **INFORMATION_SCHEMA [61]**
 - ▲ **PURCHASING [6]**
 - ☐  DIM_PURCHASING_INVOICE_ERRORS
 - ☒  DIM_PURCHASING_INVOICE_LINES
 - ☐  DIM_PURCHASING_INVOICE_TAX_DETAILS
 - ☒  FACT_PURCHASING_INVOICES
 - ☒  FACT_PURCHASING_ORDER_ITEMS
 - ☒  FACT_PURCHASING_PURCHASE_ORDERS
 - ▷ **SNOWFLAKE**
 - ▷ **SNOWFLAKE LEARNING DB**

Select Related Tables

Preview downloaded on 20 April 2026

[illegible]

i The data in the preview has been truncated due to size limits.

Load

Transform Data

Cancel



Filters

Cancel

Load

-  FACT_PURCHASING_PURCHASE_ORDERS
Evaluating...
-  FACT_PURCHASING_ORDER_ITEMS
Evaluating...
-  FACT_PURCHASING_INVOICES
Evaluating...
-  DIM_PURCHASING_INVOICE_LINES
Evaluating...

Import data

Visualizations

Build visual





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04

Q2 – Priorities

Guided Purchasing Deliverables



End-User Experience

-  **New Hybrid Search** with high-performance keyword and semantic matching.
-  **Guided AI Assistant** Intelligent search combining conversational AI guidance with high-performance keyword and semantic matching.
-  **Flexible Request** Support for free format buying requests when standard catalog searches don't meet needs.
-  **Complete Journey Navigation** Unified user flow to easily view search results, drill down into product details, and manage the shopping basket.
-  **Direct Login Access** Simplified and modernised entry access point direct into the intelligent platform UI experience.

Integrations & Infrastructure

- ✓ **Supplier Punchouts** Seamless external punchout capabilities to suppliers catalogues
- ✓ **Finance System Connectivity** Robust backend integrations natively connecting ERP workflows via Oracle and XML standards.
- ✓ **Intelligent UI Framework** Built entirely on a modernised, enterprise-grade Platform UI ensuring high usability, response speed, and accessibility



BYOBI – Product, Price and Contract

We will continue to make data sets available

Dataset	What does it include?
Product and Price	Suppliers catalogues along with the attributes
Price	The current price of an item
Price History	The price history of an item which includes the price and time and date it changed
Item Visibility	The visibility status of an item for a company or business unit level. Ability to also see where visibility controls have been put in place at the supplier or category level
Contracts	Local Contracts and Frameworks that have been created, the details of those and the items assigned
Contracted Spend	Where orders have been made for items on a contract

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03

Guided Purchasing Customer Development Programme



Help shape the future of Guided Purchasing

We are looking for customers to partner with us through our discovery to beta phases. Your insights will directly influence and optimise the experience of the new Guided Purchasing workflow

Timeline



Phase 1: Discovery & UX

June - August

- Workflow observations and user journey mapping.
- Search failure analysis of traditional keyword limitations.
- Procurement policy alignment & leadership discussions.

Outcome:

- Validated AI-guided journey designs
- Prioritised Search /comparison pain points
- Rollout /adoption recommendations
- Shortlist of customers for beta
- Procurement Policy best practice (quality content



Phase 2: Controlled Beta

September - November

- Real transactional validation in controlled environments.
- Side-by-side performance & UX behavior testing.
- Hybrid search (keyword + semantic) evaluation.

Outcome:

- Measured optimisation of AI recommendation quality. Focusing on:
- AI recommendation quality
- User Trust (in results/quality)
- Procurement Policy adherence
- Workflow completion rate
- Comparison experience

Phase 1: Discovery & UX Validation



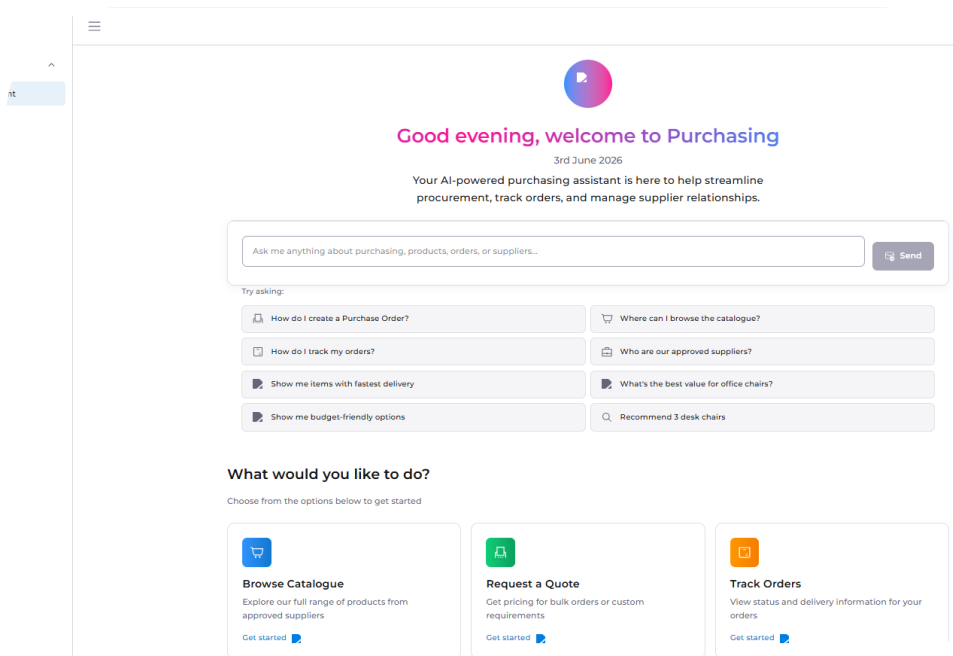
Research Activities

-  **User Journey Mapping** Observe current user workflows to pinpoint friction and design opportunities.
-  **Search Failure Analysis** Identify where standard keyword-based searches fail and where AI can step in.
-  **Leadership Alignment** Assess procurement policy readiness for AI and map out the rollout strategy.

Targeted Outcomes

- ✓ **Validated AI buying journeys** Ensure design fits natural purchaser behavior.
- ✓ **Prioritised search pain points** Clear, structured targets for developers to address.
- ✓ **Policy integration guidelines** Ensure AI recommendation safety and compliant rules.
- ✓ **Beta participant list** Secured partners to launch immediately into Phase 2.

Phase 2: Controlled Beta



Guided Purchasing Assistant & Hybrid Search

Validate real transactional behaviors in controlled production environments.

1. Determine whether AI intelligent recommendations materially improves purchasing outcomes.
2. Determine whether Hybrid Search materially improves discovery

KEY EVALUATION METRICS



AI Recommendation Quality



Policy Compliance Rate



Workflow Completion Speed



User Trust & Satisfaction

Partnership Engagement



Monthly Exec Sponsor

AUDIENCE

- > Procurement Heads
- > Programme Sponsors
- > Product Leadership

FOCUS

- > Strategy & Roadmap
- > Adoption Planning
- > Rollout Progress
- > KPI Review



Fortnightly UX/User Sessions

AUDIENCE

- > Operational Users

FOCUS

- > Usability Testing
- > Search Failures
- > AI Guidance Quality
- > Journey Workflows



Monthly Product Demos

AUDIENCE

- > Anyone (Buyers and Supplier)

PRIMARY VALUE

- > Maintain Momentum
- > High Visibility & Adoption
- > Validate ongoing development and get feedback



If you would like to be involved please get in touch with myself or your ecommerce consultant/account manager

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Q&A



Thank you for
your time.





Connect with us



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