Thought Leadership

Getting Ready for a P2P Transformation

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Transforming your procure-to-pay (P2P) processes can feel like a daunting task, but it needn't be. The key is preparation. Careful planning can help you choose the right software for your business and create the foundations for a successful implementation.

A successful P2P transformation begins long before new technology is introduced. It starts with developing a clear understanding of your existing system, business requirements and objectives. Organisations that invest time in preparing for change can create stronger foundations for lasting improvements, helping to reduce implementation risks and maximise the value of their investment.

Read on to discover the key steps you need to undertake to ensure that your organisation is ready for an efficient and effective P2P implementation.

Build a clear case for change

A successful P2P transformation starts with a clear understanding of why change is needed. This begins by reviewing the current procurement environment and developing a complete picture of how procurement operates today. It means analysing how money is spent across the organisation, where approvals take place and how suppliers interact with existing systems.

As an organisation, ask yourself the following questions:

- Do we have a clear understanding of our supply chain, including where we spend money in each category and with each supplier? What is the frequency of spend with each supplier? What are the risks?
- What procedures are in place to approve contracts, invoices and purchase orders? Are there defined roles for each stage in the process?
- Which processes are manual or automated? How long does each stage take, and where are the bottlenecks or inefficiencies?

- What control methods are in place, and are they effective?
- Do we face any current challenges when purchasing? Payment inaccuracies or delays, invoice matching issues, unauthorised spending or supplier complaints?
- Are our processes compliant, and are we an attractive organisation for suppliers to work with?
- What budget can we commit to the P2P transformation, and is it ring-fenced?

Mapping the P2P process end to end helps organisations identify recurring issues that may be limiting performance. These could include inefficient approval processes, limited visibility of organisational spend or inconsistent supplier management. Understanding these challenges provides the foundation for a stronger business case and ensures transformation is driven by genuine operational need.

A P2P transformation should support commercial objectives, improve governance and create room for continuous improvement. Many organisations begin this process through procurement strategy consulting.

Define clear business goals from the outset

Technology should always support procurement strategy rather than determine it. Once organisations understand their current challenges, they can begin defining the capabilities required from a new P2P solution. This stage is about identifying the outcomes the business wants to achieve rather than focusing immediately on software functionality.

Business requirements should reflect both operational priorities and longer-term strategic objectives. Procurement teams should consider how the system will improve user experience and strengthen supplier engagement, while keeping an eye on future organisational growth.

It is also important to distinguish between essential functionality and desirable features. This helps procurement teams evaluate potential solutions objectively while avoiding unnecessary complexity during implementation.

Clear business requirements provide suppliers with a stronger understanding of organisational needs and create a more effective procurement process during software selection.

Seek external validation before making a decision

Selecting the right technology requires more than comparing product features. Organisations should take time to understand the wider market and evaluate which providers are best suited to their requirements. Independent market research and analyst reports can help here. Specialist procurement expertise often adds further insight during this stage.

External validation also reduces the risk of selecting technology that may not be appropriate for the organisation's procurement maturity or future ambitions.

Working with experienced procurement specialists can add further value. Independent advice helps organisations develop robust evaluation criteria while ensuring procurement decisions remain focused on long-term outcomes rather than short-term functionality.

Choosing the right implementation partner is equally important. Successful suppliers demonstrate more than technical capability. They also show a clear understanding of organisational objectives and explain how they will support the business throughout implementation and beyond.

Engage stakeholders throughout the transformation

A successful P2P transformation is shaped by the people who will use the system every day. Procurement teams should engage stakeholders from the earliest stages of the project to ensure requirements reflect how different parts of the organisation operate. Finance teams, accounts payable and operational departments will all have valuable insight into existing challenges. Their involvement also helps build confidence in the transformation before implementation begins.

Early engagement can help reduce resistance to change by giving stakeholders an opportunity to understand the reasons behind the project and influence its direction. It also improves the quality of business requirements by capturing practical knowledge that may otherwise be overlooked.

This collaborative approach forms the foundation of successful change management in procurement, helping organisations achieve stronger adoption once a new P2P solution is introduced.

Evaluate suppliers beyond software functionality

Choosing a P2P provider should not be based solely on software features. While functionality is important, organisations should also consider how suppliers approach implementation and long-term support. A successful provider will take time to understand your procurement processes, challenge existing ways of working and demonstrate how the solution will help achieve wider business objectives.

Supplier evaluation should also consider practical factors such as implementation methodology and training. Post-launch support matters just as much, and these elements often have a significant influence on whether a project delivers lasting value.

Organisations should also assess whether there is a strong cultural fit between both parties. Procurement transformation is a collaborative process, so choosing a supplier that works as a genuine partner can support better outcomes over the lifetime of the project.

A structured supplier evaluation process helps organisations compare providers consistently while selecting the solution that offers the strongest long-term value.

Test organisational readiness before implementation

Once a preferred supplier has been selected, organisations should take time to confirm they are ready to move forward.

This means ensuring governance arrangements are in place and responsibilities are clearly understood before implementation begins. Project teams should also confirm that key stakeholders remain committed to the programme and understand the role they will play throughout implementation.

Preparing for implementation also involves establishing realistic timelines and agreeing decision-making processes. This creates greater accountability while helping project teams respond more effectively if priorities change during delivery.

Many organisations also develop a dedicated change management plan at this stage. This helps prepare employees for new ways of working while ensuring communication and training continue throughout the implementation process.

Successful transformation depends on people as much as technology

Technology enables procurement transformation, but people determine whether it succeeds. The most effective organisations recognise that implementation is only the beginning of the journey. Lasting improvements come from embedding new ways of working and supporting employees through change, then continuously reviewing procurement performance once the system goes live.

Successful P2P transformation creates more than operational efficiencies. It strengthens procurement capability and improves supplier relationships, while providing better visibility across organisational spend. Over time, these improvements help procurement become a more strategic function that supports wider business objectives.

Treating preparation as a core part of the programme rather than a preliminary exercise helps create the foundations for achieving the outcomes the organisation has set out to deliver.

About the author

Matthew Hardaker has over 20 years of experience in procurement across financial services, transport, logistics, and management consultancy. Over the last five years, he has worked with over 40 clients to deliver various procurement, digital, and cost transformation programs. He joined Barkers in September 2021 and leads the Barkers Digital practice, guiding clients through digital transformation and technology enabled procurement programs.

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