



Suhas Bhairav

# AI Procurement Intake Guide

**A practical framework to standardize requests, automate routine checks, and govern AI-enabled procurement**

Streamline AI-enabled purchasing with structured intake, clear ownership, and auditable workflows.

**Suhas Bhairav**

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# What to Automate in AI Procurement

Identify repetitive, rule-based tasks within procurement where AI can add speed and accuracy without compromising control. Distinguish automation candidates from activities requiring expert judgment.

**Key move** Pilot a single intake form to test end-to-end data flow.

## PRACTICAL CHECKLIST

- 01** AI-assisted intake: auto-fill vendor details and business need fields from the request.
- 02** RFP, RFQ data extraction: capture requirements, timelines, and budget line items.
- 03** Vendor onboarding: automate document collection and validation against compliance checks.
- 04** Budget validation: ensure requested spend aligns with approved thresholds.
- 05** Security and policy screening: flag high-risk vendors before review.
- 06** Approval routing: auto-advance requests based on thresholds and stakeholders.
- 07** Contract metadata extraction: pull key terms into the CLM system.

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# Governance, Data, and Human Review

Automation requires defined owners, data standards, and guardrails. Decide what stays human-reviewed, and what can be AI-automated with review gates.

**Key move** Document ownership and escalation path before enabling automation.

## PRACTICAL CHECKLIST

- 01** Owner mapping: assign process owners for intake, review, and approval steps.
- 02** Data standards: define fields, formats, and validation rules for all requests.
- 03** Audit trails: log decisions, changes, and timestamps for compliance.
- 04** Exceptions path: clearly document when humans must override automation.
- 05** Security access: enforce least privilege and role-based approvals.
- 06** Vendor risk signals: integrate external risk data for screening.
- 07** Governance cadence: monthly reviews of automation outcomes and policy gaps.

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# Adoption Plan, Timelines, and Metrics

Define a weekly, low-friction pilot to validate ROI. Track outcomes and adjust scope quickly.

**Key move** Hold weekly reviews to adjust scope and ownership.

## PRACTICAL CHECKLIST

- 01** Week 1: implement standardized intake template linked to ERP/finance system.
- 02** Week 2: enable AI-assisted data extraction for RFPs, RFQs, and contracts.
- 03** Week 3: establish auto-approval thresholds and manual review gates.
- 04** Week 4: run a 2-vendor pilot for a common category.
- 05** Ongoing metrics: cycle time, cost savings, data quality, user satisfaction.
- 06** Governance reviews: quarterly audits of rules, logs, and access.
- 07** Risks: workflow deviations, data leakage, supplier pushback; plan mitigations.

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## ABOUT THE CREATOR

# Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

## EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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