MERCURY

Category Management and Strategic Sourcing Course

7 – 11 June 2027
Rome (Italy)



Dubai - UAE: +971 4 450 5697
Istanbul - Türkiye: +90 539 599 1206
Amman - Jordan: +962 79 712 3347

Category Management and Strategic Sourcing Course

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Category Management and Strategic Sourcing Course is a 1-week course for buyers, category leads and purchasing analysts who manage a spend area and decide how to source it. You analyze spend, segment items with the Kraljic matrix, read the vendor market, position yourself as a customer and write a sourcing plan, and you take back a Category Strategy Pack. Mercury Training Center delivers this category management and strategic sourcing course.

About This Course

Many purchasing teams buy item by item, renew the same contracts and miss savings, supply exposure and innovation that only show when spend is grouped into categories. To follow the course you should already buy, tender or manage vendors for a spend area. You practice on spend data and build a plan for one category.

Who It Is For

- Buyers who run tenders and contracts for a defined spend area.
- Category leads who own the plan and savings target for one or more categories.
- Purchasing analysts who clean, classify and report spend data.
- Budget holders who specify needs and approve sourcing decisions.
- Vendor relationship staff who manage key accounts after award.

This course is not for senior leaders designing an end-to-end purchasing function over a longer period, who are better served by a two-week strategic purchasing course, nor for clerks who mainly raise orders, who suit a purchasing fundamentals course.

Competencies You Will Build

- Spend Analysis: you classify spend into categories and spot fragmentation, maverick buying and savings potential.
- Kraljic Segmentation: you place items by profit impact and supply exposure and pick the right approach for each quadrant.
- Market Reading: you assess vendor markets with Porter's Five Forces and a PESTLE scan.
- Customer Positioning: you use the supplier preferencing model to see how vendors view your account.
- Whole-Life Costing: you compare offers on total cost of ownership and should-cost estimates.
- Category Planning: you write a category plan with options, savings, risks and an implementation timeline.

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What You Will Be Able to Do

By the end of the course you will be able to:

- From raw purchase data, build a spend cube by category, vendor and business area.
- Given a category's items, place them on the Kraljic matrix and set a buying approach for each.
- Using market data, rate vendor power and switching costs and identify leverage points.
- From stakeholder interviews, write category requirements and agree them with budget holders.
- Given two or three sourcing options, compare them on whole-life cost, exposure and sustainability and recommend one.
- Using a KPI set, track category savings, contract compliance and vendor performance after award.

Course Content

Day 1: Category Basics and Spend Analysis

- Category Management Cycle From Analysis to Review
- Spend Cube Construction From Purchase Order and Invoice Data
- Category Taxonomy and Item Classification Rules
- Fragmentation, Tail Spend and Maverick Buying Analysis
- Stakeholder Mapping and Requirement Gathering for a Category

Day 2: Segmentation and Market Analysis

- Kraljic Matrix: Leverage, Strategic, Bottleneck and Non-Critical Items
- Porter's Five Forces Applied to Vendor Markets
- PESTLE Scan for Category Supply Exposure
- Supplier Preferencing Model: How Vendors See Your Account
- Market Sounding and Requests for Information

Day 3: Sourcing Options and Costing

- Total Cost of Ownership Models for Equipment and Services
- Should-Cost Estimates and Price Breakdown Analysis
- Demand Management, Specification Change and Bundling Options
- Single, Dual and Multi-Sourcing Decisions
- Sustainable and Ethical Criteria in Sourcing Choices

Day 4: Tender, Award and Vendor Performance

- Evaluation Criteria and Weighting for Category Tenders
- Negotiation Planning by Kraljic Quadrant
- Contract Terms, Compliance and Exposure Mitigation
- Vendor Scorecards and Relationship Segmentation
- Category KPIs and Spend Analytics Dashboards

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Day 5: Practice Building the Category Strategy Pack

- Exercise: Spend Cube for an Office and Facilities Category
- Exercise: Kraljic Placement for Maintenance Spare Parts
- Exercise: Sourcing Option Appraisal for an IT Services Contract
- Exercise: Category Plan Presentation to Budget Holders
- Completing the Category Strategy Pack for Your Own Spend Area

Case Studies and Exercises

These are suggested activities.

- Case study: a hospital group buys medical consumables from dozens of vendors; you consolidate the category and choose a sourcing approach.
- Case study: an oil and gas operator depends on one vendor for a critical valve; you place it on the Kraljic matrix and plan supply security.
- Exercise: a retailer's logistics services are renewed each year without testing the market; you run a market scan and propose a tender.
- Exercise: a university's IT spend sits in many departments; you build the spend cube and set category KPIs.

What You Take Back

The Category Strategy Pack is the plan you complete for one of your own spend areas during the course. In your first month back, you use it to agree requirements with budget holders, test the market and present the sourcing recommendation to your manager.

- A spend cube and category profile.
- Kraljic segmentation and market analysis.
- A sourcing options appraisal with whole-life cost.
- A category plan with savings, KPIs and a timeline.

Quick Answers FAQ

What should I know before category management and strategic sourcing training?

You should already buy, tender or manage vendors for a spend area and be able to work with spreadsheets. Bring a summary of your own category's spend if you can, since the plan is built on it.

How does category management training differ from a two-week strategic purchasing course?

It concentrates on one job: analyzing and planning a single spend category over one week. Longer strategic purchasing courses also cover function design, negotiation, digital tools, resilience and performance across the whole purchasing organization.

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What is the Kraljic matrix used for in strategic sourcing?

It sorts purchased items by their profit impact and supply exposure into leverage, strategic, bottleneck and non-critical groups. Each group then gets a different buying approach, from competitive tendering to long-term partnership or securing supply.

What do I take back from the Category Management and Strategic Sourcing Course?

You take back the Category Strategy Pack for one of your spend areas: a spend cube, Kraljic and market analysis, a sourcing options appraisal and a category plan with KPIs.

For Your Manager

After the course, the team member can analyze spend, segment a category, read the vendor market, compare sourcing options on whole-life cost and write a category plan. They return with a Category Strategy Pack for one live spend area, first used to agree requirements with budget holders and prepare the next tender.