

SAMPLE

Vendor Scorecard Dashboard

Performance, compliance, and spend — five active vendors, six months

PREPARED BY Ian Carstairs · iancarstairs.com

REPORTING PERIOD 2026-01 to 2026-06

DATA AS OF 2026-09-30

POPULATION 5 active vendors · \$81,460 spend

SAMPLE — all vendors, figures, and data in this document are fictional and created for illustration only. No real client, vendor, or result is represented.

Commercial analysis only — not legal advice.

Dashboard top strip

1 · AT A GLANCE

Inactive/excluded: 1 (archived, not scored)

COST

+1.7%

ON TARGET

V01 spend vs. budget · target
±10% · budget \$5,000/mo

PERFORMANCE

77.3%

BELOW TARGET

Worst on-time %: V04 (17 of 22
jobs) · target ≥95%

COMPLIANCE

4 of 5

OVERRIDE: RED

Vendors with current docs ·
V04 insurance expired
2026-05-01

RISK

1

WATCH

Critical vendors with open
findings: V04 · V01 = 37.5% of
spend

Worst item: V04 QuickFix Plumbing — liability insurance expired 2026-05-01; vendor is high-criticality with active jobs.
No new work orders until a renewal certificate is received.

Vendor comparison

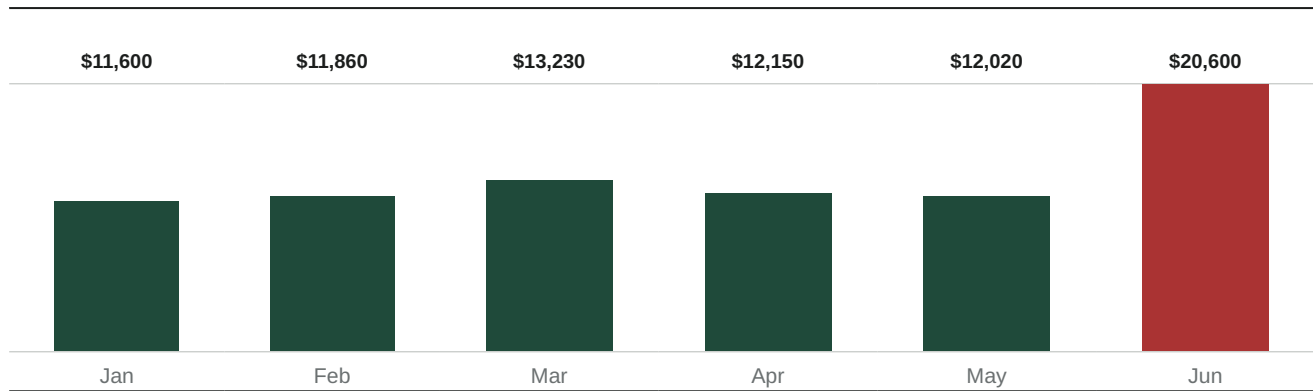
2 · VENDORS

VENDOR	6-MO SPEND	ON-TIME JOBS	CALLBACKS	COMPLIANCE	STATUS
V04 · QuickFix Plumbing Plumbing · high criticality · contract ends 2026-11-30	\$12,400	77.3% (17/22)	3 (13.6%)	EXPIRED Insurance lapsed 2026-05-01	RED — OVERRIDE
V01 · Meridian Supply Co. Supplies · high criticality · contract ends 2026-12-31	\$30,510	n/a — not tracked	n/a	CURRENT	GREEN
V02 · SparklePro Cleaning · medium criticality · contract ends 2027-05-31	\$17,850	97.5% (39/40)	0	CURRENT	GREEN
V03 · Apex HVAC HVAC · high criticality · contract ends 2027-02-28	\$15,900	n/a — not tracked	n/a	VERIFY License renewal due 2026-09-15	AMBER
V05 · GreenGrow Landscaping Grounds · low criticality · contract ends 2027-03-31	\$4,800	n/a — not tracked	n/a	CURRENT	GREEN

V06 OldCo Electrical is inactive (contract ended 2025-12-31, \$0 spend) — excluded from the population and archived, not scored. Override rule: an expired compliance document makes a vendor **red** regardless of cost or performance; overrides are never averaged away.

Monthly spend trend — active vendors

3 · SPEND



June spike is one-time: \$9,500 emergency chiller replacement (V03). Excluding it, V03 averages \$1,280/mo and monthly spend is flat — this is not a cost trend. One-time jobs are tagged separately in the workbook and excluded from budget-variance math.

Action table

4 · ACTIONS

OWNER	VENDOR	ISSUE	SEVERITY	DUE DATE
Dana	V04 QuickFix Plumbing	Liability insurance expired 2026-05-01 — request renewal certificate; no new work orders until received	CRITICAL	2026-10-07
Dana	V04 QuickFix Plumbing	5 late jobs of 22 (77% on-time) + 3 callbacks — performance review meeting, probation terms	HIGH	2026-10-14
Priya	V03 Apex HVAC	HVAC license renewal due 2026-09-15 — confirm renewal filed and certificate on record	HIGH	2026-10-07
Dana + Priya	V01 / V04	Contracts end 2026-12-31 / 2026-11-30 — build Q1 renewal decision package	HIGH	2026-11-01
Dana	V01 · V03 · V05	Confirm whether late-job tracking is complete — “0 late” may mean untracked, not perfect	MEDIUM	2026-10-14
Priya	V02 · V03 · V04 · V05	Set monthly budgets so the cost KPI covers all vendors (today only V01 has one)	MEDIUM	2026-10-31
Dana	V06 OldCo Electrical	Inactive, contract ended 2025-12-31 — move to archive tab; remove from dashboard population	LOW	2026-10-31

KPI dictionary (compact)

K1 · Spend vs. budget

COST

ANSWERS: is this vendor running over the agreed spend?

DEFINITION: $\text{actual spend} \div \text{approved budget}$, per vendor per month.

TARGET (PROPOSED): $\pm 10\%$ green · 10–20% over amber · >20% over red.

MISSING DATA: no budget on file → N/A, never assumed.

K2 · On-time job %

PERFORMANCE

ANSWERS: can we count on this vendor to show up?

DEFINITION: $\text{jobs completed by agreed date} \div \text{total jobs}$.

TARGET (PROPOSED): $\geq 95\%$ green · 90–95% amber · <90% red.

MISSING DATA: no job log → N/A, never 100%.

K3 · Current compliance docs

COMPLIANCE

ANSWERS: is any vendor working without valid paperwork?

DEFINITION: active vendors with all required docs current ÷ active vendors.

TARGET (PROPOSED): 100% green; any expired doc = **red vendor override**.

MISSING DATA: unknown status → amber “unverified”, never assumed current.

No blended “overall vendor score” — the four pillars are shown separately; averaging would hide a compliance failure. All thresholds above are **proposed**; the client initials each before the dashboard goes live.

K4 · Critical vendors with open findings

RISK

ANSWERS: where is our exposure concentrated this month?

DEFINITION: count of critical vendors with ≥ 1 open compliance or performance finding.

TARGET (PROPOSED): 0 green · 1 amber · ≥ 2 red.

MISSING DATA: unknown findings excluded from count, listed as a gap.

Data-quality note

- **Solid**: vendor master has clean, unique IDs; all 36 spend rows join (0 unclassified dollars); contract dates present.
- **Shaky — fix before trust**: budgets exist for 1 of 5 active vendors — 62% of spend has no cost-control KPI until Priya sets them.
- V06 ships six \$0 rows (inactive) — archived, excluded from all KPIs.
- Performance samples are small (V04: 22 jobs; V02: 40) — counts shown next to every percentage.
- “0 late jobs” for V01/V03/V05 is unverified — treated as N/A (“not tracked”), not 100% on-time.

Refresh SOP (monthly, 15 minutes)

1. **Replace:** drop the new month's spend export, job-log rows, and compliance updates into the workbook source tabs.
2. **Refresh:** Data → Refresh All. Confirm the refresh-timestamp cell updates.
3. **Reconcile:** dashboard total spend must equal SUM of the Spend tab; vendor count and compliance rows must match sources. **If any check fails, stop — do not publish.**
4. **Inspect:** read the data-quality counters (unclassified \$, N/A count, docs expiring in 30 days).
5. **Publish:** save a PDF snapshot as *Scorecard_YYYY-MM.pdf*.
6. **Review:** open the action table at the monthly ops meeting; close or carry each item with a date.

Known limitations

- The cost KPI covers only V01 until the remaining budgets are set.
- On-time % for V01, V03, V05 is N/A (tracking unverified), not 100%.
- Six months of history is thin for trend detection; seasonal effects can't be separated yet.
- The dashboard does not price renewal scenarios — that is a separate quote-leveling engagement.
- Joins are on Vendor ID + Period, never vendor name alone.