

# 9 steps

# to success in eSourcing

## Step 1

### Set goals and stay on track

Set annual program goals i.e. Minimum 10% increase in volume each year by department

Create a plan for each department complete with calendar of events and goals

Meet with stakeholders:

- ④ **Annual:** Review the past year's goals and create new goals for the upcoming year.
- ④ **Monthly:** Review progress and adjust plan as necessary.

### Results that Proactis Provides:

- ④ Shared best practices.



## Step 2

### Educate Category Managers

- ④ Let them know what to expect, the process, category selection criteria, sample savings, checklists, guides, and more.



### Results that Proactis Provides:

- ④ On-site category review.
- ④ Creation of an event calendar.

## Step 3

### Collect information for bids

- ④ Collect event information and fill out event planner.
- ④ Ensure all information is included and accurate.
- ④ Use completed information to build the online sourcing event.



### Results that Proactis Provides:

- ④ Event built based on planner.
- ④ Suggested strategy and supplementations.
- ④ Supplier research.

## Step 4

### Approving bids

- ④ Review online bid details with stakeholders to ensure accuracy. After event is verified, invite suppliers.

### Results that Proactis Provides:

- ④ Approval requests from stakeholders
- ④ Invitations sent to suppliers
- ④ Training and preparing suppliers to bid.

**BID**

## Step 5

### Run events

- ④ View all live events to answer questions and resolve issues in real-time.
- ④ Stakeholders: Watch live event and celebrate wins!



### Results that Proactis Provides:

- ④ Monitoring of live events.
- ④ Solving supplier bid questions.
- ④ Reports and analysis sent after event.

## Step 6

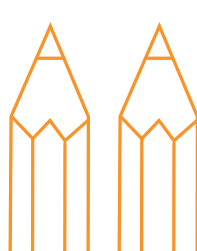
### Collect samples

Samples are a critical step in the process:

- ④ Request samples **before** an event to pre-qualify unfamiliar suppliers.
- ④ Request samples **after** an event to evaluate product from selected suppliers based on event pricing.

### Results that Proactis Provides:

- ④ Samples requested for stakeholders.



## Step 7

### Award the business

- ④ Stakeholders should finalize award decisions based on price, samples, and quality within 30-60 days from live event.

### Results that Proactis Provides:

- ④ Award and non-award notifications sent.



## Step 8

### Scorecard results

- ④ Scorecard event results by department and enterprise-wide based on actual pricing from awarded supplier, not lowest bidder.



### Results that Proactis Provides:

- ④ Scorecarding functionality.

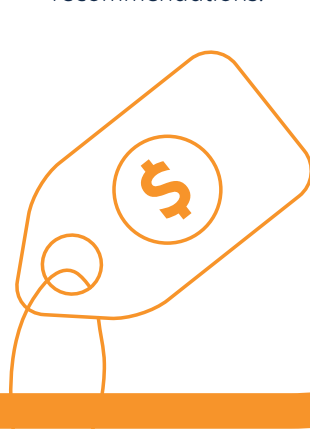
## Step 9

### Categories to focus on

- ④ High spend categories with a minimum of \$100K.
- ④ Lower spend categories if savings potential is significant.
- ④ Non-branded goods typically provide the greatest savings.
- ④ Focus on categories with at least three suppliers.
- ④ Validate price increases and take full advantage of price decreases.

### Results that Proactis Provides:

- ④ Extensive analysis and recommendations.



For more information on the 9 steps or to learn more about Proactis Sourcing Services visit [proactis.com/sourcing-services](http://proactis.com/sourcing-services)