sourcingdojo

Sourcing Dojo:
eSourcing Guide

A guide covering the Sourcing Dojo basics, including how to create and manage events.

V1.1 Nov ‘21

Sourcing Dojo eSourcing Guide

Table of Contents

Introduction to Market Dojo **2**
- What is Market Dojo? 2
- Your Dashboard 2
- Analytics 2
- Your Profile 3
- The Sandpit 3

How to Create an Event **4**
- Creating an Event 4
- Using Event Templates 5

New Event - Settings **6**
- Event Name and Brief 6
- Event Structure 7

Documents **10**
- Adding Documents 10

Questionnaires **11**
- Ways to Build a Questionnaire 11
- Adding your Questions 12
- Formatting your Questionnaire 13
- Scored Questions 14
- Adding Scorers 14
- Weighting 15

Lots **15**
- Simple Lots 15
- Advanced Lots 16

Inviting Participants **17**
- Invite Options 17
- Invite Participants and Finish 18

Participant Experience **18**
- Accepting the Invite 18
- Questionnaire Responses 19

Bidding in an RFQ 19

During the Event **20**

Monitoring your Participants 20

Reinviting Suppliers 20

Multi Stage RFQs - Adding a New Round of Bidding 21

Deleting Bids 23

Editing the Event 24

Adding Notes 24

Reviewing Supplier Responses **25**

Questionnaire Responses 25

Scoring Questionnaires 25

RFQ Pricing 26

Awarding Lots 26

Help and Support **27**

Contact Market Dojo 27

©Market Dojo 2021

Introduction to Market Dojo

What is Market Dojo?

Market Dojo offers an array of capabilities, to help procurement professionals get the most out of their sourcing and supplier engagement activities.

We believe in making better eSourcing a reality for all procurement teams, regardless of location, experience or budgets. All our products are fully on demand, designed by procurement professionals and built with a focus on ease of use.

This guide will cover the Sourcing Dojo basics, including how to create and manage events. For specific details on how to run an auction using the tool, please see our “Sourcing Dojo Auction Guide”.

Your Dashboard

When you log in to Market Dojo, the Dashboard is the first screen you will see. The Dashboard is designed to give you a quick overview of all the important information relating to your events. This includes your Draft, Current and Closed events, Calendar, Messages and more.

The different widgets on screen can be dragged and dropped into an order that suits you, whilst elements that are not relevant to you can be removed entirely via the Dashboard Settings.

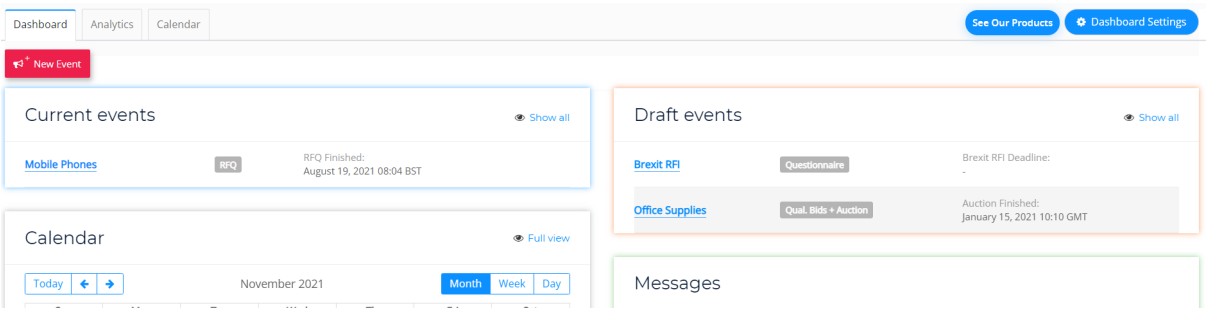


Figure 1.1 - Market Dojo Dashboard

Analytics

The analytics tab provides an insight into your events. The visuals can be filtered by user or date.

©Market Dojo 2021

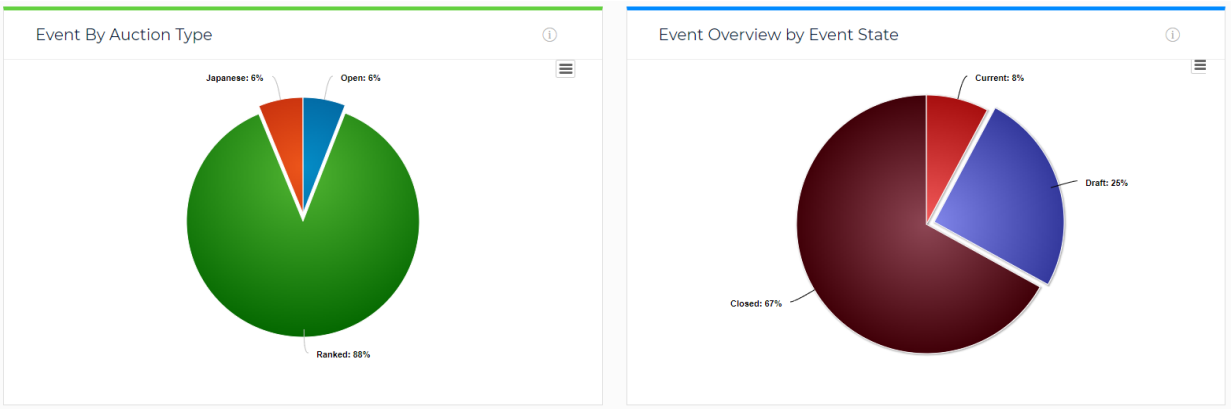


Figure 1.2 - Analytics

If the reporting in this tab is not sufficient for your needs please get in contact with our Support Team to discuss our add-on Power BI reporting option.

Your Profile

Your Profile settings are located in the top right corner of the page. We strongly recommend that you check and update your Profile the first time you log in to ensure that your account is operating with the right time zone and currency and that your contact details are correct.

The Sandpit

The Sandpit is our test environment. It is designed to give you an opportunity to practice your events and become accustomed to the tool before going live with real suppliers. In the Sandpit, you can create an event, put it live to our Sandpit participants, and work through the event from a supplier perspective.

To do this, create an event, invite our 3 Sandpit companies, then switch your view to a supplier view in the top-right corner of your screen (see below). You'll then be able to answer questions and place bids as if you were a supplier. Once you're done, switch back to "Act as Host" and you can review the responses you've given.

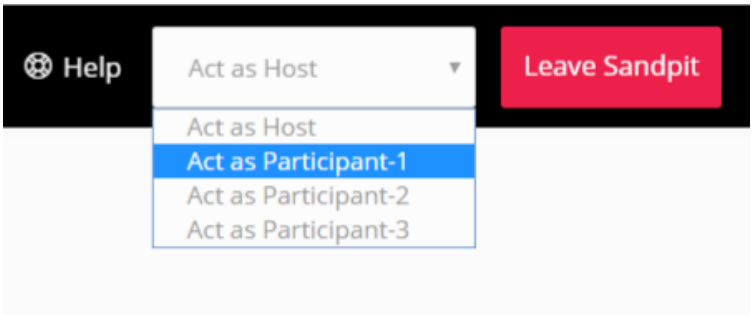


Figure 1.3 - Switching your View in the Sandpit

©Market Dojo 2021

For new users, or anyone who is running a complicated event, we strongly recommend that you get things set up in the Sandpit first. This gives you the opportunity to spot any errors and to make sure that everything is being portrayed to your suppliers in the way you intended. Once you're happy with your event, you can then 'clone' all your work into a live event.

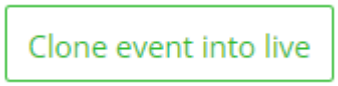


Figure 1.4 - Cloning into Live

How to Create an Event

Creating an Event

To create a new sourcing event, click on the "New Event" button on either your Dashboard or Events page.

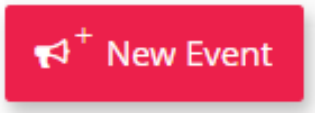


Figure 2.1 - Creating a New Event

In order to ensure that users have the flexibility they need in conjunction with the time-saving benefit attached to being able to reuse the great work they've done already, Sourcing Dojo allows users to set up events in three different ways:

- Cloning an event
- Using an event template
- Starting from scratch

Cloning an Event

Sourcing Dojo makes it possible to fully copy (clone) any event that you have access to. This means that if you've created events before, or have been granted the ability to view / edit your colleagues' events, then any work that already exists can be copied rather than it being necessary to recreate or re-do anything.

After clicking on the "New Event" button, a pop-up will appear. Just type in the part of the name of the event you'd like to clone and then select it from the drop-down list provided. If you are in the live site, cloning from the Sandpit, tick the "From Sandpit" button, and vice versa. To clone a Quick Quote tick the "Quick Quotes" box to see these in the drop-down list.

©Market Dojo 2021

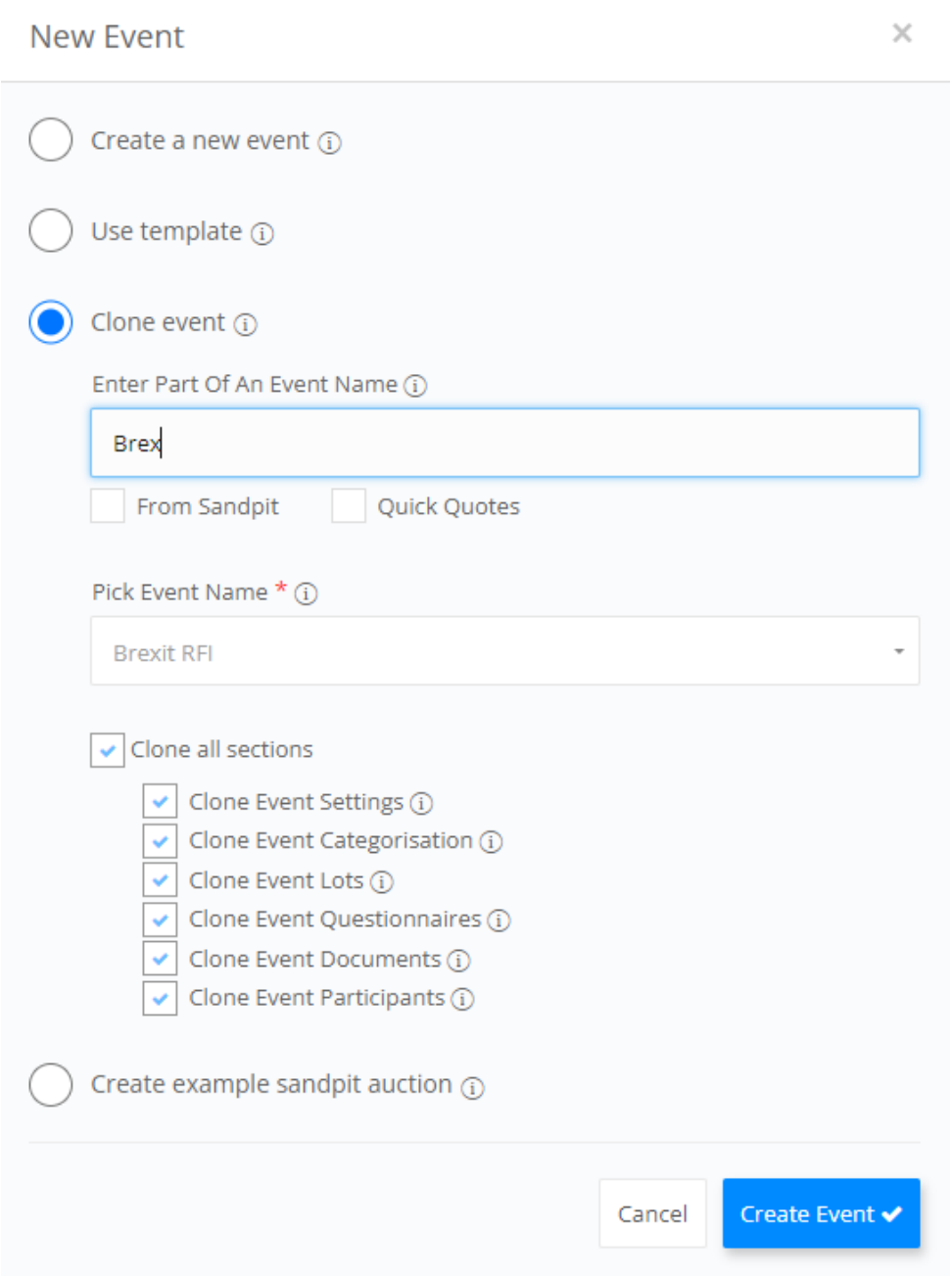


Figure 2.2 - Cloning an Event

Using Event Templates

Here at Market Dojo we have created a number of category-specific Global Event Templates which can be used to help you get started with your sourcing activities. Each company also has the ability to store their own company-specific templates which can be used to ensure consistency across the business.

©Market Dojo 2021

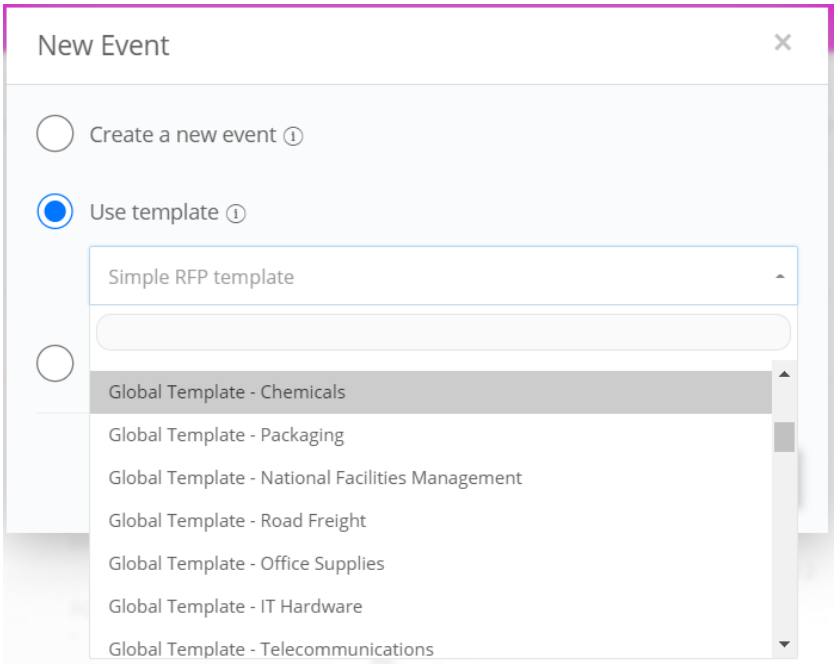


Figure 2.3 - Event Templates

Creating a New Event from Scratch

The third way to create an event is from scratch. If you're new to the tool and have no colleagues' work to draw from, then this will be the route you will need to take. We've split this out into the different stages involved below.

New Event - Settings

The first tab that is completed when creating a new event is the Settings tab. Here you will set the structure of the event, before moving on to insert the content on the later tabs.

Event Name and Brief

Your Event Name and Brief are sent to your suppliers as part of their invitation email and therefore the first thing your suppliers will see. It's important that you make it clear what you are looking for, without going into so much detail that your invitation email becomes too long. A great event brief is likely to include the following:

- An introduction to your business
- A description of your requirement
- Details on the process
- Any key deadlines
- Information on how they should get in contact - remember, our Support team is here to answer any technical questions that your supplier might have, leaving you just to

©Market Dojo 2021

handle questions on the tender itself. They can contact us via Help Dojo and we recommend that you require them to contact you via the Messages tab.

See our **Creating an Event Brief** guide for more help on creating the perfect event brief.

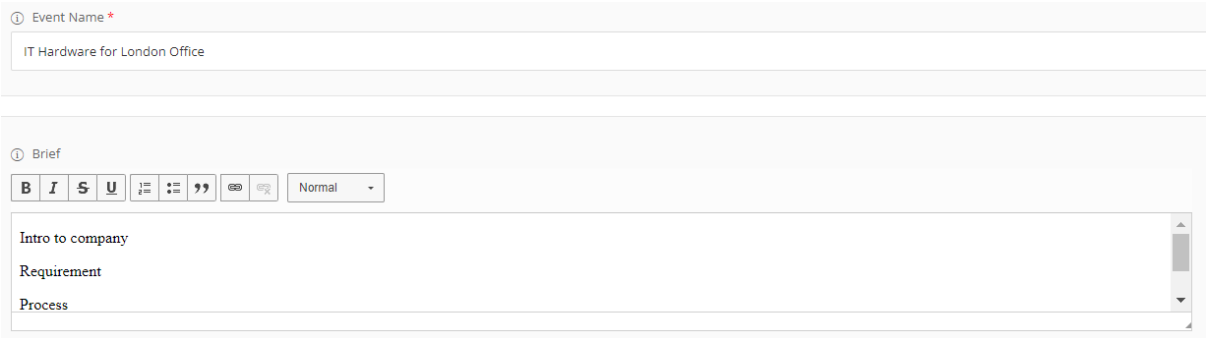


Figure 3.1 - Event Brief

Event Structure

Each event must include at least 1 of the following stages, although in many cases they will involve two or all:

- Questions (Questionnaire(s))
- Pricing (RFQ)
- Online Auction

On the event Settings page you will select the stages you wish to include, then the details are added later.

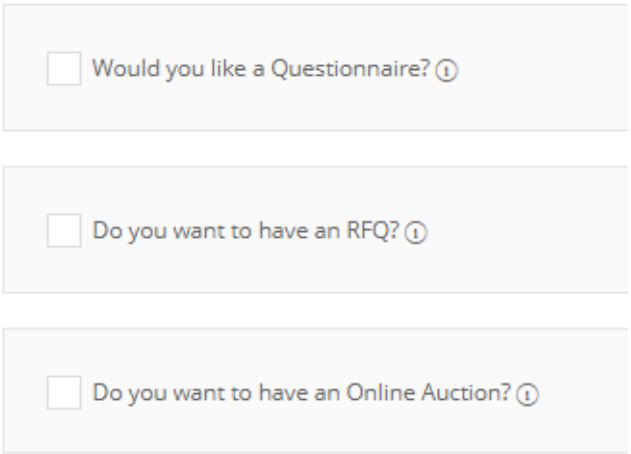


Figure 3.2 - Event Structure

©Market Dojo 2021

Questionnaire Settings

If there are questions you would like the supplier to answer, you should add a questionnaire to your event. Our questionnaire functionality allows you to ask the supplier as many questions as you wish, either as part of one set of questions (questionnaire) or split into multiple questionnaires. On the settings tab, you are asked to make decisions on the overall set-up of the questionnaire, whilst the content and questions themselves are added at a later stage. Please see below the settings that must be completed for each questionnaire:

- **Questionnaire name** - the name you give your Questionnaire will be used throughout the event. It will be the title of the tab related to the questionnaire and will be used in all communication. It should clearly state the topic of the set of questions it relates to (e.g. “Pre-Qualification Questions”, “Company Information”or “Proposal”).

- **Deadline** - your deadline can be as far in the future as you would like. For urgent requirements, this might be a couple of days, or for less urgent requirements you may choose to give the supplier a month or more. Suppliers will be made aware of the deadline and will not be able to submit once it has passed, however you can change the deadline to allow late suppliers to participate if you wish or leave the deadline blank if you prefer.

- **Do you want it to be Pre Qualification?** - Only the first Questionnaire can be made into a Pre-Qualification Questionnaire. If you tick this box then this Questionnaire will act as an extra 'gateway' into the event. A participant must successfully pass this gateway to have access to the rest of the event; and complete other questionnaires, place bids or see documents. This gateway questionnaire might be simply asking the participant to accept your T&Cs, or it might be a more complicated, scored questionnaire where participants must score enough marks to move forwards.

- **Do you want it to have scoring?** - This box should be ticked if you would like the ability to assign scores to specific questions.

- **Do you want it to have weighting?** For those using more complex assessment criteria, weighting can be added to your questionnaires. This allows you to assign differing levels of importance to specific questions, sections or both.

You can add further questionnaires by ticking the “Would you like another Questionnaire?” box.

©Market Dojo 2021

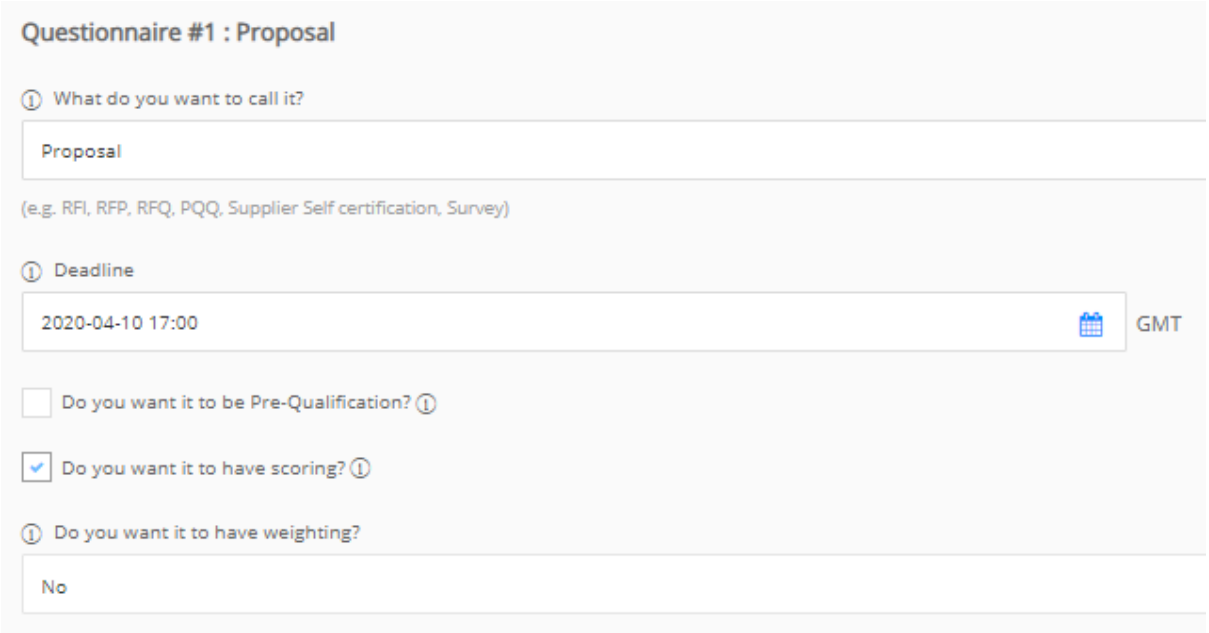


Figure 3.3 - Questionnaire Settings

RFQ Settings

Adding an RFQ to your event will allow you to request pricing from your suppliers, which will then be ranked by the tool. This can be used to gain one price from each user, or to work through multiple rounds of bidding.

Tick the RFQ box then provide the following:

- **Currency information** - The currency of your event is selected using the “Default Currency” drop-down list. Your standard default can be amended via your Profile settings. If you wish to allow suppliers to bid in their local currency, this can be done by making the event “multi currency”. Where “multi-currency” is selected, you will be required to set the exchange rate for any other currencies against your default. When running a “multi currency” event you will not be able to use simple lots, advanced lots are required

- **Bid deadline** - this is the date on which bidding will close. Participants will no longer be able to submit pricing after this date, however it can be left blank if you prefer.

©Market Dojo 2021

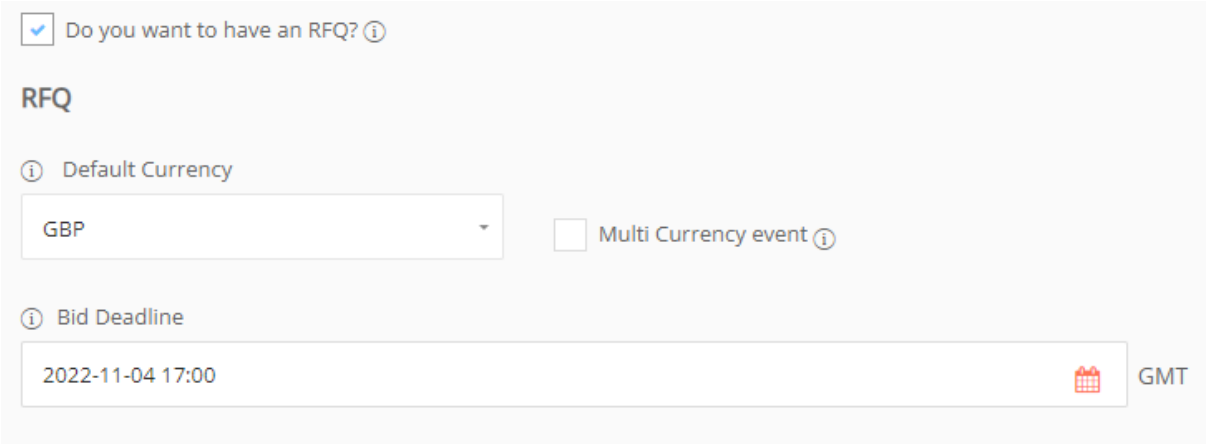


Figure 3.4 - RFQ Settings

Auction Settings

Please see our **Sourcing Dojo Auction Guide** for information on running an auction through Sourcing Dojo.

Documents

Adding Documents

After creating the structure of your event on the Settings page, you will work from left to right along the tabs to insert the content of the event. The next step is to upload your documents. Any document that you would usually share with your supplier as part of your sourcing activities should be added here. Common examples include T&Cs, NDAs and product specifications.

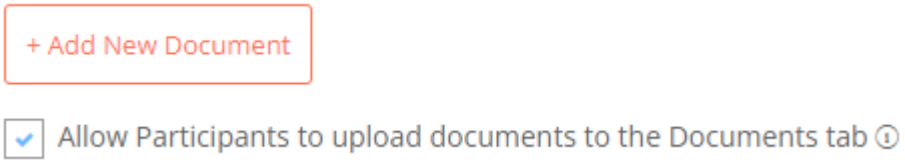


Figure 4.1 - Adding Documents

Documents can be uploaded in any file type by both you and your suppliers.

To send your document as part of the initial invitation email, tick the ‘include in invite’ box. This will also determine which documents are accessible by suppliers as part of any pre-qualification stage. For any documents that you wish to remain hidden before pre-qualification answers have been accepted, you should ensure this box is left un-ticked.

©Market Dojo 2021

The “share with” button allows you to specifically select which suppliers are able to access the document. For example, you may wish to share an award letter or other documentation with just the winning supplier, rather than all involved.

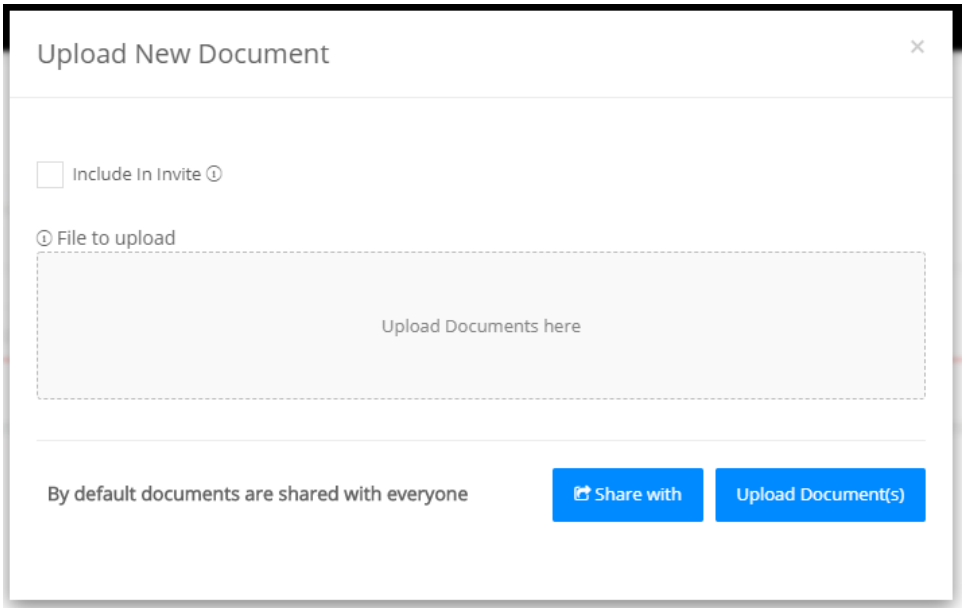


Figure 4.2 - Uploading a Document

The “Allow Participants to upload documents into the Documents tab” setting allows you to choose whether participants can only upload documents in response to specific questions, or whether they can also upload directly into the Documents tab.

Questionnaires

Ways to Build a Questionnaire

There are 3 ways to build a questionnaire:

- Within the application through by selecting ‘New Questionnaire’
- Using the ‘Download’ and ‘Upload’ features to create your questions in Excel first
- Using templates to import a previously-saved questionnaire

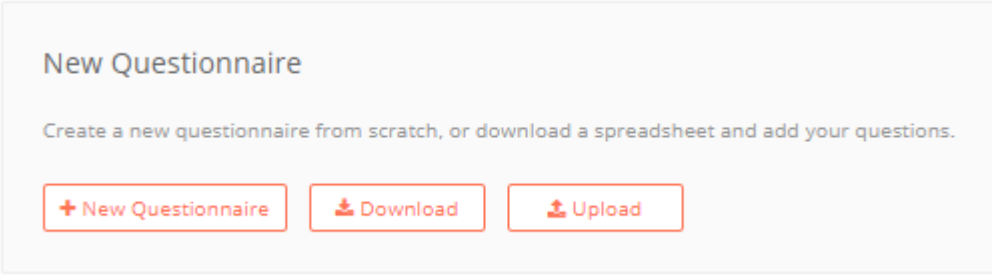


Figure 5.1 - Creating your Questionnaire

©Market Dojo 2021

Adding your Questions

To add a new question, click on “add new question” and write your question in the first box. If necessary you can add a question description below. URLs and documents you have uploaded to the event can be linked to your question description by clicking on the paperclip icon.

For each question you will be asked to choose from a range of response types: yes/no, pick from a list, multiple choice, one line text, paragraph text, document upload, table, date or number. Questions can be made mandatory or optional by either ticking or leaving blank the ‘Mandatory’ box.

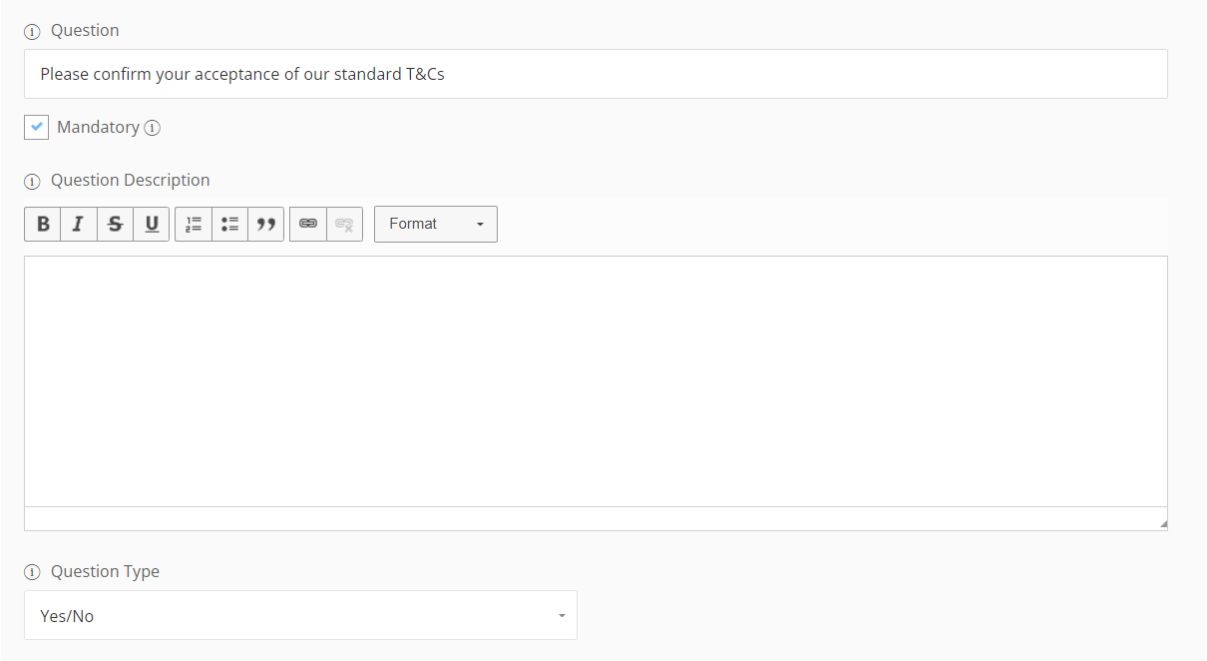


Figure 5.2 - Adding a Question

In some scenarios, there will be questions that you only wish to show if the supplier has given a specific answer to a previous question. For example, the initial question might be “Please confirm whether you accept our T&Cs”, with the follow-up being “Please provide the reasons that you are unable to accept” if the supplier gives a response of “No” to the first question. These dynamic questions can be managed by using the “Display when” drop-down to choose the relevant parent question and then selecting the response that the supplier must give to see the follow-up question.

©Market Dojo 2021

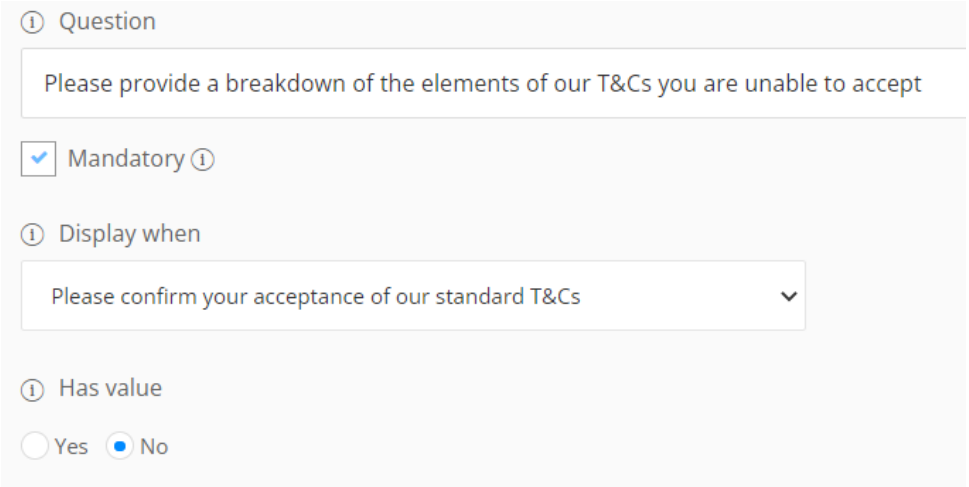


Figure 5.3 - Dynamic Question

Formatting your Questionnaire

Additional questions and sections can be added using the relevant buttons. There is no limit to the number of questions and sections. Use the copy function to copy questions or entire sections. Both sections and questions can be dragged around the screen to reorder them.

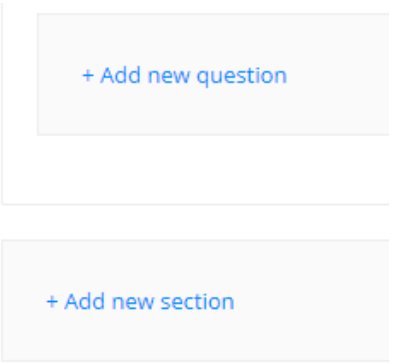


Figure 5.4 - New questions and sections

To change the name of a section or add a section description, click on 'Edit Section Attributes.

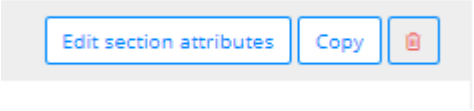


Figure 5.5 - Edit Section Name & Description

Introduction text can be added at the start of your questionnaire by clicking on the 'Description' button.

©Market Dojo 2021

Figure 5.6 - Edit Questionnaire Description

Scored Questions

Where your questionnaire is scored, you will have the option to apply a maximum score to each question. Where scoring is applied, you can also provide details on the scoring criteria to be shown internally.

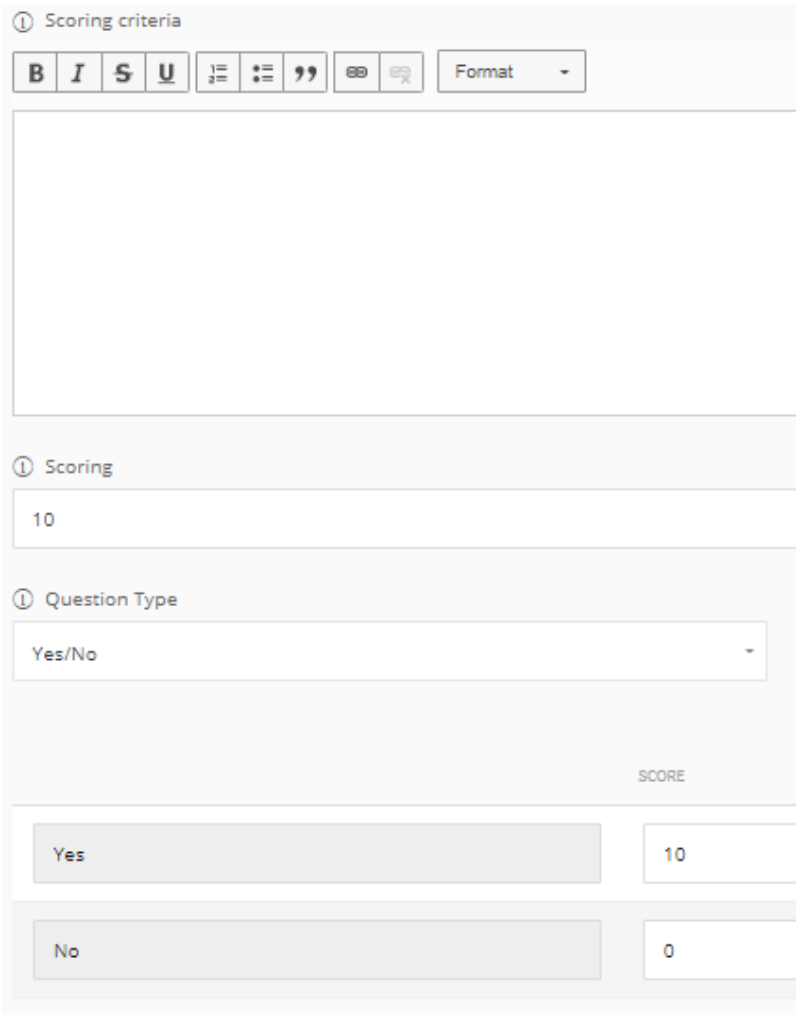


Figure 5.7 - Scored Questions

Adding Scorers

As an add-on service, additional scorers can be added by clicking on the 'Edit Scorers' button at the top of the page. Please note that additional scorers cannot be added to a

©Market Dojo 2021

Sandpit event. If you do not see this option in the live site, please contact our support team to check whether this should be included with your licence.

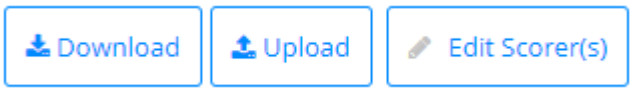


Figure 5.8 - Adding Additional Scorers

Weighting

Questionnaires can be weighted by question, by section or by both.

Where weightings relate to questions, each scored question can be assigned a weighting of 0 -100. This is assigned within the question. Where weightings are applicable to the different sections, clicking on the “Edit Section Attributes” box will allow you to amend the weighting along with any other section details.

Figure 5.9 - Weighted Questions

Please note that you will not be able to leave the questionnaire page until all weightings add up - if in doubt we recommend adding weightings at the end when all the questions have been finalised.

Lots

The priced element of your event will be managed using lots. There are two ways to create lots in Sourcing Dojo - Simple Lots and Advanced Lots. Simple lots are a useful way of capturing lot by lot pricing. Advanced lots allow text and pricing information to be captured, multiple pricing columns, ranking by line item and total, and formulas.

Simple Lots

Simple lots require a **name**, a **unit of measure** and a unit **quantity**. This allows you to state the format in which suppliers should quote and the volume you will be purchasing.

©Market Dojo 2021

A **current price** can also be added. As this is used to calculate savings, we strongly recommend including a current price. If you have no current price to compare against, you should add your budget or expected price here. This information is not shown to suppliers, and is used purely for savings calculations.

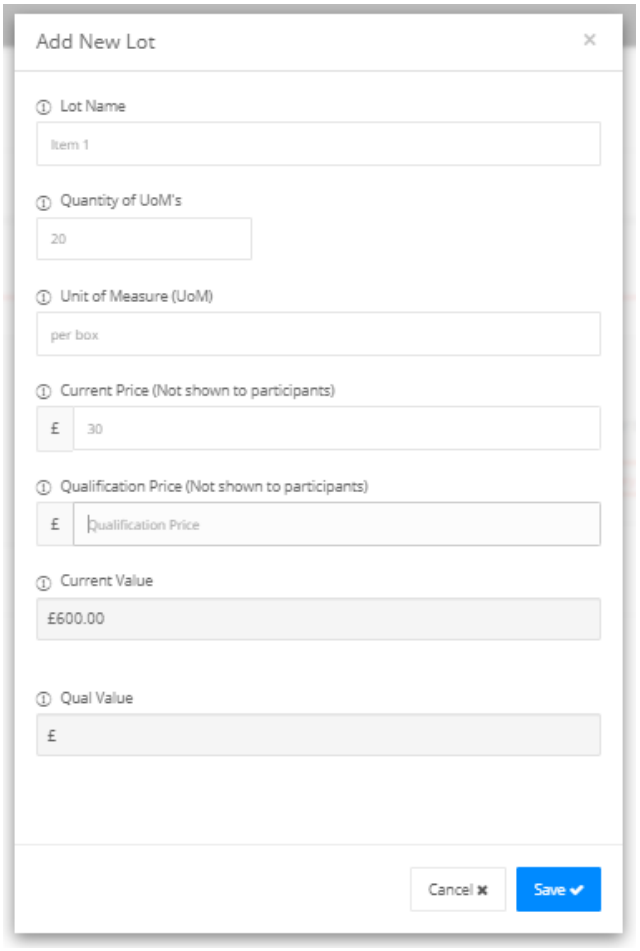


Figure 6.1 - Adding a Simple Lot

The final optional field is **qualification price**. The qualification price is the upper limit at which you are willing to accept bids. Where a qualification price is included, suppliers will be unable to submit bids above this figure. We only recommend including a qualification price in scenarios where you have a stringent budget that you cannot go above and / or you have a very strong grip on the market and expected pricing. Where there is doubt, we recommend leaving this field blank.

Simple lots can be added manually one by one or in bulk using the 'Excel Upload' function.

Advanced Lots

Advanced lots can be used to create a pricing matrix which includes multiple columns and rows. For advice on using advanced lots, please contact your account manager or our support team.

©Market Dojo 2021

Inviting Participants

Invite Options

The final stage of setting up a new event is inviting your participants. From the final “Invite Participants” tab click on “Add New Participant”. A pop-up will then appear with four options:

- Add Participant Manually (by adding in each supplier’s email address)
- Upload List (use the template provided to upload a CSV file with multiple participant email addresses)
- Pick Group (choose from a pre-defined list of suppliers)
- Pick From Participant Database (choose suppliers who has previously been invited to sourcing events)

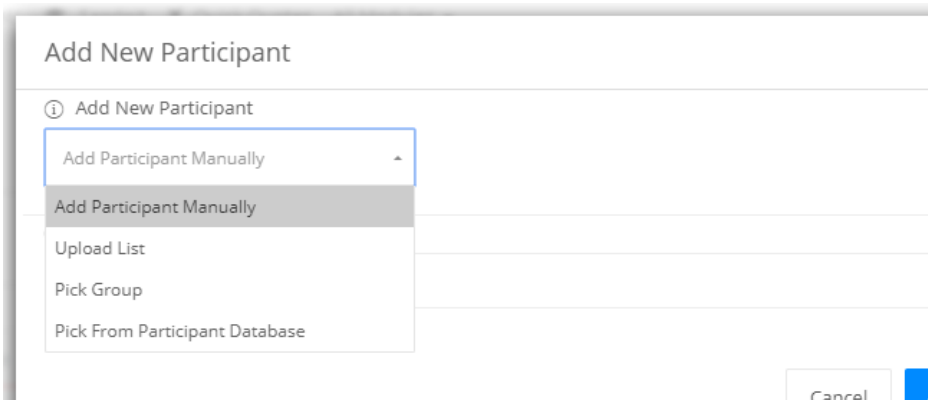


Figure 7.1 - Adding Participants

Once you’ve added your suppliers, you must decide whether or not to automatically accept participants. Most users leave this box ticked so that all invited suppliers are automatically accepted. If an uninvited supplier tries to join (e.g. after being forwarded an invitation), you’ll still need to accept them before they will be able to participate.

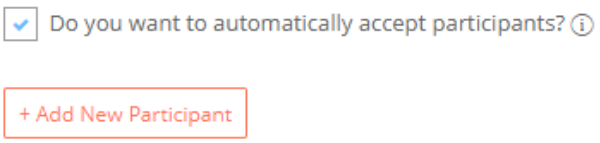


Figure 7.2 Automatically Accepting Participants

©Market Dojo 2021

Invite Participants and Finish

Finally, click on the “Invite Participants and Finish” button to put your event live. This will move your event from “Draft” stage to “Current” and will trigger an email invitation to be sent to your suppliers. To see what this email contains, just set up an event in the Sandpit and invite the Sandpit companies - you’ll then receive a copy of the email that is sent to suppliers.

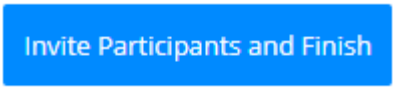


Figure 7.3 - Putting the Event Live

Participant Experience

Accepting the Invite

The supplier invitation email will contain a link which will either direct them to set up a Market Dojo account (if they have not used the tool before) or to sign in (if they have an existing account).

Once they have set up an account / signed in they will be directed to the Event Invitations page where they will need to accept your invitation.

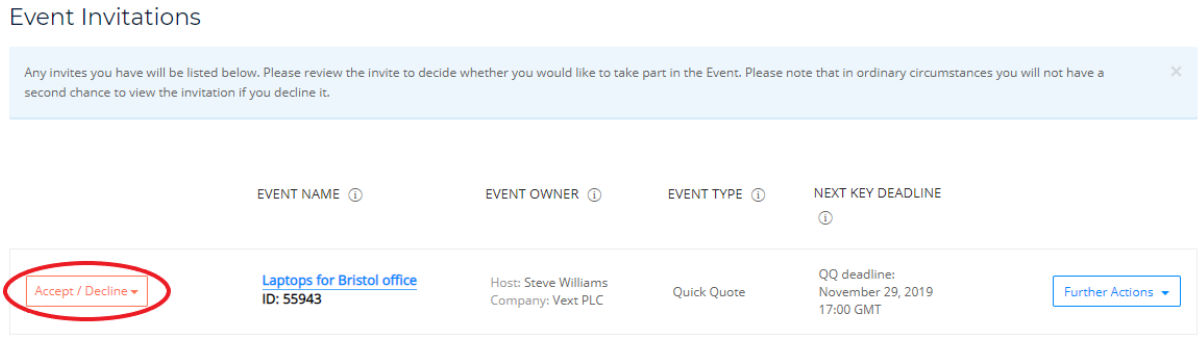


Figure 8.1 - Accepting the Invite

Overview

Once the invite has been accepted, the supplier will see an overview of the sourcing event. This will include the brief you created, your contact details and information on the stages they are required to complete. They will then work through the tabs on the event from left to right.

©Market Dojo 2021

Questionnaire Responses

If you have included questions in your event, this will be the first stage the supplier's need to complete. Each time they answer a question, their progress is saved. Once they are finished they will click the "Submit Answers" button.

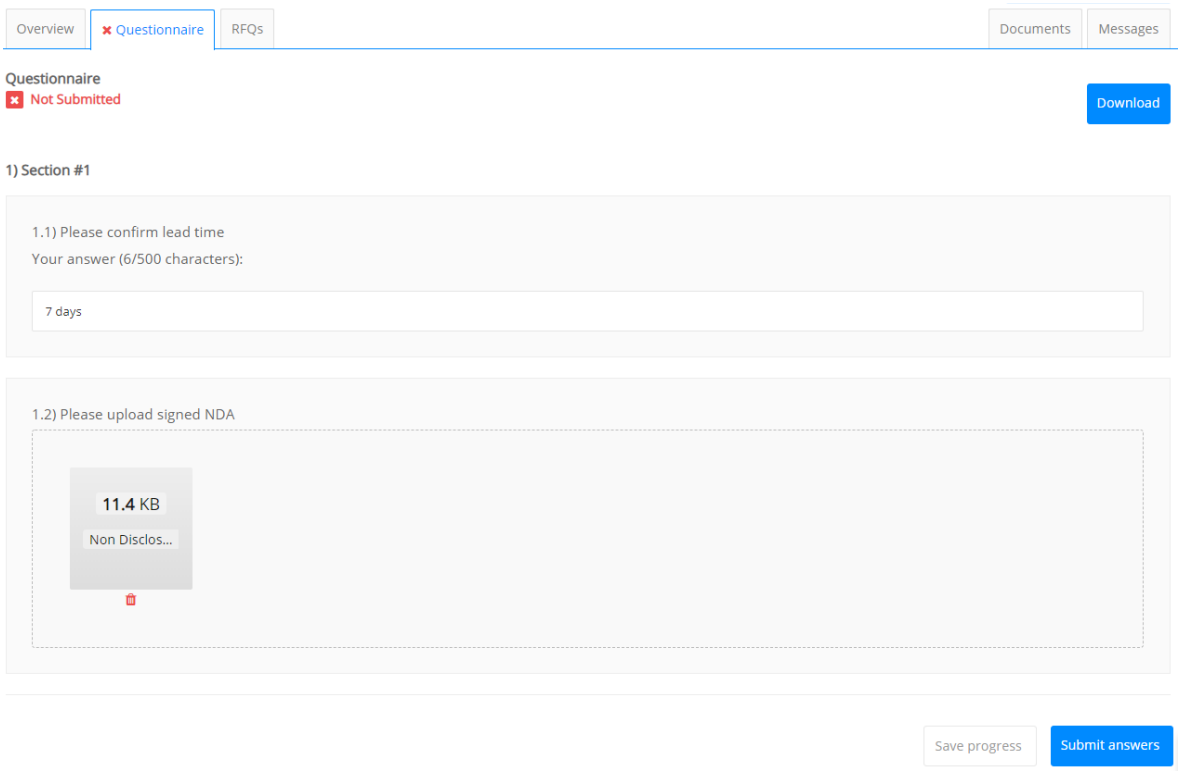


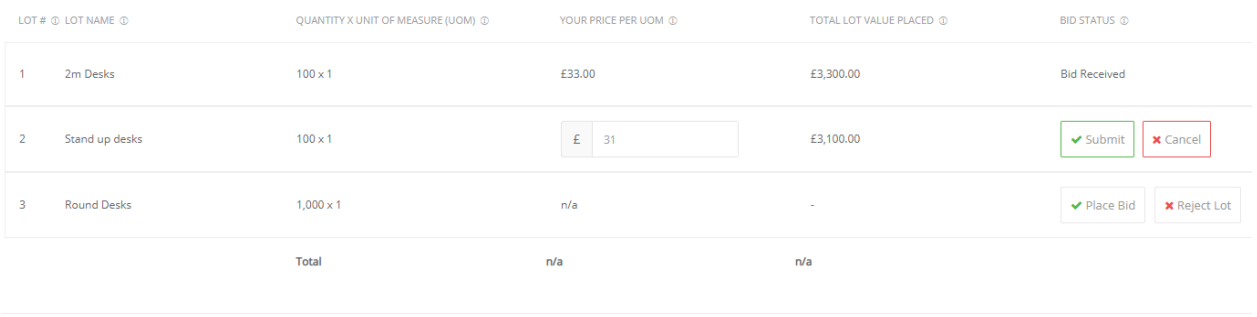
Figure 8.2 - Answering Questions

Bidding in an RFQ

The final stage for your suppliers is the bidding. In an RFQ, this is completed on the RFQ tab. Suppliers click on the "Place Bid" button, then add their figures and submit.

To find out more about the supplier auction experience see our **Sourcing Dojo Auction Guide**.

©Market Dojo 2021



LOT #	LOT NAME	QUANTITY X UNIT OF MEASURE (UOM)	YOUR PRICE PER UOM	TOTAL LOT VALUE PLACED	BID STATUS
1	2m Desks	100 x 1	£33.00	£3,300.00	Bid Received
2	Stand up desks	100 x 1	£ 31	£3,100.00	✔ Submit ✖ Cancel
3	Round Desks	1,000 x 1	n/a	-	✔ Place Bid ✖ Reject Lot
		Total	n/a	n/a	

Figure 8.3 -Simple Lot Bidding

During the Event

Monitoring your Participants

Throughout the event, you can keep track of which participants have received and accepted your event invitation via the Participants tab. This tab will clearly show who the invite has been delivered to, who has opened the email and who has accepted the invitation. As any deadlines approach, we recommend that you use the Participants tab to identify which suppliers you should chase.

APPROVAL	PARTICIPANT	INVITED	STATUS	QUESTIONNAIRES COMPLETED	LOTS ENTERED
✔	Participant 1 Sandpit Participant 1	Through platform	✔ Registered ✔ Accepted invite	1/1	0/1
✔	Participant 2 Sandpit Participant 2	Through platform	✔ Registered ✔ Accepted invite	0/1	0/1
✔	Participant 3 Sandpit Participant 3	Through platform	✔ Registered ✖ Not accepted invite	0/1	0/1
Totals	Involved: 3 Approved: 3	Through platform: 3 With invite code: 0	Registered: 3 Accepted: 2	1/3	Full 0 Partial 0 None 3

Figure 9.1 - Keeping track of your Participants

Reinviting Suppliers

To resend an invitation to a supplier, go to the Participants tab and click on the supplier's email address / company name. A popup will appear. At the bottom of the popup there is the option to either re-invite the supplier you clicked on or all suppliers who have not yet accepted your invitation.

©Market Dojo 2021

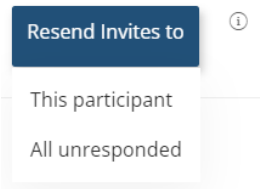


Figure 9.2 - Reinviting Suppliers

Pre-Qualification Questionnaires & Allowing Re-Submission

If your event includes a pre-qualification questionnaire, you will generally need to accept each participant's pre-qualification questionnaire responses before they can progress to the other stages of the event. If all questions are set as "pass/fail" questions, the system will automatically accept suppliers based on their responses.

To do this, go to the pre-qualification questionnaire tab (this will have the questionnaire name you selected) to review the participant responses. At the bottom of the page, you will see a drop-down box to select from. If you are happy with the participant's responses, choose "Accept answers" from the list, and the supplier will move on to the next stage. If you would like to allow a participant to update their response, select "Allow re-sub", or if you do not want the participant to progress, select "Decline Answers".

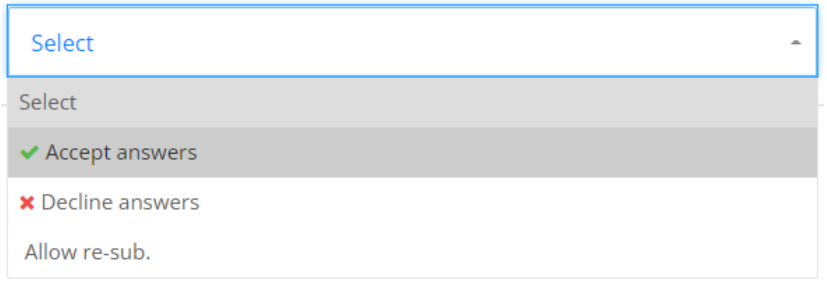


Figure 9.3 - Managing Pre-Qualification Questionnaires

Multi Stage RFQs - Adding a New Round of Bidding

Once you have received your participant responses and the RFQ deadline has passed, you have the option of adding another round of bidding. This allows you to ask either specific suppliers or all suppliers to provide an updated quote.

©Market Dojo 2021

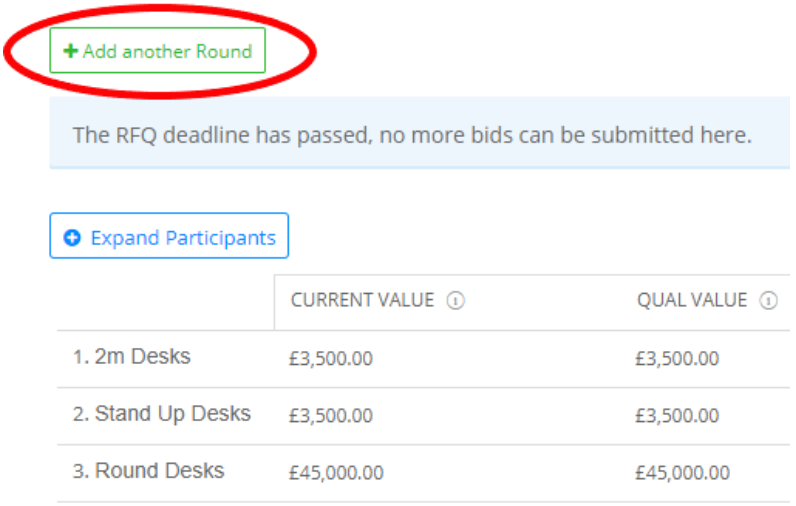


Figure 9.4 - Adding a New Bidding Round

To add a new round, click on the “Add another Round” button, choose a deadline, and select the participants you would like to take forward to the next round.

Tick the box if you would like all participants to know their current rank before they place updated bids. If this box is left un-ticked, suppliers will be unaware of their ranking.

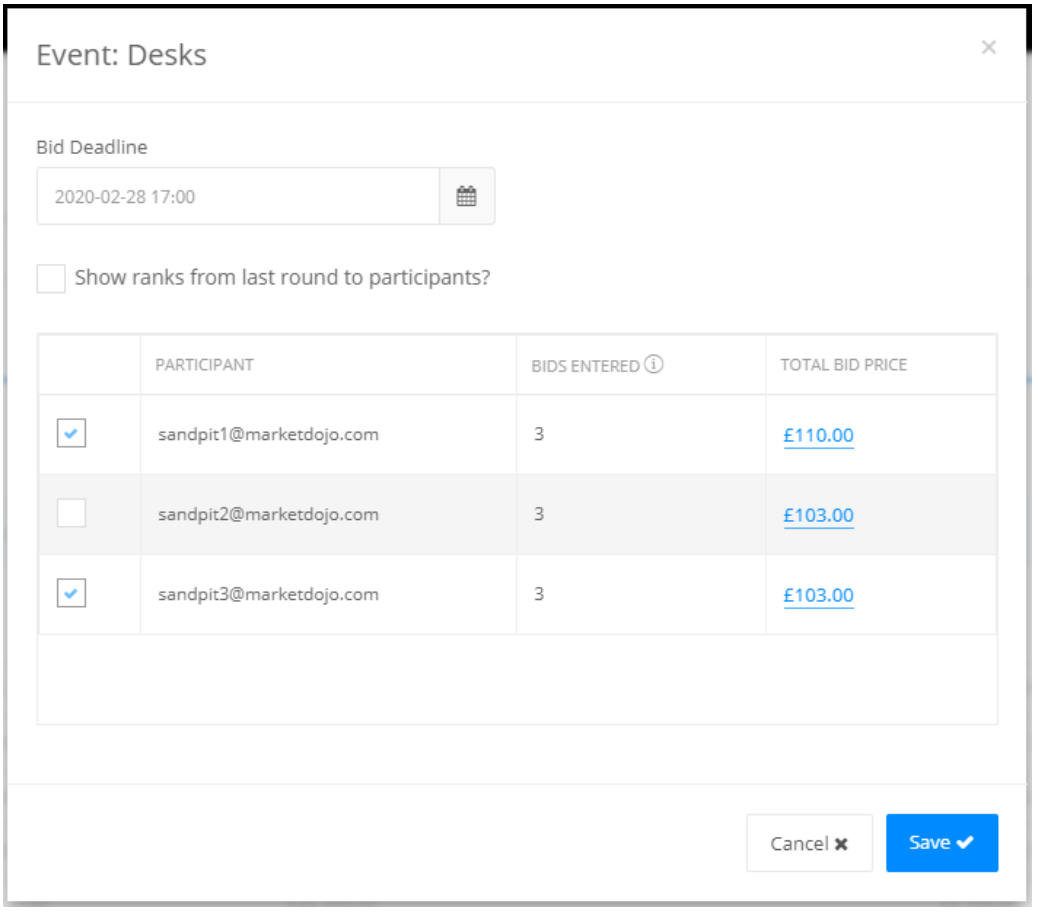


Figure 9.5 - New Bidding Round Details

©Market Dojo 2021

Once you click the “Save” button, your participants will receive a notification to let them know that a new round of bidding has been opened. They will then be able to update their bid.

To add a brand new supplier into a later bidding round, go to the Participants tab, put the event into Edit mode and add their email address to send an invitation. Remember to save your event again.

Please note that currently multi-stage bidding is only available when using Simple Lots. This functionality is planned to be extended to Advanced Lots in 2022.

Messages

When your event is live, we recommend communicating with your suppliers via the messages tab to ensure that all your communication is kept in one place. You can choose to send messages to all participants, active participants, pending participants, declined participants or to select them on an individual basis. Suppliers can respond and send you new messages. You will receive an email notification prompting you to log into the tool to review any communication you receive from participants.

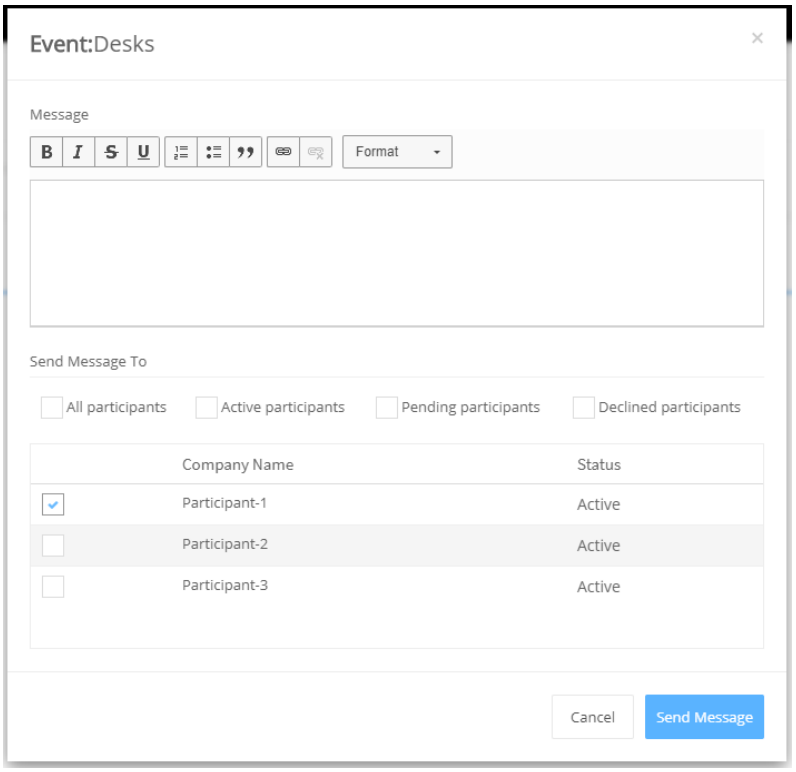


Figure 9.6 Sending Messages

©Market Dojo 2021

Deleting Bids

If a supplier has placed a bid in error, they will be unable to remove this themselves. If they wish to remove a bid, they will need to contact you to request that you do so on their behalf. To remove a bid, click on it to enlarge the bid details, then use the rubbish bin icon to remove.

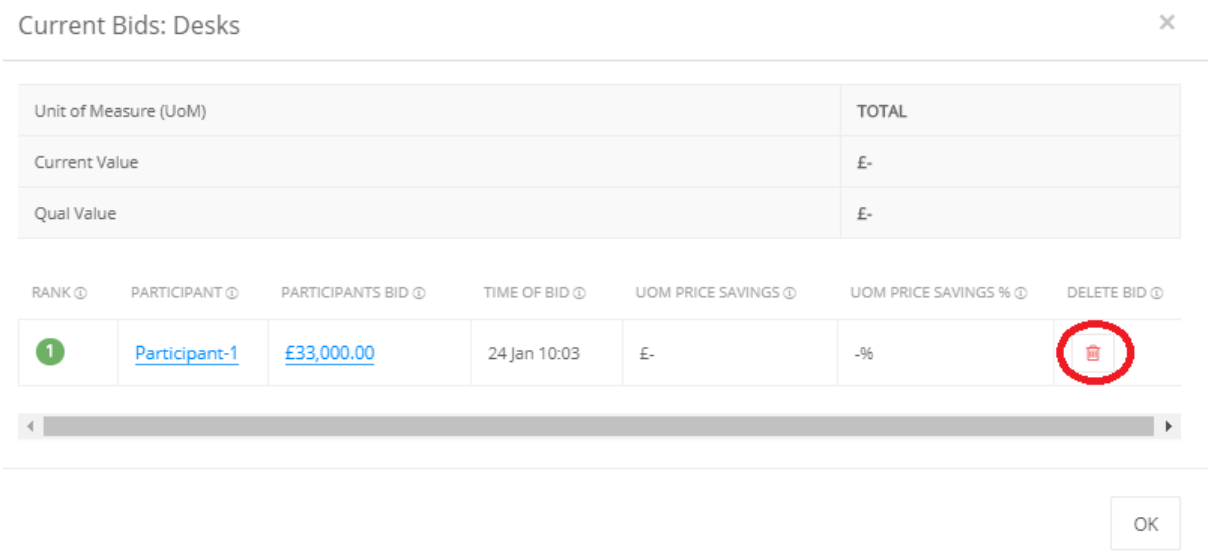


Figure 9.7 - Deleting a Bid

Editing the Event

If you need to make changes to your event, such as extending a deadline or adding a question, go to the overview tab for your event and scroll down to the bottom of the page, where you will see an 'Edit' button. Click here to put your event on hold and make your changes. Remember to save your changes at the bottom of the page - until you've done so, your event will be paused.

Adding Notes

Throughout the event, there is the option to add notes to either a participant or to the event itself. We recommend that all information relating to the event is stored here in order to make it easy for yourself and others to understand why decisions were made and how the business was awarded.

©Market Dojo 2021

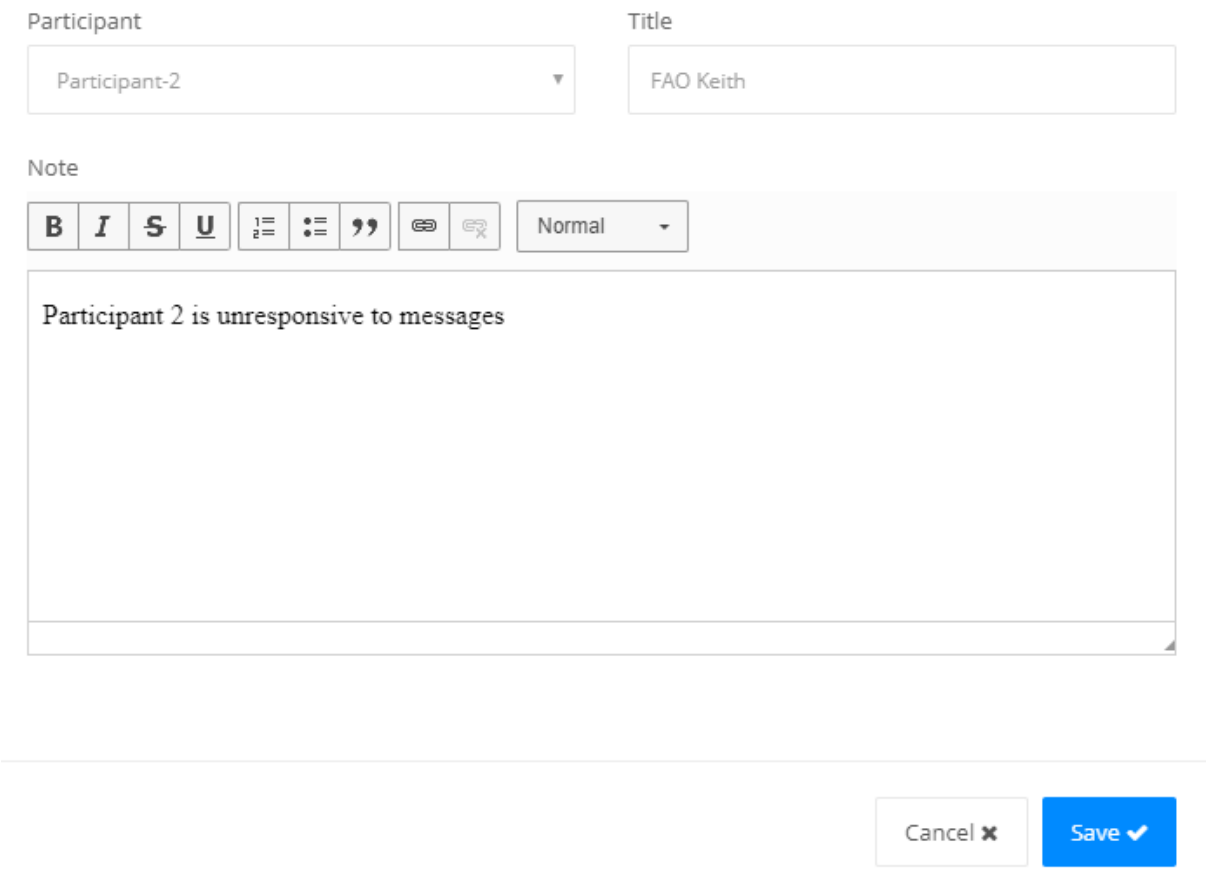


Figure 9.8 - Adding Notes

Reviewing Supplier Responses

Questionnaire Responses

The questionnaire responses from each supplier will be stored on the relevant questionnaire tab, where they can easily be compared against one another. Responses can be exported into a spreadsheet by clicking on the “Export Report” button.

©Market Dojo 2021

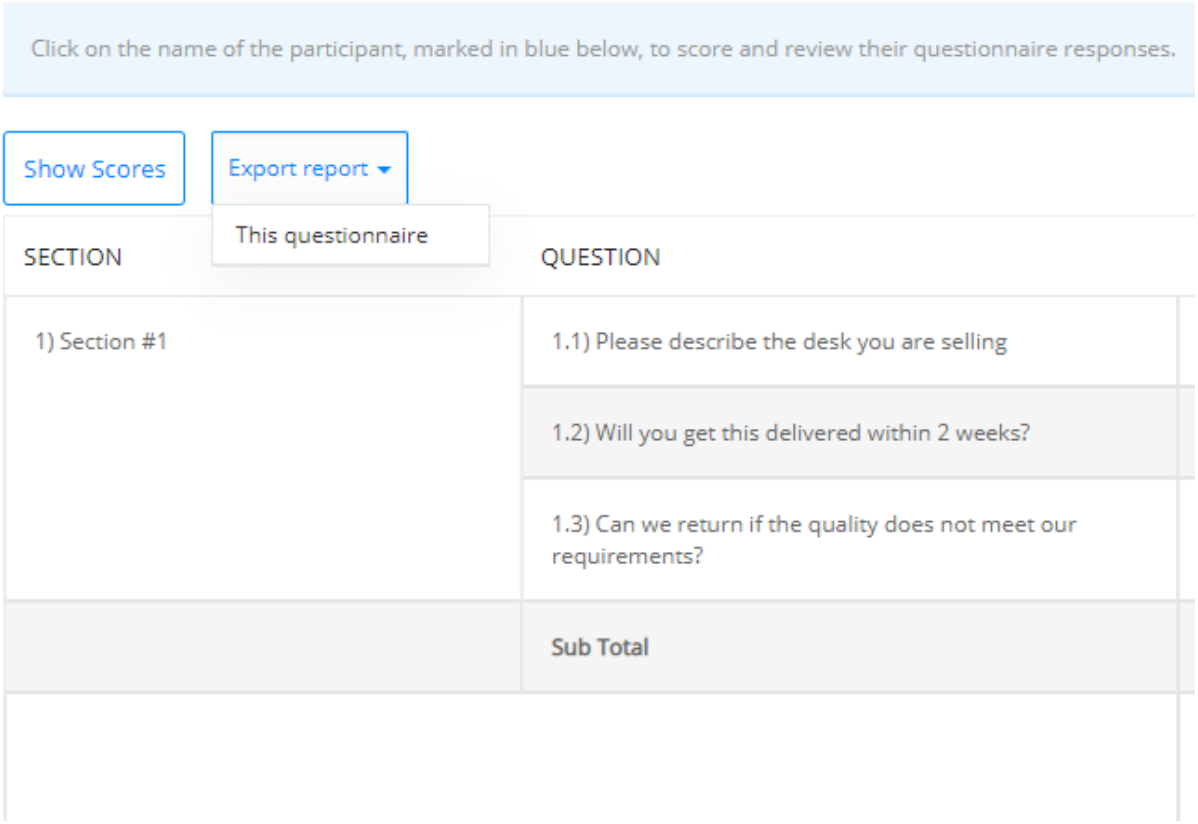


Figure 10.1 - Exporting Questionnaire Responses

Scoring Questionnaires

Where questionnaires are scored, the scoring can be completed as soon as an individual supplier has submitted their response, there is no need to wait for the deadline to pass or for all suppliers to have completed their submission.

To score a questionnaire, go to the relevant questionnaire tab. Any question that requires scoring will have a “Score” button clearly displayed next to it, click on this to provide your score. The speech bubble icon allows you to make a comment too.

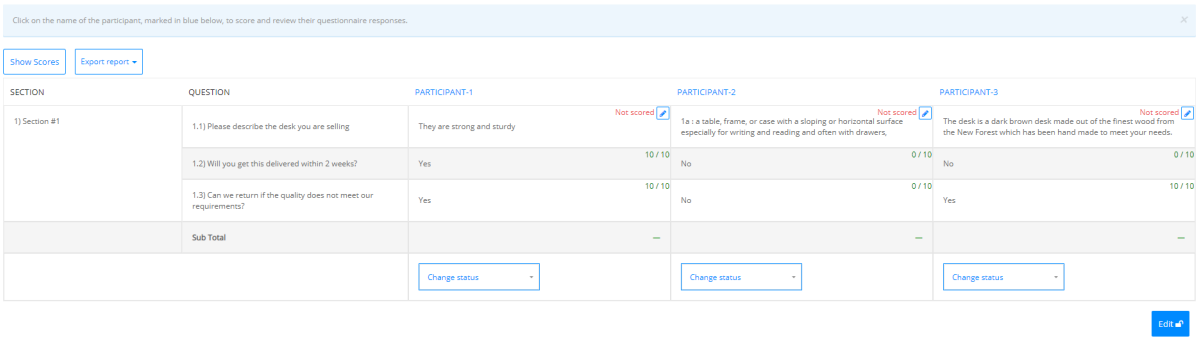


Figure 10.2 - Scored Questions

©Market Dojo 2021

RFQ Pricing

Participant pricing will be shown on the RFQ tab. This page will clearly show the best bid for each participant as well as the savings offered against the current price.

Click on the “Expand Participants” button to see all participant bids.

After the RFQ deadline has passed, bids can be exported into a spreadsheet by clicking on “Download Report” in Further Actions. In a multi-stage RFQ event you can choose between seeing the bids from a single round, or the most recent bid from each participant.

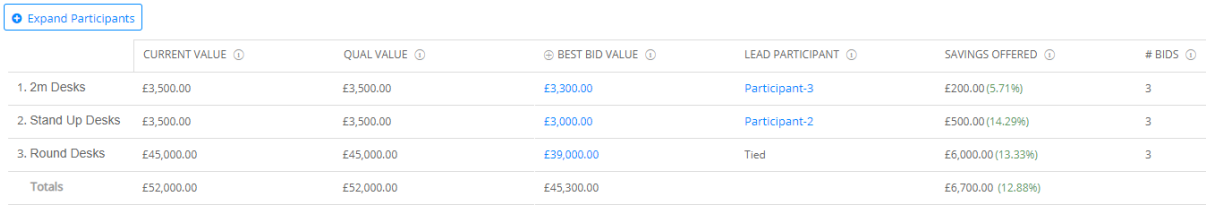


Figure 10.3 - RFQ Bids

Awarding Lots

To award your lot through the tool, click on the “Award Lots” button. You will then see the pop-up below. To record which participant has been awarded the lot, choose their name from the drop-down list (the best price will be selected as default) and tick the box next to their name to include them in the award notice.

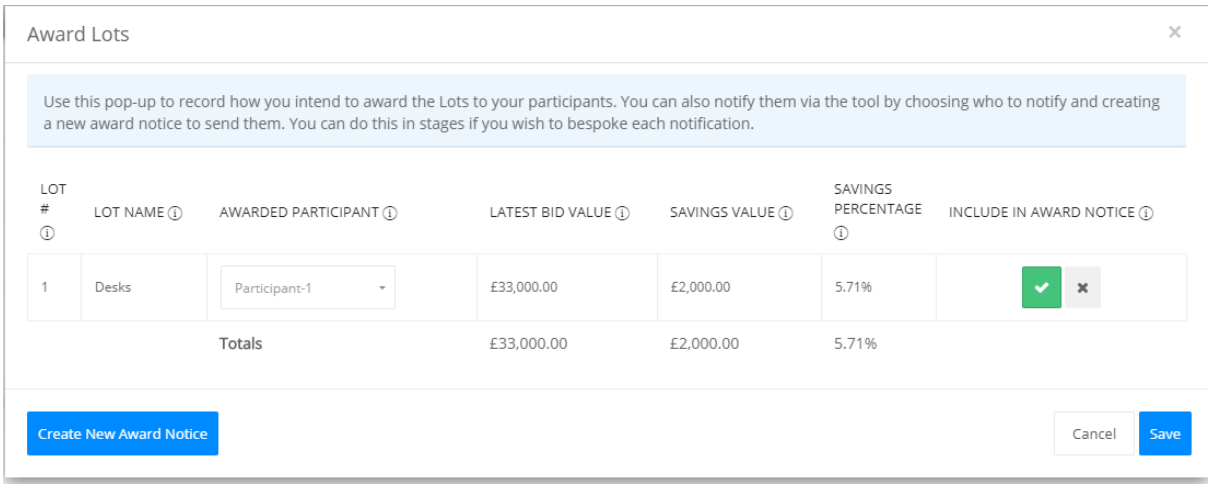


Figure 10.4 - Awarding Lots

©Market Dojo 2021

Help and Support

Contact Market Dojo

If you are experiencing any technical difficulties with the tool please contact Market Dojo directly via email on support@marketdojo.com or call +44 (0) 117 456 6813 or use the live chat option through the Help Dojo Portal.

©Market Dojo 2021