



Overview of Workshop Offering: Supplier Selection Workshop

Outsourcing Support Services (OSS)

Supplier Selection Workshop | Overview



Purpose: Prepare for the supplier selection process, derive insights from a pre-workshop questionnaire and group discussion, and narrow the potential set of outsourcing suppliers

Agenda

- Introductions and background
- Criteria for selection of short-list
- Overview of approach
- Identify open issues and action items

5-6 hours of supplier overview and insight

Additional details and timing on following page

Objectives

- Develop a current and fact-based understanding of the key service providers
- Identify key trends that should influence client supplier selection
- Short list potential suppliers using feedback questionnaire from client

Typical participants

- Core team lead
- Sourcing lead
- Project manager
- Strategic sourcing/ vendor management
- Sourcing lead
- HR

Everest inputs

- Market research on the market and supplier capabilities
- Supplier requirements questionnaire
- Expert, experience-based market insight
- Facilitate workshop

Client preparation

- Complete supplier requirements questionnaire and submit to Everest prior to workshop
- Bring list of preferred suppliers

Agenda item	Time allocation
Introductions and background <ul style="list-style-type: none">■ Key stakeholders■ How suppliers qualify their potential clients	0.5 hour
Overview of Approach <ul style="list-style-type: none">■ Identify the universe of potential suppliers■ Develop criteria and framework for evaluation■ Perform supplier analysis	1 hour
Outsourcing Supplier Selection <ul style="list-style-type: none">■ Identify key stakeholder to syndicate and confirm supplier selection■ Select 3-4 suppliers to engage■ Document potential risks and mitigation strategies	3 hours
Identify open issues and action items <ul style="list-style-type: none">■ Assign action items■ Determine target dates	0.5 hour

Supplier Selection Workshop | Preparation for Workshop



Client

- Provide to Everest completed questionnaire 2 weeks prior to the workshop
- Bring following items to the workshop
 - List of required or preferred suppliers (if applicable)
 - Questions about the suppliers
 - Unique requirements in the environment that may impact the supplier selection
- Invite appropriate meeting participants
- Secure logistics for meeting (room, audio-visual, etc.)

Everest

- Provide and discuss in advance of workshop
 - Structure for the workshop
 - Supplier criteria/initiative scope questionnaire
 - Draft project responsibility matrix
- Confirm logistics of workshop
- Bring following items to the workshop
 - Supplier selection process overview
 - Supplier research materials

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