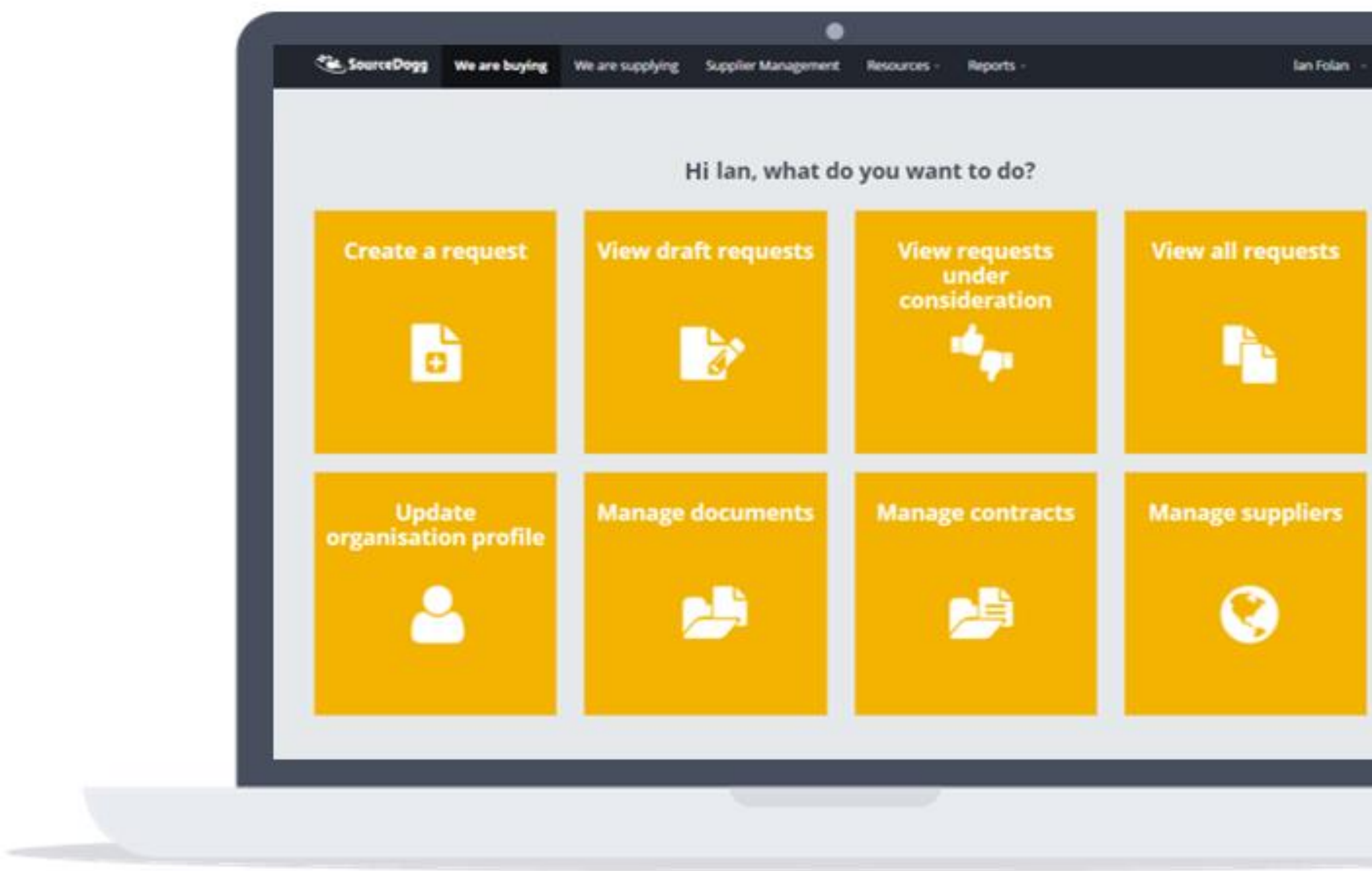
Supplier Performance Management

Scorer Guide

Date: June 2022



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1. Introduction

The **Supplier Performance Management** (SPM) module allows you to design and implement processes to measure, analyse and manage the performance of your suppliers using scorecards and KPI tracking. This will lead to the continuous improvement between the buyer and supplier organisations.

This module should be used in conjunction with the other features available under the umbrella of "**Supplier Performance Improvement**":

(1) **Supplier Relationship Management**:

- Arrange Review Meetings with suppliers and log associated discussion points and details.
- Key Actions to maintain an action log relating to each supplier.

(2) **Action Plans**:

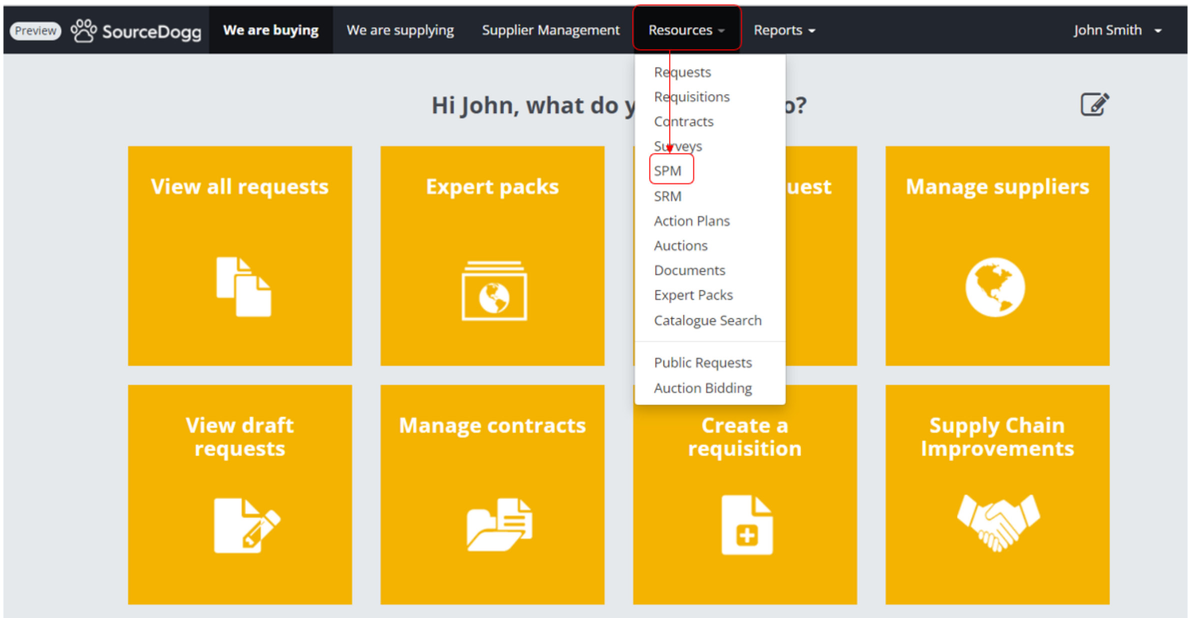
- Create Improvement Plans to agree, document, and track a roadmap for improvement with suppliers on areas/KPIs where they are underperforming.
- Create Non-Conformance and Corrective action reports to flag breaches of SLAs or other specific issues with suppliers.
- Provide details of the issue and gather supplier responses on corrective actions, solutions, and evidence of completion.

The previous guide covers the creation of the **SPM Templates**, including the KPIs, Review Criteria and Categories that the Templates are made up of, and the various SPM User Permissions.

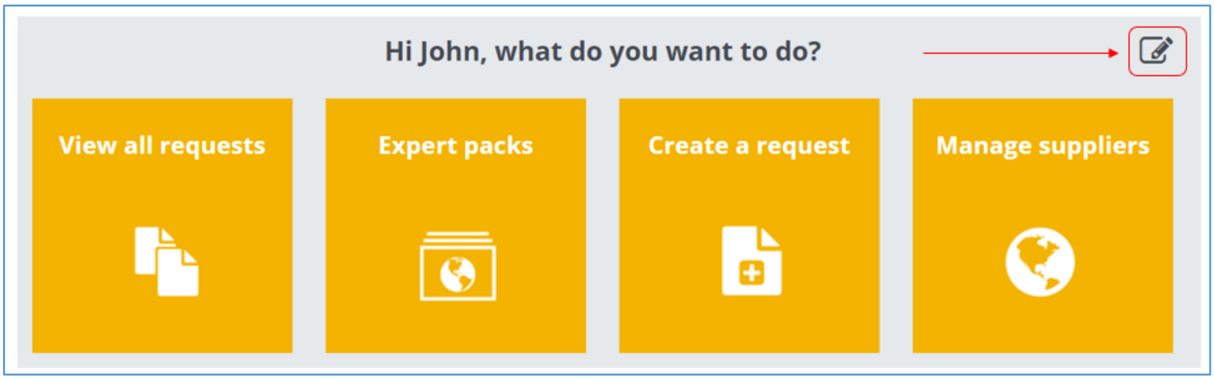
There guide will look at the **SPM Records** – how to create and complete a scorecard.

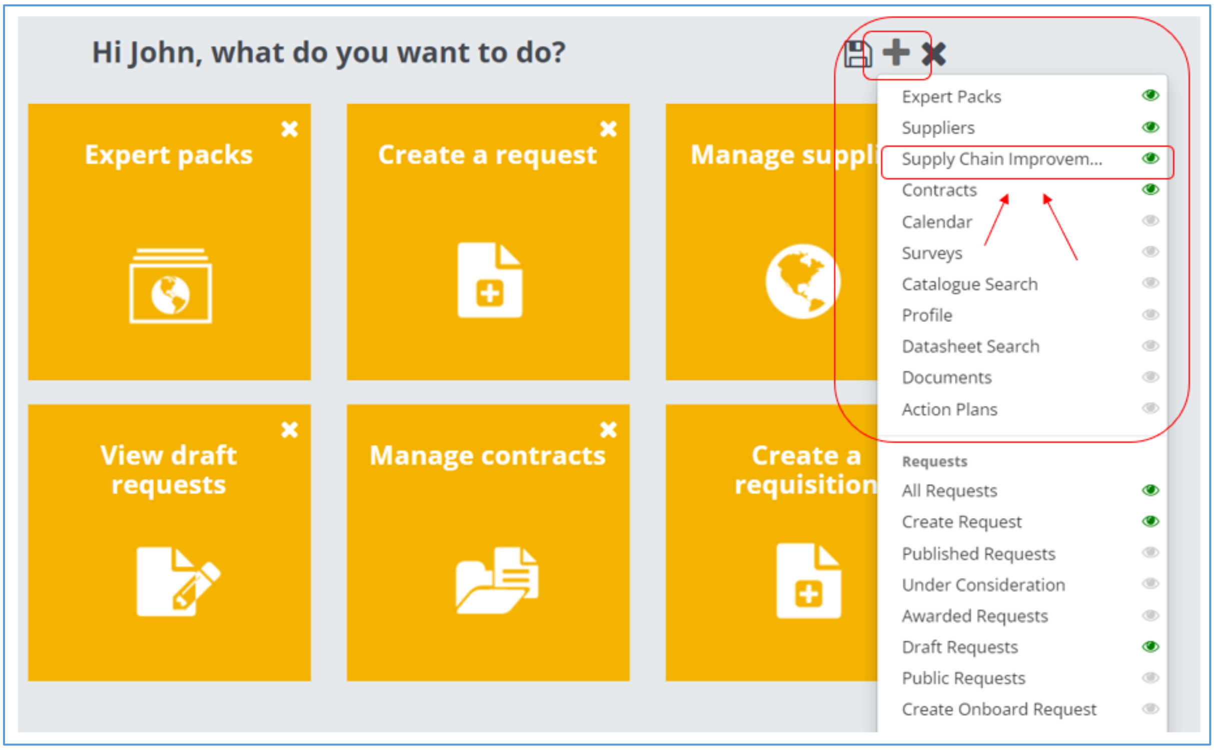
2. Where to find SPM

There are 2 ways of accessing the SPM module. From any page on SourceDogg you can find it by clicking on the ‘Resources’ dropdown and selecting ‘SPM’.



If your permission levels allow it, you can also add the ‘Supply Chain Improvements’ tile to your homepage by clicking on the pencil icon, followed by the + button and choosing it from the list.





The Supply Chain Improvements tile is where you can access 3 different SourceDogg modules – SRM (Supplier Relationship Management), SPM (Supplier Performance Management) and Action Plans.

Click on 'Go to SPM' to open this module.

SPM Record email

Alternatively, a schedule may have been created by your account admin for you to score your suppliers at a specified time for a particular time period. In that case you will receive an email notification.

When logged in, clicking on the link in that email will bring you directly to the SPM module.

Hi Ronan,

The following draft SPM records requires your attention to complete the supplier performance review:

Please see the below details or log in to SPM module Records section for more details

Reminder Details

Reminder message: Please complete the supplier performance reviews before the last date of the review period.

SPM Template Name: Subcontractor On-Site Evaluation - Quarterly

Auto-Schedule name: Subcontractor On-Site Evaluation - Quarterly

Review Period : Q1:2022

Name	SPM Record Link
International Courier Service -	Supplier International Courier Service SPM Record Q1:2022

In order to work on the SPM records you will need to login to your SourceDogg Account.

If you have forgotten your password please visit the forgot password page.

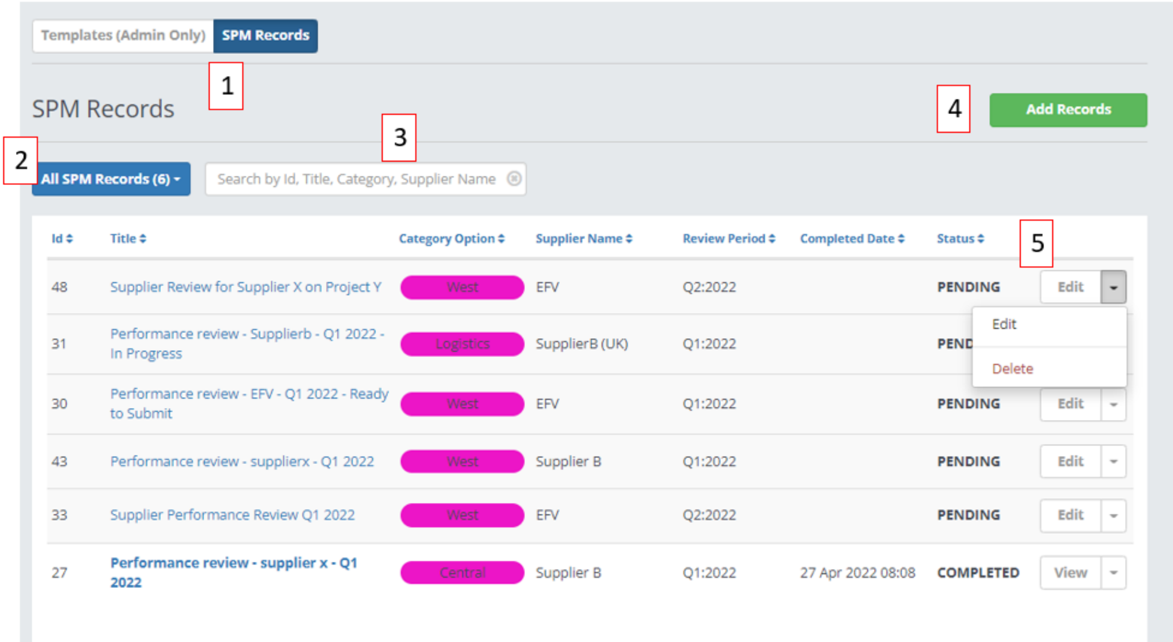
If you have technical queries regarding SourceDogg, please contact a support agent via the Contact us page or through the live chat on the right hand side of your browser.

Best Regards,
The SourceDogg Team (on behalf of International Courier Service)

SourceDogg

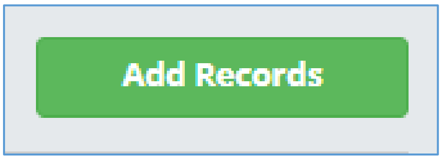
3. SPM Module

SPM Records

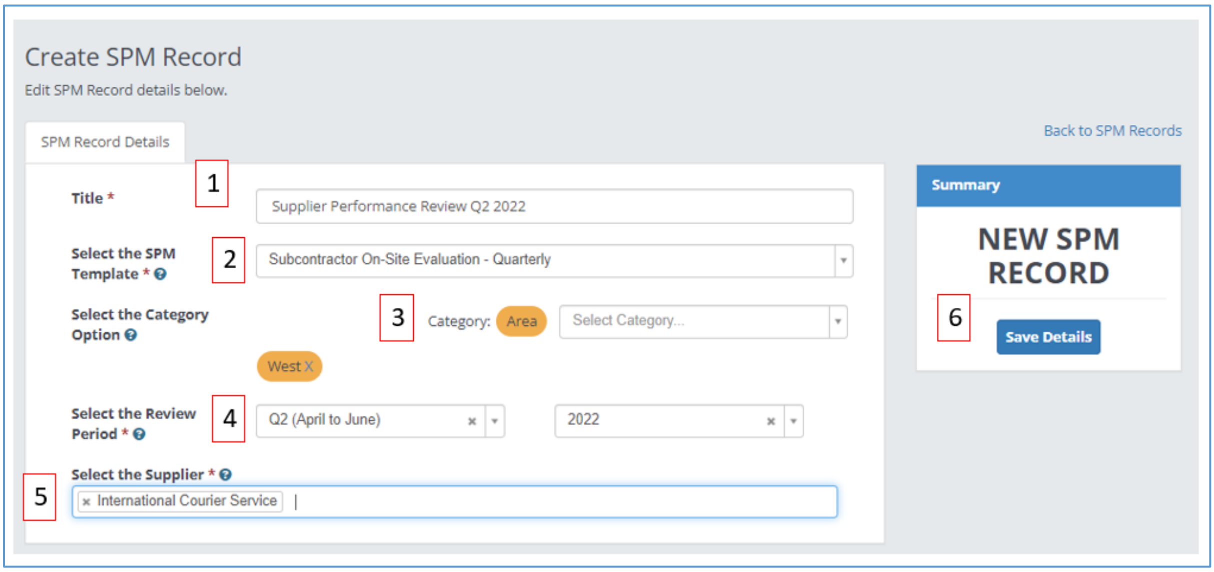


1. SPM Admins will be able to open either **Templates** or **SPM Records**. SPM Editors or Readers will only be able to access **SPM Records**.
2. Using the **SPM Records dropdown filter** you can narrow your view down to the status of the Records – Pending and Completed.
3. Using the **search box,** you can search by the Title, Category or Supplier Name related to the Record.
4. To create a new SPM Record, click on the green **'Add Records'** button.
5. To **View or Edit** a Record click on the dropdown next to the appropriate Record and select.

Add Records



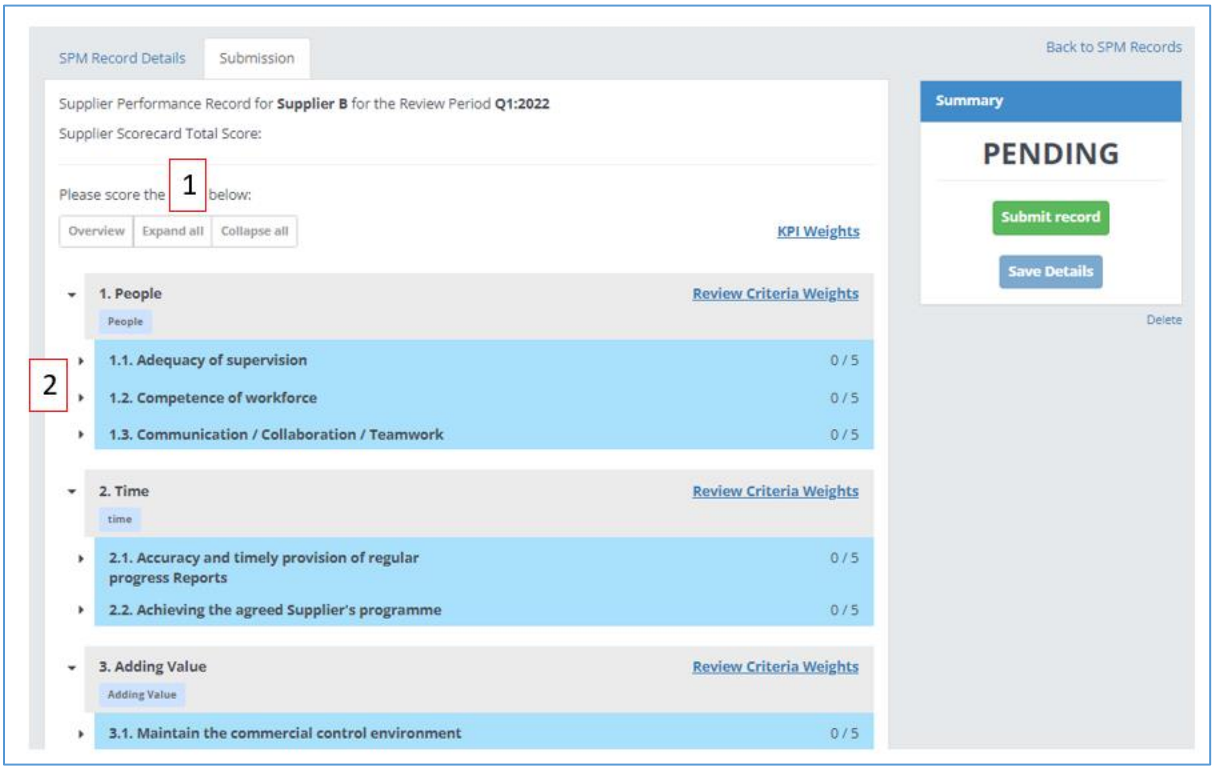
SPM Record Details



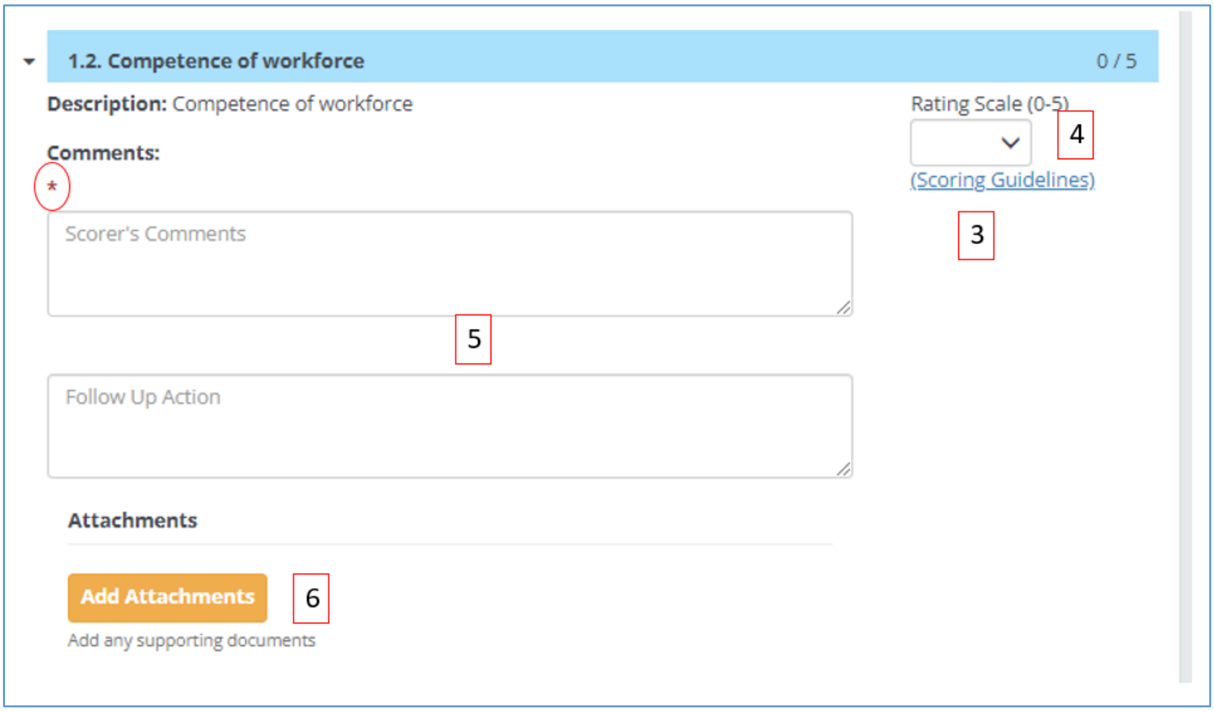
1. Enter the **Title** of the record/scorecard.
2. Choose which scorecard you want to complete from the **Select the SPM Template** dropdown.
3. Choose which Category this scorecard is to be associated with from the **Select the Category Option** dropdown.
4. Choose the Review Period (e.g. Monthly – January, February, March etc) from the **Select the Review Period** dropdown(s). These are locked to the review period frequency and category options set by your account admin on the template.
5. Enter the supplier the scorecard is related to in the **Select the Supplier** box. The system will automatically search for registered suppliers on SourceDogg, if one is not available you can type in the name of a supplier that is not registered.
6. Click **Save Details** to save this information and open up the Submission tab.

Submission

When you have saved the details from the 'SPM Record Details' tab the 'Submission' tab will open, this is where you enter the scores for the period and supplier selected.



1. When you first click on the Submission tab you are given the '**Overview'** of the KPIs and Review Criteria. To see it all in more detail click on '**Expand all'**.
2. Alternatively, you can open/close the KPIs and Review Criteria individually by clicking on the **arrows** next to each of these.



3. Click on **Scoring Guidelines** to help you decide what score to allocate to the supplier against each metric.

Scoring Guidelines

SCORE VALUE	DESCRIPTION
0	Incompetent
1	Lacks competence
2	Little evidence of skill or qualification
3	Demonstrated knowledge/fully adequate
4	Well skilled and qualified
5	Skilled craftsmen fully trained

Close

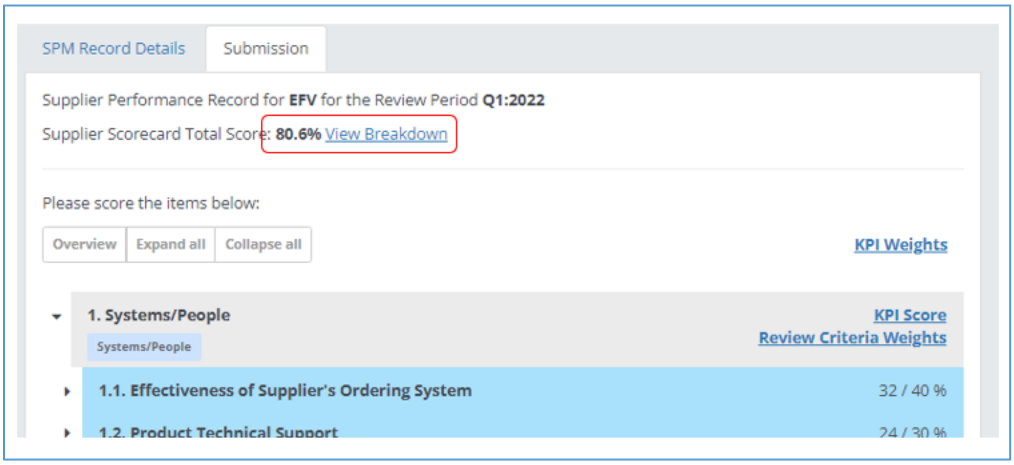
4. After consulting the guidelines enter your score by clicking on the **Rating Scale** dropdown. If there are a lot of options in the scale you can type the number to jump to that option.
5. There may be **Comments** boxes available to you to perhaps give a justification for the score you have given this metric, record some feedback the supplier has given them, or perhaps some suggestion for possible future improvements. The text in the box is not standard and may vary from the image above but will guide you as to what is expected. If the box has a

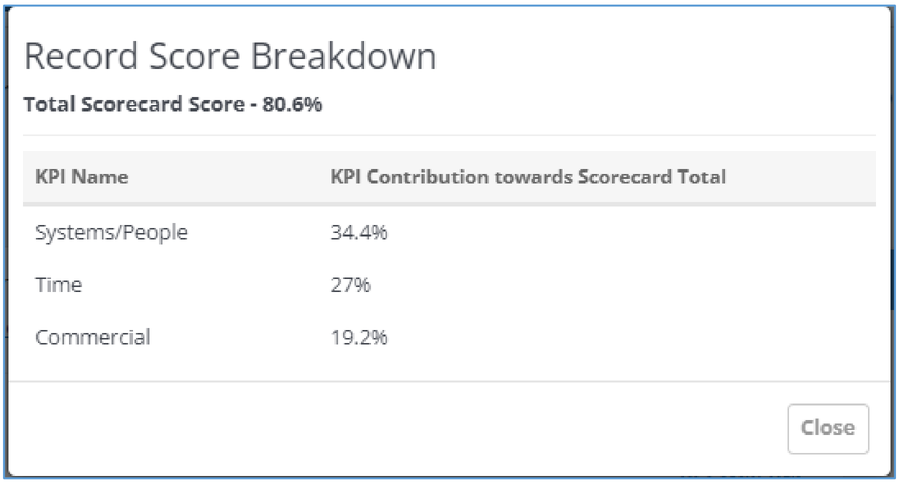
red star beside it, it is mandatory to populate and you won't be able to submit the record until that is done.
Please note that submitted scorecards, and their comments, are visible to all other users with permissions to access the SPM area of the system.

6. If you have any documents to upload to support your score you can do so by clicking on the orange '**Add Attachments'** button.

Submit Record

When you have entered all your scores and provided any mandatory comments you will then be able to submit the record. Your score is displayed near the top of the Submission tab. Click on 'View Breakdown' to see the KPI Contribution towards Scorecard Total.

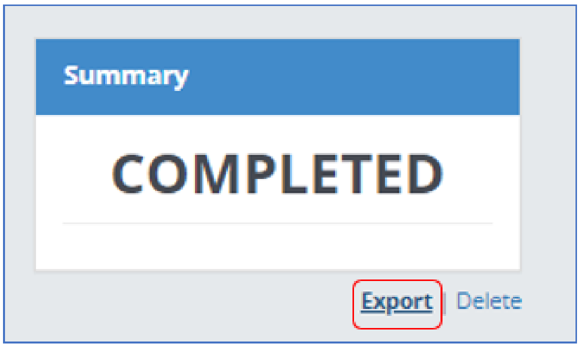


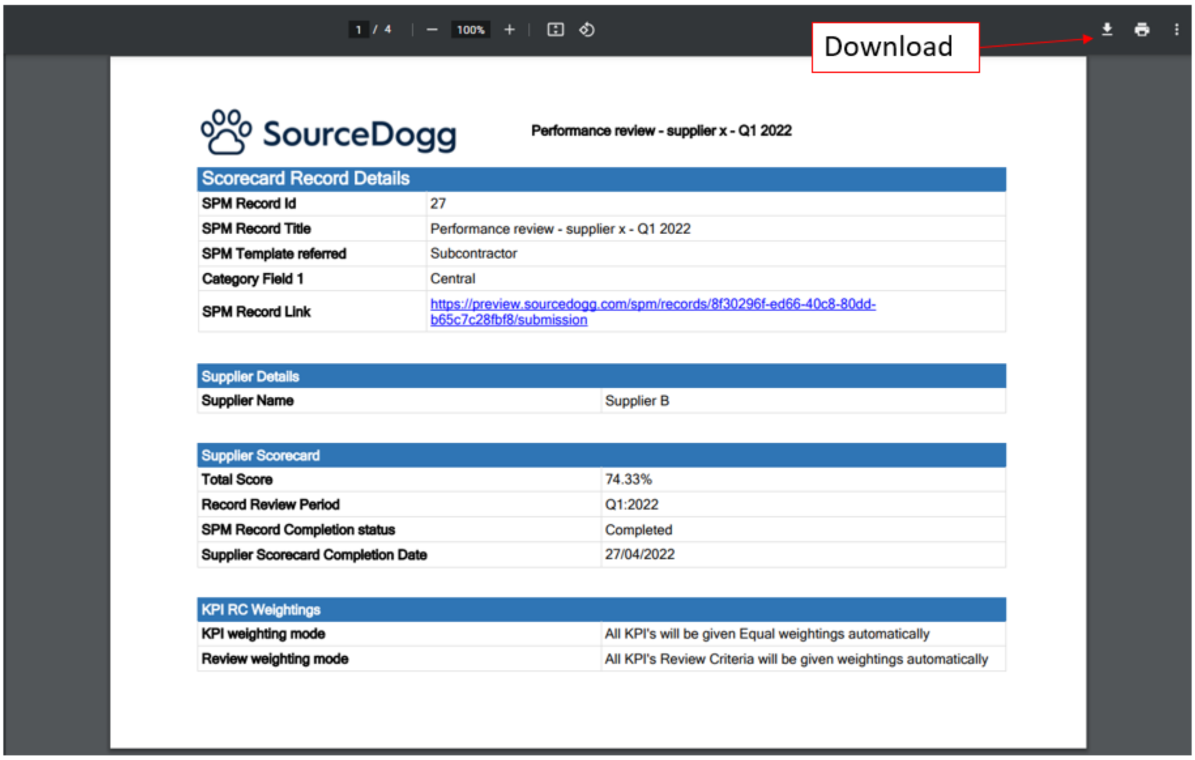


Click on 'Submit Record' to finalise. Please note you will not be able to make any changes to the scorecard after it is submitted.

The status of the Record will then change to ‘Completed’.

You can then get an Export of the record which you can download and share if needed.





SourceDogg Performance review - supplier x - Q1 2022

Scorecard Record Details	
SPM Record Id	27
SPM Record Title	Performance review - supplier x - Q1 2022
SPM Template referred	Subcontractor
Category Field 1	Central
SPM Record Link	https://preview.sourcedogg.com/spm/records/8f30296f-ed66-40c8-80dd-b65c7c28fbf8/submission

Supplier Details	
Supplier Name	Supplier B

Supplier Scorecard	
Total Score	74.33%
Record Review Period	Q1:2022
SPM Record Completion status	Completed
Supplier Scorecard Completion Date	27/04/2022

KPI RC Weightings	
KPI weighting mode	All KPI's will be given Equal weightings automatically
Review weighting mode	All KPI's Review Criteria will be given weightings automatically