COUPA SOURCING OPTIMIZATION (CS0) TRAINING AND CERTIFICATION
COURSE DESCRIPTION

OVERVIEW

This 3-day, instructor-led course provides participants with the foundational concepts necessary to understand and take advantage of the flexibility within Coupa Sourcing Optimization (CSO).

Through hands-on labs and do-it-yourself exercises, the participants will learn how to design, run, and analyze a sourcing event. Day 1 gives an overview of the capabilities and guides the participants through the basic workflow. During day 2, methods and tools available in CSO that are commonly used to further leverage the sourcing process are explored in more detail. Finally, concepts are pulled together into a real-life practicum on day 3, along with the certification exam.

AUDIENCE

A great class for those involved in sourcing projects on a hands-on level, for data preparation and event design, management of the bidding process, and/or analysis for the selection phase. Day 1 may be taken as a stand-alone course.

LEARNING OBJECTIVES

- Understand common CSO concepts and terminology
- Understand the data elements and considerations required to successfully meet the sourcing objectives
- Learn how to build and execute a basic sourcing event
- Learn how to configure scenario analysis and reports to drive an efficient decision-making process

PREWORK AND CERTIFICATION

Online prework is required for this course and will be assigned by Coupa University to every attendee.

Having attended the 3-day training, the students take an on-line exam to receive a Coupa CSO Certification.

DURATION
- 3 days

DELIVERY FORMAT
- Classroom
- In Person
- Virtual

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MODULES AND TOPICS

What is CSO?
An overview of the tool and how it is used in strategic sourcing projects

Methodology and Success Factors
Understanding basic CSO terminology and workflow
Planning the sourcing process and identifying requirements for a relevant outcome

Event Set-up and Launch
Building the event framework and the data structure for supplier submissions
Gateway documents
Messaging and issue board

Bids and Bidding
Monitoring the bidding process
The bid cost and assessing the quality of the input

Scenario Analysis
Using optimization to support decision making and finding best-value options for given business constraints

Reporting
Using the highly configurable reporting tools to assess responses, aggregate data, and create negotiation support and business summaries

Fact Sheets
Using custom data tables to store and process data before, during and after a sourcing event

Formula Fields
Understanding the structure, syntax, and efficient use of formulas to process data and evaluate offers

Feedback
Using feedback to strategically drive competition