



Your Marketplace onboarding checklist

Welcome to Marketplace! This checklist takes you through **a quick list of ideal set up tasks** – tick each item off as you go, and you'll have a live, filtered pipeline of opportunities landing in front of you.



Within **one week** of signing up

1

Familiarise yourself with the Marketplace platform and bookmark it in your browser

Log in and head to the Opportunities Board – the home of every opportunity to Tender and lead available to you. Bookmark this in your favourites or bookmark folder to allow easy access next time you want to login. Try filtering by location, map radius, project value, work category and CPV code so you can see how the results narrow.

[Get the most from Marketplace resource hub](#)  [\(Helpful Links\)](#)

2

Familiarise yourself with our Premium and Public opportunity types

Discover opportunities earlier with premium access to exclusive advertised work packages, Expressions of Interest and market intelligence leads from our UK research team. Plus, explore public tenders and planning applications to spot what's coming before it reaches tender.

[Our premium project opportunity types](#) 

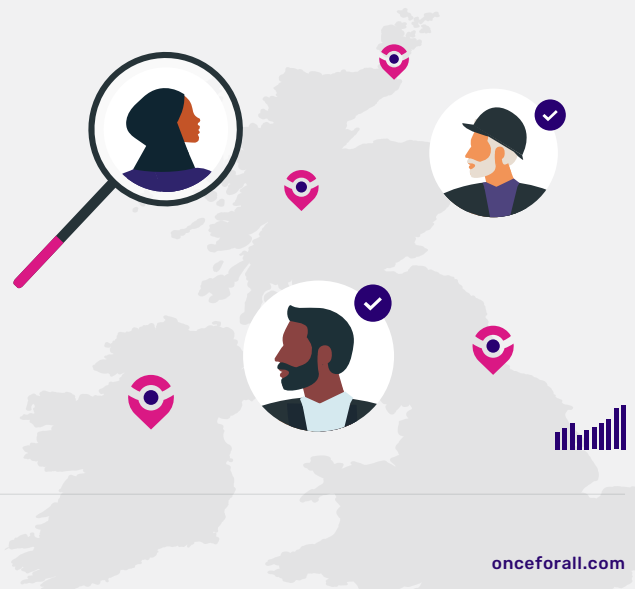
[Understanding the difference between our lead sources](#) 

3

Save a search for each work category your business does

Build a saved search for every trade, category of work or type of project your business undertakes and set the location radius to match where you wish to work. Each saved search then feeds you email alerts.

[Save a search and set up alerts](#) 



4

Bookmark an opportunity to see its progress

Find an opportunity you're interested in and bookmark it. Bookmarked opportunities sit in one place for easy access, and you'll get automated reminders as the deadline approaches.

Stay organised with bookmarks [\(Helpful Links\)](#)

5

Add additional users

Add everyone who needs visibility – business development managers, directors, contracts managers.

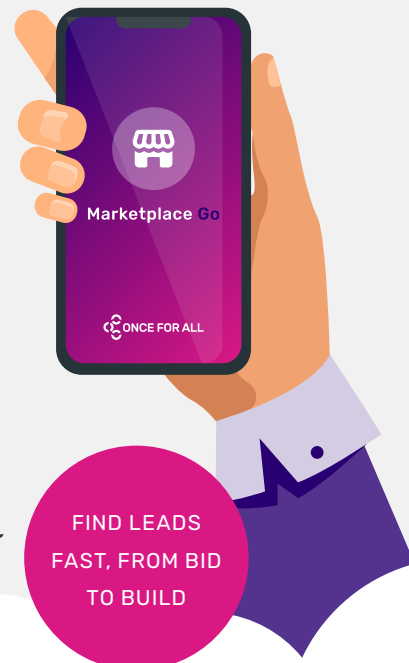
Add a new user easily and quickly

6

Each user should download the Marketplace app

Ask every user to download the app and log in, so tenders can be viewed on the go. Estimators on site, directors between meetings – the app means a deadline reminder gets seen the same day rather than the following Monday.

Getting started with the Marketplace Go app is simple



Within 30 days of signing up

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Refine your saved searches now that results are coming through

Your first month of alerts tells you whether your filters are set correctly. Too few results usually mean the radius or value range is too tight. Too many irrelevant ones mean the work categories need narrowing.

Using CPV codes to search for opportunities

8

Request access to a live Tender

Move from watching to responding. Submit a request to tender for an advertised work package or use the contact details on a listing to approach a main contractor directly.

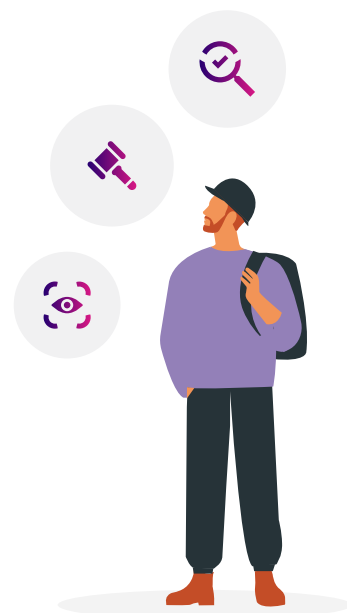
Understanding the difference between our lead sources

9

Explore Market Intelligence

Market Intelligence gives you project insights and competitor activity – early sight of schemes before they reach formal tender. Use it to spot work at the planning stage and to see who else is active in your region, so you can approach main contractors before an opportunity is openly advertised.

Find out how to use Market Intelligence with a demo



10

Check your team is actually using it

Confirm that every user you added has logged in and has the app installed. A dormant login is a missed opportunity.

[Add a new user easily and quickly](#)  [\(Helpful Links\)](#)

11

Register for your nearest Marketplace Live event

Marketplace membership makes you eligible to free access our Marketplace Live events across the UK. These put you in the same room as main contractors and buyers, which is often the fastest route from “on their radar” to “on their tender list”. Check the events calendar and book the one closest to you.

[Attending Marketplace Live](#) 



Within **four months** of signing up

12

Build a target list of main contractors and approach them directly

By now you'll have seen which contractors post work in your region and your categories. Pick the ones you most want to work with, use the contact details on their listings, and introduce your business – capability statement, recent projects, coverage area. Don't wait for the right opportunity to appear; get on their supply chain list so you're invited when it does.

[How to find contractor details](#) 

13

Turn an EOI into a submitted bid

Expressing interest gets you the invitation. The win comes from what you submit next. Use Track to manage your live EOI opportunities against their deadlines.

[How to use Track](#) 

14

Review what's actually working

Look back over four months and ask which saved searches produced real opportunities, which regions and project values converted. Then reshape your searches around the answer.

15

Attend a Marketplace Live event

If you registered in month one, this is where it pays off. Go with a clear objective – a list of specific contractors you want to meet – rather than treating it as general networking. Follow up within a week while the conversation is still fresh.

[Why attend a Marketplace Live event?](#) 

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Considering posting your own opportunities? (if relevant)

If your company subcontracts and issues tenders, please get in touch with us to arrange a demo on how to post projects in Tender Management which is how they appear on Marketplace.

ARRANGE A
DEMO – GET IN
TOUCH TODAY

