WORKING TEMPLATE

Sourcing report

Keep the search and the decision in one place.

Use this report to explain what you need, where you looked, what the evidence shows, and what should happen next. Make it useful to someone who was not part of the search.

Prepared for / organization

Prepared by

Project / reference

Version / revision

Review date

Decision owner

How to use it

Start with the decision the reader needs to make. Record sources and dates. Keep verified facts, assumptions and unanswered questions distinct.

Type into the fields, save a copy, or print and write by hand. Keep entries brief and refer to attachments for longer evidence. Use the Word file when you need more space or additional sections.

Use this as a starting point. Adapt it to the assignment, available evidence and applicable organizational, legal and regulatory requirements. Agree final scope and deliverables separately and obtain appropriate professional review. The buyer retains decision and approval authority.

01 Executive summary

State the decision context and most important finding.

Decision required

Recommended next action

Sourcing report

02 Requirement and assumptions

Separate confirmed requirements from working assumptions.

Scope

Constraints

Assumptions

03 Research method

Record where and how the market was reviewed.

Sources consulted

Search logic

Research dates

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04 Market landscape

Describe relevant supplier types, coverage, and market constraints.

Market segments

Capacity signals

Constraints

05 Longlist and shortlist

Explain inclusion, exclusion, and qualification logic.

Source

Evidence

Disposition

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06 Commercial observations

Capture pricing structures and material non-price terms.

Price basis

Lead time

Terms

07 Open questions and risks

Assign unresolved issues before action.

Question

Owner

Due date

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08 Recommendation and next actions

Make the proposed path and conditions explicit.

Recommendation

Conditions

Next action

09 Decision and next action

The buyer or authorized reviewer records the decision. Name any conditions and the person responsible for the next step.

Decision / disposition

Conditions

Approved by

Approval date

Next action