

PREMIUM BLANK TEMPLATE / US PROCUREMENT TOOLKIT

Sourcing Report

Document the requirement, research logic, qualified market, evidence, and recommended next actions.

Prepared for		Prepared by	
Project / reference		Version	1.0
Review date		Decision owner	

These templates are practical starting points, not fixed engagement deliverables. Final documents, fields, evaluation criteria, and supporting records may vary based on the scope of work, task requirements, procurement category, stakeholders, available information, and applicable organizational, legal, or regulatory requirements. Use and adapt them with appropriate professional review.

How to use this template

- 01 Confirm the requirement and decision owner before completing fields.
- 02 Separate verified facts, assumptions, and unresolved items.
- 03 Retain evidence for material entries, scores, and conclusions.
- 04 Assign open actions and review under applicable organizational rules.

1. Executive summary

State the decision context and most important finding.

Decision required	
Recommended next action	

2. Requirement and assumptions

Separate confirmed requirements from working assumptions.

Scope	
Constraints	
Assumptions	

3. Research method

Record where and how the market was reviewed.

Sources consulted	
Search logic	
Research dates	

4. Market landscape

Describe relevant supplier types, coverage, and market constraints.

Market segments	
Capacity signals	
Constraints	

5. Longlist and shortlist

Explain inclusion, exclusion, and qualification logic.

Source	
Evidence	
Disposition	

6. Commercial observations

Capture pricing structures and material non-price terms.

Price basis	
Lead time	
Terms	

7. Open questions and risks

Assign unresolved issues before action.

Question	
Owner	
Due date	

8. Recommendation and next actions

Make the proposed path and conditions explicit.

Recommendation	
Conditions	
Next action	

Final review and authorization

Decision / disposition	
Conditions	
Approved by	
Approval date	
Next action	