COMMERCIAL FINANCE LAUNCH PROGRAMME · SET UP SOURCING AND CRITERIA-SEARCH TOOLS

Sourcing tool selection grid

Tools scored by which of your product lines they cover and how they evidence the search.

01 Coverage by product line

Score each tool against the lines you actually broker, not the whole market.

Which of your product lines does each tool cover?

Where are the gaps, and which tool or panel fills them?

02 Evidence of search

A tool is only useful if it produces a rationale you can defend.

Does the tool produce a sourcing rationale you can show the client and file?

Which tool do you adopt for each product line, and why?

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