

Sourcing Strategy Starter Kit Guide

Use this guide with the editable Excel workbook to prepare buyer-side sourcing work before formal bidding, contracting, renewal, or vendor-management activity begins.

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Workbook Flow

Step	Worksheet	What to produce	Human review point
01	Intake	Scoped sourcing request with owners, timing, constraints, known suppliers, and decision ownership.	Business approval confirms scope and decision ownership.
02	Category Profile	Category snapshot with demand pattern, current state, objectives, and visible risks.	Category owners and finance review requirements and spend context.
03	Market Scan	Market summary covering supplier segments, regional factors, substitutes, capacity, and social pressure.	Sourcing review confirms confidence, and unsupported claims.
04	Supplier Discovery	Supplier universe with fit signals, evidence notes, constraints, gaps, and initial priorities.	Initial review reviews fit signals before shortlist planning.
05	Cost & TCO Inputs	Cost-driver log separating validated facts from assumptions and sensitivity questions.	Finance and operations review baseline and total-cost assumptions.
06	Shortlist Planning	Transparent shortlist rationale before formal evaluation or supplier outreach.	Business, sourcing, and specialist reviewers confirm rationale.
07	Event Readiness	Final sourcing packet check before the next phase begins.	Decision owner confirms readiness or routes missing work.

How to use the kit

Start with Intake even if the request seems clear. Most sourcing problems become harder when scope, owners, constraints, source material, and assumptions are not visible. Move through the worksheets in order and treat each worksheet as a review gate.

What the completed example demonstrates

The completed workbook shows how a business-side sourcing scenario can move from intake to event readiness. Replace the example content with approved, non-confidential facts from your own sourcing effort.

AI-use principle

AI may assist with research synthesis, source comparison, drafting, checklist generation, and evidence organization. AI should not make supplier selections, replace legal or compliance review, or turn uncertain assumptions into facts.

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Worksheet Prompts and Quality Checks

Worksheet	Useful prompts	Quality check
Intake	What is the sourcing need? Who owns the decision? What constraints, timing, and scope materials are proposed?	Decision and proposed next gate are clear.
Category Profile	What demand pattern, current state, objective, and assumptions define this category?	Assumptions and stakeholder priorities are visible.
Market Scan	What supplier segments, regions, substitutes, capacity signals, and cost pressures shape the market?	Supplier and confidence ratings are documented.
Supplier Discovery	Which suppliers appear credible, what evidence supports fit, and what gaps remain?	Fit signals are separated from unsupported supplier claims.
Cost & TCO Inputs	Which cost drivers are known, estimated, vendor-provided, or unknown?	Finance can see what is validated and what remains an assumption.
Shortlist Planning	Why should each supplier be included, held, removed, or advanced for review?	Shortlist rationale is visible before formal evaluation begins.
Event Readiness	Is the sourcing packet complete enough to proceed to the next phase?	Missing information and required approvals are named.

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