

# Commercial Lending Authority Kit

A starter kit for commercial lending and capital advisory teams that want stronger borrower education, clearer trust signals, and more confidence-building consult support before deal work begins.

Commercial lending teams, capital advisors, marketers, and consult operators

## GUIDE

A starter kit for commercial lending and capital advisory teams that want stronger borrower education, clearer trust signals, and more confidence-building consult support before deal work begins.

## WHAT THIS ASSET COVERS

- Commercial Lending Borrower Education Playbook
- Commercial Lending Proof and Conversion Guide
- Professional Services Consult Authority Playbook
- Professional Services Proof Stack Guide
- Trust-Signal Architecture Guide for Small Businesses

## SUGGESTED ROLLOUT

1. Clarify borrower questions and qualification expectations before the first consultation.
2. Strengthen trust and authority so the team feels more prepared and more credible for complex financing conversations.
3. Align consult-authority and proof assets so borrower education supports conversion instead of drifting into generic finance content.
4. Review consult quality and decision friction quarterly so the authority layer stays commercially useful.

## WORKING ASSET

Bundle the education, trust, and proof assets that help a commercial lending or capital advisory business feel clearer and more credible before deal work begins.

## RESOURCE STACK

- Commercial Lending Borrower Education Playbook
- Commercial Lending Proof and Conversion Guide
- Professional Services Consult Authority Playbook
- Professional Services Proof Stack Guide
- Trust-Signal Architecture Guide

## DEPLOYMENT PATH

Phase 1:

- clarify borrower questions and qualification guidance

Phase 2:

- strengthen trust and proof around the consult path

Phase 3:

- review whether borrower readiness and consult quality are improving

## METRICS TO WATCH

- consultation quality
- borrower readiness
- trust-asset freshness
- decision-friction themes

## OPERATING CADENCE

Monthly:

- review repeated borrower questions
- update education and trust assets

Quarterly:

- audit the proof layer for financing authority

## DEPLOYMENT NOTES

## HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Commercial Lending Authority Kit" become shared but unmanaged work.
- Use it with commercial lending teams, capital advisors, marketers, and consult operators in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

## 30-DAY ROLLOUT SEQUENCE

- Clarify borrower questions and qualification expectations before the first consultation.
- Strengthen trust and authority so the team feels more prepared and more credible for complex financing conversations.
- Align consult-authority and proof assets so borrower education supports conversion instead of drifting into generic finance content.
- Review consult quality and decision friction quarterly so the authority layer stays commercially useful.

## WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: Commercial Lending Borrower Education Playbook, Commercial Lending Proof and Conversion Guide, Professional Services Consult Authority Playbook, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.