

# THE FINANCIAL INFRASTRUCTURE PARTNER SCORECARD

10 questions for risk-smart CIOs

Use Anchor Bridge Innovation's partner scorecard to evaluate technology partners through a finance-specific lens — focusing on audit-readiness, data integrity, automation, and measurable ROI.

For each item below, rate potential partners on a scale of **1–5 (1 = Not at all, 5 = Fully meets standard)**.

**1. Can the partner provide clear documentation on how their solutions support financial regulatory requirements?**

Look for SOC 2, ISO 27001, FINRA, SEC, or GAAP-aligned documentation.

**Score:** \_\_\_\_

**2. Does the solution deliver real-time access to clean, structured financial data across platforms?**

Data clarity and accessibility directly impact decision velocity and reporting accuracy.

**Score:** \_\_\_\_

**3. How well does the partner's solution support automation of critical workflows (e.g., reconciliations, audits, reporting)?**

Automation is key to scaling operations without scaling headcount.

**Score:** \_\_\_\_

**4. What built-in tools support audit readiness and compliance transparency?**

Features like immutable logs, access controls, and granular reporting should be non-negotiable.

**Score:** \_\_\_\_

**5. Is their platform truly cloud-native and optimized for hybrid financial environments?**

Ask about latency, uptime SLAs, and seamless integrations with your ERP, CRM, and core systems.

**Score:** \_\_\_\_

**6. Can they demonstrate measurable ROI for clients in the finance sector?**

Request case studies that quantify operational gains, risk reduction, or cost savings.

**Score:** \_\_\_\_

**7. Does the partner offer white-glove support — not just during deployment, but post-go-live?**

In finance, delays cost money. Support must be fast, responsive, and staffed by experts.

**Score:** \_\_\_\_

**8. How well do they manage risk across the tech stack — from endpoint security to data governance?**

Evaluate how the partner reduces risk at every layer of your infrastructure.

**Score:** \_\_\_\_

**9. Are services modular and scalable to your institution's growth or restructuring plans?**

Future-ready infrastructure must support M&A, spin-offs, and geographic expansion.

**Score:** \_\_\_\_

**10. Do they speak your language — with financial domain expertise baked into their approach?**

Your partner should act as a strategic ally, not just a tech vendor.

**Score:** \_\_\_\_

**Final Assessment**

- **Total Score:** \_\_\_\_ / 50
- **Suggested Threshold for Consideration:** 40+