

THE TECHNOLOGY DECISION PLAYBOOK

A Practical Framework for Evaluating
Technology Investments

NO VENDOR BIAS. **BROADER OPTIONS.** BETTER DECISIONS.

Introduction:

WHY I CREATED THIS PLAYBOOK

Technology decisions have never carried greater business impact.

Today, organizations are under constant pressure to modernize, strengthen cybersecurity, improve customer experience, evaluate AI opportunities, optimize operations, and prepare for future growth.

Yet many technology investments are still made with limited market visibility, incomplete requirements, compressed timelines, and increasing vendor influence. The result is rarely bad technology. More often, it is technology that is simply not the best fit for the organization's objectives, operating model, or long-term priorities.

Across our ecosystem of 300+ technology providers, one reality remains constant: access to technology is rarely the problem; making the right technology decision is.

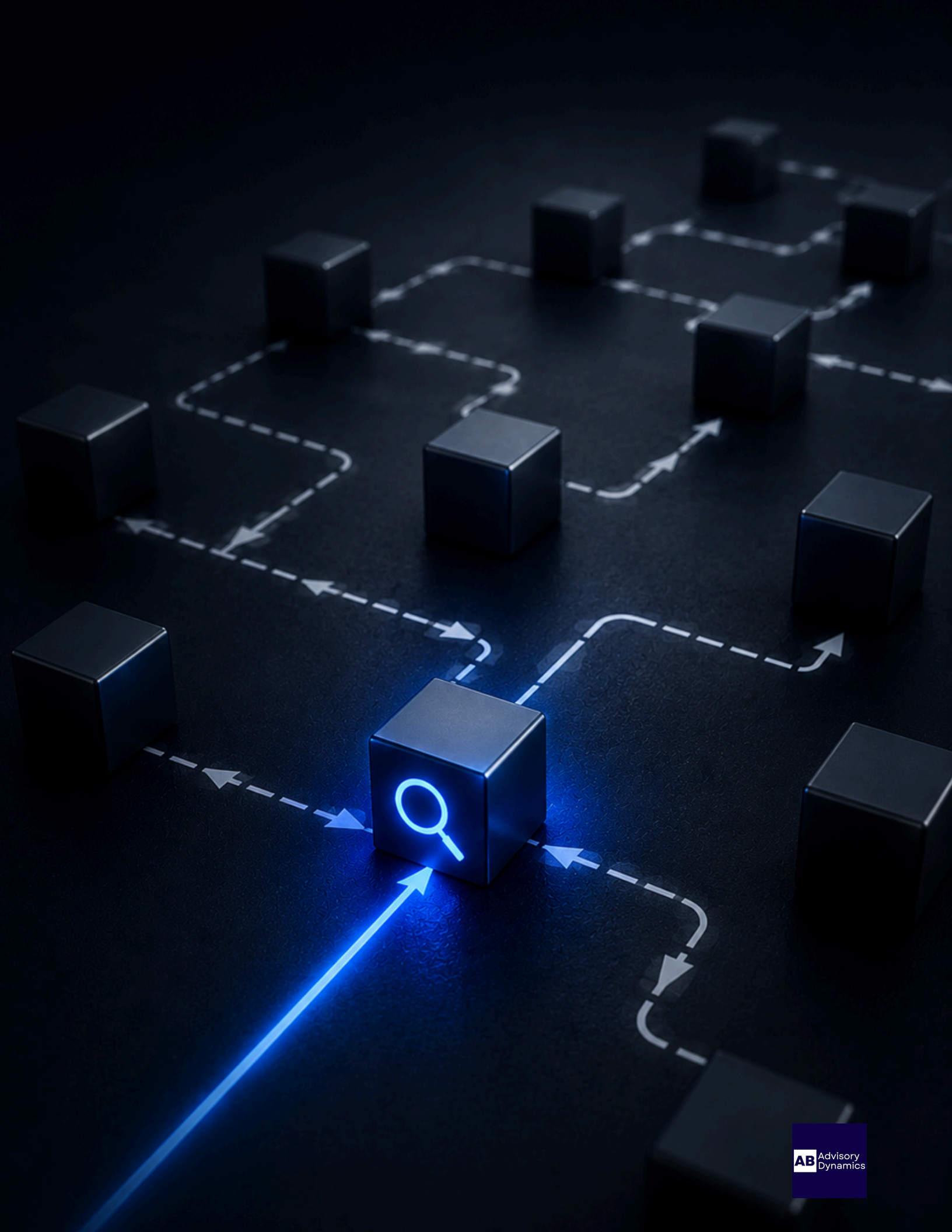
This playbook provides a practical framework to help executives and decision-makers evaluate technology investments more objectively, reduce risk, and improve decision quality before significant time, resources, and capital are committed.

The goal is simple:

Improve decision quality before technology selection begins.

— **Adrian Borcoci**

Founder, AB Advisory Dynamics



THE TECHNOLOGY DECISION MATURITY MODEL

Organizations typically fall into one of four technology decision maturity levels. Understanding your current level provides context for what to improve and where to focus.

The objective is not necessarily to achieve Level 4 everywhere; rather, it is to understand where your organization currently operates and where improvement may create value.

Level 1 – Reactive

Technology decisions are driven primarily by immediate needs, vendor recommendations, or operational issues. Teams respond to outages, lifecycle events, or sales pressure without holistic analysis.

Outcomes are inconsistent, costs are unpredictable, and technical debt accumulates.

Level 2 – Tactical

Technology decisions include some evaluation and comparison but remain largely project-focused. Teams capture basic requirements

and run limited proofs or quotes. There is progress compared to reactive mode, but decisions may still overlook longer-term alignment and cross-functional impact.

Level 3 – Strategic

Technology decisions are aligned with business objectives, operational requirements, and long-term planning. Governance is clearer, evaluation criteria are defined, and success metrics precede selection. Stakeholders outside IT participate in shaping outcomes and adoption plans.

Level 4 – Optimized

Technology decisions are continuously reviewed, benchmarked, and measured against business outcomes. Portfolio health is monitored, contracts are calibrated to market conditions, and value realization is tracked.

These organizations iterate intentionally, retire low-value assets, and reinvest in growth.

PHASE 1

DEFINE THE OUTCOME BEFORE THE SOLUTION

Technology investments should begin with business objectives, not technology preferences.

1. What Business Outcome Are We Trying To Achieve?

Before evaluating technology, define the desired business outcome. Many initiatives begin with solution statements such as:

“

We need a new phone system.

“

We need AI.

“

We need cloud.

These are solutions, not objectives. Instead, start by asking:

- What problem are we solving?
- What opportunity are we pursuing?
- How will success be measured?

When business outcomes are clearly defined, technology decisions become more focused, objective, and aligned with measurable value.

Examples illustrate the difference between a technology request and a business outcome:

Technology Request	Business Outcome
New Contact Center	Improve customer response times
AI Initiative	Increase operational efficiency
SD-WAN Deployment	Improve site reliability
Cybersecurity Platform	Reduce business risk

PHASE 2

EVALUATE ALTERNATIVES AND QUANTIFY RISK

Expand market visibility and understand the consequences of the wrong decision.

2. Are We Solving A Business Problem Or Replacing Technology?

Many organizations replace existing technology simply because contracts expire, systems age, or vendors propose upgrades. The more important question is: Has the business requirement changed?

Technology refreshes should be driven by business needs rather than vendor life cycles whenever possible. Align refresh timing to inflection points in process, customer expectations, and security posture.

3. How Many Viable Alternatives Have We Evaluated?

Many organizations evaluate only their incumbent provider, one competitor, and one additional recommendation. The market is often much larger.

Limited visibility can lead to higher costs, missed capabilities, and poor long-term fit. Build a broad longlist, establish objective criteria, and make decisions based on evidence, not familiarity.

Common Evaluation Scope

- Existing provider
- One competitor
- One additional recommendation

4. What Criteria Will Determine The Best Fit?

Define evaluation criteria before comparing solutions. Without a structured framework, decisions often become driven by vendor influence or price alone.

The best technology decisions balance functionality, cost, risk, scalability, and long-term business fit.

Common Evaluation Criteria

- Business requirements
- Functional capabilities
- Total cost of ownership (TCO)
- Security & compliance
- Scalability & future fit
- Vendor support & stability

5. What Happens If We Make The Wrong Decision?

Every technology investment carries risk. Evaluations should consider financial, operational, security, customer experience, adoption, and vendor dependency risks, not just features and pricing.

The goal is not to identify the “best” solution, but the one that offers the most appropriate balance of risk, value, and long-term fit.

Key Risk Areas

- Financial risk
- Operational risk
- Security risk
- Customer experience risk
- Adoption risk
- Vendor dependency risk



PHASE 3

UNDERSTAND **THE** **COST** OF DOING NOTHING

Every decision has a cost, including the decision to do nothing.

6. What Happens If We Do Nothing?

One of the most overlooked evaluation techniques is analyzing the cost of inaction. Organizations often focus exclusively on project costs while ignoring productivity losses, customer frustration, security exposure, technical debt, and competitive disadvantage.

Maintaining the status quo is itself a strategic decision. Evaluate it accordingly, quantify the drag on performance, and compare the do-nothing scenario against proposed investments.

- Productivity losses
- Customer frustration
- Security exposure
- Technical debt
- Competitive disadvantage

7. Are We Optimizing For Price, Value, Risk, Or Growth?

Technology decisions often become price discussions. Price is important, but investments frequently support broader objectives such as revenue growth, customer retention, operational efficiency, risk reduction, and scalability.

The lowest-cost solution may not be the lowest-cost decision. Clarify the primary objective and weight evaluation criteria accordingly. Ensure TCO models account for migration, training, adoption, reliability, and exit costs.

- Revenue growth
- Customer retention
- Operational efficiency
- Risk reduction
- Scalability

PHASE 4

DESIGN FOR THE FUTURE, NOT FOR TODAY

Evaluate scalability, flexibility, and long-term fit.

8. How Well Will This Solution Support Future Business Requirements?

Technology investments should be evaluated against future requirements, not just current conditions. Consider business growth, new locations, acquisitions, workforce changes, AI initiatives, and customer experience requirements.

A solution that fits today may become a constraint tomorrow. Scalability should be evaluated from the beginning, including licensing models, data architecture, integration pathways, and geographic expansion.

- Business growth
- New locations
- Acquisitions
- Workforce changes
- AI initiatives
- Customer experience requirements

9. How Dependent Are We On A Single Vendor?

Vendor concentration creates risk. Common indicators include long-term contract dependency, limited portability, proprietary integrations, restricted data access, and limited competitive alternatives. Vendor relationships are valuable, but dependency can become problematic. Understanding the difference is critical.

Build exit ramps, negotiate portability, favor standards-based integrations, and maintain optionality through contract terms and architecture choices.

- Long-term contract dependency
- Limited portability
- Proprietary integrations
- Restricted data access
- Limited competitive alternatives

PHASE 5

DEFINE ACCOUNTABILITY AND MEASURE VALUE

Technology creates value when ownership and outcomes are clearly defined.

10. How Will Success Be Measured?

Technology projects often launch without clearly defined success criteria. Before implementation begins, establish measurable outcomes: reduced operational costs, faster customer response times, improved uptime, increased productivity, reduced security incidents, and improved customer satisfaction.

Technology investments should be evaluated based on outcomes, not deployment completion. Define baselines, targets, timeframes, and data sources for each metric, and connect them to executive dashboards.

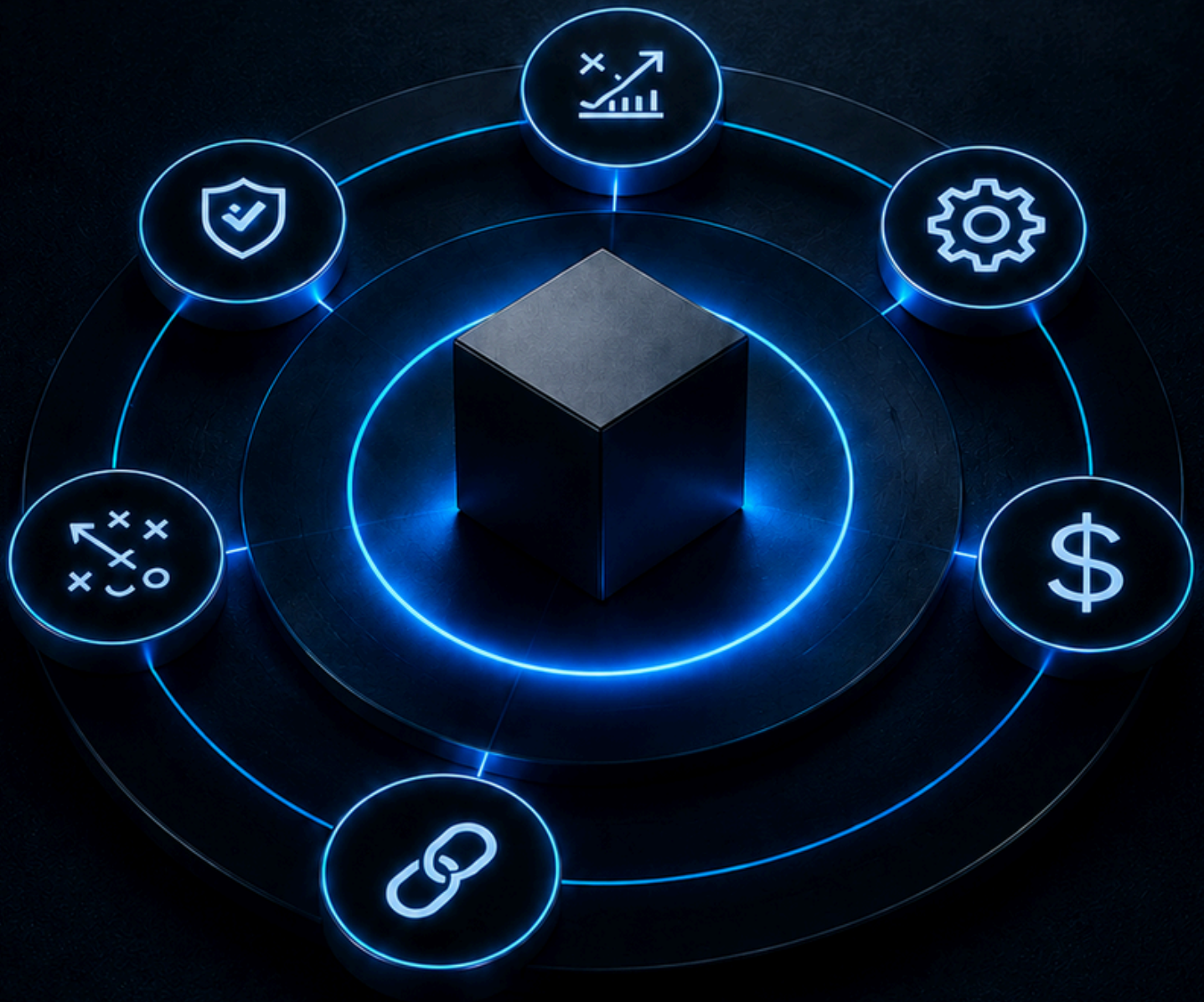
- Reduced operational costs
- Faster customer response times
- Improved uptime
- Increased productivity
- Reduced security incidents
- Improved customer satisfaction

11. Who Owns The Business Outcome?

Technology ownership should extend beyond IT. The most successful initiatives involve executive sponsors, operational stakeholders, technology teams, and end users.

Technology creates value when business ownership exists alongside technical ownership. Without accountability, even strong technology solutions may fail to deliver expected outcomes. Assign a single accountable owner for the business result, define RACI, and schedule value realization reviews at 30/60/90 days post go-live.

- Executive sponsors
- Operational stakeholders
- Technology teams
- End users



Executive Review Checklist

Before approving any significant technology investment, use this checklist as a gating mechanism to ensure alignment, visibility, and risk control. If any answer remains uncertain, additional evaluation may be warranted.

Treat unchecked boxes as known unknowns that must be resolved prior to committing capital or signing long-term agreements

Strategy & Business Alignment

- ☐ Have we clearly defined the desired business outcome?
- ☐ Are we solving a business problem or simply replacing technology?
- ☐ Are we optimizing for the correct objective (growth, efficiency, risk reduction, customer experience, or scalability)?
- ☐ Will this solution support future business requirements and growth?

Evaluation & Decision Quality

- ☐ Have we defined objective evaluation criteria?
- ☐ Have we evaluated a sufficient number of viable alternatives?
- ☐ Have we assessed both upside opportunities and downside risks?
- ☐ Have we considered the cost of doing nothing?
- ☐ Can we confidently explain why this solution is the best fit?

Governance & Value Realization

- ☐ Have we assessed vendor dependency and portability risks?
- ☐ Do we have measurable success criteria and KPIs?
- ☐ Is business ownership clearly defined and accountable?

If any answer remains uncertain, additional evaluation may be warranted.

Technology decisions should not be approved based solely on features, pricing, or vendor recommendations. The strongest decisions are supported by clear business outcomes, structured evaluation, measurable success criteria, and defined accountability.

Before committing capital or signing long-term agreements, ensure that risks are understood, alternatives have been evaluated, and expected value can be clearly articulated to executive stakeholders.

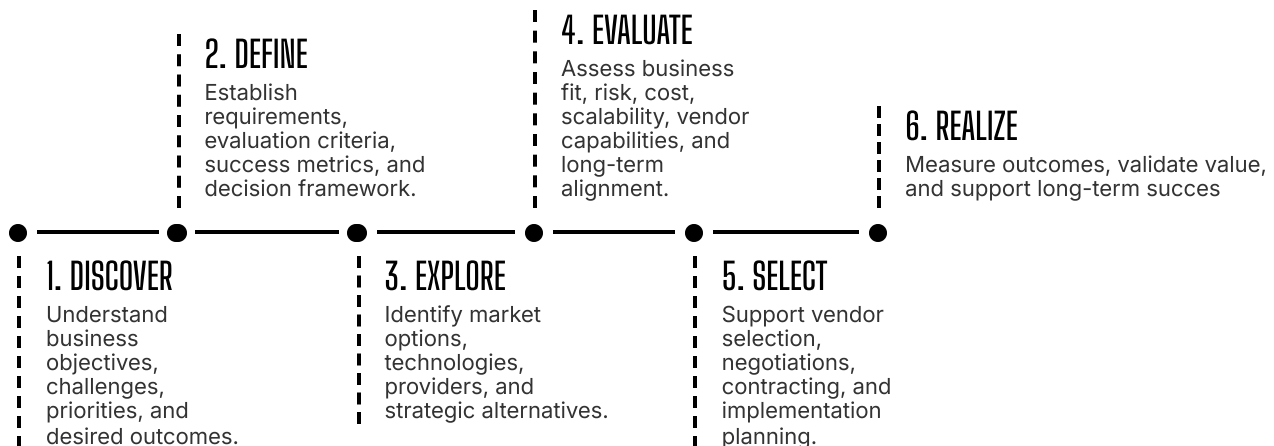
THE AB ADVISORY DYNAMICS DIFFERENCE

AB Advisory Dynamics is an independent technology advisory practice helping organizations navigate complex technology decisions across:

- Technology Strategy & Advisory
- Vendor Evaluation & Strategic Sourcing
- Communications, Customer Experience & AI Readiness
- Cloud, Connectivity, Mobility & IoT
- Cybersecurity & Risk Reduction

Our Structured Approach to Better Technology Decisions

Better technology decisions don't happen by accident. AB Advisory Dynamics provides a structured, vendor-neutral approach to evaluating options, reducing risk, and aligning technology investments with business objectives.



WHY ORGANIZATIONS ENGAGE AB ADVISORY DYNAMICS



**Independent and
Vendor-Neutral
Guidance**



**Access to 300+
Technology Providers**



**Structured
Evaluation
Methodology**



**CIO-Level Insight
Without the
Overhead**



**Technology Decisions
Aligned to Business
Outcomes**

FINAL THOUGHT

Technology decisions are no longer purely technical decisions.

They are business decisions with long-term operational, financial, customer, and strategic implications. Organizations that consistently achieve better outcomes are rarely those with the largest budgets. They are the ones that approach technology decisions with structure, discipline, and objective evaluation.

In practice, this means defining outcomes before selecting solutions, expanding market visibility, evaluating both opportunities and risks, challenging assumptions, and assigning clear business ownership. It also means designing for flexibility, measuring results, and continuously aligning technology investments with evolving business priorities.

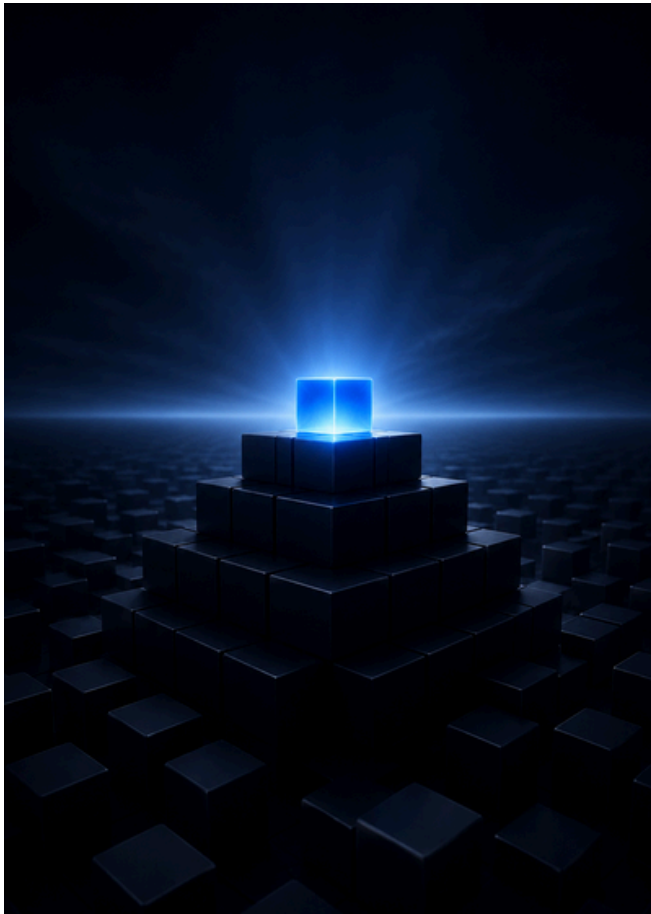
When technology decisions improve, business outcomes follow.

Ready to apply this framework to your next technology decision?

AB Advisory Dynamics provides independent, vendor-neutral guidance to help organizations evaluate options, reduce risk, and make more informed technology decisions

Connect to discuss your next technology initiative, upcoming renewal, or strategic investment

[Learn more about AB Advisory Dynamics](#)



BETTER TECHNOLOGY DECISIONS START HERE



Explore Your Technology Options

AB Advisory Dynamics

Independent, Vendor-Neutral Technology Advisory



abadvisorydynamics.com



Dallas, Texas

No Vendor Bias. Broader Options. Better Decisions.

