

PLAYBOOK

# Elevating SAM data for executive relevance

A practical playbook to transform technology management  
into strategic value

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**The problem is translation.**



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# The translation problem

Technology decisions have never carried more financial and strategic weight, yet the insights meant to inform those decisions are rarely actionable.

## 43%

Flexera reports that only **43% of organizations** have full visibility across their technology estate<sup>1</sup> — yet renewals, audits, and budget decisions continue on schedule. Decisions don't wait for perfect data.

## 2-4x

The FinOps Foundation found that **practitioners with executive alignment show 2-4x more influence** over technology choices<sup>2</sup>. Influence follows decision-ready insight.

## Three ways value gets buried

### Insights arrive without a decision attached

When information isn't clearly tied to a decision, leaders are left to interpret what, if anything, needs to change. Most won't. Value stalls not because the insight lacks merit, but because the next move is unclear.

### Metrics are presented without business context

Cost, utilization, or compliance signals don't create value on their own. Without connection to a business priority or risk leadership cares about, they register as background noise, not decision inputs.

### Savings are framed as numbers, not outcomes

"We identified \$400K" isn't actionable unless it's tied to what that decision enables, protects, or advances. Value is realized when savings are positioned as strategic tradeoffs, not isolated wins.

<sup>1</sup>Flexera 2025 State of ITAM Report. Flexera. Sep 15, 2025. <https://info.flexera.com/ITAM-REPORT-State-of-IT-Asset-Management>

<sup>2</sup>State of FinOps 2026 Report. FinOps Foundation. Feb 19, 2026. <https://data.finops.org/#about>

# Changing the questions that shape decisions

Executives don't reject technology insights. They struggle to act on them. The issue isn't accuracy. *It's whether the insight is framed for a decision.*

## Instead of asking...

What does the data show?

What's our compliance position?

How much could we save?

What's our utilization rate?

What's our cloud spend?

Which AI tools are deployed?

## Ask...

**What can we decide?**

**What risk could derail our priorities?**

**What does this enable or protect?**

**Why is adoption lagging – and what does that signal?**

**Is our cloud investment producing the outcomes we approved?**

**Are we governing AI spend before it becomes ungovernable?**

## THE FIVE-STEP TRANSLATION PROCESS

# Changing the questions that shape decisions

Executives don't reject technology insights. They struggle to act on them. The issue isn't accuracy. It's whether the insight is framed for a decision.

- 01 ANCHOR TO THE BUSINESS**

Identify what leadership is already focused on before you look at your data.

**VALUE:** You are connected to business priorities, not just IT operations.

5 minutes
- 02 CHOOSE YOUR LENS**

Match your insight to the decision domain that gives it the most executive traction.

**VALUE:** You understand where your data matters most.

5 minutes
- 03 FRAME THE INSIGHT**

Turn your prepared insight into a decision-ready recommendation using five elements.

**VALUE:** You drive decisions. You don't just report findings.

10 minutes
- 04 DELIVER AND DECIDE**

Open the conversation, read the room, handle pushback, and drive to a decision.

**VALUE:** You are a trusted advisor, not a compliance function.

10 minutes
- 05 BUILD THE HABIT**

Make the translation process the default – every executive touchpoint, every time.

**VALUE:** You are demonstrating sustained, strategic value over time.

Ongoing

# 01

## ANCHOR TO THE BUSINESS

- **Start with the decision,  
not the data**

# 01. ANCHOR TO THE BUSINESS

Identify what leadership is already focused on. The data is the same. The framing changes everything.

**THE EXECUTIVE FILTER – Every executive filters information through three questions:**

**1**

What can I decide right now?

**2**

What happens if I don't?

**3**

Does this connect to what I'm already trying to do?

## Step 1 in practice – ask yourself:

**What is leadership focusing on this quarter?**

Check published priorities, recent town halls, or planning documents before preparing anything.

**Which of my current insights connects to that, even loosely?**

One connection is enough. You don't need perfect alignment, just an entry point.

**Can I state that connection in one sentence?**

If yes, you're ready for Step 2. If not, keep looking.

# 02

## CHOOSE YOUR LENS

- Match your insight to the domain with most executive traction

## 02. CHOOSE YOUR LENS

Don't lead with your data. Lead with what leadership is already focused on, then find the domain that connects.

### Business priority

Enabling growth / supporting a strategic or transformation initiative

Improving adoption / unlocking value from existing technology investment

Reducing cost / improving spend defensibility across software, SaaS, cloud, or AI

Improving efficiency / removing process or provisioning friction

Managing risk / avoiding audit, compliance, or data exposure

Improving data confidence / enabling faster technology decisions

Getting ahead of issues / reducing reactive fire drills across the estate

### Lead with this domain

#### Domain 1: Strategy and governance

Are our technology choices reinforcing strategic priorities, or just renewing what we've always had?

#### Domain 2: Org capability and change leadership

Is our technology investment actually delivering the outcomes we paid for?

#### Domain 3: Financial management and optimization

Is our spend intentional and defensible, or are we renewing on autopilot?

#### Domain 4: Operational excellence and process

Where do provisioning and governance processes create delays or redundant work?

#### Domain 5: Risk and compliance

Which risks could derail something we care about, and which are we carrying deliberately?

#### Domain 6: Inventory and data management

Can we trust what we're seeing, and does the uncertainty change any decisions in front of us?

#### Domain 7: Technology enablement and automation

Are we getting insights fast enough to change outcomes, or always reacting after the fact?

## 02. CHOOSE YOUR LENS

### Strategy and governance

Are our technology investments reinforcing the organization's goals, or are we funding yesterday's priorities on autopilot?

#### What your data gives you visibility into

Across on-prem infrastructure, SaaS platforms, cloud environments, and managed services, your asset data reveals the full shape of your technology portfolio: what exists, what it costs, what it's supposed to do, and how it connects to the rest of the organization.

#### The reframe

The question isn't what technology you have. It's whether the portfolio you're funding is the one your strategy actually requires. Every misaligned asset is a decision that was never made.

#### Signals to watch for

- Technology renewed or extended without a documented link to a current business priority or initiative
- Duplication across on-prem, SaaS, and cloud that points to unresolved decisions about platform direction
- Governance gaps — ungoverned tools, unowned systems, or policy exceptions — that accumulate risk and erode accountability

#### The prompt for this domain

"If we reviewed every major technology commitment against this year's strategic priorities, which ones would be difficult to justify — and who would need to make the call to change them?"

## 02. CHOOSE YOUR LENS

### Org capability and change leadership

Are we getting the outcomes we funded, and where is technology friction quietly slowing the organization down?

#### What your data gives you visibility into

Deployment records, adoption metrics, active usage patterns, training completion rates, and feature utilization across every layer of your technology estate — from infrastructure tools to end-user applications — show not just what's installed, but what's actually being used to create value.

#### The reframe

Unused technology is a funded liability. The gap between what was deployed and what people use is the clearest indicator of where organizational value is leaking.

#### Signals to watch for

- Significant gaps between deployment counts and active usage, months after a technology was rolled out
- Capability investments that haven't changed how work gets done (adoption without behavior change)
- Teams building workarounds or maintaining parallel processes because the deployed solution doesn't fit how they operate

#### The prompt for this domain

"Which technology investment — on-prem, SaaS, or cloud — has the largest gap between what we paid for and what people actually use? Do we know why, and has anyone been asked to decide what to do about it?"

## 02. CHOOSE YOUR LENS

### Financial management and optimization

Is our technology spend a deliberate investment in outcomes, or a record of commitments we've stopped questioning?

#### What your data gives you visibility into

The complete financial picture of your technology estate: contract values, renewal timelines, consumption vs. entitlement across licenses and cloud resources, and the spend patterns that show where investment is intentional and where it has simply accumulated over time.

#### The reframe

Most technology overspend isn't caused by bad decisions, but by decisions that were made once and never revisited. The data shows savings as well as which commitments are still valid, and which are funding assumptions the organization has already moved past.

#### Signals to watch for

- Contracts renewing at volumes that don't reflect current headcount, usage, or organizational structure
- Cloud or infrastructure consumption that has grown past its original business case without a formal reapproval
- Spend spread across overlapping tools — on-prem, SaaS, and cloud — solving the same problem in different parts of the organization

#### The prompt for this domain

"Which technology commitments renewing in the next 90 days are based on assumptions about headcount, usage, or strategy that haven't been validated since they were first made?"

## 02. CHOOSE YOUR LENS

### Operational excellence and process

Where is technology slowing the organization down, and what upstream decision, if made, would eliminate friction for good?

#### What your data gives you visibility into

The operational data behind how technology is provisioned, managed, and governed across your estate: request volumes, cycle times, exception rates, approval queues, and the recurring friction points that consume capacity without creating value.

#### The reframe

Operational drag is rarely a process problem. It's usually a decision that was never made. Every recurring exception, bottleneck, or workaround is a signal that something upstream — a policy, an ownership question, a platform choice — remains unresolved.

#### Signals to watch for

- The same provisioning delays, exception requests, or approval bottlenecks reappearing quarter after quarter without resolution
- Manual processes persisting across on-prem, SaaS, and cloud operations that automation or clearer governance could eliminate
- Operational overhead that grows with scale — a sign that the underlying model hasn't kept pace with the organization's size or complexity

#### The prompt for this domain

"Which operational friction point is consuming the most time or capacity? Is it a process problem, or is there an unresolved decision upstream that keeps regenerating it?"

## 02. CHOOSE YOUR LENS

### Risk and compliance

Which technology risks could derail a priority we've committed to, and which are we carrying without having explicitly decided to?

#### What your data gives you visibility into

The risk posture of your full technology estate: unmanaged assets, ungoverned access, software out of support, compliance gaps across on-prem systems, SaaS applications, and cloud resources, and the open exceptions that have outlasted the audit cycles that created them.

#### The reframe

Not all risk is equal, and not all risk is accidental. The value of this domain is separating risk that was chosen and understood from risk that accumulated without anyone deciding to carry it — and connecting both to the outcomes leadership is actively trying to protect.

#### Signals to watch for

- Unmanaged or undiscovered assets — on-prem, cloud, or SaaS — that sit outside governance and create blind spots in security and compliance posture
- End-of-life (EOL) or out-of-support software still running in production environments, creating exposure that grows with every passing quarter
- Open risk exceptions and compliance gaps that have persisted across multiple audit cycles without a documented decision to accept or remediate them

#### The prompt for this domain

“Which open risk, if it materialized in the next 60 days, would create the most disruption to a priority leadership has publicly committed to? Has anyone explicitly decided to accept it?”

## 02. CHOOSE YOUR LENS

### Inventory and data management

Can we trust what we're seeing, and does any remaining uncertainty change a decision we need to make right now?

#### What your data gives you visibility into

The foundational layer of your technology estate: what you know with confidence, what you're inferring, and what remains undiscovered across physical infrastructure, virtual environments, SaaS subscriptions, cloud resources, and every connection point between them.

#### The reframe

Data quality isn't a technical problem; it's a decision problem. When inventory is incomplete, decisions get made on assumptions. The right question isn't how complete the data is, it's whether the gaps change any decision that's currently in front of the organization.

#### Signals to watch for

- Discovery gaps in parts of the estate where active decisions – renewals, consolidations, migrations, audits – are already in progress
- Persistent reconciliation discrepancies between what's contracted, what's deployed, and what's in use across on-prem and cloud environments
- Decisions being deferred because the data 'isn't ready yet' when the existing data may already be sufficient to act

#### The prompt for this domain

"Where is our inventory data most uncertain, and does that uncertainty sit in an area where we have an active decision, contract, or audit coming up in the next 60 days?"

## 02. CHOOSE YOUR LENS

### Technology enablement and automation

Are we generating insight fast enough to change outcomes, or are we always explaining what happened after the window to act has already closed?

#### What your data gives you visibility into

The operating model behind how technology insight is generated and delivered: the coverage, timeliness, and reliability of the data that feeds every other domain and the degree to which that data arrives in time to influence decisions rather than document what already happened.

#### The reframe

The most expensive technology problem is the one you didn't see coming. Insight that arrives after the renewal window, the audit, or the budget cycle doesn't create value, it creates regret. This domain is about pulling the signal earlier, so decisions happen before options close.

#### Signals to watch for

- Renewals, audits, or budget decisions where the right data existed but arrived too late to change the outcome
- Reactive patterns across on-prem, SaaS, and cloud operations, consistently discovering issues after they've already created cost, risk, or delay
- Manual, periodic, or siloed reporting processes that introduce lag between what's happening in the estate and what leadership can see and decide on

#### The prompt for this domain

"Which decision in the past two quarters would have had a materially better outcome if the right data had been available 30 days earlier? What would it take to pull that signal forward permanently?"

# 03

## FRAME THE INSIGHT

- From prepared data to decision-ready recommendations

# 03. FRAME THE INSIGHT

You know the domain, the metrics, and the executive questions. These five elements shape how you deliver them.

## How your domain prep maps to the five elements:

## Exec question:

### 1 CONFIDENCE

You come into the conversation knowing:

- What you know for certain
- What you're assuming
- Why any remaining gaps don't change the recommendation

Is this good enough to act on?

- Stop explaining what you don't know
- State what you do know and why the recommendation holds regardless of the gap

"We're at ~90% confidence. The remaining gap doesn't change the recommendation."

### 2 CLARITY

You come into the conversation knowing:

- A one-sentence recommendation
- Stated before any supporting detail

In one sentence, what do you recommend?

- State the recommendation first
- Let supporting context follow
- If you can't state it in one sentence, it isn't clear enough

"I recommend we reduce the seat count by 18% at renewal. It's reversible if hiring accelerates."

### 3 TRADE-OFFS

You come into the conversation able to explain:

- What changes if we act now
- What compounds if we wait

What do we gain? What does waiting cost?

- Include a 'do nothing' scenario with a cost the executive cares about:
  - Financial, strategic, or time

"If we right-size now: avoid \$340K overpayment. If we wait: locked into unused capacity for 3 years."

## 03. FRAME THE INSIGHT

How your domain prep maps to the five elements:

Exec question:

### 4 INTENTIONALITY

You come into the conversation knowing:

- Whether the current state was chosen or accumulated
- Who needs to decide what happens next

Did we choose this, or did it just happen?

- Separate chosen outcomes from accumulated outcomes
- Make the distinction visible and name who needs to decide

"This isn't a compliance gap. It's an unreviewed assumption that's been auto-renewing for two cycles."

### 5 OUTCOME

You come into the conversation able to connect:

- Your recommendation to a named initiative or priority
- The decision to something leadership already cares about

What does this enable, protect, or advance?

- Every recommendation must
- connect explicitly to a named initiative or priority
- Never assume the executive will draw the connection themselves

"The \$187K annual savings maps directly to the Q4 technology refresh budget discussion."

### 03. FRAME THE INSIGHT

## Worked example – *all five applied*

# Building the recommendation

Use this to build and pressure-test your recommendation before any executive conversation. It maps directly to the five elements and ensures nothing critical is missing.

| Element                                     | Your input  |
|---|---|
| What outcome are we enabling or protecting? | <i>One sentence. If you can't answer this, you're not ready.</i><br><input type="text"/>  |
| Current state                               | <i>Two sentences maximum. Plain language, no acronyms.</i><br><input type="text"/>  |
| My recommendation                           | <i>Stated directly before any supporting context.</i><br><input type="text"/>   |
| Confidence level                            | <i>___% because we know [A, B, C]. Remaining uncertainty: [X]. Does it change the recommendation? Yes / No.</i><br><input type="text"/> |
| If we act                                   | <i>What outcome does this enable or protect?</i><br><input type="text"/>  |
| If we wait or do nothing                    | <i>What does this cost financially, strategically, or operationally?</i><br><input type="text"/>  |
| Intentionality check                        | <i>Is this outcome deliberate, or did it accumulate? Who needs to decide?</i><br><input type="text"/>                                   |
| Outcome connection                          | <i>Which initiative, milestone, or priority does this advance or protect?</i><br><input type="text"/>                                   |
| Smallest reversible next step               | <i>What moves this forward without overcommitting?</i><br><input type="text"/>  |

## 03. FRAME THE INSIGHT

### Worked example — *all five applied*

#### SCENARIO

Preparing for a QBR with the CIO and CFO, you are reviewing a company-wide productivity suite renewing in 11 weeks. The contract was set in 2022 based on a workforce expansion that did not materialize and has not been revisited.

#### CURRENT STATE

The organization pays for 4,800 seats, while active utilization is 3,750 users. The remaining 1,050 seats reflect outdated growth assumptions and cost \$312,000 annually. The renewal window closes in 11 weeks, after which terms are locked for three years.

#### MAIN

#3: Financial management and optimization.

#### 1 CONFIDENCE

We have high confidence in this analysis. 94% of the active user base is verified through SSO and device data. The remaining 6% are field-based roles with variable access patterns.

#### 2 CLARITY

I recommend we reduce the seat count to 4,000 at renewal. That preserves a 250-seat buffer for planned hiring and eliminates the inherited overage. The decision needs to happen in the next six weeks to allow for contract negotiation.

#### 3 TRADEOFFS

**Act:** If we right-size now, we avoid \$950K in annual overpayment and retain flexibility for growth.

**Wait:** If we auto-renew at current terms, we commit to three more years at a count that hasn't reflected reality since 2022, roughly \$2.9M in avoidable spend.

#### 4 INTENTIONALITY

The current seat count wasn't a deliberate choice. It was a projection that became a default. We have been auto-renewing it for two cycles without review. This isn't a compliance gap, it's an unreviewed assumption. The question is whether we make a different decision now, while we have leverage, or later when we don't.

#### 5 OUTCOME

The \$950K in annual savings maps directly to the technology refresh budget conversation happening in Q4. Getting this decision made now means that budget is available and confirmed, rather than contested during planning.

# 04

## DELIVER AND DECIDE

- **Conversation readiness check**

## 04. DELIVER AND DECIDE

Getting to a decision requires more than a well-structured recommendation. It requires knowing how to open, adjust, and drive to a decision.

### Your input

Can I state my recommendation in one sentence before any supporting context?

Yes

Partial

No

Can I articulate what acting on this enables and what waiting costs?

Yes

Partial

No

Do I know my confidence level and why remaining uncertainty doesn't change the recommendation?

Yes

Partial

No

Have I connected this insight to a named initiative, priority, or outcome leadership already cares about?

Yes

Partial

No

Do I know who must approve, who must align, and who is likely to push back?

Yes

Partial

No

Do I have a clear ask – a specific decision, action, or next step – for this conversation?

Yes

Partial

No

Do I know what a successful outcome looks like as well as a partial win?

Yes

Partial

No

## 04. DELIVER AND DECIDE

### Reading the room and handling pushback

# In-conversation adjustments

## Opening frames

WEAK

"I wanted to walk you through our latest utilization analysis and some findings from the renewal review."

STRONG

"We have a decision with a six-week window that connects directly to the Q4 budget conversation. I want to make sure we get ahead of it while we still have leverage."

## Reading the signals

**SIGNAL: Questions about data quality**

**Means:** Not confident in the foundation

**Adjust:** Pause. Address confidence directly. Return to recommendation.

**SIGNAL: Silence or short responses**

**Means:** Agreement or quiet skepticism. Don't assume which

**Adjust:** Ask directly, "Does this connect to what you're focused on right now?"

**SIGNAL: Can you send me more detail**

**Means:** You haven't answered the question they're actually asking

**Adjust:** Before agreeing, ask what specific question the detail would answer.

## Close with

*"What would need to be true for you to feel confident making this decision?"*

## 04. DELIVER AND DECIDE

Quick reference frames and common pitfalls

# Copy, adapt, and use in emails, QBRs, and steering conversations

**1**  
CONFIDENCE "The decision we can make today is [X]. Our confidence is ~[Y]% based on [A, B, C]. The remaining uncertainty doesn't change the recommendation."

**2**  
CLARITY "The risk matters now because [audit / fiscal year-end / contract window] closes in [timeframe]. Proactive cost: [X]. Reactive cost: [Y]."

**3**  
TRADEOFFS "If we act now: [outcome]. If we wait [timeframe]: [cost or consequence]."

**4**  
INTENTIONALITY "We didn't choose this outcome — it accumulated through [history]. The question: does it still reflect how we want to operate?"

**5**  
OUTCOME "This advances [initiative] by [how] and protects [milestone] from [risk]."

## Reading the signals

**Pitfall:** Leading with data before the recommendation

**Safeguard:** State the recommendation first. Data supports it. It doesn't precede it.

**Pitfall:** Framing savings without a connected outcome

**Safeguard:** Every dollar tied to a decision, initiative, or risk avoided.

**Pitfall:** Treating SaaS, cloud, and AI as separate conversations

**Safeguard:** The estate is one portfolio. The executive conversation should reflect that.

# 05

## BUILD THE HABIT

- **Consistency is what converts a framework into a reputation**

## 05. BUILD THE HABIT

A single well-framed conversation changes how you're perceived that day. A consistent pattern changes how the function is perceived permanently.

### The weekly ten-minute practice

One prompt per week. Apply it to something you're already working on.

#### Week 1

##### **Name the initiative**

Which current work item connects most directly to a named company priority?  
Write the link in one sentence.

#### Week 2

##### **State the trade-off**

If nothing changes in the next 30 days, what gets worse? What improves if you act this week?

#### Week 3

##### **Decide with confidence**

What decision could your current data support today? State the confidence level and the smallest reversible next step.

#### Week 4

##### **Remove friction**

Which recurring exception or process failure wastes the most time? What two people must align to eliminate it?

#### Week 5

##### **Surface drift**

Where does your data suggest the technology landscape has drifted from stated strategy – and who needs to see that?

#### Week 6

##### **Protect an outcome**

Which risk matters now because it directly affects a near-term deliverable leadership has committed to?

#### Week 7

##### **Pull the signal left**

What insight, if it had arrived 30 days earlier, would have changed a renewal, a budget decision, or a program outcome?

## 05. BUILD THE HABIT

### The 90-day adoption roadmap

# Work through these in order

#### Days 1 - 30 Apply the framework to real work

**FOCUS** → Pick two active items: one financial decision and one risk or process issue. Work through all five steps before your next leadership touchpoint. Don't redesign your reporting. Change the framing.

**SUCCESS** → You are asked for a recommendation, not just a status update. At least one insight lands in a leadership conversation as a decision point rather than background information.

**PROMPTS** → Which current work connects to a named company priority? What decision could my data support right now? Which domain maps to the conversation I'm walking into?

#### Days 31 - 60 Embed the framework in your regular cadence

**FOCUS** → Apply the framework to your regular reporting. Add a consistent executive summary to your next QBR: recommendation first, tradeoff named, outcome connected. Use the readiness check before every touchpoint.

**SUCCESS** → Technology management insights begin appearing in planning conversations. Stakeholders start requesting the analysis before you bring it.

**PROMPTS** → Am I leading every update with a recommendation or a finding? Where in my reporting am I burying the value? Which insight has a closing window I haven't framed yet?

#### Days 61 - 90 Make It the default

**FOCUS** → Use the full recommendation structure as standard preparation for every major renewal, SaaS review, cloud commitment, or risk escalation. Implement one early signal or automated alert.

**SUCCESS** → Decisions happen with stated confidence rather than being deferred for more data. The function is referenced in planning documents, not just audit responses.

**PROMPTS** → Where am I still defaulting to operational reporting? What insight, delivered 30 days earlier, would have changed a Q3 outcome? Which team members are ready to apply this framework independently?

## 05. BUILD THE HABIT

### Markers of progress

# How you know it's working

#### WHEN MAKING PROGRESS...

- Asked for a recommendation before the data walkthrough is finished

- Renewals and subscriptions treated as decisions, not defaults

- Stakeholders reference your insights in conversations you weren't part of

- Leadership adopts your language: confidence levels, tradeoffs, outcomes

#### WHEN DEMONSTRATING VALUE...

- A specific decision can be traced back to your insight

- Risks are addressed before they become costs

- Programs course-corrected before milestone reviews surface the issue

- Technology spend decisions reference your data, not just finance's view

#### WHEN YOU'VE CHANGED THE REPUTATION...

- Included early, before a crisis forces the conversation

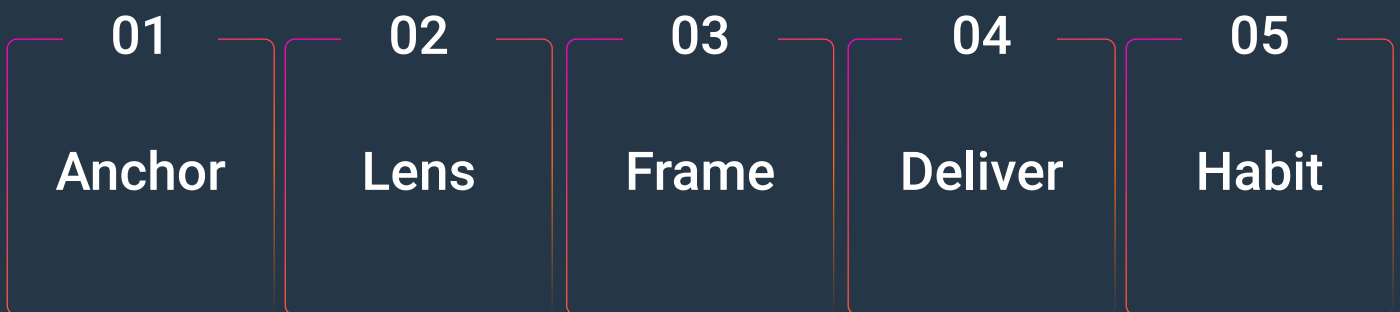
- Technology decisions appear in planning documents, not just audit responses

- The question shifts from 'What does this team do?' to 'What do they recommend?'

- Named partner in the next strategic planning cycle

# The data, the expertise, and the value are all there.

The problem is translation.



Now prepare the next conversation differently  
than the last one.



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