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A SOLUTION BUILDERS PLAYBOOK
2026 EDITION

A PLAYBOOK FOR LEADERS WHO WANT IT TO PULL ITS WEIGHT

# The Technology Roadmap Playbook.

Why reactive IT costs more, what a virtual CIO really does, a budget your CFO will defend and a way to tie every technology decision to a goal.

INSIDE THE PLAYBOOK


01 Reactive vs. strategic

02 The virtual CIO

03 A budget you can defend

04 Decisions tied to goals



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**30+** YEARS

**Top 1%** OF MSPS

**98%** CSAT

WHAT'S INSIDE

# Built for leaders who are done being surprised by IT.

Most businesses buy technology reactively. A server dies, a license renews, a vendor calls and a check gets written. Then everyone wonders why nothing quite fits. This playbook replaces that pattern with a three year roadmap, a budget you can defend and one test for every technology decision.


**01** **Reactive vs. strategic IT spending.**
Emergency purchases, duplicate tools and surprise refreshes. What reactive buying really costs, and what changes when the same dollars follow a three year plan.
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**02** **What a virtual CIO actually does.**
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**03** **Building an IT budget you can defend.**
Run, grow and transform, the refresh cycles that keep run predictable, the end of support dates already on the calendar, and how to present it all to a board.
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**04** **Aligning every tech decision to a goal.**
A four column test that links each purchase to a goal and a metric, a matrix that ends arguments about priority, and a 12 quarter roadmap built from both.
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**WHO IT IS FOR**
Owners, COOs, CFOs and IT leaders at companies with 25 to 500 people who want IT to show up as a plan, not a surprise.

**HOW TO USE IT**
Read chapter 01 before your next budget cycle. Chapters 03 and 04 are working tools to bring to your leadership team.

**READING TIME**
About 25 minutes cover to cover. The budget tables and the alignment table are built to reuse every quarter.

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01

# Reactive vs. strategic IT spending.

Nobody decides to spend reactively. It happens one urgent purchase at a time, until the IT budget is a list of things that broke. This chapter shows the pattern, puts a price on it and introduces the alternative: a roadmap that buys the same things on purpose, earlier and cheaper.

**41%**
of employees acquired, modified or built technology outside IT visibility in 2022

**27%**
of cloud spend is wasted, by the estimate of the companies paying the bill

**$300K+**
per hour: what over 90% of midsize and large companies say an outage costs

**3 yrs**
the planning horizon that turns IT from a surprise into a line item

# Reactive IT does not look expensive. It looks urgent.

A reactive IT budget is not a budget. It is a record of emergencies. Each purchase made sense on the day it was made, which is the problem. That day always had the least time, the fewest options and the highest price.

**01** **Emergency replacements**

A server dies on a Tuesday and is replaced by whatever ships fastest: expedited hardware, overtime and two days of downtime.

**02** **Duplicate tools**

Sales buys a scheduling app, operations buys another, and both overlap with the Microsoft 365 licenses you already pay for.

**03** **Surprise refreshes**

Windows 10 left support in October 2025 and a third of the fleet cannot run Windows 11. The date was public for four years.

**04** **Renewal autopilot**

Contracts renew because the notice window passed. Seat counts never shrink, prices never get negotiated and the vendor does your planning.

**05** **Vendor driven roadmaps**

The next project is whatever the last salesperson pitched well. The business goal gets written after the purchase order, if at all.

**Where a reactive year's IT spend goes**




| | |
|---|---|
| Keeping the lights on | 55% |
| Unplanned replacements | 18% |
| Renewals on autopilot | 17% |
| Planned improvement | 10% |

Illustrative, from Solution Builders reviews of new client budgets.

### The tell

Sort last year's IT spend into two piles: things you decided to buy and things you had to buy. If the second pile is bigger, you have a reactive budget, whatever the spreadsheet is called.

> **Reactive IT is not cheaper. It just sends the invoice later.**
>
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# The same dollars go further on a roadmap.

A strategic budget does not have to spend more. It spends the same money earlier, in bulk, on standard equipment, with the goal written down first. The difference is fewer emergencies, fewer tools and a leadership team that is never surprised.

REACTIVE

### How most companies buy technology

- Purchases triggered by failures and sales calls.
- Each department picks its own tools.
- Refreshes found the quarter they are due.
- IT only asks for money in emergencies.

STRATEGIC

### How a roadmap buys the same things

- Purchases scheduled three years out.
- One standard per category, reviewed quarterly.
- Refreshes budgeted a year ahead, bought in bulk.
- A plan once a year, a scorecard every quarter.

## Three purchases, two ways

| PURCHASE | REACTIVE | ON THE ROADMAP |
|---|---|---|
| Aging file server | Dies, replaced in 72 hours, data lost | Moved to SharePoint in Q2, retired |
| Laptop fleet | Replaced as they fail, six models | A quarter of the fleet a year, one model |
| Collaboration tools | Teams, Slack and Zoom, all half used | One platform, two retired, seats reclaimed |

### Where the savings hide

Emergency pricing, duplicate licenses, unused seats and the downtime between failure and fix. None of them is a line item, so reactive budgets look smaller than they are.

> **Step one was a standard, not a purchase.**
>
> SOLUTION BUILDERS CLIENT, 85 USERS, 60% FEWER TICKETS

Sources: Gartner, 2023 (technology acquired outside IT visibility); Flexera 2024 State of the Cloud Report (self estimated cloud waste); ITIC 2024 Hourly Cost of Downtime Survey; spend split is illustrative, from Solution Builders budget reviews; client outcomes from Solution Builders engagements.

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02

# What a virtual CIO actually does.

A virtual CIO is a fractional technology executive: senior strategy a few days a month, without the full time salary. The title gets used loosely, so this chapter pins it down. Here is what the role owns, what a year with one looks like, and how to spot an impostor.

**6**
documents a real vCIO owns: roadmap, budget, risk register, vendor plan, lifecycle, decisions

**4**
business reviews a year, 90 minutes each, every one ending in written decisions

**180**
days of notice on every renewal, refresh and end of support date

**0**
sales quota. A strategist paid to sell hardware is a salesperson with a nicer title

# Six jobs a virtual CIO owns, and three it does not.

Strip away the title and a vCIO does six things, every quarter, in writing. If the person you pay for strategy cannot put these six documents on the table, you are paying for account management and calling it strategy.

**01** **The three year roadmap**

Every planned project, refresh and retirement on one page, sequenced by dependency and dated by quarter. Updated every 90 days.

**02** **The budget and forecast**

A run, grow, transform budget for this year and a forecast for the next two, with every known renewal already in it.

**03** **The risk register**

A ranked list of what could hurt the business, from an aging firewall to payroll running on one server, each with an owner.

**04** **Vendor strategy**

Which vendors you standardize on, which contracts renew when, and who negotiates. Renewals get decided 90 days out, never the week of.

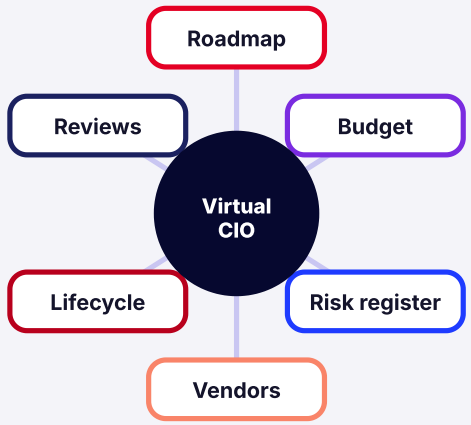
**05** **Lifecycle management**

Every device, server and license with a purchase date and a planned end date, so nothing retires by surprise.

**06** **The quarterly business review**

Ninety minutes with your leadership team: what changed, what is at risk, what we decide next. Decisions are written down and tracked.

**Six jobs, one owner**




### What a vCIO is not

Not your help desk escalation point, not a salesperson with a quota for your account and not a project manager. A vCIO decides what should be built and why. Engineers decide how.

> **A vCIO is measured by the surprises that did not happen.**
>
> SOLUTION BUILDERS CONSULTING PRACTICE

# Four reviews a year, each one ending in a decision.

The quarterly business review is where the roadmap meets reality. It is not a status report. It is a 90 minute working session where the vCIO brings the data and your leadership team leaves with decisions. Here is the rhythm and the agenda.

**Q1**

### Plan

Approve the year, lock the refresh calendar, baseline the risk register and the metrics you will track.

**Q2**

### Check

Projects against plan, spend against budget. New risks in, retired risks out. Fall renewals get a recommendation.

**Q3**

### Budget

Next year drafted from the roadmap, three year forecast updated, board pack prepared with the CFO.

**Q4**

### Reset

Score the year against the metrics, retire what did not work, move the dates that need moving.

## The 90 minute agenda

| MINUTES | TOPIC | WHAT YOU WALK OUT WITH |
|---|---|---|
| **0 to 10** | Scorecard | Uptime, tickets, security posture and spend against plan, on one page |
| **10 to 30** | Risk register | The top five risks, what changed, which ones need a decision today |
| **30 to 55** | Roadmap | Done, in flight and next. Dates confirmed or moved, with the reason |
| **55 to 75** | Budget and renewals | Spend against plan and every renewal in the next 180 days, with a recommendation |
| **75 to 90** | Decisions | Written down, with an owner and a date. No decisions, no meeting |

## How to tell the real thing

- **They bring numbers unasked.** Spend against plan and risk trend arrive before you ask.
- **They talk you out of purchases.** A strategist who never says no works for the vendor.
- **They own documents, not decks.** The roadmap changes when reality does.
- **They know your CFO.** If finance has never met your strategist, you do not have one.

**98%**

client satisfaction, every account with a named strategist

**50+**

engineers behind every roadmap, so plan and build are one team

Sources: Review cadence, agenda and role definition from the Solution Builders IT Consulting practice. Client satisfaction is the Solution Builders CSAT score, measured continuously.

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03

# Building an IT budget you can defend.

An IT budget gets rejected for one reason: nobody in the room can tell what the money does. This chapter fixes that with three buckets, a lifecycle table that removes every surprise, and a way to present the result that sounds like the CFO wrote it.

**5.5%**
of revenue: the average technology budget in 2022, up from 4.25% in 2020

**3**
buckets that make any IT budget legible: run, grow and transform

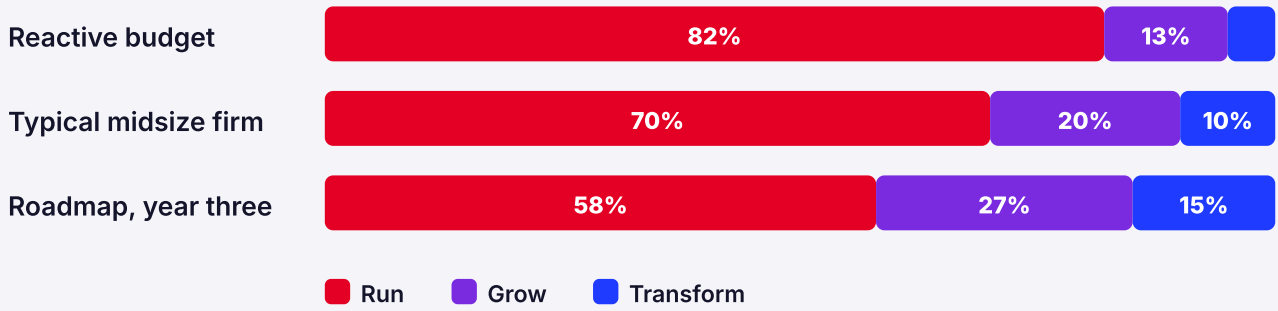
**4 yrs**
the laptop refresh cycle that keeps failure rates and support time flat

**Oct 2025**
the month Windows 10, Office 2019 and Exchange 2019 all left support

# Sort every dollar into run, grow or transform.

Boards do not reject IT budgets because they are too big. They reject them because they cannot tell what the money does. Three buckets fix that, and the trend between them tells you whether IT is a cost or an investment.

**Where the IT budget goes, three ways**




Illustrative splits from Solution Builders budget reviews. Run is not the enemy. Unpredictable run is.

## What goes in each bucket

| BUCKET | WHAT IT PAYS FOR | THE QUESTION IT ANSWERS |
|---|---|---|
| **Run** | Licenses, support, security operations, backup, connectivity and scheduled refreshes | Is the business safe and working today? |
| **Grow** | Capacity for more people, sites and customers: integrations, automation, cloud scale | Can we handle next year's growth at this year's headcount? |
| **Transform** | New ways of operating: AI, analytics, new platforms, new revenue lines | What will make us different in three years? |

## Three ways to shrink run without adding risk

- **Standardize.** One laptop model, one phone system, one collaboration platform. Variety is run cost in disguise.
- **Retire on schedule.** Every aging server costs more each year it stays. Give each one a date.
- **Move to fixed fees.** Managed services turn surprise hours into a flat line your CFO can forecast.

### Why 70% run is fine and 85% is not

Run creeping up each year while grow and transform shrink to fit is the signature of a reactive budget: emergencies eating the future.

# Plan the refresh, then present it like a CFO.

Every device, server and license has a known end date. A defensible budget writes those dates down three years ahead so nothing is a surprise, then presents them in the board's language: goals, risk and a number that holds.

**OCT 2025**

### Windows 10 and Office 2019

Ended, with Exchange 2016 and 2019. Paid updates buy one year.

**JUL 2026**

### SQL Server 2016

Months away. Any app still on it needs a migration plan now.

**JAN 2027**

### Windows Server 2016

Budget the replacement this year, before the deadline forces it.

**JAN 2029**

### Windows Server 2019

Far enough out to plan a cloud move, not a like for like refresh.

## Refresh cycles that keep run predictable

| ASSET | REPLACE EVERY | WHY THEN |
|---|---|---|
| **Laptops and desktops** | 4 years | Warranty ends, failures climb |
| **Servers and storage** | 5 years | Support ends, parts get scarce |
| **Firewalls** | 5 years | Inspection lags, updates stop |
| **Switches and Wi-Fi** | 5 to 7 years | Standards and firmware move on |
| **Phones and tablets** | 3 to 4 years | Batteries and patches give out |
| **UPS batteries** | 3 to 5 years | Nobody tests the old battery |

Solution Builders refresh standards. Replace a quarter of each category every year and the refresh line never spikes.

## Presenting it to the board

1. **Lead with the business**
   Open with the three goals the budget serves, not the hardware list.
2. **Show the trend, then the envelope**
   Run flat, grow and transform rising. Then ask for a three year envelope.
3. **Put a risk next to every deferral**
   For every deferral, name the risk and the quarter it becomes an emergency.

### The sentence that wins the room

"Nothing in this budget is a surprise, and nothing in it will be a surprise next year either." You can only say it when the lifecycle table is real.

Sources: Deloitte 2023 Global Technology Leadership Study (technology budget as a share of revenue); Microsoft Lifecycle Policy (end of support dates); run, grow, transform splits and refresh cycles are Solution Builders standards, illustrative.

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04

# Aligning every tech decision to a goal.

Technology aligned to strategy is a phrase everyone nods at and almost nobody can show on paper. This chapter makes it mechanical. One table connects goals to capabilities to projects to metrics. One matrix decides what gets done first. One roadmap puts it all on a calendar.

**16%**
of companies say their digital transformations improved performance in a way that lasted

**55%**
of middle managers can name even one of their company's top five priorities

**4**
columns in the alignment test: goal, capability, project, metric

**12**
quarters on the roadmap, refreshed every 90 days so it never goes stale

# Every project names its goal and its metric.

Alignment is a table, not a feeling. Every roadmap line should read left to right: a business goal, the capability it needs, the project that delivers it and the number that proves it worked. A blank column means the project waits.

### Goal to capability to project to metric, five examples

| BUSINESS GOAL | CAPABILITY NEEDED | PROJECT | METRIC |
|---|---|---|---|
| **Open a second location in 2027** | Same systems in any building | Cloud file and identity migration | New site live in 30 days, no servers |
| **Win regulated customers** | Prove security controls on demand | CMMC or SOC 2 readiness program | Assessment passed, RFPs answered in days |
| **Cut order to cash from 14 to 7 days** | ERP, CRM and accounting share a record | Integration and workflow automation | Days from order to invoice, monthly |
| **Keep the plant running** | No single point of failure | Redundant network, immutable backup | Downtime under two hours a quarter |
| **Free the team from busywork** | AI on governed company data | Copilot pilot with 20 users | Hours saved per user per week at day 90 |

**Score the project list, then plot it**




Top right first. Top left when a quarter has room. Bottom right only with a sponsor who will fight for it. Bottom left never, however good the demo was.

### Scoring in five minutes

- **Impact, 1 to 5.** Revenue enabled, cost removed, risk retired. Score the goal, not the demo.
- **Ease, 1 to 5.** Cost, calendar time, dependencies and how much people must change.
- **Plot it together.** The CFO, the COO and IT score the same list in the same room.

> **The matrix does not pick projects. It ends arguments.**
>
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# Twelve quarters, four phases, one page.

A roadmap is the alignment table sorted by the matrix and laid on a calendar. Three years is far enough to plan every refresh and close enough to be real. Each phase builds what the next one depends on, so order matters more than dates.

QUARTERS 1 TO 3

### Stabilize

Inventory everything, close the security gaps, fix the three things that break most, document as you go.

QUARTERS 4 TO 6

### Standardize

One device standard, one identity, duplicate tools retired, file servers moved to the cloud.

QUARTERS 7 TO 9

### Integrate

Connect the systems that run the business: ERP, CRM, finance and operations. Automate the handoffs.

QUARTERS 10 TO 12

### Evolve

AI and analytics on clean, governed data. Draft the next roadmap before this one ends.

## Six questions before any purchase

- Which goal on the alignment table does this serve? If none, it waits for the next review.
- What metric will move, and who measures it 90 days after go live?
- Where does it sit on the matrix? Bottom left is a no, even when the demo was great.
- What does it replace or retire? Adding a tool without removing one grows run cost forever.
- Is the dependency ahead of it done? Copilot before data governance is a pilot designed to fail.
- What does it cost over three years, including licenses, people time and the refresh after it?

> **A roadmap is not a document. It is a standing decision about what gets funded next.**
>
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**____ /6**

### Score your last purchase

Count how many of the six questions were answered in writing before your last big purchase was approved.

### Quarter 12 is not a finish line

By quarter nine the vCIO is drafting the next three years, because the refreshes you buy in year four are decided by the standards you set in year one.

Sources: McKinsey Global Survey on digital transformations, 2018; Sull, Homkes and Sull, Why Strategy Execution Unravels, Harvard Business Review, March 2015; alignment table, scoring matrix and roadmap method from the Solution Builders IT Consulting practice.

# Technology with a strategy, not just a budget.

Solution Builders has planned technology for Minnesota businesses since 1995. Our IT Consulting practice puts a virtual CIO at your leadership table, backed by 50+ engineers and the RISE framework.

**R**

**Resilient**

Cloud, backup and continuity planned on the roadmap, so resilience is budgeted, not improvised.

**I**

**Integrated**

Infrastructure, integrations and projects sequenced by dependency and delivered by senior engineers.

**S**

**Secure**

Security and compliance on the risk register every quarter, backed by a 24/7 operations center.

**E**

**Evolving**

AI, Copilot and analytics scheduled for the quarter your data and governance are ready.

## 01

### Technology Strategy Snapshot

A 30 minute conversation about where your IT spend goes today. You leave with the three reactive patterns costing you the most.

**FREE · 30 MINUTES**

## 02

### Roadmap and Budget Build

Three weeks of discovery: inventory, lifecycle dates, a risk register and a 12 quarter roadmap with a run, grow, transform budget.

**FIXED FEE · 3 WEEKS**

## 03

### Virtual CIO Program

A named vCIO, quarterly business reviews, a living roadmap and budget, vendor strategy and lifecycle management, all year.

**MONTHLY · ONGOING**

## Find out where your IT dollars really go in 30 minutes.

Book a free Technology Strategy Snapshot with a Solution Builders solution architect. No pitch, just a clear read on your spend and the first three things to fix.

**Book my strategy snapshot**

THE SHORT VERSION

# Three things to remember.

If this playbook disappears into a drawer, keep these three ideas. They are the difference between companies that buy technology and companies that plan it.

**01** **Reactive IT is the most expensive kind.**

Emergency purchases, duplicate tools and surprise refreshes cost more than any plan. Buy the same things on purpose, earlier and in bulk.

**02** **A vCIO is six documents, not a title.**

Roadmap, budget, risk register, vendor strategy, lifecycle plan and a quarterly review that ends in written decisions.

**03** **Every purchase names its goal and its metric.**

Goal, capability, project, metric. Score it on the matrix, put it on the 12 quarter roadmap and measure it 90 days after go live.

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START THE CONVERSATION

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