



## Financial Impact

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### Category Description

This award honors organizations that have leveraged TBM to optimize technology financials, fuel innovation investment, and drive overall business value. It recognizes those that have demonstrated superior IT financial stewardship through cost optimization, transparency, and strategic investment in innovation. Submissions should focus on how TBM is used to enhance accountability for financial and/or strategic impact, optimize spending, and enable data-driven investment decisions that fuel innovation and deliver measurable business outcomes.

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### Application Questions

1. What financial management and value realization challenges did you face before implementing TBM?
  2. What specific actions did your organization take, using TBM, to address each challenge?
  3. What was the outcome of these actions?
  4. How will your TBM practice evolve over the next 12 months to further strengthen financial stewardship and business value?
  5. What technical changes or enhancements were made to your TBM model to help solve these challenges?
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### Question #1 Guidance & Scoring Criteria

*What financial management and value realization challenges did your company face before implementing TBM?*

**Expert Guidance:** Clearly list and describe each distinct financial management challenge your organization faced before implementing TBM. Focus on specific issues related to cost transparency, budgeting, IT spending accountability, difficulties in proving the business value of technology investments, or challenges in aligning IT investments with innovation priorities. Examples may include inconsistent IT cost tracking, misalignment of IT spending with business priorities, difficulties optimizing costs, or lack of a clear financial decision-making structure. Each challenge should be separately identified and explained in detail, including how it impacted financial decision-making, cost control, or business value realization. Avoid broad statements – ensure each challenge is well-defined and specific to financial stewardship and business value.

### Judging Criteria

- **Exceptional:** Clearly defined actions that directly map to each challenge listed, demonstrating structured execution and strategic alignment. The response includes a detailed explanation of how TBM principles were applied, highlights innovative or best-practice approaches, and provides evidence of stakeholder engagement and execution effectiveness.
- **Strong:** Well-defined actions with a clear link to challenges but may lack some depth in execution details or innovation. Direct mapping to challenges is present but could be more thoroughly articulated.
- **Moderate:** Actions are mentioned, but they are loosely connected to TBM principles, lack execution detail, or are not well justified. Limited evidence of actions being directly mapped to challenges.
- **Weak:** No clear actions described; vague, missing, or weakly justified response. No clear link between actions and challenges.



## Question #2 Guidance & Scoring Criteria

*What specific actions did your organization take, using TBM, to address each challenge?*

**Expert Guidance:** For each challenge listed above, describe the specific actions taken to resolve it, ensuring that every action is directly linked to a challenge. Responses should focus on how TBM was applied to drive financial stewardship, support innovation investment, and business value. Actions could include refining cost allocation models, improving transparency through TBM reporting, optimizing spending through cost optimization initiatives, and prioritizing innovation investments through data-driven decision-making using TBM insights.

Avoid generic statements – clearly explain how each action was executed, what TBM tools or methodologies were used, and how these actions contributed to improved financial stewardship or value realization.

### Judging Criteria

- **Exceptional:** Clearly defined actions that directly map to each challenge listed, demonstrating structured execution and strategic alignment. The response includes a detailed explanation of how TBM principles were applied, highlights innovative or best-practice approaches, and provides evidence of stakeholder engagement and execution effectiveness.
- **Strong:** Well-defined actions with a clear link to challenges but may lack some depth in execution details or innovation. Direct mapping to challenges is present but could be more thoroughly articulated.
- **Moderate:** Actions are mentioned, but they are loosely connected to TBM principles, lack execution detail, or are not well justified. Limited evidence of actions being directly mapped to challenges.
- **Weak:** No clear actions described; vague, missing, or weakly justified response. No clear link between actions and challenges.

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## Question #3 Guidance & Scoring Criteria

*What was the outcome of these actions?*

**Expert Guidance:** Describe the outcome that resulted from each action taken. Clearly link each outcome to the challenge it addressed to show direct cause-and-effect. Outcomes may include expected or unexpected results, improvements in financial transparency, cost control, IT-business alignment, or increased executive confidence in IT spending, as well as enhanced outcomes in innovation investment. If quantitative data is available, such as percentage reductions in IT costs, better forecasting accuracy, or improvements in financial reporting cycles, include it. If the outcome was different from what was anticipated, explain why and how the organization adapted or learned from it.

Avoid broad success statements – each outcome should be clearly tied to an action taken and should reflect real impacts, whether they were positive, negative, or a learning experience.



### Judging Criteria

- **Exceptional:** Clearly articulated outcomes that directly tie to both the challenges and actions taken, demonstrating a structured approach with strong evidence, including quantitative data where applicable. The response provides compelling examples of improvements in financial transparency, cost control, IT-business alignment, or forecasting accuracy, with clear business impact.
- **Strong:** Good outcomes described with reasonable depth and some evidence of business impact but may lack comprehensive quantitative metrics or detailed cause-and-effect linkage. Direct mapping between challenges, actions, and outcomes is present but could be stronger.
- **Moderate:** Some outcomes mentioned, but they are general, anecdotal, or weakly connected to TBM practices. The response may lack clear business value demonstration. Direct mapping between challenges, actions, and outcomes is weak or inconsistent.
- **Weak:** No clear outcomes presented; vague or unsupported success claims, with little to no measurable impact. No discernible link between challenges, actions, and outcomes.

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### Question #4 Guidance & Scoring Criteria

*How will your TBM practice evolve over the next 12 months to further strengthen financial stewardship and business value?*

**Expert Guidance:** Describe the priorities your organization has identified for the coming year as your TBM practice continues to mature. Focus on the new capabilities, use cases, or outcomes you plan to pursue that build on the financial improvements and value realization described in your submission.

Your response should explain how you intend to expand or deepen the use of TBM to support areas such as investment planning, cost optimization, forecasting, innovation funding, or broader business decision-making. This may include extending TBM into new domains, enhancing data quality and analytics, strengthening governance, or supporting additional strategic initiatives across the organization.

Be specific about what you plan to achieve over the next 12 months, why these priorities matter, and how TBM will continue to enable stronger financial accountability and measurable business impact.

### Judging Criteria

- **Exceptional:** The response presents a clear, forward-looking roadmap for advancing TBM maturity and financial impact. Planned initiatives demonstrate strong strategic alignment, thoughtful prioritization, and a clear connection to ongoing value creation.
- **Strong:** The response outlines relevant next steps for evolving the TBM practice and strengthening financial stewardship. Plans are well aligned to current efforts but may lack depth or defined outcomes.
- **Moderate:** Future plans are mentioned but remain high-level or loosely defined. The connection between current results and planned TBM evolution is weak or unclear.
- **Weak:** The response offers limited insight into future direction, focuses primarily on past achievements, or shows minimal intent to further develop the TBM practice.



## Question #5 Guidance & Scoring Criteria

*What technical changes or enhancements were made to your TBM model to help solve these challenges?*

**Expert Guidance:** Describe any technical modifications, enhancements, or refinements made to your TBM model that directly addressed the financial challenges identified. This may include changes in cost modeling, taxonomy updates, automation of reporting processes, integration of TBM with financial planning systems, improvements in cost allocation accuracy, or the creation of new dashboards or reporting structures, particularly those that incorporate metrics for innovative investment. Clearly explain what modifications were made, why they were necessary, and how they helped to improve financial stewardship, drive innovative investments, or value realization.

This question is focused solely on technical improvements to the TBM model itself – avoid general descriptions of business process changes that may have been covered in previous questions. Be as specific as possible about technical execution and implementation details.

### Judging Criteria

- **Exceptional:** Well-documented technical modifications with clear examples of how they addressed financial stewardship challenges. The response includes evidence of improvements in cost allocation, financial tracking, automation, or forecasting, along with demonstrable business impact.
- **Strong:** Clear description of technical modifications with reasonable evidence of effectiveness but may lack depth in implementation details or quantifiable business impact. Modifications are linked to optimization efforts but could be better detailed.
- **Moderate:** Some modifications mentioned, but they are loosely connected to TBM principles, lack execution detail, or do not demonstrate a clear improvement in financial management. Weak connection between modifications and optimization goals.
- **Weak:** No clear description of how the TBM model was changed or leveraged for problem-solving; vague or missing response. No connection between modifications and financial stewardship optimization.