

The CFO's Guide to Planning Your Next Technology Move

The stakes have never been higher for busy CFOs making technology decisions. Two in three face intense pressure to drive more ROI from their tech investments.

Here's how to test your next technology choice against your strategic priorities.



Assess Your Business Alignment

Technology investments should always help, not hinder, your business. Evaluate how your tech proposal will help you meet your goals.



Strategic question: Does this technology directly advance any of your top three business objectives?



Key test: How can this investment support revenue growth, cost reduction, or operational efficiency goals within 12-18 months?

Plan Your Technology Integration

Technology doesn't exist in a vacuum. Understand how your proposed investment will align with your existing tech stack.



Strategic question: Will this solution integrate well with your existing technology ecosystem?



Key test: Have we mapped all data flows, user access requirements, and system dependencies?



Integration assessment: Does this create more tech debt or reduce it by consolidating your stack?



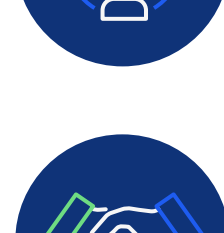
Implementation reality: Do we have the internal resources and expertise to deploy this successfully?

84%

of CFOs say they **have not realized** a return on AI investment in finance, due to lack of skills, legacy technology, and employee adoption.

Plan Your Change Management

Introducing technology into your organization will impact your people and processes. Get ahead of the game by outlining your change management tactics.



Strategic question: How will this technology affect your people and their productivity?



Stakeholder buy-in: Which departments need to champion this for success?



Skills assessment: How much will it cost to train your team or hire new talent to make this tech investment work?



Change readiness: What's your track record with technology adoption across the organization?

82%

of finance and account leaders are **offering higher pay** for relevant AI skills.

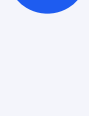


Model the Financial Impact

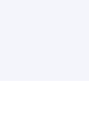
Justifying a technology investment is about taking stock of cold, hard numbers — and some softer numbers too.



Hard ROI analysis: Evaluate which measurable cost savings and/or revenue increases you can quantify from your proposed technology investment.



Soft ROI benefits: Explore hard-to-quantify benefits such as improved decision-making speed, better data quality, and enhanced compliance.



TCO: Include integration, training, maintenance, and ongoing operational costs in your analysis.

Assess Your Technology Risk

Finance isn't the only risk to analyze when buying technology. Here are some others.



Data security: Does this solution meet your cybersecurity standards and compliance requirements?



Vendor stability: Is the provider financially stable with a strong track record?



Business continuity: What happens if this solution fails or the vendor goes out of business?



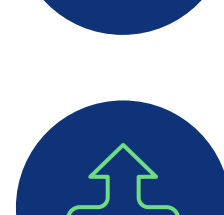
Implementation risk: What could go wrong during deployment, and how do we mitigate those risks?

Future-Proof Your Investment

The technology you buy today should benefit your business tomorrow and beyond. Here's how to think about its longer-term implications.



Growth accommodation: Can this solution scale with your business over the next 3-5 years?



Technology evolution: How does this position us for future innovations like AI and automation?



Flexibility assessment: Can we adapt this solution as your business needs change?

Volatile economic policy makes agility especially important.

CFOs drive growth why they unify finance, operations, and tech.

Alignment often breaks because of a lack of integration between governance, risk, and finance systems.

[Learn more.](#)



Work With a Partner

Eide Bailly can help you navigate complex technology decisions with data-driven insights and proven frameworks that align your technology investments with strategic business objectives.

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