

EXECUTIVE BRIEFING

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# THE 15 SOLUTION SELECTION CRITERIA EXECUTIVE SPONSORS SHOULD USE

How to Evaluate the Complete Candidate Against Sponsor Intent



ERP



CRM



DATA & ANALYTICS



AGENTIC AI



OTHER SOLUTIONS

— Powered by The CFO-TA, the Executive Sponsor Platform —

## A L E N T R A   A D V I S O R Y

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**TIM HOURIGAN**

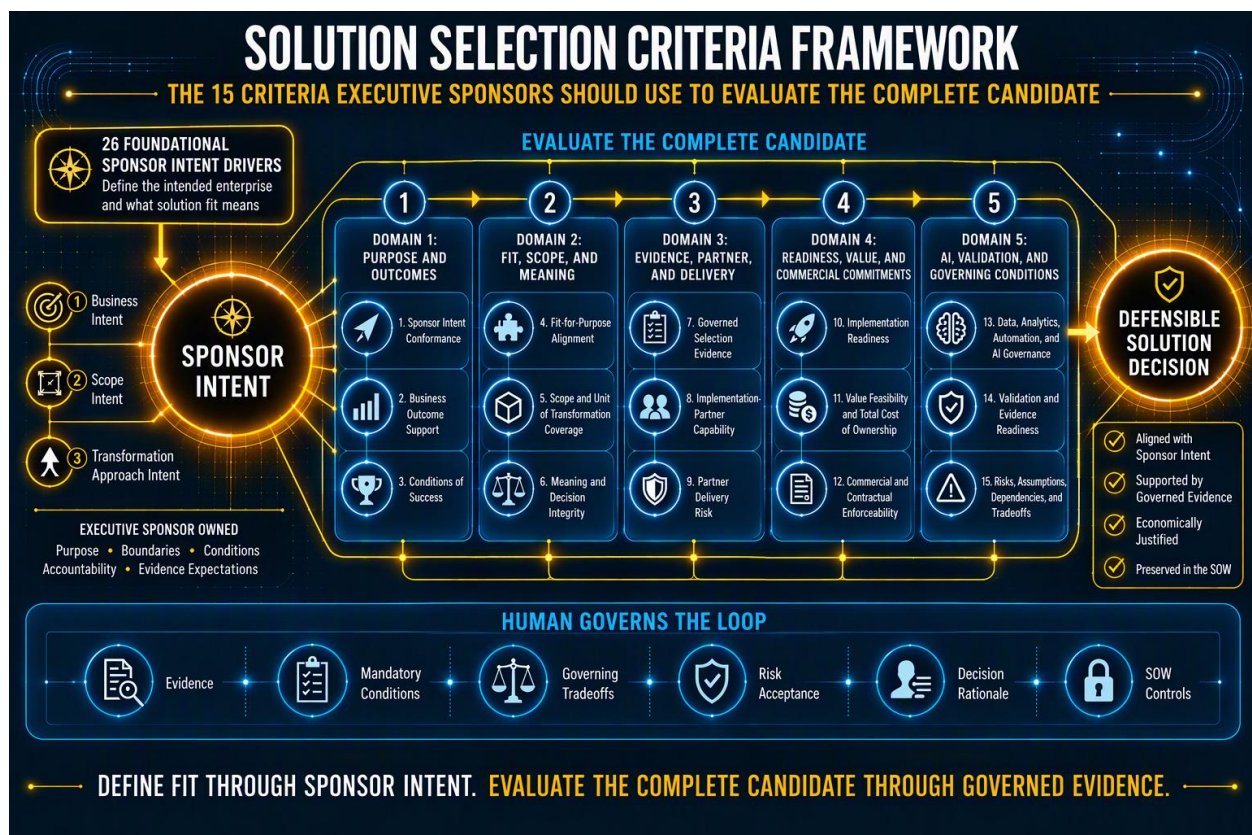
Founder of Alentra Advisory

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## Executive Summary

Enterprise solution selection teams commonly evaluate functional fit, technical capability, provider strength, implementation experience, price, and Total Cost of Ownership. These considerations contribute essential evidence to the decision. A complete Business-Side selection standard also connects that evidence to the business purpose, intended outcomes, required change, decision boundaries, and operating conditions authorized by the Executive Sponsor.

The Solution Selection Criteria Framework evaluates the complete candidate: the proposed combination of platforms, supporting technologies, implementation partner, implementation approach, solution architecture, commercial structure, SOW, governance conditions, evidence, validation readiness, expected value, economic exposure, risks, assumptions, dependencies, and organizational commitments required to operationalize Sponsor Intent. Throughout this Executive Briefing, “candidate” refers to this complete proposed solution.



The same governing criteria apply across ERP, CRM, data and analytics, Agentic AI, and other consequential enterprise solution classes. Category-specific evaluation factors determine the additional evidence required for the solution under consideration. The common standard remains anchored in Sponsor Intent, the complete candidate, governed evidence, investment quality, enforceable commitments, and lifecycle continuity.

**The product is a component. The complete candidate is the decision. Sponsor Intent is the standard against which that decision should be made.**

Before the criteria are applied, the 26 Foundational Sponsor Intent Drivers establish the Sponsor-owned positions that define the enterprise the solution must fit. Every applicable driver should receive an explicit Sponsor disposition before consequential Solution Selection decisions are made. That disposition can be an authorized position, a provisional position based on an explicit assumption, a determination that the driver is not material to the current decision with documented rationale, or a bounded unresolved position with a named owner, defined resolution point, and explicit limits on which decisions can proceed.

This provides complete disposition coverage without suggesting that every foundational position is final or supported by complete evidence. All Sponsor Intent classified as Solution-Critical must then be sufficiently defined before the affected solution, architecture, scope, commercial, SOW, or platform-selection commitment is authorized. Remaining Sponsor Intent continues to be progressively refined through implementation and operations.

The framework is organized around one governing question:

**Which complete candidate can most credibly operationalize the Sponsor Intent authorized by the Executive Sponsor?**

This question shapes the requirements, demonstrations, evidence, scoring model, economic analysis, tradeoff decisions, SOW commitments, and final selection decision. Each candidate must demonstrate how its complete proposed solution will support the Business Outcomes the Enterprise Transformation Program was authorized to produce.

The 15 Solution Selection Criteria operate within the Alentra Methodology. The canonical 30-step Alentra Methodology governs how Transformation Definition and Solution Selection are performed. The criteria establish the decision domains through which the complete candidate is evaluated against Sponsor Intent, preserving one integrated methodology and a consistent Sponsor-governed selection standard.

The CFO-TA is the AI-powered Executive Sponsor Platform. It helps Executive Sponsors and Business-Side leaders apply the Alentra Methodology, develop and govern Foundational and Solution-Critical Sponsor Intent, evaluate the complete candidate through the 15 Solution Selection Criteria, preserve governed evidence, authorize consequential tradeoffs and decisions, and carry Sponsor Intent into the SOW.

The platform maintains continuity throughout implementation, validation, operations, and Value Realization. The Adaptive Sponsor Intent Discovery Engine helps identify missing, implicit, incomplete, conflicting, or assumption-dependent Sponsor Intent. The SILMS preserves and governs the resulting Sponsor Intent Assets so the basis of selection remains explicit, accessible, validatable, durable, and connected to the Business Outcomes the investment was authorized to produce.

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## Foundational Sponsor Intent Drivers Establish the Definition of Fit

The [26 Foundational Sponsor Intent Drivers](#) establish the Sponsor-owned positions that define the enterprise the solution must fit. They address the intended operating model, distribution of authority, management system, economics, information architecture, technology architecture, and enterprise intelligence architecture before product demonstrations and consequential Solution Selection decisions begin.

The drivers are organized around six Executive Sponsor questions:

- How should the enterprise operate?
- How should authority be distributed?
- How should performance and value be measured?
- How should information be governed?
- How should technology be architected?

- How should intelligence, AI, and human decision-making work together?

Every applicable driver should receive an explicit Sponsor disposition before consequential Solution Selection decisions are made. The disposition can be an authorized position, a provisional position based on an explicit assumption, a determination that the driver is not material to the current decision with documented rationale, or a bounded unresolved position with a named owner, defined resolution point, and explicit limits on which decisions can proceed. This provides complete foundational disposition coverage while preserving the ability to validate and improve individual positions as evidence develops.

These positions shape Business Intent, Scope Intent, Transformation Approach Intent, Sponsor Intent Assets, Meaning-Aligned Requirements, demonstration scenarios, evaluation criteria, implementation assumptions, commercial commitments, and Evidence Requirements. They apply across ERP, CRM, data and analytics, Agentic AI, and other consequential enterprise solution decisions, with their relative consequence varying by solution class.

The Foundational Sponsor Intent Drivers also help identify which Sponsor Intent Assets are Solution-Critical. Solution-Critical is a classification attribute applied to any Sponsor Intent Asset that must be sufficiently defined before a consequential solution, architecture, scope, commercial, SOW, or platform-selection commitment is made. Some Foundational Sponsor Intent Assets will be Solution-Critical. Other Solution-Critical Sponsor Intent Assets will emerge as candidates are evaluated through the 15 Solution Selection Criteria.

The governing requirement is decision sufficiency. Foundational and Solution-Critical Sponsor Intent must be explicit enough to govern the selection decisions and SOW commitments it materially affects. Where evidence remains incomplete, the applicable assumptions, uncertainties, dependencies, Decision Boundaries, owners, and resolution requirements must be visible and governed before the affected commitment is authorized.

Sponsor Intent continues to be refined through implementation and operations. Implementation Discovery, provider expertise, prototypes, validation activities, and accumulating evidence should test and improve the Sponsor Intent established before the SOW. They should strengthen the governing baseline rather than become the first

mechanism for discovering the foundational purpose, positions, and assumptions that should have shaped Solution Selection and the SOW.

Sponsor Intent Assets remain governed throughout the Enterprise Transformation Program lifecycle. They are monitored, validated, challenged, improved, reaffirmed, revised, or retired as decisions are made, assumptions change, evidence develops, and operating conditions evolve.

**The 26 Foundational Sponsor Intent Drivers establish the enterprise the solution must fit. Solution-Critical Sponsor Intent establishes what must be sufficiently defined before the affected commitments are authorized. The 15 Solution Selection Criteria evaluate whether the complete candidate can credibly operationalize that Sponsor Intent.**

The framework is organized around one governing question:

**Which complete candidate can most credibly operationalize the Sponsor Intent authorized by the Executive Sponsor?**

This question shapes the requirements, demonstrations, evidence, scoring model, economic analysis, tradeoff decisions, SOW commitments, and final selection decision. Each candidate must demonstrate how its complete proposed solution will support the Business Outcomes the Enterprise Transformation Program was authorized to produce. Category-specific evaluation factors determine the additional evidence required for ERP, CRM, data and analytics, Agentic AI, and other enterprise solution classes.

The 15 Solution Selection Criteria operate within the Alentra Methodology. The canonical 30-step Alentra Methodology governs how Transformation Definition and Solution Selection are performed. The criteria establish the decision domains through which the complete candidate is evaluated against Sponsor Intent, preserving one integrated methodology and a consistent Sponsor-governed selection standard.

The CFO-TA is the AI-powered Executive Sponsor Platform. It helps Executive Sponsors and Business-Side leaders apply the Alentra Methodology, develop the applicable Foundational and Solution-Critical Sponsor Intent, evaluate the complete candidate through the 15 Solution Selection Criteria, preserve governed evidence, authorize consequential tradeoffs, and carry Sponsor Intent into the SOW.

The platform maintains continuity throughout implementation, validation, operations, and Value Realization. The Adaptive Sponsor Intent Discovery Engine helps diagnose

missing, implicit, incomplete, conflicting, or assumption-dependent Sponsor Intent. The SILMS preserves and governs the resulting Sponsor Intent Assets so the basis of selection remains explicit, accessible, validatable, durable, and connected to the outcomes the investment was authorized to produce.

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## What Are Solution Selection Criteria?

Solution Selection Criteria are the Sponsor-governed standards used to evaluate whether a complete candidate can operationalize Sponsor Intent. The complete candidate includes the proposed combination of platforms, supporting technologies, implementation partner, implementation approach, architecture, commercial structure, SOW, governance conditions, evidence model, validation readiness, economic exposure, risks, assumptions, dependencies, and organizational commitments.

The criteria define what candidates must demonstrate, which evidence they must provide, how material differences should be evaluated, and which conditions require authorization by the appropriate human Decision Authority. They create a common basis for comparison across scope, assumptions, responsibilities, operating conditions, time horizons, economics, dependencies, and evidence expectations.

The criteria originate from Sponsor Intent. The Foundational Sponsor Intent Drivers first help define the intended enterprise and what fit means. Business Intent, Scope Intent, and Transformation Approach Intent then establish the complete governing standard. Meaning-Aligned Requirements translate that standard into required capabilities, behaviors, boundaries, and evidence expectations. Category-specific evaluation factors determine the additional evidence required for ERP, CRM, data and analytics, Agentic AI, or another solution class.

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## Sponsor Intent Establishes the Solution Selection Standard

Sponsor Intent is the Executive Sponsor-owned expression of purpose and foundation of the Transformation Definition. It is formed by three responsibilities that remain owned by the Executive Sponsor:

- Business Intent
- Scope Intent
- Transformation Approach Intent

Business Intent defines the intended business results, priorities, governing meaning, accountability expectations, validation requirements, and conditions that must remain true for the Enterprise Transformation Program to be considered successful.

Scope Intent defines the complete business-change boundary required to achieve the intended outcomes. It establishes what the Enterprise Transformation Program will address, exclude, sequence, defer, transfer, or depend upon, and makes explicit the assumptions, responsibilities, interfaces, integrations, customizations, organizational impacts, external dependencies, and Units of Transformation included within the authorized scope.

A Unit of Transformation is the smallest complete business-change boundary capable of meaningfully achieving, enabling, protecting, or validating a Business Outcome. A Unit of Transformation may span multiple processes, roles, decisions, systems, interfaces, data sets, controls, reports, organizational groups, and technology components. By defining scope through Units of Transformation rather than isolated requirements, features, modules, or workstreams, Scope Intent helps ensure that the complete business-change boundary required to achieve the intended outcome remains visible, governable, and comparable throughout Solution Selection, implementation, and operations.

Transformation Approach Intent makes implementation assumptions explicit before the detailed project plan is created. For each in-scope domain and process, it defines the expected degree of business-process change, organizational change, operating-model change, customization, integration responsibility, data remediation, sequencing, resource requirements, risk acceptance, and other factors that materially influence implementation effort, estimates, staffing, timelines, and delivery planning. It prevents parties from assuming different levels of transformation effort, complexity, or business change across the Enterprise Transformation Program while believing they are aligned.

Together, these responsibilities make explicit the outcome assumptions, scope assumptions, implementation assumptions, responsibilities, dependencies, and decision boundaries that materially influence solution selection, implementation effort,

commercial commitments, expected value, Total Cost of Ownership, and the likelihood of achieving the intended Business Outcomes.

Sponsor Intent is operationalized through Sponsor Intent Assets, which make approved Sponsor Intent explicit, actionable, referenceable, accessible, governable, validatable, traceable, and durable throughout the Enterprise Transformation Program lifecycle. Initial Sponsor Intent Assets are expected to be partial and are refined as decisions are made, assumptions change, evidence develops, and operating conditions evolve.

Core Business Definitions establish the authoritative business meaning used to classify, measure, govern, automate, report, validate, and make decisions across the Enterprise Transformation Program and ongoing operations.

Business Intent Design is the discipline responsible for progressively defining Sponsor Intent before consequential commitments are made. Intent Governance preserves and governs that purpose as participants, decisions, assumptions, evidence, and operating conditions change.

Intent Governance addresses both the enduring challenge of transformation drift and the emerging requirements of Agentic AI. It preserves authoritative Sponsor Intent as decisions, participants, assumptions, and operating conditions change. It also makes intended outcomes, priorities, boundaries, accountabilities, validation requirements, and evidence expectations explicit enough to guide increasingly autonomous execution.

**People compensated for ambiguity. Autonomous agents amplify it. Organizations must govern it.**

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## The Alentra Methodology Governs the Solution Selection Process

The Alentra Methodology provides the canonical 30-step methodology across Transformation Definition, Solution Selection, Govern Implementation, and Prove Outcomes. It governs how Sponsor Intent is progressively defined, how Business Outcomes and Conditions of Success are established, how Scope Intent and Transformation Approach Intent are authorized, how candidates are evaluated, and how the selection basis is preserved through SOW development and implementation mobilization.

The methodology also governs how Meaning-Aligned Requirements are developed, Sponsor-controlled demonstrations are structured, evidence is classified, risks and assumptions are assessed, tradeoffs are authorized, decisions are recorded, and the resulting Sponsor Intent, evidence, commitments, and decision rationale remain governed throughout the Enterprise Transformation Program lifecycle and ongoing operations. These activities operate as part of one integrated Enterprise Transformation Program methodology.

The 15 Solution Selection Criteria define what Executive Sponsors should evaluate when applying the Alentra Methodology to a solution selection decision. The criteria are decision domains rather than steps, stages, phases, or gates. The applicable steps of the Alentra Methodology determine when and how each criterion is defined, applied, analyzed, reviewed, and authorized.

**The Alentra Methodology governs the process. The Solution Selection Criteria govern the decision.**

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## Why Traditional Solution Selection Criteria Are Incomplete

Traditional solution selection criteria commonly originate from functional requirements, departmental requests, current-system limitations, product categories, consulting templates, technical standards, vendor questionnaires, implementation estimates, and commercial terms. These inputs organize useful information, but they do not establish the complete Business-Side standard the selected solution platform and implementation partner must satisfy.

A functional requirement can describe expected system behavior without defining why that behavior matters, which Business Outcome it supports, what governing meaning must remain intact, who holds Decision Authority, how exceptions must be handled, or what evidence will demonstrate achievement.

A feature comparison can show that multiple solution platforms possess similar capabilities. It cannot determine whether those capabilities should be configured and applied in a manner that supports the organization's intended operating behavior,

accountability model, Core Business Definitions, evidence expectations, approved Sponsor Intent, and authorized Transformation Approach Intent.

A price comparison can identify a lower-cost proposal without determining whether the lower-cost option weakens intended value, shifts responsibility to the client, increases Partner Delivery Risk, depends on future capability, or requires extensive customization. The apparent savings may simply defer cost, effort, risk, or complexity to later stages of the Enterprise Transformation Program.

A vendor-controlled demonstration can present a polished version of a product under preferred conditions without establishing how the product will perform within the Sponsor's business context, data conditions, decision boundaries, exception conditions, accountability model, or evidence requirements. A forecast ROI can also appear compelling while depending on uncertain assumptions about scope, implementation effort, adoption, benefit timing, attribution, operating costs, and the durability of expected results.

Traditional criteria organize the comparison.

**Sponsor-governed criteria establish what the comparison must prove.**

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## From Foundational Position to Selection Decision

The governing sequence connects the Executive Sponsor's earliest enterprise positions to the final selection decision and the Enterprise Transformation Program that follows:

The 26 Foundational Sponsor Intent Drivers help define the intended enterprise.

Sponsor Intent establishes the complete governing standard through Business Intent, Scope Intent, and Transformation Approach Intent.

Sponsor Intent Assets preserve authorized positions, rationale, boundaries, validation requirements, and evidence expectations.

Meaning-Aligned Requirements translate Sponsor Intent into required capabilities, behaviors, boundaries, and evidence.

Sponsor-controlled demonstrations test candidates within the Sponsor's business context.

Governed Selection Evidence establishes what each candidate has credibly demonstrated.

The 15 Solution Selection Criteria evaluate the complete candidate.

Governing Tradeoff Decisions protect mandatory conditions and Sponsor-owned priorities.

The SOW converts material selection commitments into enforceable obligations.

Implementation Readiness confirms that the authorized decision can responsibly move into implementation.

Lifecycle continuity preserves the basis of selection through implementation, Value Realization, and operations.

Define fit through Sponsor Intent. Test fit through evidence. Evaluate the complete candidate. Preserve the basis of selection through the SOW and implementation.

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## The Complete Solution Selection Decision

The Solution Selection Criteria Framework evaluates the complete candidate position:

- solution platform
- Implementation partner
- Implementation approach
- Commercial structure
- SOW model
- Governance conditions
- Business-Side and technical responsibilities
- Required integrations and third-party products
- Governed selection evidence
- Validation and Outcome Evidence Readiness
- Expected Value Feasibility
- Total Cost of Ownership
- Risks, assumptions, dependencies, and tradeoffs
- SOW commitments
- Implementation Readiness
- Continuing alignment with Sponsor Intent

The criteria work together as an integrated evaluation standard while preserving the distinct question each criterion must answer. Weighted comparisons remain useful, while mandatory conditions, non-compensating criteria, evidence sufficiency requirements, Governing Tradeoff Decisions, disqualification conditions, SOW conditions, and residual-risk acceptance keep consequential matters directly visible to human Decision Authorities.

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## The 15 Solution Selection Criteria

### 1. Sponsor Intent Conformance

Sponsor Intent Conformance determines whether the proposed platform, implementation partner, commercial model, and implementation approach can operationalize approved Sponsor Intent without requiring the Executive Sponsor's authorized Business Intent, Scope Intent, or Transformation Approach Intent to be materially reconstructed, narrowed, redefined, or informally traded away.

The evaluation tests conformance with Sponsor Intent Assets, Core Business Definitions, governing constraints, decision boundaries, accountability requirements, exception rules, validation requirements, evidence expectations, authorized scope boundaries, and approved implementation assumptions.

A candidate can be capable, commercially attractive, and broadly suited to the organization while still requiring a material departure from what the Executive Sponsor authorized. Any such departure must be made explicit and addressed through the appropriate Governing Tradeoff Decision rather than absorbed through scoring, solution design, estimation, negotiation, or implementation planning.

**Executive Sponsor question: Can this candidate operationalize the Sponsor Intent I authorized without requiring an unauthorized material change to that intent?**

### 2. Business Outcome Support

Business Outcome Support determines how credibly the proposed platform and implementation approach can enable the approved Business Outcomes. Every candidate must demonstrate the causal connection between its proposed capabilities and the intended Business Outcomes. That connection must extend beyond product

functionality to include the required operating changes, data conditions, controls, adoption conditions, implementation commitments, accountability, dependencies, and evidence-producing mechanisms.

Platform capability demonstrates the potential to support an outcome. The evaluation must therefore identify which Sponsor Intent Assets support each Business Outcome, which candidate capabilities are required, which implementation and operating conditions must remain true, which parties control those conditions, and what Outcome Evidence will eventually demonstrate achievement.

This criterion evaluates the strength and credibility of the candidate's path from capability to outcome. Sponsor Intent Conformance evaluates preservation of authorized intent, Fit-for-Purpose Alignment evaluates inherent suitability for the future-state business environment, and Value Feasibility and Total Cost of Ownership evaluates investment quality.

**Executive Sponsor question: How credibly can this candidate support the approved Business Outcomes, under what conditions, and with what evidence?**

### 3. Conditions of Success

The Alentra Methodology evaluates candidates against four transformation-level Conditions of Success:

- Capital Protection
- Outcome Confidence
- AI & Data Integrity
- Compliance Proof

These conditions extend evaluation across the complete environment required for the Enterprise Transformation Program to produce durable value. They make capital exposure, outcome evidence, data meaning, AI authority, compliance, and proof part of the selection decision.

Each Business Outcome should support at least one Condition of Success. The selected solution platform and implementation partner should support the complete transformation standard authorized by the Executive Sponsor.

A platform can satisfy extensive functional requirements while creating unacceptable capital exposure, uncertain outcome evidence, unreliable data meaning, unclear AI authority, or inadequate compliance proof. Conditions of Success ensure these considerations remain visible throughout evaluation and authorization.

**Executive Sponsor question: Does this candidate support the conditions required to protect capital, strengthen outcome confidence, preserve AI and data integrity, and produce compliance proof?**

## 4. Fit-for-Purpose Alignment

Fit-for-Purpose Alignment determines whether the proposed platform and implementation partner are naturally suited to the intended future-state business environment defined by the Executive Sponsor.

The applicable Foundational Sponsor Intent Drivers provide the primary Sponsor-owned definition of fit. They make explicit the operating model, authority structure, management and economic model, information architecture, technology architecture, and enterprise intelligence architecture the complete candidate must support.

The assessment considers the organization's intended operating model, business architecture, scale, complexity, geographic and organizational structure, Business Domains, Units of Transformation, material business flows, cross-functional interactions, required operating behaviors, governance expectations, strategic direction, and the expected degree of business-process, organizational, and operating-model change within each in-scope domain and process.

A candidate can possess the capabilities required to support individual Business Outcomes while remaining poorly suited to the environment in which those capabilities must operate. Excessive customization, structural workarounds, fragmented third-party dependencies, persistent operating complexity, or a material mismatch with the intended business architecture can indicate that a candidate is technically capable but not Fit-for-Purpose.

The strongest product in a generic category is not automatically the strongest choice for a specific Enterprise Transformation Program. Fit-for-Purpose Alignment distinguishes broad product strength from the candidate's inherent suitability for the authorized future-state business environment.

**Executive Sponsor question: Is this candidate naturally suited to the business environment, operating model, complexity, and transformation we intend to establish?**

## 5. Scope and Unit of Transformation Coverage

Solution providers commonly structure scope around modules, features, workstreams, integrations, and technical components. Meaningful Business Outcomes frequently require coordinated change across processes, roles, decisions, data, controls, systems, interfaces, organizational units, and third parties.

The Alentra Methodology uses Units of Transformation to preserve the complete business-change boundary required to achieve a meaningful Business Outcome. The evaluation should make the following scope conditions explicit:

- Included scope
- Excluded scope
- Optional scope
- Deferred scope
- Conditional scope
- Dependencies
- Third-party responsibilities
- Future capability
- Sponsor Intent Asset coverage
- Unit of Transformation coverage

This treatment reveals business change that has been fragmented, transferred, deferred, qualified, or left unresolved. It also creates a stronger basis for comparing implementation estimates, commercial proposals, risks, resource commitments, and expected value.

Two proposals can only be compared responsibly when they reflect a common evaluation basis. Scope, responsibilities, dependencies, assumptions, and Units of Transformation should be normalized before the organization compares cost, timing, value, or implementation credibility.

**Executive Sponsor question: Does the proposed scope cover the complete business change required to achieve the intended outcomes, with exclusions, dependencies, and transferred responsibilities made explicit?**

## 6. Meaning and Decision Integrity

Enterprise solutions operationalize business meaning and decision behavior. Core Business Definitions influence classifications, approvals, workflows, reporting, controls, automation, analytics, and AI-enabled actions.

A modern enterprise agent can approve transactions, route work, grant exceptions, recommend actions, and initiate business processes. The question is whether those actions will be performed according to the business meaning, authority structure, decision boundaries, accountability requirements, and evidence expectations approved by the Executive Sponsor. Before asking whether an agent can perform an action, Executive Sponsors should ask: By what business meaning, under whose authority, within what decision boundaries, and with what evidence?

**Capability determines what a system can do. Meaning and Decision Integrity determines what it should do.**

Candidates must demonstrate that the proposed solution can preserve authorized definitions, Decision Authority, accountability, decision boundaries, exception rules, escalation paths, and evidence requirements. The evaluation should determine how the platform represents business meaning, applies decision logic, manages competing priorities, recognizes exceptions, escalates consequential decisions, and preserves human authority. It should also establish how changes to definitions, rules, configurations, models, prompts, policies, data, permissions, and agent behavior are authorized and governed.

AI-enabled behavior requires explicit purpose, stable meaning, reliable data, bounded authority, governed exceptions, human Decision Authority, attributable evidence, and continuing validation. Meaning and Decision Integrity evaluates whether these conditions remain aligned with approved Sponsor Intent as automation becomes increasingly autonomous.

Intent Governance addresses both the enduring challenge of transformation drift and the emerging requirements of Agentic AI. It preserves authoritative Sponsor Intent as decisions, participants, assumptions, and operating conditions change. It also makes

intended outcomes, priorities, boundaries, accountabilities, validation requirements, and evidence expectations explicit enough to guide increasingly autonomous execution.

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**Executive Sponsor question: Can the candidate preserve our authorized business meaning, Decision Authority, accountability, boundaries, and exception conditions as work becomes increasingly autonomous?**

## 7. Governed Selection Evidence

Evidence should be observable, attributable, traceable, accessible, reviewable, produced under known conditions, and accompanied by its limitations. A written response and a capability demonstrated under Sponsor-controlled conditions provide different forms of evidence and should receive different evidentiary treatment.

The evaluation should preserve the distinction among raw evidence, evaluator observations, approved findings, scores, recommendations, decision rationale, and SOW use. This separation allows human Decision Authorities to understand how conclusions were reached and whether the available evidence supports them.

Agentic capabilities require evidence that extends beyond a prepared demonstration. The evaluation should establish the data and instructions provided, the authority granted, the operating conditions, the decisions made, the exceptions encountered, the actions initiated, and the evidence available to explain and validate the resulting behavior. Persistent evidence should be stored on the client's infrastructure.

This criterion concerns the quality, classification, provenance, sufficiency, and governed use of evidence produced during candidate evaluation and selection. Validation and Outcome Evidence Readiness separately evaluates whether the selected platform and implementation partner can support the evidence required for implementation conformance, sustained operating validation, Sponsor Intent achievement, and Business Outcome achievement.

**Executive Sponsor question: What evidence supports each material candidate claim, how dependable is that evidence, and under what conditions was it produced?**

## 8. Implementation-Partner Capability

Platform capability and implementation-partner capability are separate evaluation questions. Implementation-Partner Capability determines whether the proposed implementation partner possesses the demonstrated knowledge, experience, leadership, specialized expertise, delivery competencies, and organizational capacity required to implement and support the proposed solution in the client's environment.

A platform demonstration does not establish that the proposed implementation partner can design, configure, integrate, migrate, test, stabilize, and support that capability. An implementation partner's representation does not establish that the platform currently provides the capability.

The capability evaluation addresses:

- Relevant implementation experience
- Business and domain understanding
- Solution and technical expertise
- Integration, data, migration, testing, and stabilization competencies
- Experience with the expected degree of business-process, organizational, and operating-model change
- Proposed leadership qualifications
- Named resource qualifications
- Knowledge-transfer capability
- Evidence-production capability
- AI and automation capability
- Remediation capability
- Ability to operate in alignment with Transformation Approach Intent

The implementation partner's ability to configure AI-enabled and Agentic AI capabilities requires specific scrutiny. The partner should be capable of translating approved Sponsor Intent into purpose, instructions, boundaries, Decision Authority, exceptions, monitoring, evidence, and validation conditions that the platform can operationalize.

This criterion evaluates the partner's demonstrated capability. Partner Delivery Risk separately evaluates whether the specific staffing model, estimates, dependencies, milestones, assumptions, responsibilities, and commercial conditions proposed for the Enterprise Transformation Program constitute a credible delivery model.

**Executive Sponsor question: Does the proposed implementation partner possess the demonstrated capability required to convert platform potential into operating reality?**

## 9. Partner Delivery Risk

Partner Delivery Risk evaluates whether the specific implementation model proposed for the Enterprise Transformation Program provides a credible path to the authorized result.

The assessment examines proposed staffing levels, named resource commitments, resource continuity, location and availability, subcontractor arrangements, estimates, milestones, sequencing, dependencies, qualifications, exclusions, client responsibilities, implementation responsibilities, evidence obligations, governance conditions, remediation accountability, contingency assumptions, status reporting practices, change-order procedures, commercial models, commercial exposure, and the assumptions underlying proposed cost and timing.

A capable implementation partner can still present a delivery model that depends on insufficient staffing, unrealistic estimates, unavailable resources, unresolved data conditions, accelerated approvals, limited testing, deferred controls, future decisions, unstable dependencies, extensive client effort, unexamined contingency assumptions, or commercial structures and change-order practices that materially alter the organization's cost, risk, or delivery exposure.

A detailed implementation plan remains a proposal. Partner Delivery Risk determines whether the proposed resources, responsibilities, assumptions, estimates, dependencies, evidence obligations, and contractual conditions support a credible and sufficiently controlled path to the authorized result.

Agentic AI capabilities introduce additional delivery considerations involving specialized expertise, agent configuration, data readiness, testing environments, observability, exception design, human authority boundaries, evidence retention, continuing validation, and accountability as configurations or operating conditions evolve.

This criterion evaluates the credibility and exposure of the proposed delivery model. Implementation-Partner Capability evaluates the partner's underlying competencies, Implementation Readiness evaluates whether mobilization can begin responsibly, and Value Feasibility and Total Cost of Ownership evaluates investment quality.

**Executive Sponsor question: Does this specific delivery model provide a credible path to the authorized result, and where does it expose the Business-Side to material delivery risk?**

## 10. Implementation Readiness

Implementation Readiness determines whether the preferred candidate can transition responsibly into implementation. The proposed solution, resources, environments, data approach, integration approach, governance structure, validation responsibilities, evidence mechanisms, risks, assumptions, dependencies, and Decision Authorities should be sufficiently mature to support implementation mobilization.

This criterion protects continuity between the authorized selection decision and implementation mobilization. It provides a structured basis for authorizing work, constraining conditional activities, and preventing implementation from becoming a semantic reset, scope reinterpretation, commercial reset, or transfer of unresolved Sponsor responsibilities to the Delivery-Side.

Implementation Readiness should identify which activities can begin, which remain conditional, and which should remain constrained until the required Sponsor Intent, evidence, authority, resources, data, environments, or governing definitions are available. For AI-enabled and agentic capabilities, readiness also requires explicit purpose, authorized autonomy boundaries, accountable human authorities, exception procedures, monitoring requirements, evidence expectations, validation conditions, and triggers for reassessment.

Implementation Readiness is a mobilization decision. Partner Delivery Risk evaluates the credibility of the proposed delivery model during candidate evaluation, while Validation and Outcome Evidence Readiness evaluates whether the implemented solution can later support the evidence required to validate Sponsor Intent and Business Outcome achievement.

**Executive Sponsor question: Are the organization and the preferred candidate sufficiently prepared to mobilize implementation against the authorized Transformation Definition?**

## 11. Value Feasibility and Total Cost of Ownership

Total Cost of Ownership remains a critical selection criterion, but cost cannot be evaluated independently from the value the investment is intended to create, protect, enable, or preserve.

Organizations devote substantial effort to governing cost because cost has an enforcement mechanism. Value rarely has an equivalent mechanism. Expected value can drift, assumptions can change, responsibilities can become unclear, and intended outcomes can weaken without creating the same immediate visibility as cost overruns. Value therefore requires explicit governance.

The framework evaluates both the complete economic exposure of each alternative and the strength of evidence that the proposed platform, implementation partner, and implementation approach can support the approved Business Outcomes and Conditions of Success. This creates two connected dimensions:

- Expected Value Feasibility
- Total Cost of Ownership

Expected Value Feasibility assesses how credibly each alternative can support the approved Business Outcomes. The assessment considers Sponsor Intent alignment, Fit-for-Purpose Alignment, implementation credibility, adoption dependencies, evidence readiness, time to expected value, durability, Partner Delivery Risk, operating-model implications, and material assumptions and dependencies.

Expected Value Feasibility also considers whether expected value depends on extensive customization, future-roadmap capability, third parties, temporary staffing, manual workarounds, extraordinary leadership attention, unstable data, or operating conditions that have not been established.

Expected Value Feasibility can be expressed through evidence-based classifications:

- Strongly supported
- Supported with qualifications
- Conditionally supported
- Weakly supported
- Insufficient evidence

These classifications allow the Executive Sponsor to compare the strength of expected value while preserving uncertainty and avoiding unsupported financial precision.

Total Cost of Ownership evaluates the complete economic implications of each proposed platform and implementation approach over the approved analysis horizon. Applicable costs include:

- Software licensing and subscriptions
- Business Intent Design, Sponsor Intent Lifecycle Management, validation activities, and The CFO-TA operating costs
- Consumption-based and AI usage charges
- Infrastructure and hosting
- Implementation services
- Internal Business-Side and technical resources
- Data remediation and migration
- Process analysis, process design, business-process redesign, and operating-model redesign
- Integrations, customization, extensions, custom development, automation development, Agentic AI development, and third-party products
- Testing and validation
- Training, organizational change, and adoption
- Cutover and stabilization
- Support, managed services, maintenance, and upgrades
- Regression testing and continuing Sponsor Intent Testing
- Evidence production, compliance, assurance, security, and privacy
- Model, prompt, policy, configuration, and agent changes
- Agent monitoring and human oversight
- Future Units of Transformation
- Decommissioning, transition, and exit
- Contingency and material risk exposure

TCO analysis should preserve user, volume, transaction, data, consumption, scope, responsibility, resource, timing, pricing, renewal, third-party, and exchange-rate assumptions where applicable. It should also make excluded costs, client-borne costs, deferred costs, transferred costs, and cost uncertainty visible. Proposals should be normalized to a common evaluation basis before TCO is compared.

The economic decision should then consider TCO in relation to Expected Value Feasibility. A lower-cost alternative with weak support for the authorized Business Outcomes can represent poor investment quality. A higher-cost alternative can be

economically stronger when the additional investment produces materially better Sponsor Intent alignment, stronger implementation credibility, lower Partner Delivery Risk, better evidence, greater durability, or a more defensible path to value.

**Expected Net Value = Expected Value - TCO**

Where the organization has an authorized financial methodology and sufficiently supportable inputs, Finance or another authorized specialist can calculate forecast ROI:

**Forecast ROI = (Expected Financial Benefit - TCO) / TCO**

The CFO-TA does not create the organization's financial model or determine accounting and financial treatment. It structures and governs the relationship among Sponsor Intent, Business Outcomes, expected value, TCO, assumptions, evidence, risk, and the authorized investment methodology so the applicable human authorities can make a defensible decision.

Formal financial modeling remains conditional on the availability of an authorized methodology and supportable inputs. Expected Value Feasibility and TCO remain required because both can be assessed pragmatically even when a dependable forecast ROI cannot yet be calculated.

During the Post Go-Live Value Realization phase, realized ROI can be validated using actual Outcome Evidence, actual TCO, the authorized financial methodology, and the evidence available to support attribution and durability:

**Realized ROI = (Realized Financial Benefit - Actual TCO) / Actual TCO**

Forecast ROI and realized ROI remain separate. The original authorization basis, updated expectations, actual costs, realized benefits, changes in assumptions, and resulting conclusions should remain visible.

**The objective is economic decision quality, not mathematical theater.**

**Executive Sponsor question: Does the evidentiary strength and feasibility of the expected value justify the complete cost, risk, time, dependencies, and organizational commitment required to achieve it?**

## **Enterprise Solution Investment Models Can Resemble the Drake Equation**

The Drake Equation illustrates how a precise-looking result can depend on multiple uncertain variables. solution implementation estimates, TCO projections, expected-value forecasts, and ROI calculations can exhibit the same characteristic. A model can contain specific numbers for implementation hours, data-conversion effort, user adoption, productivity improvement, operating savings, revenue impact, time to value, and benefit durability while remaining highly sensitive to a small number of influential assumptions.

### **The answer is to govern the variables and the assumptions.**

For each material implementation, TCO, value, or ROI assumption, the Business-Side should understand:

- The variable being used
- The source of the estimate
- Whether it is evidenced, estimated, assumed, or unknown
- The applicable range or sensitivity
- The accountable owner
- The Decision Authority
- The scope, cost, timeline, or Business Outcome affected
- The evidence required to validate the assumption
- The consequence if the assumption proves incorrect
- The reassessment trigger

This produces an assumption-transparent investment case. The Executive Sponsor can see which conclusions are strongly supported, which remain conditional, which variables materially influence the result, and which commitments should remain constrained until stronger evidence becomes available.

### **The Executive Sponsor does not need artificial certainty.**

A forecast ROI supported by governed assumptions can provide useful decision context. A highly precise number built on hidden assumptions can create confidence the evidence does not support. That distinction belongs inside the solution selection process.

## 12. Commercial and Contractual Enforceability

Commercial and Contractual Enforceability determines whether material selection representations can survive negotiation. Capabilities, responsibilities, staffing commitments, evidence obligations, acceptance conditions, validation requirements, remediation duties, retesting rights, payment conditions, escalation mechanisms, and change controls should be reflected in the SOW when they support the selection decision.

A future Release statement should remain classified as future capability unless the provider makes an enforceable commitment addressing timing, evidence, remedies, and consequences. A general statement of intention provides a different level of protection than a contractual obligation.

AI-enabled capabilities require clarity regarding licensing, consumption charges, data treatment, service dependencies, model or agent changes, evidence access, monitoring responsibilities, security, privacy, support, continuity, and the conditions under which functionality can be modified, withdrawn, or replaced.

The authorized selection decision should become the basis for a Sponsor-controlled SOW framework. The reasons the candidate was selected should remain visible and durable in the executed SOW.

**The selected candidate should remain the candidate represented in the final SOW.**

**Executive Sponsor question: Will the commitments supporting this selection decision remain explicit, enforceable, and durable in the final SOW?**

## 13. Data, Analytics, Automation, and AI Governance

Solution platforms establish and apply business meaning across operational and analytical environments. Solution Selection should therefore assess whether meaning-critical data can support consistent decisions, evidence, analytics, automation, and AI-enabled behavior.

Meaning-critical data is data whose definition, classification, interpretation, or use materially influences business decisions, accountability, reporting, controls, automation, validation, or AI-enabled actions.

Relevant evaluation considerations include:

- Core Business Definitions
- Authoritative data sources
- Data Ownership
- Data lineage
- Cross-system consistency
- Data quality requirements
- Decision logic
- Decision Authority
- Accountability
- Autonomy boundaries
- Agent permissions
- Exception handling
- Escalation
- Monitoring
- Explainability
- Evidence
- Validation

AI-enabled capabilities should be evaluated through governance readiness. An AI-enabled capability becomes suitable for implementation when its purpose, inputs, outputs, boundaries, authority, accountability, data conditions, exceptions, evidence, and validation requirements are sufficiently explicit.

The evaluation should examine whether agents can act across applications, initiate transactions, create or modify records, recommend decisions, apply policies, route work, interact with other agents, and invoke downstream actions. Each capability should be assessed against the authority granted, the purpose served, the conditions constraining its use, and the evidence required to validate its behavior.

The solution interface is also changing. Human interaction is expanding beyond menus, forms, reports, and workflows to include conversational interfaces, copilots, agent-generated work, event-driven actions, and autonomous coordination. solution selection should evaluate how users understand, authorize, review, challenge, override, and validate actions produced through these interfaces.

**Human governs the loop.**

**Executive Sponsor question: Can the proposed environment preserve authoritative business meaning, data integrity, human Decision Authority, accountability, and evidence as automation becomes more autonomous?**

## **Agentic AI Changes the Evaluation Standard**

As solution platforms embed copilots, agents, autonomous workflows, and decision-support capabilities, organizations must evaluate purpose, business meaning, authority, accountability, decision boundaries, exceptions, evidence, validation, and governance.

A modern enterprise agent can approve transactions, route work, grant exceptions, recommend actions, and initiate business processes. The governing question is whether those actions will be performed according to the business meaning, authority structure, decision boundaries, accountability requirements, and evidence expectations approved by the Executive Sponsor.

**Capability determines what a system can do. Meaning and Decision Integrity determines what it should do.**

Executive Sponsors should ask what an agent can do, what it should be allowed to do, under whose authority, according to which Core Business Definitions, within what decision boundaries, with what exception rules, and with what evidence. These questions convert Agentic AI from a feature discussion into a governed business decision.

Intent Governance addresses both the enduring challenge of transformation drift and the emerging requirements of Agentic AI. It preserves authoritative Sponsor Intent as decisions, participants, assumptions, and operating conditions change. It also makes intended outcomes, priorities, boundaries, accountabilities, validation requirements, and evidence expectations explicit enough to guide increasingly autonomous execution.

**People compensated for ambiguity. Autonomous agents amplify it.  
Organizations must govern it.**

## 14. Validation and Evidence Readiness

Validation and Outcome Evidence Readiness determines whether the selected platform and implementation partner can support the planned validation activities and produce the evidence required to test implementation conformance, sustained operating behavior, Sponsor Intent achievement, and Business Outcome achievement during implementation and operations.

Approved Sponsor Intent establishes what must remain true, what outcomes are expected, and what evidence will be required to demonstrate conformance and success. The Business-Side remains responsible for defining validation requirements, governing validation activities, evaluating evidence, and determining whether approved Sponsor Intent and intended Business Outcomes have been achieved.

The evaluation must assess whether the platform and implementation partner can support those Business-Side validation responsibilities through appropriate environments, data, evidence sources, access, attribution, retention, remediation, observability, and retesting capabilities. This creates continuity between selecting a claimed capability and later validating that the implemented behavior conforms to approved Sponsor Intent.

Expected value becomes more credible when the selected platform and implementation partner can produce the evidence required to demonstrate implementation conformance, sustained operating behavior, and Business Outcome achievement. Agentic AI capabilities require validation across purpose, inputs, authority, boundaries, exceptions, decisions, actions, evidence, and continuing conformance as data, configurations, models, prompts, policies, integrations, permissions, and operating conditions change.

Monitoring is continuous. Improvement is continuous. Validation is sampling-based during planned events defined by the Sponsor Intent Validation Plan.

This criterion evaluates the candidate's ability to support future validation and evidence production across implementation and operations. Governed Selection Evidence separately governs the evidence used to make the selection decision, while Implementation Readiness determines whether the selected solution is sufficiently prepared to mobilize.

**Executive Sponsor question: Can the selected platform and implementation partner support the Business-Side’s validation responsibilities and produce the evidence required to prove continuing conformance with Sponsor Intent and achievement of the intended Business Outcomes?**

## 15. Risks, Assumptions, Dependencies, and Tradeoffs

Material risks, assumptions, dependencies, exclusions, qualifications, limitations, and tradeoffs belong inside the selection decision. These factors influence capability, scope, cost, timing, implementation credibility, Expected Value Feasibility, TCO, and the durability of expected outcomes.

Every material assumption should identify its source, affected scope, cost, timeline, Business Outcome, accountable party, required evidence, validation condition, Decision Authority, consequence, and reassessment trigger.

When a candidate materially diverges from Sponsor Intent, the Executive Sponsor determines whether to:

- Preserve Sponsor Intent
- Modify Sponsor Intent through explicit authorization
- Defer the decision
- Constrain the decision within a narrower or more reversible boundary

This preserves authority over tradeoffs that could otherwise become embedded through evaluation scoring, negotiation, configuration, schedule pressure, or interpretation.

AI-enabled and agentic capabilities should also be evaluated for dependencies involving data availability, model behavior, third-party services, interoperability, agent permissions, consumption economics, human oversight, evidence access, security, regulatory conditions, operational continuity, and future vendor Releases.

The Executive Sponsor does not need artificial certainty. The Executive Sponsor needs to understand which conclusions are supported, which remain conditional, which variables materially influence the decision, and which commitments should remain constrained until stronger evidence becomes available.

**Executive Sponsor question: Which conclusions are supported, which remain conditional, and which risks, assumptions, dependencies, or tradeoffs require my explicit authorization?**

## Vendor Demonstrations Must Follow Sponsor-Controlled Scripts

Once the relevant Foundational Sponsor Intent Drivers are sufficiently defined, demonstrations become structured tests of Sponsor Intent. The drivers determine which operating conditions, authority structures, management requirements, information rules, architectural choices, ecosystem positions, and AI governance boundaries the candidate must demonstrate under Sponsor-controlled conditions.

Conventional product demonstrations commonly allow solution providers to determine what to present, which capabilities to emphasize, which data to use, and which conditions to avoid. Each provider presents a polished version of the product under preferred conditions, leaving evaluators to compare demonstrations that were not designed to produce equivalent evidence.

The CFO-TA creates a Demo and Evidence Script Pack deliverable from Sponsor Intent Assets, Conditions of Success, Outcome Evidence and Measures, material risks, evaluation criteria, business scenarios, and evidence requirements.

The scripts establish:

- The business scenario vendors must perform
- The conditions under which the scenario must be performed
- The roles, data, decisions, exceptions, and boundaries involved
- The evidence the vendor must produce
- The limitations and dependencies that must be disclosed
- The evaluation and validation conditions
- The procedures for deviations, reruns, and supplemental evidence

Vendors follow Sponsor-controlled scripts and produce evidence under common conditions. This creates a stronger basis for comparing platform capability, partner understanding, configuration requirements, exceptions, dependencies, implementation implications, and Expected Value Feasibility.

AI-enabled demonstrations should test how copilots and agents interpret business context, apply Core Business Definitions, operate within authority boundaries, manage exceptions, explain consequential actions, interact with human Decision Authorities, and

produce attributable evidence. Scenarios should include normal conditions, exceptions, conflicting objectives, incomplete data, unauthorized requests, required escalation, and the evidence needed to validate the resulting behavior.

**The vendor demonstrates within the Sponsor's business context. The Sponsor does not evaluate within the vendor's sales context.**

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## Weighted Scoring Cannot Carry the Decision Alone

Weighted scoring creates useful structure, but a total score can conceal consequential differences among candidates. A candidate can mathematically offset a material weakness in a Sponsor Intent-critical condition by scoring well across numerous lower-consequence categories.

A strong user interface, broad feature set, favorable price, or optimistic value projection can increase the total score while the proposal contains an unacceptable gap in accountability, data integrity, evidence, scope, implementation readiness, Expected Value Feasibility, or contractual enforceability.

The CFO-TA advocated Evaluation Framework distinguishes among:

- Weighted comparative criteria
- Mandatory conditions
- Non-compensating criteria
- Evidence sufficiency requirements
- Disqualification conditions
- Governing Tradeoff Decisions
- SOW conditions
- Residual risks requiring explicit acceptance

Scoring supports the decision.

### **Human Decision Authorities make the decision.**

The final selection record preserves evidence, rationale, assumptions, accepted risks, authorized tradeoffs, rejected alternatives, economic conditions, decision conditions, and required SOW controls. The Executive Sponsor can understand why the candidate was selected, which value expectations remain conditional, and what must remain true for the decision to remain valid.

## The Evidence Repository Changes Decision Quality

Solution Selection evidence commonly exists across questionnaires, spreadsheets, presentations, proposals, demonstrations, meeting records, emails, reference discussions, financial models, and evaluator observations. A Sponsor-controlled Evidence Repository stored on the client's infrastructure preserves this information as a governed lifecycle asset.

The repository maintains the distinction among raw evidence, evaluator observations, approved findings, scores, recommendations, decision rationale, financial analysis, and SOW use. It preserves traceability among:

- Sponsor Intent
- Business Outcomes
- Conditions of Success
- Evaluation criteria
- Demo and evaluation scenarios
- Raw evidence
- Evaluator observations
- Approved findings
- Expected Value Feasibility
- TCO assumptions
- Scores
- Risks and tradeoffs
- Decision rationale
- SOW obligations
- Implementation controls
- Validation requirements

This governed evidence chain allows the Business-Side to trace a selection decision back to its supporting evidence and trace a material Sponsor Intent condition forward into SOW development, implementation, Sponsor Intent Testing, Value Realization, operations, and sustainment.

Evidence produced by AI-enabled and agentic capabilities should remain attributable to the applicable agent, configuration, model, data, instructions, permissions, operating

conditions, and human authority. This context allows authorized reviewers to understand what occurred, why the action was permitted, and whether the resulting behavior conformed to Sponsor Intent.

Evidence becomes a governed lifecycle asset rather than a temporary input to a scorecard. The evidence, producing conditions, findings, decisions, SOW uses, and validation requirements remain visible, traceable, reviewable, and actively governed throughout the Enterprise Transformation Program lifecycle and ongoing operations.

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## The SOW Is Part of the Solution Selection Decision

SOW development should preserve the basis on which the preferred candidate was selected. Applicable Sponsor Intent, scope boundaries, Units of Transformation, responsibilities, evidence obligations, acceptance requirements, validation conditions, remediation duties, retesting rights, payment milestones, escalation paths, change controls, and reauthorization requirements should be translated into the Sponsor-controlled SOW framework.

A vendor or implementation partner should be accountable for the capabilities, behaviors, resources, evidence, responsibilities, and obligations within that party's control. Business Outcomes can also depend on adoption, operating-model change, leadership, policy, data, market conditions, and other factors owned by the client or influenced by external conditions.

The SOW should preserve these accountability boundaries while ensuring each party remains responsible for the contribution and evidence within its control.

AI-enabled and agentic capabilities should receive explicit contractual treatment when they materially influence the selection decision. Relevant provisions can address current capability, future Releases, licensing and consumption, data treatment, agent permissions, monitoring, evidence access, model or configuration changes, validation, security, privacy, continuity, support, remediation, and reassessment rights.

A negotiated change that materially affects scope, cost, risk, staffing, evidence, accountability, implementation approach, Expected Value Feasibility, TCO, or another component of the selection basis should receive reassessment by the appropriate Decision Authority.

## Lifecycle Continuity

Selection authorization and SOW execution establish the transition into implementation. The CFO-TA carries Sponsor Intent, evidence, decision rationale, commitments, cost and value assumptions, risks, validation requirements, and SOW controls forward as governed lifecycle assets.

These assets remain actively governed and continuously connected to implementation, validation, operations, Value Realization, and subsequent Sponsor decisions throughout the Enterprise Transformation Program lifecycle. Selection therefore establishes a governed foundation that remains current, authoritative, and usable as decisions, assumptions, evidence, participants, and operating conditions change.

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## The Complete Selection Standard

The strongest solution decision begins with the enterprise the Executive Sponsor intends to create. The Foundational Sponsor Intent Drivers establish that enterprise at a foundational level. Sponsor Intent provides the complete governing standard. The 15 Solution Selection Criteria evaluate whether the complete candidate can credibly operationalize that intent and support the value the investment was authorized to produce.

A Sponsor-governed solution selection strengthens:

- Candidate comparability
- Decision defensibility
- Scope clarity
- Capital Protection
- Outcome Confidence
- Expected Value Feasibility
- Economic transparency
- Commercial and Contractual Enforceability
- Implementation Readiness
- AI & Data Integrity

- Accountability
- Evidence continuity
- Value Realization readiness

Tradeoffs remain part of every solution selection. The Solution Selection Criteria make those tradeoffs explicit, evidence-based, attributable, and subject to the correct human Decision Authority before they become embedded in SOWs, configurations, data structures, operating procedures, financial commitments, or AI-enabled behavior.

**The right solution is the complete candidate that provides the strongest governed evidence of its ability to operationalize Sponsor Intent and support the value the investment was authorized to create.**

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## How The CFO-TA Operationalizes Solution Selection

The CFO-TA is the AI-powered Executive Sponsor Platform. It is a Business-Side platform purpose-built for Executive Sponsors responsible for major transformation investments. The platform helps Executive Sponsors govern their three Sponsor-owned responsibilities: Business Intent, Scope Intent, and Transformation Approach Intent.

Together, these responsibilities form Sponsor Intent, the Executive Sponsor-owned expression of purpose and foundation of the Transformation Definition. The CFO-TA supports Executive Sponsors through guidance, methodology, authoring, analysis, deliverable production, validation, review, coordination, decision support, continuity, and Sponsor Intent Lifecycle Management across the Enterprise Transformation Program lifecycle.

The CFO-TA discovery capabilities guide Executive Sponsors and Business-Side teams through the relevant Foundational Sponsor Intent Drivers, identify dependencies and unresolved tensions, preserve supporting evidence, and progressively convert Sponsor-owned positions into governed Sponsor Intent Assets.

The CFO-TA supports the canonical 30-step Alentra Methodology across Transformation Definition, Solution Selection, Govern Implementation, and Prove Outcomes. During Solution Selection, it supports application of the 15 Solution Selection Criteria through: Foundational Sponsor Intent Driver discovery and position development

- The Evaluation Framework
- Sponsor Intent Assets
- Meaning-Aligned Requirements
- Demo and Evidence Script Pack
- Vendor Evaluation Instructions and Protocol
- Sponsor-controlled Evidence Repository
- Comparative Proposal Analysis
- Expected Value Feasibility assessment
- Total Cost of Ownership analysis
- Partner Delivery Risk assessment
- Governing Tradeoff Decisions
- Decision Rationale Register
- Sponsor-controlled SOW framework
- Implementation-transition controls
- Sponsor Intent Validation Plan
- Sponsor Intent Test Cases

Sponsor Intent Lifecycle Management Studio (SILMS) provides the major platform capability used to establish, preserve, challenge, validate, monitor, improve, reaffirm, revise, and prove Sponsor Intent throughout the Enterprise Transformation Program lifecycle and ongoing operations. SILMS maintains the governed relationships among Sponsor Intent Assets, Business Outcomes, evidence requirements, evaluation criteria, candidate evidence, approved findings, risks, assumptions, decisions, SOW obligations, validation activities, operational evidence, changes, and lifecycle status.

These governed assets remain active throughout Solution Selection, SOW development, implementation, validation, operations, continuous improvement, and future change. SILMS preserves continuity among what the Executive Sponsor authorized, what providers committed to deliver, what implementation produces, what operations sustain, and what evidence demonstrates.

The CFO-TA supports human Decision Authorities while preserving their accountability. Executive Sponsors, Finance, Legal, Procurement, Technology, Security, Compliance, and other authorized specialists retain their respective decision, review, calculation, validation, and approval responsibilities.

## Executive Sponsor Review Questions

Before authorizing a solution selection decision, the Executive Sponsor should be able to answer the following questions:

Have the applicable Foundational Sponsor Intent Drivers been defined to a decision-sufficient level?

Do the defined drivers establish the enterprise the complete candidate must fit across operating model, authority, performance and value, information, technology, and intelligence?

- Is Sponsor Intent sufficiently explicit to govern the selection?
- Are Business Intent, Scope Intent, and Transformation Approach Intent reflected in the evaluation?
- Are the Business Outcomes and Conditions of Success reflected in the evaluation?
- Does the proposed scope cover the complete business change and Units of Transformation required to produce those outcomes?
- Can each candidate preserve required business meaning, Decision Authority, accountability, decision boundaries, and exceptions?
- Are the solution platform and implementation partner being evaluated separately and together?
- Have candidates demonstrated required capabilities under common Sponsor-controlled conditions?
- Is material candidate evidence observable, attributable, accessible, traceable, reviewable, and produced under known conditions?
- Are future capabilities, dependencies, estimates, assumptions, and workarounds clearly classified?
- Does the proposed implementation partner possess the demonstrated capability required to convert platform potential into operating reality?
- Does the specific delivery model provide a credible path to the authorized result?
- Are staffing, contingency, reporting, change-order, commercial-model, and client-responsibility assumptions explicit?

- Are the organization and preferred candidate sufficiently prepared to mobilize implementation?
  - Does the evidentiary strength and feasibility of the expected value justify the complete TCO, risk, time, dependencies, and organizational commitment?
  - Are material risks, assumptions, dependencies, exclusions, qualifications, limitations, and tradeoffs visible?
  - Have consequential tradeoffs been authorized by the correct Decision Authority?
  - Will the reasons supporting the selection remain explicit and enforceable in the SOW?
  - Can the selected platform and implementation partner support the Business-Side's validation responsibilities?
  - Can the selected platform and implementation partner produce the evidence required to validate continuing conformance with Sponsor Intent and achievement of the intended Business Outcomes?
  - Can AI-enabled and Agentic AI capabilities operate within explicit purpose, meaning, authority, accountability, decision boundaries, exceptions, evidence, validation, and human-governance conditions?
  - Will Sponsor Intent, evidence, decision rationale, commitments, assumptions, validation requirements, and SOW controls remain governed throughout implementation and operations?
  - Can the organization defend why the complete candidate represents the strongest decision?
- 

## The Solution Selection Decision Should Remain Connected to the Business Purpose It Must Serve

A defensible solution selection decision is grounded in explicit Sponsor Intent, disciplined comparison, governed evidence, visible uncertainty, authorized tradeoffs, realistic value and cost analysis, enforceable commitments, confirmed implementation readiness, and Business-Side validation ownership.

Use The CFO-TA to apply the Solution Selection Criteria within the Alentra Methodology and preserve the authoritative basis of the decision throughout SOW development,

implementation, validation, operations, Value Realization, continuous improvement, and future change.

**The right solution is the complete candidate that provides the strongest governed evidence of its ability to operationalize Sponsor Intent and support the value the investment was authorized to create.**

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## Request a Confidential Solution Selection Briefing

### Determine Whether Your Solution Evaluation Standard Is Complete, Sponsor-Governed, and Decision-Ready

If your organization is preparing to select, establish the SOW for, or implement a major enterprise solution, Alentra Advisory can help your leadership team determine whether the evaluation standard is sufficiently aligned with Sponsor Intent, supported by governed evidence, economically justified, protected through the SOW, and ready to support a consequential investment decision.

Solution Selection materially influences more than the software the organization will acquire. It shapes operating processes, data structures, decision rights, implementation scope, commercial commitments, organizational change, AI enablement, Total Cost of Ownership, and the Business Outcomes the Enterprise Transformation Program can produce.

A confidential Solution Selection Briefing will help your leadership team:

- Determine whether Sponsor Intent is sufficiently explicit to govern the solution selection decision
- Evaluate whether Business Outcomes, Conditions of Success, scope boundaries, and Transformation Approach Intent are reflected in the evaluation
- Assess whether shortlisted platforms and implementation partners are being evaluated against a common Business-Side standard
- Determine whether Meaning-Aligned Requirements preserve the business purpose behind requested capabilities
- Evaluate whether vendor demonstrations follow Sponsor-controlled scripts and produce decision-relevant evidence

- Distinguish native, configured, customized, extended, integrated, planned, manual, and third-party-dependent capabilities
- Assess whether the 15 Solution Selection Criteria are being applied to the complete candidate position
- Evaluate whether expected value justifies the complete Total Cost of Ownership, risk, timing, dependencies, and organizational commitment
- Identify material assumptions, evidence gaps, dependencies, risks, and tradeoffs requiring Executive Sponsor attention
- Determine whether material candidate representations and commitments are reflected in the SOW
- Assess whether the organization and preferred candidate are ready to mobilize implementation
- Understand how The CFO-TA can preserve Sponsor Intent, evidence, decisions, commitments, and validation requirements throughout implementation and operations

## Request a Confidential Solution Selection Briefing

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# About Tim Hourigan

## **Tim Hourigan**

Founder and Chief Business-Side Advisor

Alentra Advisory

Tim Hourigan is an enterprise transformation advisor with more than 35 years of experience leading and supporting more than 185 Enterprise Transformation Programs spanning ERP, CRM, analytics, data, AI-enabled operations, automation, and business-process modernization.

Tim originated Business Intent Design and created The CFO Transformation Agent, The CFO-TA, the Executive Sponsor Platform. The platform helps Executive Sponsors govern their three Sponsor-owned responsibilities: Business Intent, Scope Intent, and Transformation Approach Intent. Together, these form Sponsor Intent, the Executive Sponsor-owned expression of purpose and foundation of the Transformation Definition.

The CFO-TA provides guidance, methodology, authoring, analysis, deliverable production, validation, review, coordination, decision support, continuity, and Sponsor Intent Lifecycle Management across the Enterprise Transformation Program lifecycle. During Solution Selection, the platform helps Executive Sponsors connect Sponsor Intent to Meaning-Aligned Requirements, Sponsor-controlled demonstrations, candidate evidence, evaluation decisions, Expected Value Feasibility, Total Cost of Ownership, SOW commitments, implementation conditions, and outcome validation.

Sponsor Intent Lifecycle Management Studio (SILMS) provides the major platform capability used to establish, preserve, challenge, validate, monitor, improve, reaffirm, revise, and prove Sponsor Intent throughout the Enterprise Transformation Program lifecycle and ongoing operations. SILMS preserves the governed relationships among Sponsor Intent, evidence, assumptions, decisions, SOW obligations, validation activities, operational evidence, changes, and lifecycle status as participants and operating conditions change.

## About Alentra Advisory

Alentra Advisory helps Executive Sponsors establish, preserve, challenge, validate, monitor, improve, reaffirm, revise, and prove the purpose of major transformation investments.

Business Intent Design helps Executive Sponsors progressively define Sponsor Intent before consequential commitments are made. Sponsor Intent is formed by Business Intent, Scope Intent, and Transformation Approach Intent and serves as the Executive Sponsor-owned expression of purpose and foundation of the Transformation Definition. Intent Governance preserves and governs that purpose as decisions, participants, assumptions, evidence, and operating conditions change.

The CFO-TA is the AI-powered Executive Sponsor Platform. It supports Executive Sponsors and Business-Side teams through guidance, methodology, authoring, analysis, deliverable production, validation, review, coordination, decision support, continuity, and Sponsor Intent Lifecycle Management across the Enterprise Transformation Program lifecycle.

Sponsor Intent Lifecycle Management Studio (SILMS) provides the major platform capability used to establish, preserve, challenge, validate, monitor, improve, reaffirm, revise, and prove Sponsor Intent throughout the Enterprise Transformation Program lifecycle and ongoing operations. Human Decision Authorities retain accountability for selection decisions, risk acceptance, tradeoffs, financial judgments, validation conclusions, and authorization.

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