

EVANGELIZE | POWERED BY EPF

Technology Finance & Value

Control technology finances. Make service and investment choices. Deliver and verify the result.

A proposed integrated service combining IT Financial Management (ITFM), Technology Business Management (TBM), FinOps, portfolio decisions and practical delivery. Designed for CFOs, CIOs and technology finance leaders who need reliable numbers and an operating practice that uses them.

The client buys an operating capability

We establish a Finance-reconciled view of technology expenditure, connect it to services and consumers, embed budgeting and forecasting, implement or repair the supporting platform, and help owners act on the results. Each engagement identifies the decisions, delivery responsibilities, acceptance evidence and enduring cost of running the practice.

Eight separately commissionable services

Service	Client entry point
1. Assess	Establish the ITFM baseline, readiness and investment case.
2. Design	Agree the financial policies, service model and operating responsibilities.
3. Implement	Build, integrate, test and adopt the selected platform.
4. Recover	Repair an existing model, financial cycle or stalled implementation.
5. Optimise	Execute approved cost, demand, cloud and portfolio interventions.
6. Operate	Run a defined recurring TBM/ITFM service.
7. Enable	Build task competence through role-based learning and supported practice.
8. Compare	Produce decision-specific benchmarks with licensed or client-owned data.

Commercial position

Platform-neutral client representation, with technical delivery performed by named qualified resources. EPF structures evidence, economics, ownership and acceptance across the work. The client retains accounting policy, budgets, investment decisions, charging authority and risk acceptance.

INTERNAL SERVICE BLUEPRINT | Version 1.0 | 19 October 2026. This document designs the offer. It does not establish that partners, accreditation, delivery capacity or client outcomes have already been secured. No competitor-superiority claim is authorised.

What clients can commission

1. Assess - ITFM Value & Readiness Assessment

For an organisation starting TBM, selecting a platform or questioning an existing practice. Review financial processes, service and consumption information, data quality, decision rights, capacity, tooling and management use. Agree the assessment population before committing a fee.

Deliver: mandate; evidence inventory; financial reconciliation findings; process/control assessment; current-to-required capability map; costed options; scoped implementation roadmap; executive decision brief.

Accept when: evidence gaps and critical blockers are explicit; findings trace to sources; each recommendation has a mechanism, dependency and accountable next decision. Finance confirms the baseline or its bounded limitations.

Price: fixed scope after intake, driven by entities, sources, services, stakeholders and financial cycles. A proposed focused assessment may target 2-4 weeks after access is ready; validate capacity and scope before quoting.

2. Design - Financial Control & Operating Design

For a client requiring an agreed design before configuration. Cover ledger mapping, taxonomy, allocation, service catalogue, budgets, forecasting, investment treatment, recovery and recurring financial operations.

Deliver: signed-off requirements; data contracts; financial policy and allocation schedules; service/consumer definitions; role and capacity model; operating procedures; test pack; platform design and implementation estimate.

Accept when: Finance and service owners approve their respective policies and boundaries; material allocation sensitivities are understood; provider feasibility and client capacity are confirmed. Design approval is separate from production acceptance.

3. Implement - Platform Delivery & Adoption

For an approved design and selected platform, or a separately commissioned selection exercise. Named specialists configure the model, integrations, dashboards and workflows. Evangelize leads the integrated plan and client-side challenge.

Deliver: tested feeds/configuration; migration and reconciliation bridges; access controls; technical documentation; pilot; trained operators; cutover and support plan. Release follows client acceptance of the scoped financial and operational evidence.

4. Recover - Existing Practice & Platform Recovery

Diagnose unexplained allocations, failed reconciliations, poor refresh performance, incomplete adoption or stalled delivery. Preserve a recoverable baseline, isolate defects and retest repairs. Do not promise rescue before diagnostic access.

Deliver: defect and root-cause register; prioritised remediation; controlled model/report repairs; performance tests; migration or redesign options; reaccepted financial cycle and ownership. Price diagnostic separately from uncertain remediation.

Improve, operate and enable

5. Optimise - Cost, Demand, Cloud & Investment

Maintain an owned intervention backlog covering supplier prices, commitments, licence usage, cloud capacity, service tiers, application demand and portfolio choices. Test alternatives, service consequences, implementation costs and the date expenditure can actually change.

Deliver: evidence-backed opportunities; gross-to-net business cases; authorised execution work; Finance-reviewed result records. Keep cash release, cost avoidance, capacity, revenue and transfers separate. Forecast benefits remain forecasts until verified.

6. Operate - TBM/ITFM Managed Operations

A modular recurring service for model administration, feed monitoring, reconciliation preparation, statement production, forecast support, consumer queries and controlled rule changes. The contract states tasks, volumes, frequency, cover and exclusions.

Deliver: versioned cycle pack; exception/dispute register; approved publication; activity and control reporting; improvement backlog. Client Finance retains financial approval and posting/charging authority unless separately evidenced delegation applies.

7. Enable - Technology Finance Academy

Role-based learning for Finance controllers, model operators, service owners, budget holders, engineers and executives. Use the client workflow, approved model and relevant exceptions rather than generic attendance-led training.

Deliver: learning paths; source-licensed materials; worked exercises; observed task assessments; administrator guides; office hours and handover evidence. Independent checks remain separate from the trainer where needed.

Accreditation: offer Evangelize practical enablement initially only where trainer competence is established. Recognised certification courses require a verified authorised training partner and licensing arrangements. Do not represent internal completion as external certification.

8. Compare - Benchmark & Service Economics Review

Compare services, unit costs, financial processes or portfolios using fit-for-purpose licensed external data or controlled internal comparators. An internal comparison must be labelled as such. No proprietary market database is assumed.

Deliver: comparator provenance; permitted-use/licence position; scope and accounting adjustments; sample/coverage limits; cost-quality-demand differences; options and sensitivity. A benchmark gap is an investigation trigger, not a savings commitment.

Dependency: contract external data access before selling external comparisons. If comparable data are unavailable, propose an internal baseline or an evidence-gathering exercise, not an invented market percentile.

ITFM | THE CONTROLLED MANAGEMENT PRACTICE

The financial scope

TBM supplies a common cost/service structure. ITFM establishes the financial work and decisions that structure must support. Apply the following areas to the agreed client scope; do not force every area into the first release.

Financial area	Minimum operating output and owner
Actuals and accounting	Finance-approved period/currency basis; ledger bridge; accruals, depreciation, capitalisation and exclusions.
Budgets and forecasts	Owned annual/rolling plans; baseline and revised versions; price/volume/mix/timing variance; review decisions.
Contracts and commitments	Invoice, PO, renewal and commitment view; distinguish accounting cost, future obligation and cash timing.
Workforce economics	Employee/contractor cost, allocation, vacancies and available capacity; reconcile sources and approved planning assumptions.
Service costing	Resource-to-service-to-consumer mapping; direct/shared/unallocated views; approved drivers and explainable unit costs.
Demand and capacity	Controllable demand, fixed/variable/step costs, service options and conditions for releasing expenditure.
Showback and chargeback	Cost versus rate/recovery bridge; subsidies, over/under-recovery, disputes and separately authorised settlements.
Investment and change	Whole-life cost, capital/run treatment, investment options, run-cost landing and portfolio affordability.
Cloud and FinOps	Engineering-owned actions; tagging/allocation quality; usage/rate optimisation; commitment risk; Finance integration.
Period operations	Feed completeness, reconciliation, provisional/final release, corrections, disputes, closure and immutable version history.
Outcomes and benefits	Baseline, intervention mechanism, execution cost, attribution, Finance verification, persistence and erosion.
Rights and exit	Client access, documentation, evidence retention, export, rule inventory, skills and support obligations.

Financial distinctions that must survive every report

Do not add commitments to actuals as if both were incurred cost, or combine capital cash outlay and depreciation as the same-period expense. A lower allocated charge may move cost to another consumer without reducing enterprise spend. A lower rate does not establish lower total cost when volume or service changes.

The supplied 2025 TBM Taxonomy 5.0.1 remains the EPF reference baseline for this design. Confirm the client-approved version and mappings; guidance from another publication cannot silently overwrite it. Finance owns accounting policy and statutory interpretation.

DELIVERY PATH | CLIENT DECISIONS AT EACH RELEASE

How the engagement progresses

Stage	Work and accountable decision
1. Mandate	CFO/CIO sponsors agree outcomes, boundaries, authority, first use cases and proposed delivery responsibilities.
2. Readiness	Assess financial, data, service, supplier and capacity conditions; agree blockers, bounded work and remediation.
3. Financial baseline	Finance accepts the reconciliation basis, periods, exclusions, commitments and confidence limits.
4. Operating design	Accept enduring functions, capacity, segregation, governance, support funding and escalation.
5. Model and policies	Approve service boundaries, taxonomy, allocation, accounting/charging treatment and driver sensitivity.
6. Planning and investment	Agree budget/forecast workflows, investment-to-run costs, demand scenarios and portfolio decision cadence.
7. Mobilise delivery	Confirm work packages, technical resources, provider obligations, dependencies, fees and acceptance criteria.
8. Configure and test	Build and test feeds, mappings, rules, reporting, security and migrations against approved requirements.
9. Pilot and accept	Run representative normal/exception cases; retain failures, reconcile and obtain scoped client acceptance.
10. Adopt and operate	Observe real work and decisions across agreed cycles; do not infer adoption from attendance or logins.
11. Improve and verify	Execute approved interventions; Finance and benefit owners verify net results separately from delivery.
12. Handover and sustain	Accept ownership, funded support, export/documentation, open obligations and monitoring before reducing programme cover.

Proportionate gates, not twelve committees

Use existing client governance and combine reviews where authority permits. Mandate, financial baseline, allocation/charging policy, production release, operational handover and benefit verification remain distinct decisions even when considered in the same forum. Preparation can run in parallel; dependent release cannot skip unresolved critical evidence.

Progression and correction

Use Ready for client decision, Rework or Validate before proceeding. A recommendation does not grant approval. Material source, rule, scope or configuration changes identify affected reliance, reopen relevant tests and preserve previous decisions and failures. Mandatory controls cannot be waived by a positive business case or a target launch date.

OPERATING MODEL | LEAN LEADERSHIP WITH REAL CAPACITY

Who delivers and who decides

The three-person Evangelize client-side core is a coordination and delivery-leadership model. It is not evidence that three people can perform the whole implementation or replace client approval functions.

Function	Responsibility and boundary
Programme Director	Client mandate, integrated plan, economics, decisions, risks, acceptance coordination and executive reporting. Cannot independently assure their own delivery.
Data Analyst	Source inventory, profiling, mapping, reconciliation analysis, model traceability and test evidence. Source owners remain accountable for their feeds.
Provider Liaison	Capture/clarify requests, track provider responses, dependencies and contractual deliverables. Cannot approve fees, rules or financial acceptance through coordination alone.
ITFM design lead	Finance/control design, allocations, planning and recovery. May be covered by a core role only with proven competence and available capacity.
Platform specialists	Named configuration, integration, migration and performance engineers, supplied by Evangelize, provider or contracted partner with scoped obligations.
FinOps engineer	Cloud analysis and technical execution within authorised environments; linked to application/platform owners and change controls.
Independent reviewer	Risk-proportionate review of material accounting/model, implementation or benefit claims; no self-certification of independent assurance.

Client participation remains essential

The sponsor approves scope and funding; Finance controls accounting policy, financial reconciliation, budgets and charging authority; data owners supply fit feeds; service/business owners validate consumption and make demand/service decisions; security and Procurement/Legal handle their respective rights and contract decisions. Name accepted individuals and actual available time in the statement of work.

Contract the missing capacity

For each work package record performer, reviewer, approver, estimate, availability, dependency, cover and fee owner. A provider must confirm its resources and configuration obligations; the liaison role does not make them available. No implementation launch where a critical delivery function remains unassigned.

Choose client-prime or Evangelize-prime delivery explicitly. If Evangelize subcontracts specialists, scope its responsibility for their work, continuity and defects. If the client contracts them directly, preserve one integrated plan and clear interface/acceptance obligations without implying uncontracted control.

CONTROL PACK | FROM REQUIREMENT TO EVIDENCE

Acceptance that can be tested

Agree the requirement, population, tolerance, evidence source, reviewer and approving authority before testing. Client Finance sets financial materiality/tolerances; none are invented as universal thresholds.

Acceptance area	Representative evidence
Financial integrity	Ledger-to-model bridge; period/FX/accounting checks; pool totals equal allocations plus disclosed residuals; duplicate/recharge eliminations.
Model validity	Approved direct/causal/proxy/policy rules; driver sensitivity; missing/zero denominators; source-to-report trace for selected material amounts.
Planning and investment	Versioned actual/budget/forecast bridges; new-contract and demand scenarios; investment-to-run costs; owner and approval history.
Technical delivery	Successful and failed feed runs; access tests; repeatable refresh; dashboard calculations; performance and controlled configuration changes.
Financial cycle	Late/missing sources, accrual, reversal, credit, disputed allocation, correction and provisional/final release.
Charging	Approved charging policy/rates; recovery bridge; recipient rights; dispute path; settlement/posting approval separate from showback.
Operational adoption	Observed tasks and management decisions across agreed distinct cycles, including exceptions and intended support levels.
Exit and portability	Client export of data, mappings/rules, versions and documentation within contractual rights; accepted operator handover and contingency.
Benefit results	Observed intervention outcome, baseline/attribution, gross-to-net bridge, owner and Finance review; no double counting.

Separate the decisions

Technical acceptance does not accept the financial model. Model acceptance does not authorise charging. Operational acceptance does not verify savings. A completion certificate does not establish sustained adoption. Retain open defects with owners, consequence, action and retest evidence.

EPF supports the evidence; it does not create authority

Use EPF for decision framing, requirement/evidence traceability, options, economic distinctions, dependencies, declared gate checks and change/revalidation records. Keep financial truth in the agreed Finance source and selected platform. Use linked records rather than a second cost ledger. Local synthetic EPF tests are not client acceptance or proof of source authenticity.

COMMERCIAL ARCHITECTURE | SCOPE BEFORE PRICE

How to price and contract it

Service	Recommended pricing basis
Assess	Fixed fee for a bounded population after intake; price additional entities/sources/analysis explicitly.
Design	Fixed deliverables or capped discovery followed by agreed design milestones; client decisions are dependencies.
Implement	Milestone fees for defined builds plus controlled changes; uncertain integration work capped or time/materials with a stop point.
Recover	Paid diagnostic first; estimate repairs only after access, baseline and defect investigation.
Optimise	Fixed/capped work packages; optional performance fee only against an agreed attributable, verified result.
Operate	Recurring base capacity plus explicit volume/service bands; transition fee and out-of-scope change rates.
Enable	Per cohort or commissioned programme, with preparation, exercises and observation included; certification partner fees separate.
Compare	Fixed scoped review plus disclosed data/licence charges; no resale without rights.

Quote economics

Build delivery cost from role-days at actual cost, partner fees, data licences, travel, tooling and delivery risk. If target gross margin is m , indicative fee = $\text{delivery cost} / (1 - m)$, using a consistently defined cost base. Validate m internally; no market price or margin is asserted here. Check cash terms, payment timing and utilisation separately.

For a managed service, model normal and peak demand, coverage, rework, absence, provider dependency and escalation before agreeing capacity or service levels. State whether platform licences, engineering changes, external data and tax are included.

Statement-of-work schedule

Specify: client decision and release scope; entities/services/periods; actuals/budget/forecast sources; client duties; named delivery and approval functions; outputs and exclusions; data/access rights; milestones; objective acceptance; defect treatment; change pricing; dependency delay treatment; reporting; support/exit; charges and invoice triggers. Procurement/Legal settle contractual terms.

Commercial safeguards

Do not reward a lower allocation or transferred charge as an enterprise saving. A results fee needs the agreed baseline, eligible category, measurement period, counterfactual, attribution, implementation/run cost, Finance verification, cap and dispute process. Keep implementation remuneration separate from any claim of independent assurance; disclose referral/reseller incentives and give the client supplier and evidence visibility.

OPERATE | FINOPS | PORTFOLIO | ACADEMY | BENCHMARKS

The recurring service and specialist modules

Operate: a defined service, not unlimited consultancy

Contract cycle preparation, feed checks, reconciliation support, model refresh, release pack, forecast support, consumer queries, change control and improvement review as selected modules. Record supported entities, sources, pools, consumers, refresh frequency, query/change volumes, hours, peak cover and provider interfaces.

Agree service measures after baseline discovery: successful reconciled cycles, feed completeness, exception age, forecast timeliness, report traceability, dispute resolution, change lead time and repeatable operation. Specify measurement, target, reporting, owner and response to breach. Do not invent universal targets or 24/7 cover. Client approval remains a release dependency.

FinOps: connect engineering actions to financial results

Scope cloud/account coverage; billing/usage ingestion; ownership and tagging; shared cost; budgets and forecasts; anomalies; rightsizing and scheduling; commitment utilisation, coverage and downside; architecture/service choices; technical action and rollback; invoice-to-Finance bridges. Engineers own authorised technical changes. Verify net outcomes including commitment risk and service effects.

Portfolio: use cost evidence to change funding

Connect investment demand to actual capacity and whole-life affordability. Establish reprioritisation, product/value-stream funding only where appropriate, stage funding and run-cost handover. Portfolio owners decide what to fund, stop, defer or change; update forecasts and record displaced work and residual commitments.

Academy: observe competence in the work

Operators reconcile and refresh; Finance explains treatment and challenges variance; service owners explain unit cost and constraints; budget holders decide demand; engineers test optimisation; executives use options and uncertainty. Use practical normal/failure exercises and agreed assessment criteria. Recognised certificates require the verified accreditation route.

Benchmarking: comparability before rankings

Agree the question and peer basis. Test service boundary, quality, period, geography/currency, accounting, demand volume, sourcing, capital treatment and sample coverage. Retain adjustment/provenance and licensing records. Show a range only when supported; do not describe the client as above market from an unmatched peer average.

INTERNAL POSITIONING | DESIGN ADVANTAGE, THEN PROVE IT

What makes the offer competitive

It's Value publicly offers an ITFM assessment, tool enablement, academy, FinOps and portfolio services. It also stresses governance and operating models. These are competitive baseline requirements, not distinctions Evangelize can claim exclusively. [1-6]

Competitive requirement	Evangelize design response and evidence needed
Packaged assessment	Named entry service with bounded population, inputs, outputs, acceptance and fee basis. Prove repeatable delivery effort in an actual engagement.
Technical delivery depth	Named specialists, capacity, integration/configuration demonstrations and contracted defects/support. Publish only credentials and permissions actually held.
Existing-platform support	Recovery diagnostic, controlled repair, model reconciliation and recurring service. Prove successful repair and operation on the scoped platform.
Training/certification	Role-based practical academy plus optional authorised certification partner. Prove trainer competence and rights before selling accreditation.
FinOps and portfolio	Cloud engineering actions and funding decisions share cost baselines, forecasts and outcome records. Prove the interfaces in live scoped work.
Benchmarking	Licensed comparators or labelled internal comparisons with normalisation and quality controls. Prove rights and comparability.
Credentials and capacity	Named availability, verified experience and referenceable engagements. A method or founder history is not evidence of a larger delivery bench.
Client outcome evidence	Permissioned case records: baseline, intervention, delivery cost, service consequences, acceptance and Finance-reviewed net result.

Where to aim for measurable advantage

Make client decision rights, price/volume/mix explanations, allocation sensitivity, whole-life economics, supplier interfaces, exportability and separately verified results contractual deliverables. These are proposed strengths of this offer; the competitor may also perform them. Compare delivery evidence before making a relative-performance claim.

Test time to a reconciled first cycle, effort per subsequent cycle, cost of running the practice, explainable cost coverage, forecast quality, dispute age, adoption in real decisions, net verified value and export/handover success. Use comparable scope, definitions, populations and periods. Neither website claims nor EPF synthetic test counts prove superior client results.

PROPOSED FIRST 30 BUSINESS DAYS | DEPENDENCY-GATED

Build the delivery capability

This is a proposed mobilisation sequence from an agreed start, not work already executed or a promise of readiness within 30 days. Missing specialist capacity, permissions or evidence changes the launch scope and date.

Window / accountable function	Concrete work and release evidence
Days 1-5 Offering owner	Approve service catalogue, target buyers, authority boundaries and costing method. Draft Assess/Design/Recovery statements of work and the evidence request. Identify claims requiring proof.
Days 6-10 Delivery lead	Validate named ITFM design, platform, integration and review resources. Confirm availability, fees, competencies, contracting model, referrals/conflicts and capacity. Identify certification/data partners without claiming appointments.
Days 11-15 Design and technical leads	Build a clearly synthetic demonstration: actual/budget/forecast bridge, allocation, traceability, financial-cycle exception and export. Develop platform-specific configuration evidence only where authorised access exists.
Days 16-20 Independent reviewer	Exercise normal/failure paths, charging boundaries, source changes, provider delays, disputed allocations and benefit double counting. Retain original failures, remediation and retests. Synthetic exercises stay labelled.
Days 21-25 Commercial lead	Finalise scoped fees, SOWs, partner capacity, service descriptions and demonstration. Prepare an anonymised case only from verified work and with rights; do not relabel demonstration as client proof.
Days 26-30 Offering owner	Authorise only the evidenced service scope. Seek a bounded paid client engagement with explicit pilot status where relevant; agree measures, independent review and permission for later case evidence.

Release dependencies

Assess/Design: named competent staff, a tested method and practical availability. Implement/Recover: add scoped technical capacity, access, recovery controls and acceptance. Operate: add funded cover, procedures, service levels and exit. Accredited training: add authorisation/licences. External benchmarks: add data rights and comparability. Do not advertise an unavailable service as currently staffed.

Launch ownership

Proposed offering owner: David Hole, subject to his acceptance of this operating responsibility. Commercial, delivery, financial design, technical, training and review functions each require accepted named individuals or partners. No appointments, contracts, sales outreach or public website changes have been made by creating this blueprint.

Buyer proposition and immediate decisions

Proposed buyer-facing description

Evangelize Technology Finance & Value helps CFOs and CIOs establish control over technology expenditure, connect costs to services and consumers, and turn financial insight into owned decisions. Powered by EPF, the service combines ITFM and TBM design with implementation, adoption and result verification.

Clients can commission a focused assessment, a financial and operating design, a platform implementation or recovery, or a defined ongoing service. FinOps, portfolio planning, practical training and benchmarking can be included where relevant. Scope, resources, evidence and acceptance are agreed before delivery; specialist services are offered only with confirmed capacity and rights.

Discovery questions that lead to a scoped proposal

Which financial or service decision is currently failing, and what changes if it is resolved?

Which entities, services and financial periods must the first release cover?

What reconciled actuals, budgets, forecasts, commitments and consumption evidence exist?

Which platform is selected or installed, who configures it, and what contractual work is included?

Who can approve accounting policy, allocations, charging, investment, acceptance and risk?

What internal capacity, provider support and enduring operating budget are available?

Immediate owner decisions

Adopt or amend the service name; select the initial services to release; appoint the design and technical resources; cost the bounded assessment; choose the contracting model; commission a synthetic demonstration; agree the first client pilot scope. These are separate from client approvals and any claim of professional accreditation.

Source basis and claim limits

Competitive observations: It's Value public pages reviewed 19 October 2026. [1] ITFM assessment: <https://www.itsvalue.com/services/it-financial-management/assessment/> [2] Tool enablement: <https://www.itsvalue.com/services/it-financial-management/tool-enablement/> [3] Academy: <https://www.itsvalue.com/services/it-financial-management/academy/>

[4] FinOps: <https://www.itsvalue.com/services/finops/> [5] Portfolio: <https://www.itsvalue.com/services/strategic-portfolio-management/> [6] ITFM: <https://www.itsvalue.com/services/it-financial-management/>

Evangelize baseline: <https://www.evangelize-consulting.com/> and /use-cases; supplied EPF 8.2.1 TBM adoption, delivery, operations, intervention, benefit, lineage and pilot guidance; user instruction to strengthen ITFM and address the competitive gaps. This document is original proposed service design. Competitor statements are self-published; no external audit, comparative trial or new Evangelize accreditation is asserted.