

From Custodians to Catalysts: The New Power of Technology Decision Leaders

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Executive Summary

The technology buying landscape has evolved – irrevocably. Today's Technology Decision Leaders (TDLs) – C-level and adjacent executives responsible for setting and funding enterprise technology priorities – are not just IT custodians; they're growth architects driving innovation, competitiveness, and operational excellence. They help shape enterprise strategy and influence major technology and business consulting purchases that define future growth.

Buying journeys are long, complex, and multi-stakeholder – yet increasingly self-directed. TDLs expect credible, evidence-led engagement long before a vendor enters the conversation. They're using generative AI to accelerate research, verify claims, and expose weak or inconsistent messaging. The result: less room for generic content, more pressure to provide proof, clarity, and confidence.

Incumbents still dominate, winning 71% of the time when considered – but disruptors can break through by leading with innovation, de-risking transitions, and leveraging relationship intelligence to create trusted warm paths to decision-makers.

For marketers, this demands a reset in how impact is built:

- **Lead with thought leadership and reputation.** Earn early visibility and credibility in AI-enabled research and shortlisting with differentiated, evidence-based content that proves authority and relevance.
- **Tailor for account context, not just industry.** Tailor your story to the buyer's objective – expand, renew, or reinvent.
- **Lead with proof and clarity.** Make every claim verifiable, every asset AI-readable, every message grounded in evidence.
- **Orchestrate multi-stakeholder journeys.** Strengthen sales and marketing alignment to deliver consistent experiences across the buying group and journey, and sustain momentum over six-month cycles.
- **Compete through connection.** Map buying networks, activate peer influencers, and use warm paths to move faster and earn trust earlier.

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About This Report

This report brings together two complementary data sources to give marketing and account-based marketing (ABM) leaders a clear, practical view of how senior technology decision-makers buy today and how to influence them effectively.

The analysis combines:

- MomentumABM's Client Buying Index (CBX) 2025 – a decade-long study tracking how B2B buying is evolving, covering business and IT buying personas, content preferences, decision-making dynamics, and the growing role of generative AI in large consulting and technology purchases.
- Altrata's intelligence on senior IT leaders – September 2025 data profiling Fortune 500 and FTSE 100 buying committees. The dataset includes CIOs, CDOs, CAIOs and CTOs, offering comprehensive insight into the backgrounds, networks, and influence of key decision-makers.

Together, these sources provide a holistic, evidence-based view of how technology leaders think, research, and decide, and what this means for the marketers trying to reach them. The goal: equip you with actionable guidance to sharpen targeting, strengthen influence, and win earlier, more credibly, and with greater confidence.

TDLs in this report encompass senior IT stakeholders, primarily VP-level and above (90% VP/Senior VP/Head/C-level/President), with survey data also including a smaller proportion of directors and managers; Altrata's dataset focuses on C-suite technology leaders.

The Shift: Technology Decision Leaders as Growth Architects

Technology Decision Leaders (TDLs) have evolved from IT custodians to enterprise growth architects. They now shape innovation strategy, influence investment priorities, and sit on cross-functional decision committees. For solution providers, this means the technology conversation is inseparable from business competitiveness – and expectations for credibility, ROI, and strategic fluency have never been higher.

TDLs' mandate spans:

- Driving innovation through AI, cloud, and digital transformation
- Ensuring operational efficiency, scalability, and risk management
- Shaping enterprise strategy and influencing cross-functional committees¹

The tension between innovation and operational efficiency is played out in the latest Client Buying Index data. Today, 85% of TDLs use a best-of-breed approach to secure the strongest

possible solutions. Yet 72% are simultaneously more interested in consolidating providers to reduce complexity than they were a year ago.

Market dynamics have raised the bar for decisions. TDLs report macroeconomic uncertainty (41%), budget uncertainty (38%), and heightened business-case scrutiny (38%) as contributing factors to tougher purchases – conditions that put a premium on ROI clarity, de-risking, and credible evidence throughout the journey.

When evaluating solution providers and making their final decision, TDLs value most:

1. Provider knowledge and understanding of their industry
2. Price of the solution
3. Quality of customer service and support

Marketers that build credible differentiation, demonstrate industry fluency, and post-sale support models – grounded in proof – outperform peers who lead with generic claims.

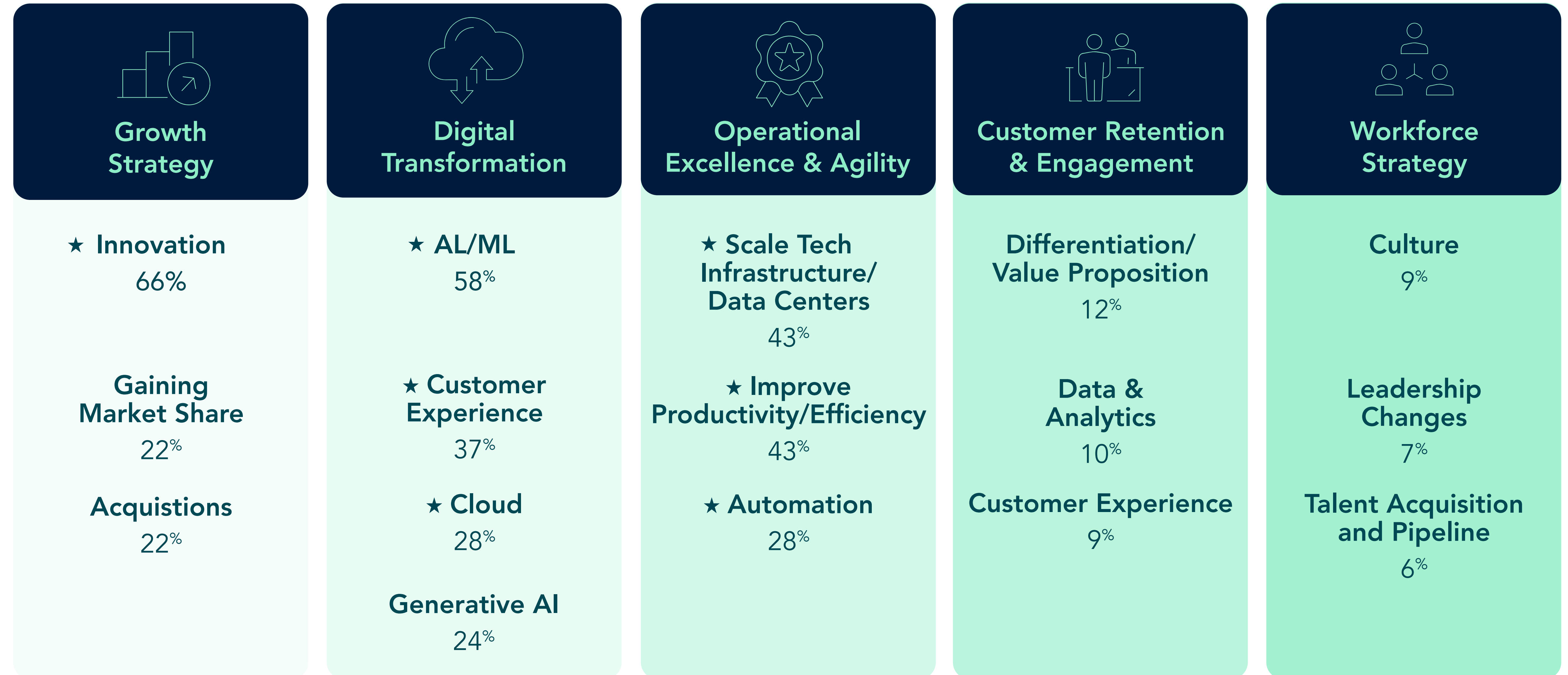
¹Altrata, 2025

Top Business Priorities for US and UK Technology Decision Leaders

Among Fortune 500 and FTSE 100 CIOs, CDOs, and CTOs

Higher Priority

Lower Priority



Note: Multiple priorities are possible and likely, so the proportions add up to more than 100%.

Source: Altrata, September 2025

Anatomy of the Buying Journey

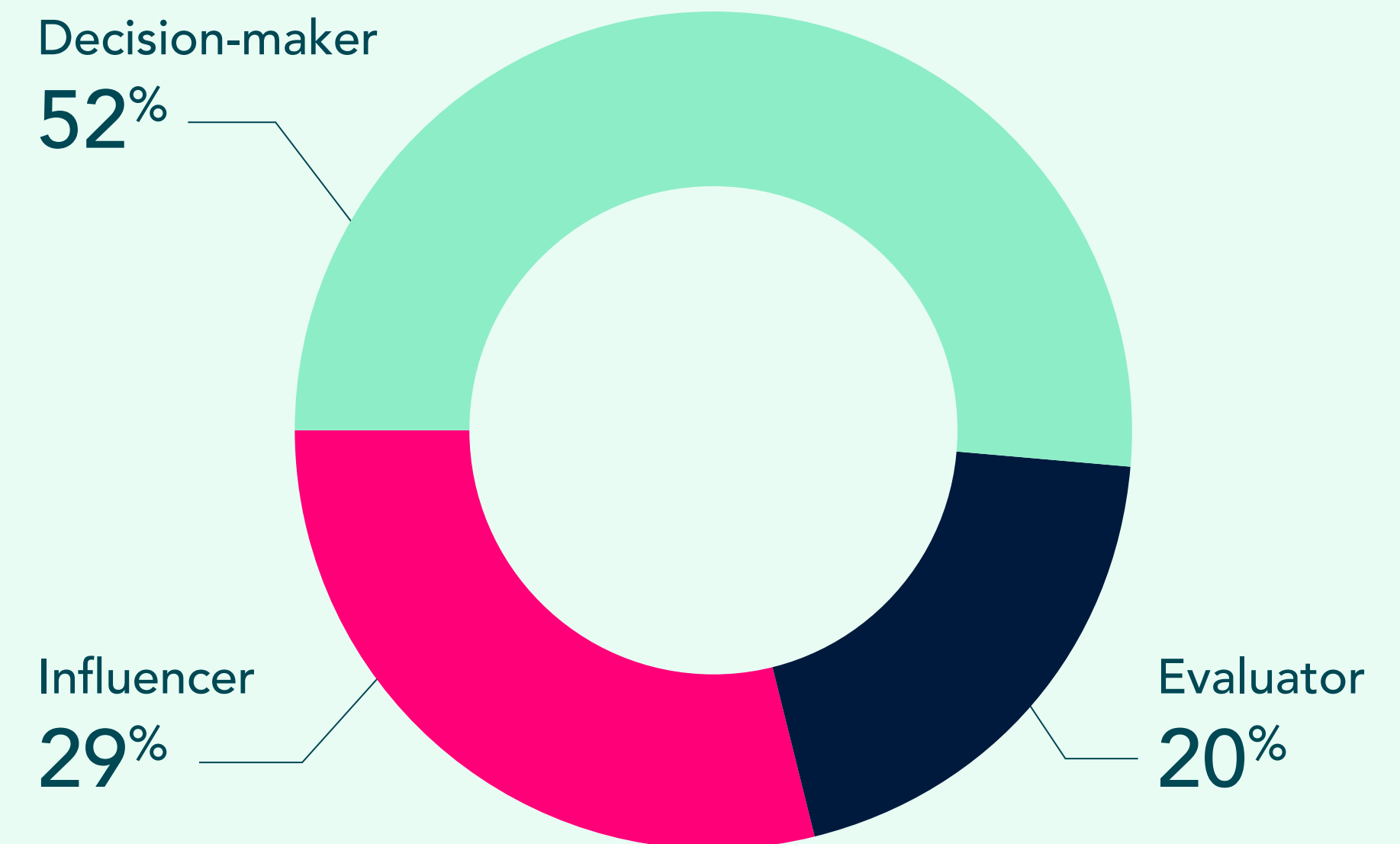
Technology leaders exert significant influence over large-scale purchases – which are long, complex, and increasingly committee-driven – typically six months or more, involving five –14 cross-functional stakeholders and multiple procurement paths.

In practice, the landscape is mixed: roughly 40% are formal RFPs, about a quarter are informal, a quarter are ad hoc or independent, and 10% are sole-source – so your enablement must cover both structured procurement and fast-path motions.

These dynamics differ by reason for purchasing: 60% aim to improve or expand existing capabilities, 25% to introduce new business capabilities, and 15% to renew or replace existing solutions. Tailoring your narrative by reason for purchasing is critical; introducing new capabilities is the best opening for disruptors, while renewing/replacing existing capabilities is most suitable for existing relationships.

IT buyers play distributed roles in enterprise purchase decisions

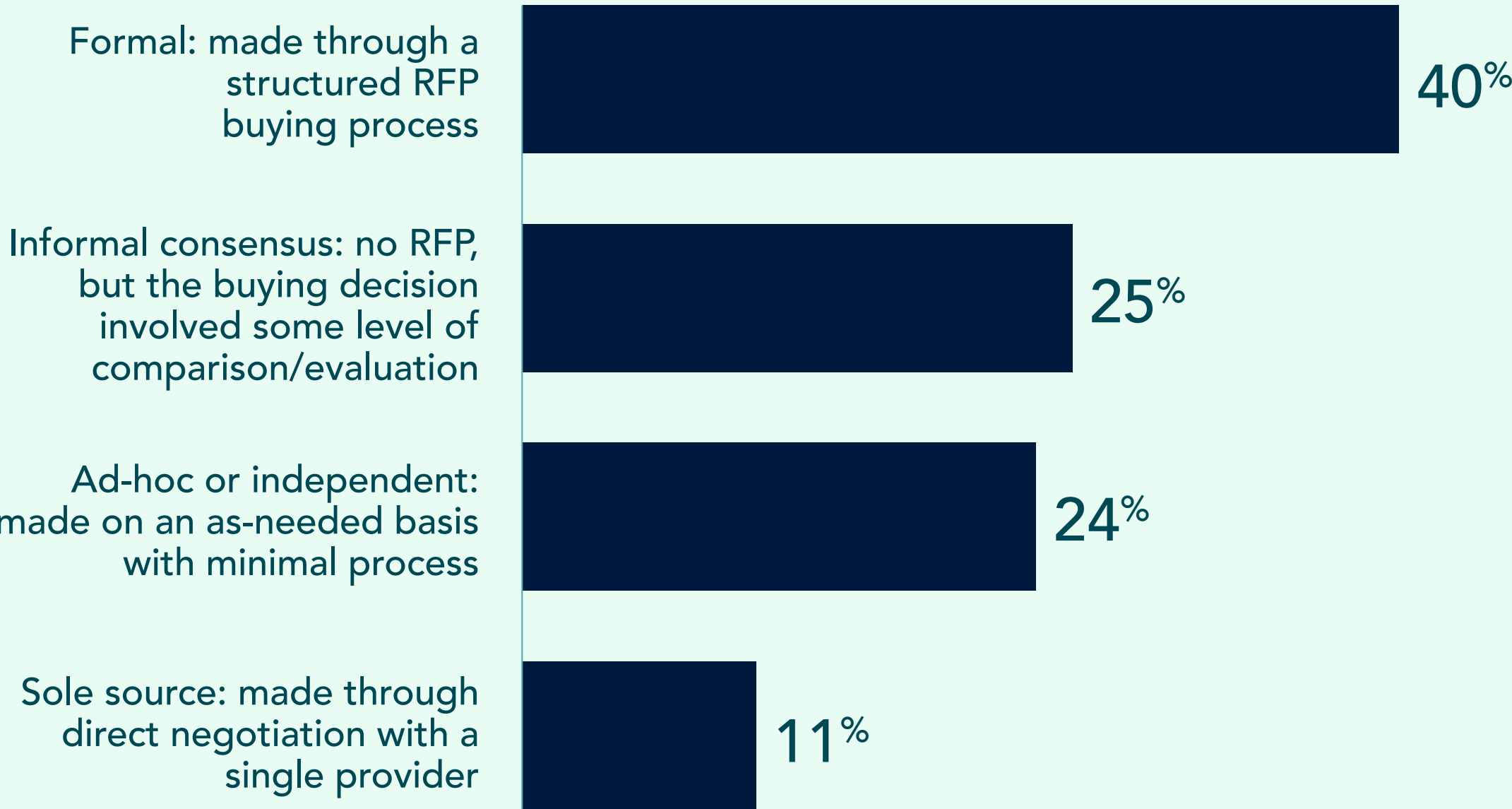
Role in most recent purchase



Source: MomentumABM Client Buying Index 2025. IT buyer subset of senior technology decision leaders (90% VP-level and above), plus a limited number of Directors and Managers. Figures do not equal 100% due to rounding

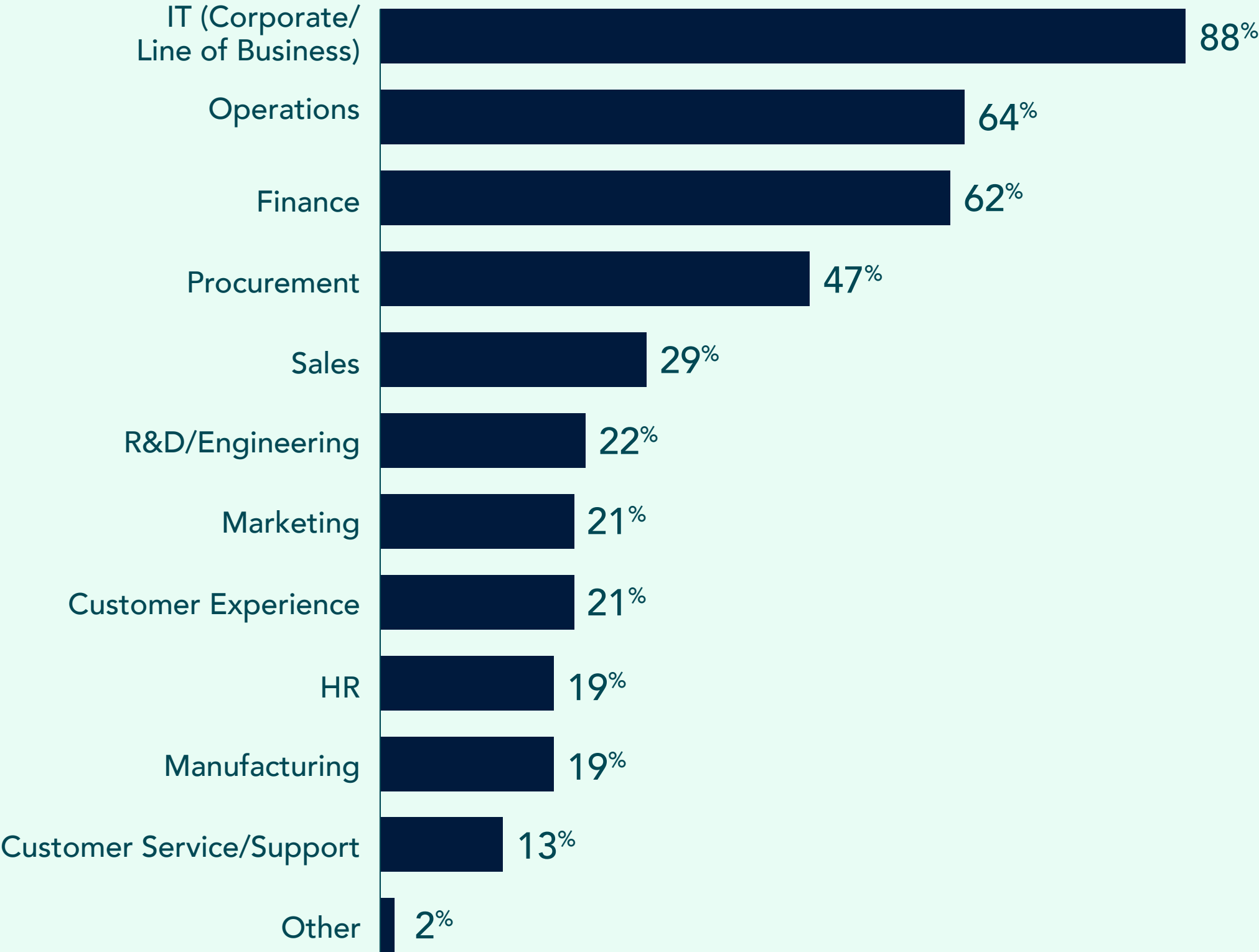
Structured evaluation dominates IT buying

Type of buying process in most recent purchase



IT dominates IT buying committees

Functional areas represented in most recent buying committee



Source: MomentumABM Client Buying Index 2025. IT buyer subset of senior technology decision leaders (90% VP-level and above), plus a limited number of Directors and Managers. (Multiple responses allowed)

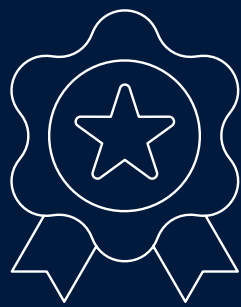
Thanks to generative AI and market pressures, shortlists compress quickly. The average longlist is 6.1 vendors – down by one-third since 2024 – narrowing to an average shortlist of 3.1. Incumbents have a head start. 90% of TDLs consider their incumbent; when considered, incumbents win 70% of the time and 85% when renewing or replacing existing capabilities. (In the latter, longlists are closer to five and shortlists to 2.5, strengthening incumbent odds further.)

Disruptors, however, win when they lead with innovation and added value; 38% of TDLs chose a new provider when introducing entirely new capabilities – proof that innovation is a genuine wedge when backed by evidence.

Top three reasons IT buyers choose an incumbent provider



Results

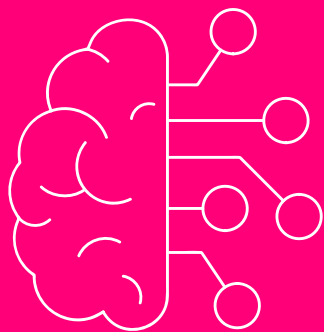


Capabilities



Price

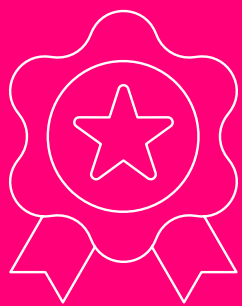
Top three reasons IT buyers choose a new provider



Innovation



Price



Capabilities

Source: MomentumABM Client Buying Index 2025. IT buyer subset of senior technology decision leaders (90% VP-level and above), plus a limited number of Directors and Managers.

How TDLs Discover, Evaluate, and Decide

Technology leaders are now self-directed and AI-empowered buyers. They complete much of their evaluation independently – consulting peers, analysts, and verified sources long before a vendor is invited to the table. The window in which suppliers can shape thinking, influence criteria, or even secure a place on the longlist is narrow.

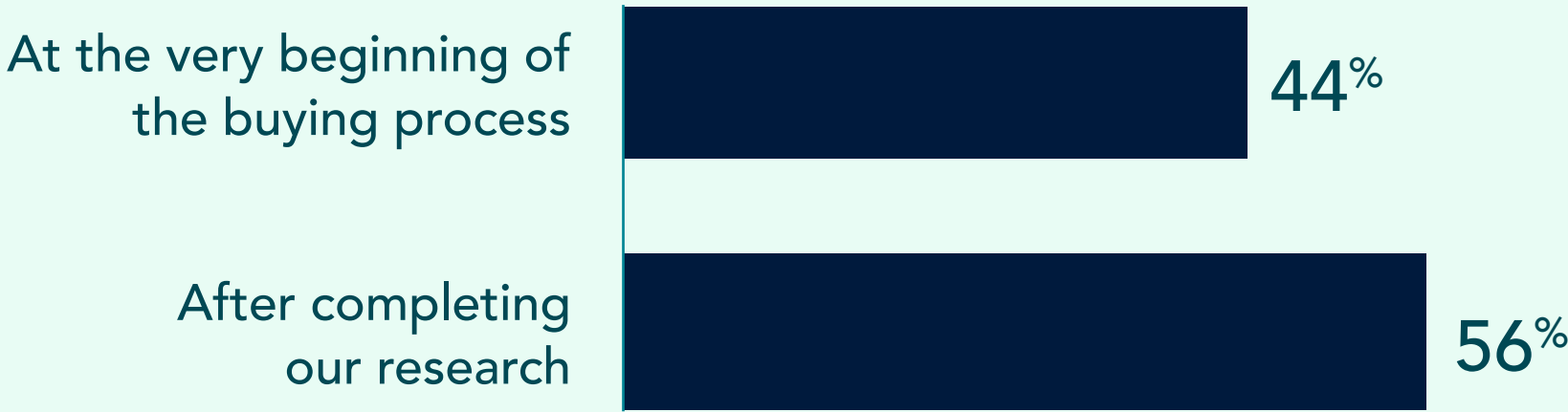
Only 44% of technology leaders engage vendors at the very start of their purchase, while 56% wait until after they’ve completed their initial research. And within that group, a striking 15% delay engagement until after they’ve already identified their preferred provider.

AI accelerates the early stages of the buying process. TDLs use generative AI to recognize needs (47%) and conduct research (54%), primarily to analyze and simplify provider information (71%), accelerate deals (53%), and verify claims (50%). Among those buying from a new provider, eight in ten say AI made it easier to understand and compare solution content, raising the bar for clarity and machine-readability across your assets.

Go-to-market teams need to show value well before first contact – through thought leadership that earns early attention, content that buyers (and AI tools) can easily parse, and messaging aligned to intent.

IT buyers engage solution providers early in the buying process

Based on most recent IT purchase



Source: MomentumABM Client Buying Index 2025. IT buyer subset of senior technology decision leaders (90% VP-level and above), plus a limited number of Directors and Managers.

Engagement Strategies: What Works and What Doesn't

TDLs view solution provider content more positively than before, with 67% saying it's more relevant than ever. Yet 63% still believe providers could have done more to make the process easier – one possible reason why many leverage AI when decision-making. TDLs abandon content that is poorly designed, too salesy, or gated. Notably, their aversion to sales pitches spikes in net-new capability buys, while jargon becomes a deal-breaker in renewal and replacement cycles.

Relationship Intelligence: Warming the Path to Yes

As buying groups grow and attention shrinks, access matters as much as messaging. Business development executives holds first- and second-degree professional and personal connections to more than 620 TDLs at listed companies² – connections that enable earlier visibility, trusted introductions, and faster credibility-building.

For marketers, this means mapping the committee, identifying warm paths, and orchestrating the right peer influencers at the right moment. For disruptors, it is often the difference between being shortlisted or never seen.



**Business development
executives hold
connections to
more than 620 TDLs**

²Source: Altrata, September 2025

The following summary shows preferred content types and channels at each stage of the journey – demonstrating the need for a buyer-centric and integrated approach to campaign planning and program execution.



Source: MomentumABM Client Buying Index 2025. IT buyer subset of senior technology decision leaders (90% VP-level and above), plus a limited number of Directors and Managers.

An Actionable Roadmap for Marketers

1

Design the journey with buyer context and purchase objectives in mind

Most decisions aim to expand or optimize existing capabilities; fewer introduce new ones or renew. Align your story to what the buyer is trying to achieve, not just their sector.

- Expand: Focus on practical outcomes, operational continuity, and measurable ROI.
- Introduce new: Lead with innovation, blueprint the path-to-value, and pre-empt migration risk with references and use cases.
- Renew: Emphasize reliability, service quality, and simplicity – avoid jargon and overclaiming.

2

Build proof-first, AI-ready content

Technology leaders rely on self-discovery and evidence, not claims – and they increasingly use AI to test, compare, and verify what you publish.

- Provide structured, machine-readable assets (FAQs, spec sheets, comparison matrices) so AI tools can interpret your value clearly.
- Embed reference architectures, security checklists, and implementation playbooks to support independent validation.
- Design for human and machine readability: plain language, clear metadata, and logical hierarchies.

3

Orchestrate and mobilize the entire buying group

Purchases span six months or more and involve 5–14 stakeholders. Influence depends on sequencing the right content and advocates at each stage.

- 69% of buyers say thought leadership helps multiple stakeholders align in buying groups³. Leverage tailored content that is data-backed and, crucially, machine-readable.
- Equip internal champions to carry your message internally – “why now, why us, how it works here.”
- Plan journey milestones that prove progress, reinforce consensus, and sustain momentum across long cycles.

³ MomentumABM Value of Thought Leadership 2025

4

Compete smartly in an incumbent-dominated market

Incumbents are considered 90% of the time and win the majority of renewals. Challengers win only when they demonstrate unique value and de-risk adoption.

- Anchor on missing capabilities or new business outcomes rather than parity claims.
- Present a clear migration and implementation plan backed by credible, named references.
- Use ROI and continuity framing to reassure on transition and reduce perceived risk.

5

Activate relationship intelligence early

Visibility and trust now depend on networks as much as messaging. Access to warm paths can determine whether you're even seen.

- Map buying committees and second-degree relationships early to identify warm introductions.
- Activate peer validators and credible intros before procurement begins.
- Use executive networks and customer advocates to build familiarity before they finalize the shortlist.

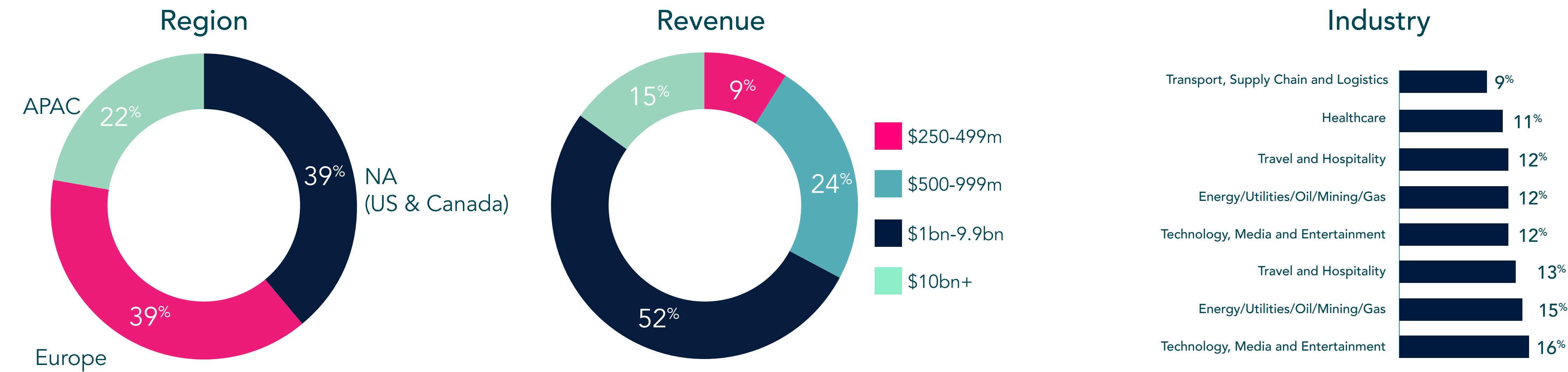
Research Scope

This report is a joint MomentumABM (now part of Accenture Song) and Altrata initiative. It is designed to give ABM and marketing leaders a practical, ready to use view of senior IT buyers. The analysis combines MomentumABM’s Client Buying Index 2025 and Altrata’s insights on Technology Decision Leaders.

Altrata’s data for this project is dated September 2025. The scope covers more than 975 Fortune 500 and FTSE 100 Chief Technology Officers, Chief Data Officers, Chief Information Officers, and Chief AI Officers.

MomentumABM Client Buying Index 2025 IT Buyers Scope

N=178



Source: MomentumABM Client Buying Index 2025, IT buyer subset

About Altrata

Altrata provides the most essential intelligence and insight on business leaders, the global wealthy and well-connected. Leading commercial, philanthropic and educational institutions depend on Altrata solutions to meet their growth objectives. Clients partner with Altrata to confidently engage with exceptional individuals and organizations, create meaningful relationships and seize strategic opportunities.

Altrata's global dataset contains millions of individual profiles on the wealthy, senior decision makers, board members and C-suite leaders. Altrata offers actionable, accurate and comprehensive data, maintained by a global team of in-house researchers committed to surfacing the right insight at the right time to drive positive business outcomes. Altrata is the definitive leader in global wealth intelligence, professional relationships mapping and affluent market dynamics.

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