

Budget Decision Map

Make the funding constraint and approval path explicit before discussing solutions.

When to use it

Use when procurement slips, budget ownership changes, or the customer raises affordability concerns.

Work the questions in order

1. Ask what kind of constraint exists: funding, timing, authority, or the business case.
2. Map the decision path with the customer and commercial owner.
3. Document authorized options and the next decision point without forecasting certainty you do not have.

Fictional worked example

The user team supports renewal, but a new approver needs a documented business case. The CSM helps assemble customer-confirmed evidence while the commercial owner clarifies the approval sequence.

A note on judgment

Do not promise pricing or contractual exceptions outside your authority. Customer enthusiasm is not the same as budget approval.

Open the related case

[The Budget Freeze](#)

Newly created educational template, not a former-employer document or a validated scoring model. Adapt it to your context. Keep confidential information out of shared copies.

Your working notes

Budget Decision Map / Part 1 of 2

Context or anonymized account: _____

Date: _____ Review date: _____

01 Customer priority

What business outcome is the spend intended to support?

02 Constraint

What specifically prevents approval? What is known versus assumed?

03 Decision roles

Who uses, advocates, approves, and processes the purchase?

04 Required evidence

What does the approver need to decide? Who can validate it?

From clues to action

Budget Decision Map / Part 2 of 2

05 Process and timing

What are the actual steps, dependencies, and customer-confirmed dates?

06 Options to explore

What scope or timing options can the authorized commercial team discuss?

07 Next action and uncertainty

Who owns the next step? What could still prevent agreement?

Before you close the file

Check what is known, what is assumed, and what still needs confirmation. Agree on the next action and the review point. A completed worksheet is not a solved case.