> A DECISION GUIDE FOR CIOS AND CFOS

The LIBERATE Playbook

Before your next SaaS renewal, decide what to keep, optimise or replace. Own what creates value; keep the platforms that fit.

Renewing by default is still a decision.
Make it on purpose, with evidence.



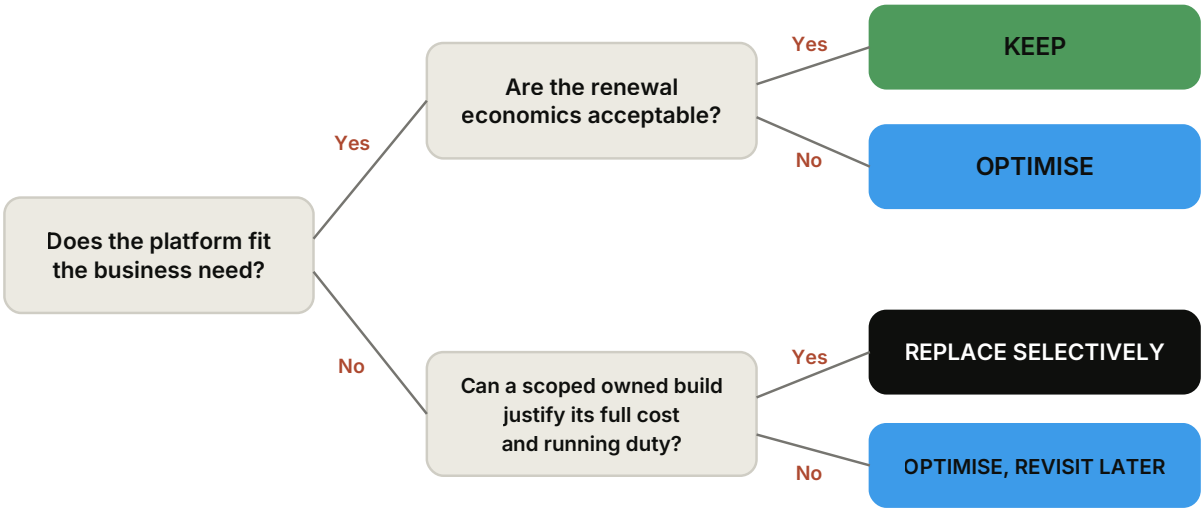
> START WITH THE DECISION

A renewal is a choice between three options, not a default

Renewing by default is still a decision. Name the capability the business needs, the constraints it must meet and the date a decision is due, then test three options against the same acceptance criteria.

EXHIBIT 1

Three answers to one renewal



Source: saasinator decision framework. Structure only; no values are implied.

Keep

The platform fits, its economics are acceptable, and switching risk outweighs the benefit.

Optimise

Unused seats, configuration, procurement terms or a vendor feature can fix the problem.

Replace selectively

A scoped, owned capability can justify its full cost and its operating responsibility.

Would you choose this platform today, at this price, knowing what you now know?

If the honest answer is yes, keep it and stop here.

> CHOOSE A SENSIBLE FIRST TARGET

Start with one bounded workflow, not the largest invoice

A large licence bill alone is not a reason to rebuild. The right first target is one workflow with clear edges, a measurable problem and an owner who will judge the result.

EXHIBIT 2

What a sensible first target looks like

TEST	WHAT GOOD LOOKS LIKE	WARNING SIGN
Bounded	One workflow with clear inputs, outputs and hand-offs	"The whole platform"
Measurable	A problem the business already counts	A pain nobody has put a number on
Accessible data	Data that can be extracted, with its owner known	Data locked in a proprietary format
Accountable owner	A named business owner who will accept or reject	Ownership shared by committee
Feasible exit	Notice period and contract terms that allow a change	An exit window that has already closed

Source: saasinator decision framework.

Record before you start

- Renewal date and notice period
- Annual cost and actual usage
- Business owner
- Integrations and data the workflow relies on

Weigh before you commit

- Regulatory constraints
- How critical the service is
- Data portability and migration effort
- Your team's ability to run the result

Patterns worth investigating include a document intake workflow, a specialist approval application or a reporting add-on. These are candidate patterns, not claimed customer outcomes.

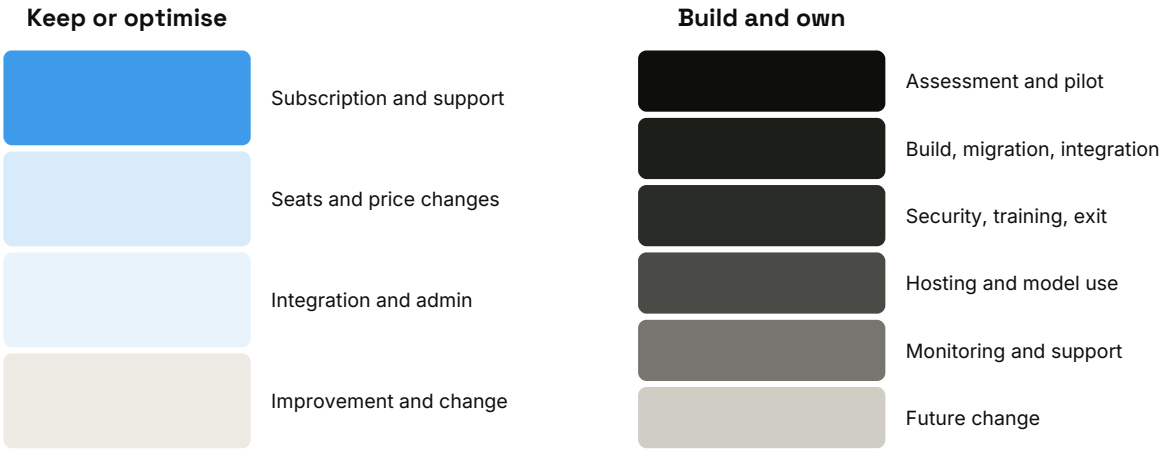
> COMPARE THE WHOLE COST

Compare the whole cost over one horizon, including what ownership adds

Compare every option over the same three-to-five-year horizon, state the assumptions, and test a base case and a downside case. Estimate benefits separately, and name who validates each one.

EXHIBIT 3

What each side of the comparison must include



Source: saasinator decision framework. Illustrative structure only; bar sizes carry no values.

Ownership can change the cost structure. It does not make operation free.

Hosting, model or API usage, monitoring, patching, support and future change belong in the build case from day one.

FOR YOUR STEERING GROUP

- Is every option costed over the same horizon, with the same assumptions?
- Who, by name, validates each benefit claimed?
- What does the downside case do to the decision, not just the numbers?

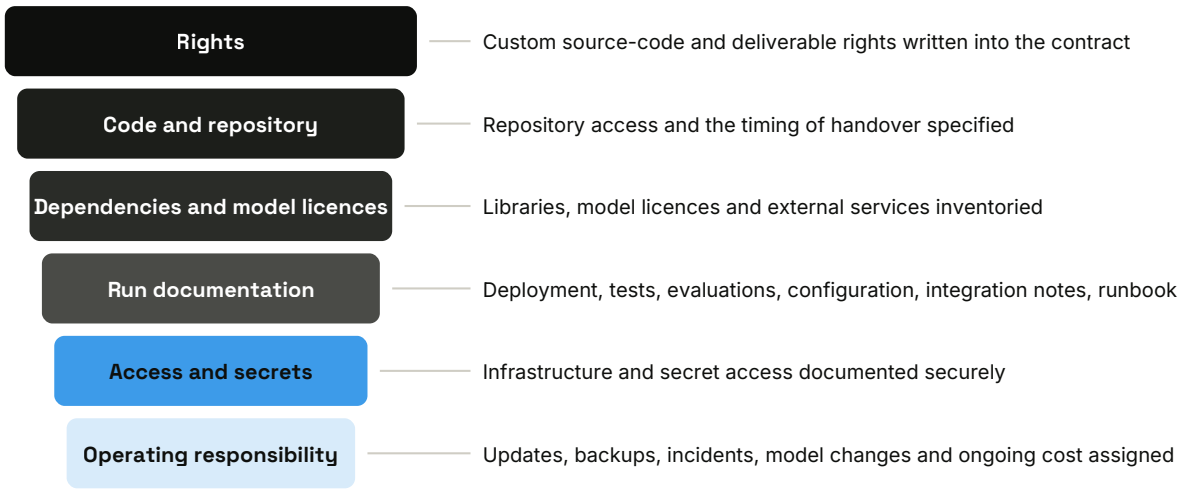
> DEFINE WHAT OWNERSHIP MEANS

Ownership is only real if the handover can be inspected

Owning software you had built is only real if the handover can be inspected. Agree it in the contract, then check it layer by layer.

EXHIBIT 4

Six layers of an inspectable handover



Source: saasinator decision framework. Structure only; no values are implied.

One limit to state plainly

Owning an application does not transfer ownership of a foundation model. Its licence terms stay with its provider.

Choose who runs it, explicitly

Internal operation, a support partner or managed services, chosen on capability and cost, and written down before handover.

FOR YOUR STEERING GROUP

- Which of the six layers does our current contract actually give us?
- If our builder left tomorrow, who could run this on Monday?
- Where is the list of every model and service the capability depends on?

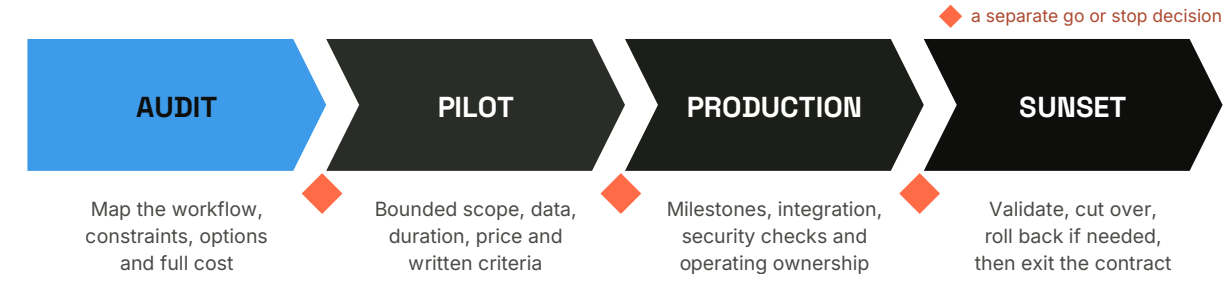
> PROVE BEFORE COMMITTING

Prove the case in stages, with a separate decision at each gate

Commit in stages. Each stage produces the evidence for the next decision, and each decision can end the work.

EXHIBIT 5

Four stages, each ending in a separate decision



Source: saasinator decision framework. Structure only; no values are implied.

What a pilot must test

Representative cases, including failures and human review, against acceptance criteria written before it starts.

When to exit the legacy contract

Only when acceptance is met and contractual conditions allow. Plan parallel running where the service needs it.

> **A stopped pilot is useful when its evidence prevents a poor investment.**
> It is not automatically a saving, and should not be reported as one.

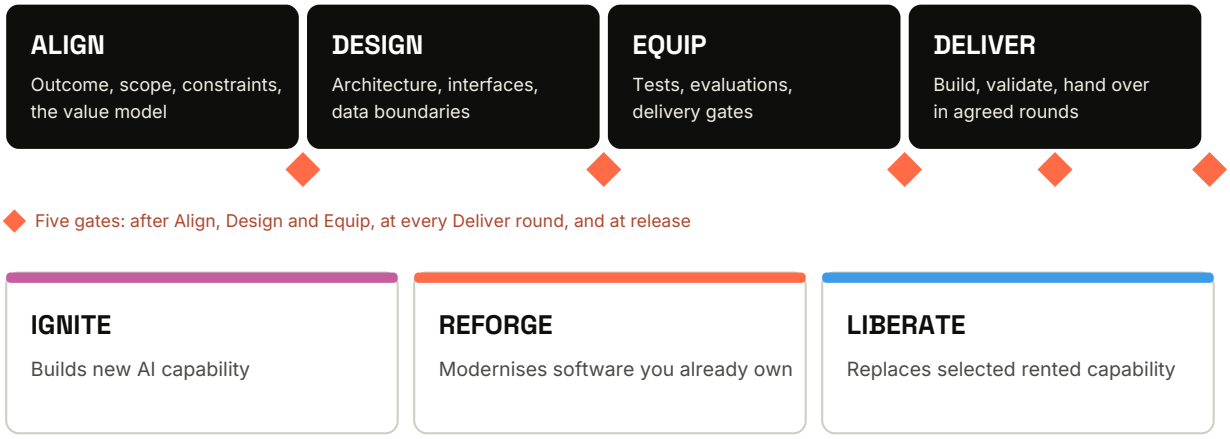
> BUILD WITH VISIBILITY

One delivery method, three ways in

SAIF is the delivery method: four phases and five gates, so every decision rests on evidence you can see. Align, Design and Equip happen once; Deliver repeats until the outcome is met.

EXHIBIT 6

SAIF, and three ways into it



Source: saasinator SAIF method.

These are entry options, not a required purchasing sequence.

The right starting point depends on the problem and the evidence available.

FOR YOUR STEERING GROUP

- Which of the three entry options fits the evidence we already have?
- What would we need to see at each gate to keep going?
- Who on our side attends each gate and signs it off?

> ANSWER THE OPERATING QUESTIONS

Answer the operating questions before handover, not after

The questions that decide whether an owned capability lasts are operational. Answer them before handover, in writing.

EXHIBIT 7

Four operating questions and what to document

QUESTION	WHAT TO DOCUMENT
Where will data and model processing run?	Application hosting separately from external model or API processing, with retention and access controls for each.
What happens when the builder changes?	Source access, usable documentation, infrastructure access, dependency knowledge and trained operators. Source access alone is not continuity.
Who runs it?	The team, the escalation path, patching responsibility and the support arrangement, named before handover.
How is development accounted for?	Eligible development expenditure may qualify for capitalisation under applicable criteria; research, maintenance and other expenditure may be expensed.

Source: saasinator decision framework.

Have finance and auditors assess the accounting treatment.

Do not let the project case depend on a blanket accounting promise.

FOR YOUR STEERING GROUP

- Is hosting documented separately from model processing, with retention for each?
- Who is named for patching, backups and incidents?
- Have finance and our auditors seen the capitalisation assumptions?

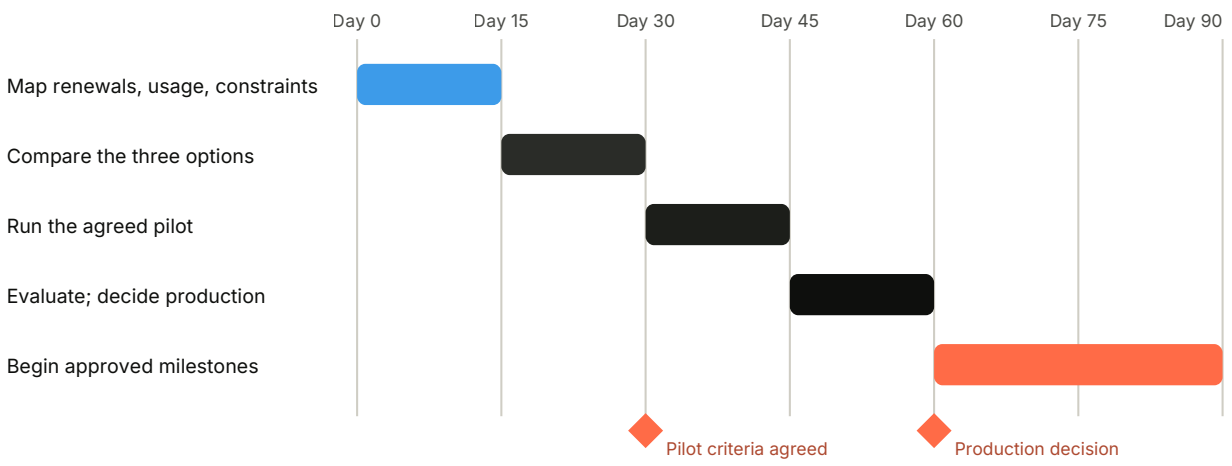
> YOUR FIRST 90 DAYS

The first 90 days produce a defensible decision

The first outcome is a defensible decision, not a finished replacement. An illustrative plan:

EXHIBIT 8

An illustrative first 90 days



Source: saasinator decision framework. Illustrative, not a delivery guarantee.

Security, procurement, integrations and data readiness may change the schedule. A complete replacement within 90 days is not promised.

FOR YOUR STEERING GROUP

- Which renewal falls due first, and when does its notice period open?
- Who owns the one candidate workflow?
- What would make us stop at day 30 or day 60, and is that written down?

> BRING ONE RENEWAL

Bring one renewal to a working session

Bring one workflow or one renewal to a 30-minute working session. Leave with the options laid out and a practical next step.

EXHIBIT 9

What to bring

1. Contract value, renewal date and notice period
2. Active usage and business-critical workflows
3. Current pain and the business outcome wanted
4. Data extraction and integration dependencies
5. Keep, optimise and replace alternatives
6. Full build and run cost assumptions
7. Pilot acceptance and failure criteria
8. Security, hosting and model-processing requirements
9. Operator, support and continuity responsibilities
10. Cutover, rollback and contract exit conditions

> BOOK A DIAGNOSTIC

saasinator.ai/diagnostic

A 30-minute working session. Bring one renewal; explore the options and a next step.

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