Business Value Research Methodology — Methodology Review

Dodone External Methodology Library | Source-faithful research brief | Version 1.0

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Document control

Field	Value
Document ID	DODONE-EXT-007
Originating publisher	IDC
Source publication	12 February 2026 explanation
Research cut-off	31 October 2026
Status	Independent source review — not an external audit
Publication type	Customer-research-driven technology business value study
Source policy	Original public material only; no Dodone adaptation
Full source links	See section 14

Executive summary

IDC describes a custom primary-research methodology: interview actual customers, measure before-and-after conditions, quantify benefits, normalise observed results and construct a bespoke Business Value model with analyst review. It supports financial justification for technology products and services, not a universal AI-only formula.

Scope: Quantify business outcomes attributable to technology investments from actual customer experiences.

Important: This paper documents published source material only. A missing equation or input is reported as not available in the reviewed sources; no substitute model or artificial worked example has been created.

1. Purpose and scope

Quantify business outcomes attributable to technology investments from actual customer experiences. This paper is an independent explanatory analysis of published methodology; it is not endorsed by the originating publisher.

2. Counterfactual and baseline

IDC explicitly collects customer conditions before and after deployment. Studies may use different systems, workloads and scale factors. The reviewed explanation does not prescribe a single universal control-group or causal-identification design.

3. Published model inputs and variables

- Actual customer interviews and contextual organisation data.
- Pre- and post-deployment operating and financial measures.
- Cost reduction and efficiency improvements.
- Security, compliance and risk-related effects.
- Revenue and other outcomes linked to the evaluated technology.
- Analyst normalisation and standardised assumptions for the bespoke model.

4. Cost methodology

IDC explicitly models business impact through a bespoke detailed model but does not publicly specify one comprehensive AI cost parameter list in the reviewed source.

5. Benefit and value methodology

IDC describes quantifying cost reductions, productivity/efficiency, security, compliance, risk mitigation and revenue impact based on customer-reported outcomes, with normalisation across the study.

6. Published formulas and calculation logic

- The source describes a structured three-step process: customer interviews, benefit quantification, and normalisation/modelling.
- A complete universal IDC financial ROI formula and the proprietary normalisation assumptions are not published in the reviewed source.

7. Publisher-reported worked examples or results

The methodology overview does not provide a standalone numeric AI investment example. It describes the outputs of studies, including a Business Value white paper, a snapshot and an executive summary.

8. Sensitivity, attribution and uncertainty

Customer interviews and primary research support evidence quality; the public explanation does not disclose prescribed uncertainty intervals or confidence calculations for all projects.

9. Author-scope qualifications and methodological limitations

- Detailed financial models are bespoke and not fully disclosed in the general public guidance.
- Customer-supplied evidence can differ in quality and representativeness across engagements.
- Commissioned deliverables are not a general free-to-use equation library.

10. Independent reproducibility assessment

Partial process transparency, low numerical reproducibility from the public overview alone.

11. Public-information gap register

Information unavailable or incomplete	Source review status
Exact universal ROI equation and financial workbook: not disclosed.	Not publicly available / insufficiently specified in reviewed source
Normalisation formulas and benchmark parameter library: not disclosed.	Not publicly available / insufficiently specified in reviewed source
Uniform uncertainty distributions and discount rates: not disclosed.	Not publicly available / insufficiently specified in reviewed source

12. Independent reviewer observations

These observations address verifiability and scope; they are not additions to the publisher's financial method.

Confirm each numerical claim against the original publication before relying on it for an investment decision. Do not treat conceptual frameworks or opportunity estimates as if they were a reproducible company-level ROI algorithm.

Do not fill source gaps using assumed discount rates, value multipliers, proprietary weights, industry benchmarks, model code or synthetic test fixtures. An independent audit of calculations is possible only where sufficient primary data and methodology are disclosed.

13. Audit and publication checklist

- Primary publisher and publication dates have been identified.
- Source-specific equations are separated from descriptive process narratives.
- All author-reported numerical examples are identified as publisher examples.
- Unavailable parameters and proprietary elements are explicitly marked.

- No Dodone adaptations or fabricated examples have been introduced.
- Claims of complete numerical reproducibility are limited to publicly verifiable material.

14. Original source links and attribution

The following are the original publisher resources reviewed. Each link is clickable in the PDF and editable Word file.

S1 — A closer look at how an IDC Business Value project unfolds — https://www.idc.com/resource-center/blog/a-closer-look-at-how-an-idc-business-value-project-unfolds/

Research cut-off: 31 October 2026. Access conditions and source text may subsequently change.

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