

The Budget Request Canvas

Build the ask before you build the business case. If this page is weak, no amount of spreadsheet will rescue it.

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Security budget requests fail for predictable reasons: they describe a capability rather than an outcome, they cannot say what happens if the answer is no, and they ask for a number without saying what the organisation gets for it. Fill in every row. Rows you cannot complete are the rows the CFO will ask about.

1 · The ask

Amount, and over what period

Capital or operating

One-off or recurring — and the year-two cost

Headcount implied, now and later

YEAR TWO IS WHERE CREDIBILITY IS WON OR LOST

Requests that hide a recurring cost inside a one-off number get funded once and remembered for years. State the run rate up front, unprompted.

2 · What the business gets

The outcome, in business terms

Which specific exposure this closes

How we will know it worked

When the benefit lands

3 · If the answer is no

Answer honestly. Overstating this is the fastest way to lose the next request.

What we will do instead

What residual risk remains,
and who accepts it

What this delays or blocks
for the business

NEVER SAY “WE’LL BE BREACHED”

You do not know that, everyone in the room knows you do not know that, and saying it once devalues every future statement you make. “We will carry this exposure and I will need someone to accept it by name” is stronger, truer, and harder to refuse.

4 · The trade you are prepared to make

Arriving with a trade already identified changes the conversation from “can we afford this” to “is this the right priority”, which is a conversation you can win.

What I would stop or defer
to fund this

What a 60% version would
buy

What I would drop first if cut

5 · Who has to say yes

Person

What they care about

Spoken to before the meeting?

A budget meeting is where a decision is confirmed, not where it is made. If anyone in that room is hearing this for the first time, the request is already in trouble.

6 · The sentence you open with

Companion to: “How to Ask for Security Budget and Actually Get It” at cybersecleader.com. Adapt freely inside your organisation with attribution retained. Not legal, financial or regulatory advice.