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Invisible Catalysts

Uncovering the value and challenges of
Virtual and Fractional Technology Leaders
in Small and Medium Businesses.

About Galson Research

Galson Research is a technology research and training organization that serves Fractional Technology Leaders and SMB Executives. Our analysts focus on researching technology domains most relevant to business success. Our signature tool, the Technology Prioritization Index (TPI), ranks technology domains based on business impact.

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Executive Summary

Fractional Technology Leaders (FTL) face a unique set of challenges in both acquiring and maintaining business engagements, rooted largely in the nature of their role, market perceptions and insufficient sales experience.

Part I: Challenges in Acquiring New Business

- Market Awareness: Many companies lack understanding of what FTL are and why they are valuable, causing a significant awareness gap leading to loss of opportunities, longer sales cycles, and misaligned expectations.

- Misunderstanding the Economic Buyer: Many FTL market to the technical buyer and don't speak to resolving the pains of the company's CFO, who is often the final decision maker.

- Differentiation: Prospects often compare FTL to full-time hires or consultants, questioning the value and fit of fractional leadership.

- Building Trust Quickly: Earning credibility and demonstrating stability within short engagement timelines is a critical hurdle.

- Limited Sales and Marketing Infrastructure: Many FTL excel operationally but lack professional sales and marketing capabilities.

- Competitive Market: The growing number of FTL and consulting firms heightens competition and necessitates niche differentiation.

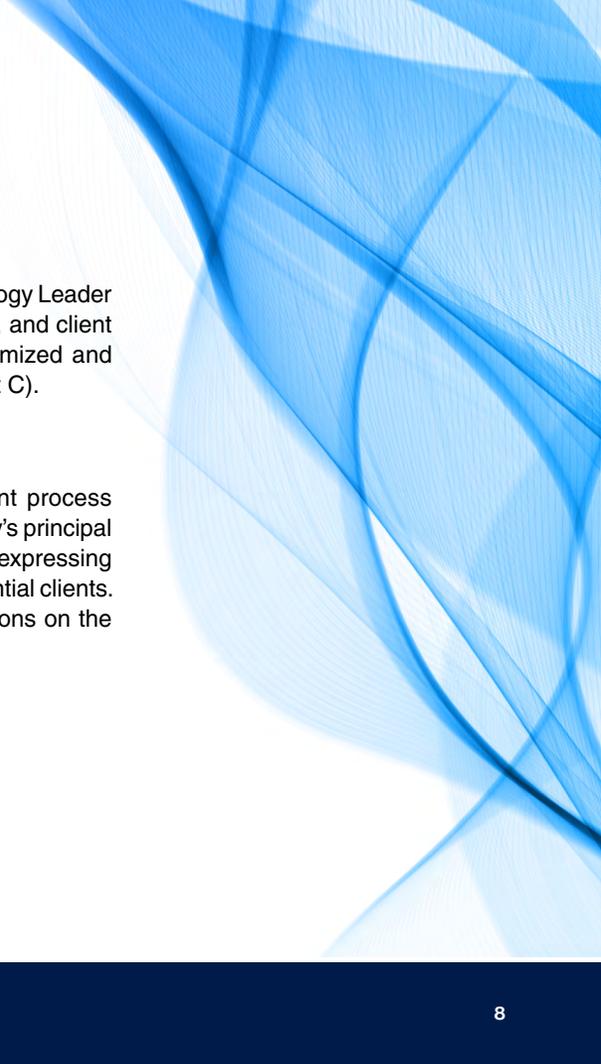**Galson.**

Executive Summary

Part II: Challenges in Maintaining New Business

- Short Engagement Durations: Client needs may be temporary, making retention and ongoing engagement challenging.

- Scope Creep and Misaligned Expectations: Clear boundaries and expectations are often undefined or misunderstood, leading to scope creep.

- Integration with Internal Teams: Resistance or skepticism from full-time staff can undermine effectiveness.

- Balancing Multiple Clients: Managing time and availability across several clients, risks spreading FTL too thin.

- Proving Long-Term Value: After initial problem-solving phases, clients may question the ongoing need for fractional leadership.

- Administrative Challenges: Many FTL have challenges building repeatable, scalable systems for client engagement.

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Study Purpose
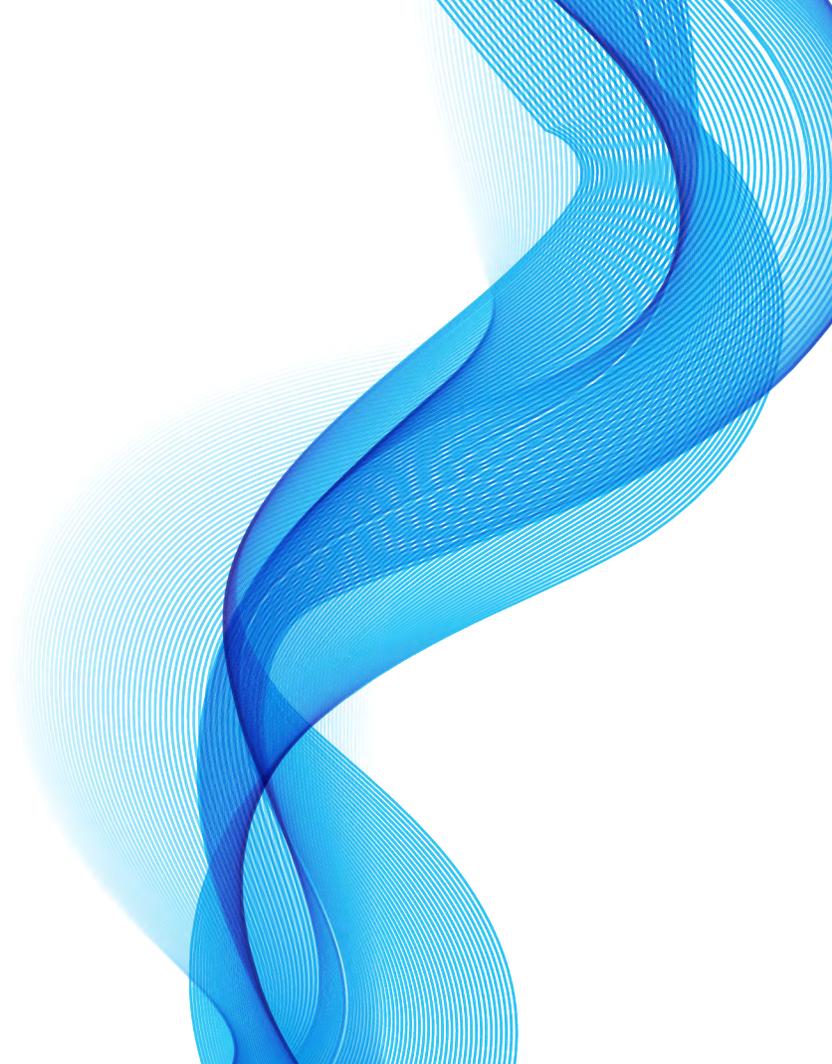
This Galson Research study, conducted Summer 2025, asked over 500 Fractional Technology Leader participants to share their challenges in the areas of positioning, business development, and client management. The study included survey and narrative responses, which were anonymized and reported by 6 "respondents" and a letter (i.e. Respondent A, Respondent B, Respondent C).

Study Hypothesis

The working hypothesis was there would be some gaps in the business development process consistent across respondents, primarily with marketing activities as observed by the study's principal investigator. An early poll of several Fractional Technology Leaders led to one respondent expressing time management challenges that prevented him from doing consistent marketing to potential clients. Another respondent noted she relied heavily on her existing network, but had reservations on the sustainability of this approach. The formal study was commissioned soon after.

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Fractional Technology Leader (FTL) Profile

In order to understand the challenges of the Fractional Technology Leader, it's important to develop a consolidated profile, as many provide similar services that fall under different roles and titles.

The profile developed for this study defines a Fractional Technology Leader (FTL) as a seasoned technologist providing technology services to Small and Medium Sized Businesses (SMB) on a part-time basis. This may come in the form of project work, part-time work, or fixed hour contract work. Ideally, each FTL will service multiple clients, however, this may not be the case for a variety of reasons.

Some of the titles Fractional Technology Leaders may fall under:

- Fractional Chief Technology Officer (CTO)
- Fractional Chief Information Officer (CIO)
- Fractional Chief Information Security Officer (CISO)
- Fractional Chief Artificial Intelligence Officer (CAIO)
- Fractional Chief Operations Officer (COO)
- Fractional Chief Data Officer (CDO)
- Virtual Chief Technology Officer (vCTO)
- Virtual Chief Information Officer (vCIO)
- Virtual Chief Information Security Officer (vCISO)
- Virtual Chief Artificial Intelligence Officer (vCAIO)
- Virtual Chief Operations Officer (vCOO)
- Virtual Chief Data Officer (vCDO)

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Some of the customers of FTL include:

- Technology startups*
- Software as a Service companies*
- Private equity and venture capital firms
- FinTech and financial services firms*
- Healthcare organizations and Health Tech companies*
- E-commerce companies*
- Retail*
- Professional services firms*
- Non-profit organizations and social enterprises
- Education and Ed Tech companies

- Manufacturers and Logistics companies
- Media agencies and Entertainment companies
- Real Estate and Prop Tech companies
- Logistics and Transportation companies
- Supply Chain companies
- Telecommunications companies
- Hospitality companies
- Energy and Clean Tech companies
- Agri Tech companies
- Construction Tech companies

* Indicates highest usage

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Fractional Technology Leaders typically have advanced technical education, over a decade of tech experience, and strong leadership, communication, and flexibility skills. Average earnings vary widely based on role, expertise, and engagement scale, ranging hourly from $150 to over $500 or annualized between roughly $85,000 to $250,000 depending on the title and contract type.

Psychographics

- Prefers dynamic, flexible work environments.
- Motivated by variety of projects, continuous learning, and personal brand growth.
- Enjoys solving complex, high-impact technical challenges.
- Comfortable with ambiguity and rapid adaptation to different company cultures and operational models.
- Values autonomy but must be skilled communicators and team leaders despite fractional, part-time engagement.

Additional Skills Required

Fractional Technology Leaders, who do not work for an advisory firm, are entrepreneurs. Besides entrepreneurial skills, other key skills not previously mentioned are financial acumen, negotiation skills, the ability to persuade and influence, industry trend awareness, and experience with governance and risk management.

Value Proposition

Using a Fractional Technology Leader offers cost-effective, high level technology leadership for companies needing expert guidance without full time salaries and benefits. Fractional Technology Leaders are crucial for digital transformations, technology roadmap development, risk management, and vendor relations.

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Reasons Companies Hire a Fractional Technology Leader

Our study found that Small and Medium Businesses commonly seek the services of Fractional Technology Leaders for several strategic and operational reasons; all aimed at accessing top tier expertise while maintaining budget flexibility.

Cost-Effective Technology Leadership

Fractional Technology Leaders provide seasoned executive expertise at a fraction of the cost of a full-time hire, enabling businesses to allocate resources wisely and maximize ROI on technology investments. This is particularly impactful for Small and Medium Businesses that do not require or cannot afford a permanent senior IT executive.

Access to Specialized Expertise

Small and Medium Businesses benefit from fractional leader's deep cross-industry experience in areas such as cybersecurity, cloud adoption, digital transformation, and technology modernization. These leaders bridge skill gaps and guide complex initiatives without long-term commitment, ensuring that businesses get immediate and relevant support for their specific technical challenges.

Flexibility and Scalability

Fractional Technology Leadership offers significant flexibility. Small and Medium Busineses can scale up or down the level of executive involvement based on current needs. This model allows for targeted advisory support (project-based, temporary, or part-time), enabling companies to adapt quickly to growth phases, periods of change, or specific IT initiatives without overcommitting resources.

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Rapid Impact and Faster Results

Fractional Technology Leaders typically "hit the ground running," delivering immediate, actionable recommendations and driving results faster than traditional onboarding processes for full-time hires. This enables Small and Medium Businesses to accelerate technology initiatives and see quicker improvements in operations, competitiveness, or risk posture.

Bridging Leadership Gaps During Transitions

Businesses experiencing IT leadership changes or instability, such as during executive searches or department restructuring, can use Fractional Technology Leaders to ensure business continuity, keep critical projects on track, and maintain system security and stability during transitions.

Strategic Oversight and Objective Perspective

Fractional Technology Leaders provide fresh, unbiased viewpoints drawn from their extensive backgrounds, helping Small and Medium Businesses identify opportunities, risks, strategic misalignments, and hidden inefficiencies. This objectivity supports innovation and ensures technology decisions are aligned with overall business strategy.

Risk Mitigation and Security Enhancement

For many Small and Medium Businesses, Fractional Technology Leaders help proactively identify, assess, and reduce risks, including regulatory compliance, data protection, and threat response, without burdening their limited budget or resources. This results in stronger security, improved customer trust, and better readiness for partnership with larger organizations.

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Study Findings

Our study found there are consistent challenges among Fractional Technology Leaders regardless of niche, industry concentration, or client base. These challenges fall into three categories: positioning, business development, and client management. Positioning, for this purpose, is marketing activities that help establish the Fractional Technology Leader as an expert. Business development is the set of activities that create sales opportunities that lead to revenue and profit. Client management, for this purpose, is managing relationships with potential and existing clients to provide positive experiences, increased sales, and client retention.

Respondent Profiles

The profiles below are based on the primary identified archetypes interviewed/surveyed during the 500+ person study.

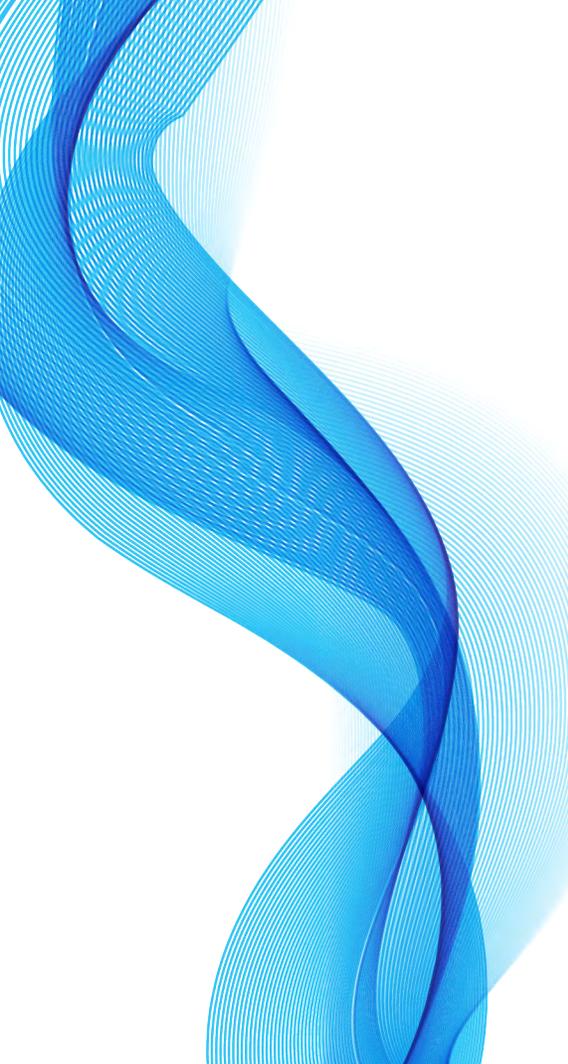**Respondent A profile:** woman, professional services, Southeast US
Respondent B profile: man, accounting, Central US
Respondent C profile: woman, private equity/tech startup, Southwest US
Respondent D profile: man, non-profit, Mid-Atlantic US
Respondent E profile: man, retail, Northeast US
Respondent F profile: woman, professional services, Mid-Atlantic US

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Part I:
Challenges in Acquiring New Business

Market Awareness

Fractional Technology Leaders face the consistent problem of low market awareness. Many business leaders either misunderstand or overlook the role. They see the title and assume contract work or consulting services, not executive-level leadership. It is precisely this misunderstanding that blocks SMB revenue growth and slows adoption across target markets.

Most Small and Medium Businesses haven't worked with a Fractional Technology Leader. They are familiar with hiring consultants or a full-time CIO, but rarely see an option between the two. Because of this, they miss clear advantages. A FTL delivers experienced strategy and oversight but does so with flexible cost and engagement models. When businesses fail to recognize this, conversations start with education instead of value. Deals stretch out. Conversion rates fall.

Many FTL report spending their first meetings educating prospects about the concept itself. Instead of discussing transformation or performance goals, they explain what fractional means. This costs time and momentum. One respondent described having to answer repeated questions about continuity, oversight, and accountability during projects. The client worried fractional meant unreliable. These doubts reveal an information gap that marketing can fix.

Respondent A:

See yourself as a peer for hire, not a consultant.

Response Distribution
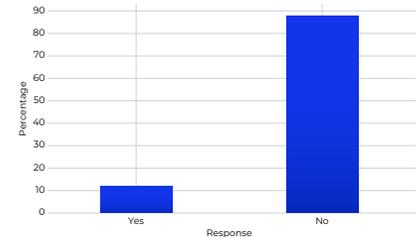
Question: Do your customers typically understand what a Fractional Technology Leader is? 12% yes 88% no.

Market confusion also affects positioning. Without a clear story, prospects compare FTL with consultants or staffing agencies. They default to safe options they already know. This drives price pressure and shorter engagements because buyers treat strategic leadership as an hourly service. FTL need consistent, data-backed communication that proves business impact and not just technical skill.

Our study found awareness challenges distort who Fractional Technology Leaders reach inside organizations. Many FTL start by pitching to IT Directors or Operations Managers because they understand the technical language, but those contacts cannot approve large budgets. They influence but do not control. The real buyer is the economic buyer, often the SMB CFO, with some company owners also having a direct say. Economic Buyers care about cost efficiency, speed to value, and measured outcomes. Until messaging focuses on them, FTL will continue to face slow progress and lost opportunities.

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Misunderstanding the Economic Buyer

Many Fractional Technology Leaders lose deals because they target the wrong audience. In order to be successful, FTL have to approach those who control budgets and approve spending. Too often, you address the technical buyer: technical managers, IT leads, or project managers. These people understand the technical value, but they lack purchase authority.

The true buyers are the SMB CFO, on occasion the CEO, and/or the business owner. They care about risk, cost, and measurable impact. FTL who focus on technical features instead of business outcomes struggle with sales. Conversations become detailed and technical. Decision makers tune out because they do not see the link to profit or growth.

A key finding of our study showed that SMB rarely allocate substantial funds without finance or ownership involvement. Respondents who focus on business outcomes reported more success with prospects. Specifically, they mentioned margin improvement, the ability to cut spending, and developing processes that improve operations.

Respondent B:

Make the CFO's life easier. Speak their language and give them data that supports their work.

Role Percentage Spread

Question: Who is your most common economic buyer? CFO 65% CEO/Owner 20% IT Manager 10% Someone Else 5%

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Small and Medium Sized Business Chief Financial Officer (SMB CFO) Profile

Our study found the most common customer for Fractional Technology Leaders is the Chief Financial Officer. Often, this person is the economic buyer, defined as the person who holds authority to approve budgets and make purchase decisions. In most organizations, the CFO will have limited knowledge of technology. In order to market and sell to the SMB CFO, it is important to understand the role.

Firmographic Characteristics

Small and Medium Sized Businesses typically range from 25 to 500 employees, with SMB Chief Financial Officers in companies under 100 employees managing significantly broader responsibilities compared to larger organizations. In smaller companies with fewer than 100 employees, 94% of SMB Chief Financial Officers are responsible for another department beyond finance, while this drops to 78% in larger organizations.

Demographics

60% of SMB Chief Financial Officers typically attain their position between the ages of 35-39. Current SMB Chief Financial Officers average age is between 48-54 years old depending on region and company size.

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Professional Responsibilities

SMB Chief Financial Officers shoulder responsibilities beyond traditional finance functions. More than 75% are responsible for data and analytics company wide, making metrics, analytics, and reporting their top focus area. Nearly 60% report dedicating more time to business performance, financial planning and analysis, and technology investment compared to previous years.

Budget Authority and Decision Making

Among Small and Medium Sized Businesses with more than 25 employees, 37% indicate the IT department holds more purchasing power, but Chief Financial Officers make final decisions while relying on IT expertise for requirements and pricing. SMB Chief Financial Officers evaluate technology ROI, assess risks, and secure funding for business development initiatives. They prioritize investments using financial metrics and strategic analysis, focusing on projects offering the highest ROI.

IT Oversight and Technology Responsibilities

SMB Chief Financial Officers increasingly find themselves at the helm of IT governance, overseeing financial implications of technology investments, ensuring regulatory compliance, and managing risks associated with digital initiatives. They establish strategic technology plans outlining the role, purpose, and vision for IT while ensuring the mission and priorities of IT link to company strategy.

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## Technology Investment Priorities

Digital transformation leadership ranks as a top priority, with 47% of SMB Chief Financial Officers citing growth strategy as a key focus area. AI adoption ranks high among SMB Chief Financial Officer priorities, though 96% report achieving no significant value from AI investments due to uncertainty about implementation, skill gaps, and data quality issues. SMB Chief Financial Officers rank inadequate technology as a top risk management challenge, with 42% prioritizing investments in risk monitoring and intelligence tools.

Strategic Collaboration Requirements

SMB Chief Financial Officers work closely with Fractional Technology Leaders to understand the technology landscape and align investments with business goals. SMB Chief Financial Officers participate in every major IT project, contributing at each step, with finance playing a predominant role in projects impacting financial technology. SMB Chief Financial Officers conduct cost-benefit analyses for IT projects, implement performance metrics using KPIs, and foster continuous improvement through regular IT performance reviews.

Technology Budget Constraints

One in four Small and Medium Sized Businesses expects to reduce technology spending by up to 25% within the next 12-24 months due to economic uncertainty. For Small and Medium Sized Businesses with more than 25 employees, IT budget cuts could reach as high as 30%. Despite cutbacks, connectivity remains a core expense, while enterprise planning software expenditures stay stable because HR and accounting functions remain essential.

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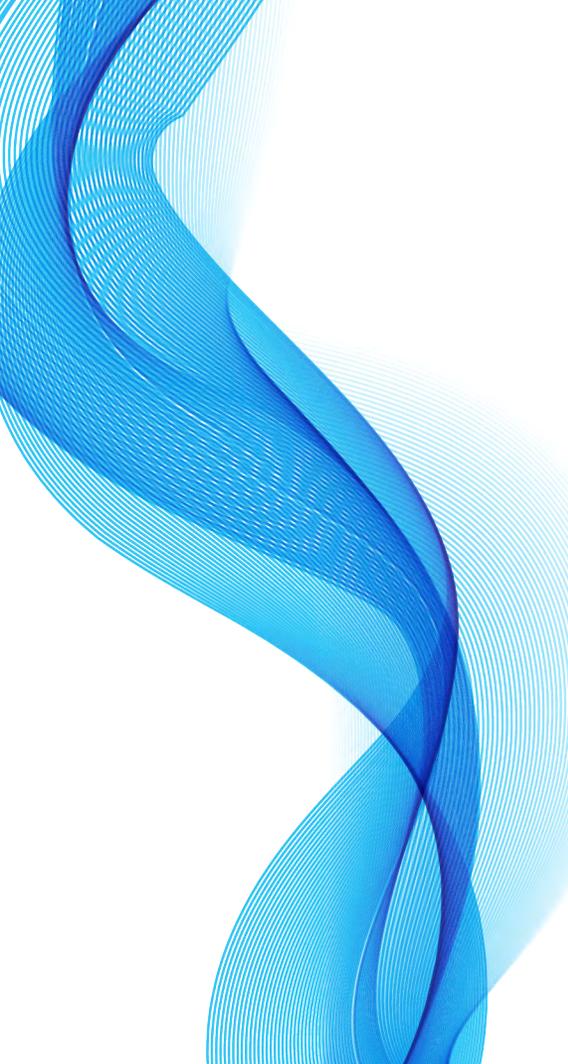
Part I:
Challenges in Acquiring New Business

(Continued)

Differentiation

Our study found that standing out as a FTL requires clarity and focus. Many respondents reported relying on referrals, highlighting credentials and past experience to attract clients. Respondents reported they achieved more customer acquisition success when they were able to make value immediately clear through their messaging and marketing assets (proposals, social posts, and website).

Three factors frequently came up when driving differentiation: business results, credibility, and relevance, demonstrating how prior work leads to improvement in revenue, risk, or operational speed was mentioned as an effective strategy. Successful respondents stated decision makers want plain language and proof. In order to be successful, FTL need evidence of impact.

Our study found service offering design that matches what buyers need through flexible engagements, targeted outcomes, plain language, and clear success criteria performed significantly better compared to competing on price and technical experience.

Respondent C:

Show business value and credibility in plain language. Sell to your buyer's needs.

Source Percentage Spread
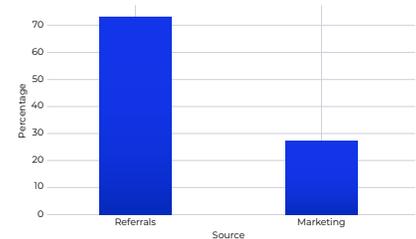
Question: What is your most common vehicle for obtaining new clients? Referrals 73% Other Marketing Channels 27%

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Building Trust Quickly

Respondents frequently reported success as a Fractional Technology Leaders depends on how fast you earn trust. New clients have little time to decide if you fit. They have seen contractors and consultants make promises that fall short. Because of that, FTL face skepticism from the first conversation. Most respondents agreed that relying on credentials or job titles to secure commitment was insufficient.

Respondent A noted she's found the most success by revealing her process upfront. Specifically, she outlines steps, deliverables, and how she will report progress to her customers. She communicates frequently and clearly. She also makes her availability and accountability visible using customer tools, as well as her own tools. Respondent A notes that she has the most success when her services become predictable and she overcommunicates with her customers.

Respondent D:

Reveal your process upfront.

Question: What do you do in order to build trust quickly? Open Response

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## Limited Sales and Marketing Infrastructure

Our study found that most Fractional Technology Leaders start with few resources for sales and marketing. Some of the reported reasons are limits on time, budget, and staff. Most report their available energy goes to delivery, not demand generation.

Of the respondents without a dedicated system, nearly all rely on word-of-mouth and existing networks. The result is a limit on FTL reach and slow client acquisition. The best solution was reported to be simple, repeatable actions done over time, with a Customer Relationship Management platform or spreadsheet.

Respondents also reported using tools like proposal templates, capability overviews, websites with lead forms, appointment scheduling forms, automation platforms and lead systems like LinkedIn Navigator and Apollo.io were the difference makers in their success with lead generation.

Respondent E:

Treat your business like a business and build systems, then have the discipline to use them.

Survey Responses
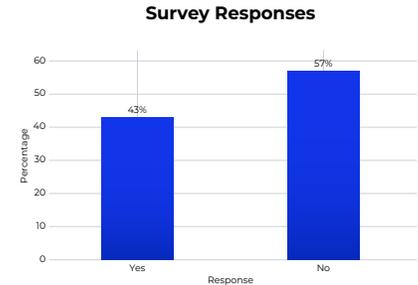
Question: Do you have a defined marketing system for client acquisition? 43% yes 57% no

Competitive Market

Fractional Technology Leaders operate in a space that grows busier every year. More professionals enter the Fractional Technology Leader market because more companies seek flexible solutions over permanent hires. This increase in supply means more options for clients and tighter competition for every project.

When prospects have many choices, they compare service providers quickly. Clients choose the familiar options or those who speak their language. Respondents who have found success highlight having focused positioning. They narrow their services to a target industry or a specific business challenge, they use value-based pricing models, and they have relationships with industry and market influencers.
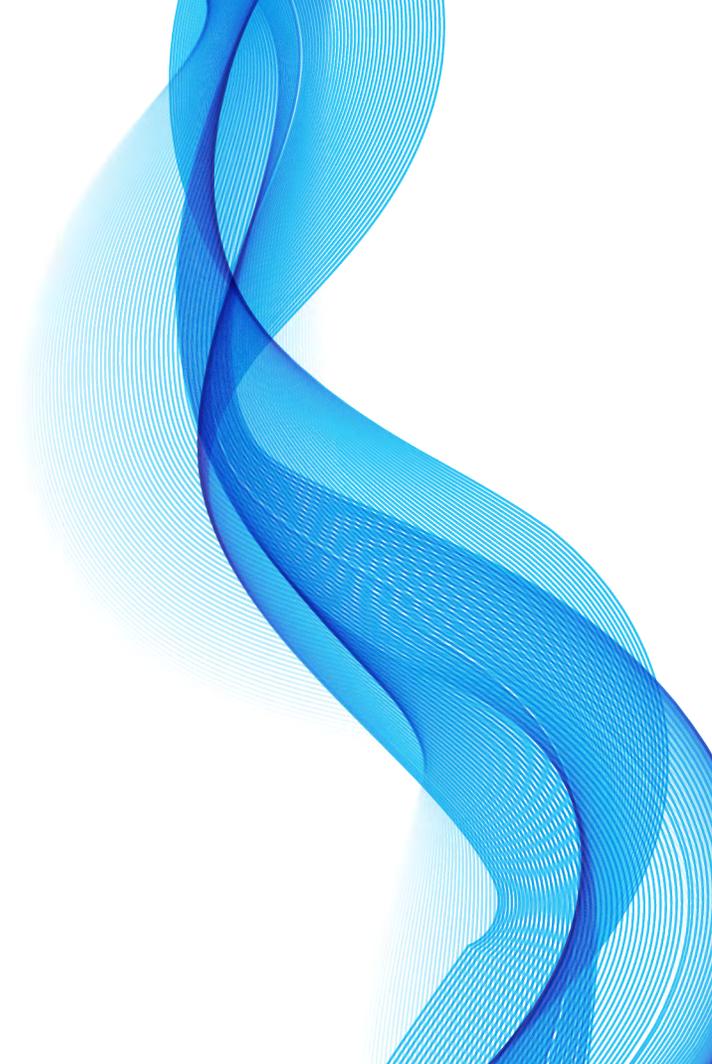
Respondent F:

I only work with law firms on the East Coast with under 250 employees and at least one physical location. This is my sweet spot.

Question: How do you sell yourself to your target audience. What qualifications do you require when working with a potential customer? Open Response

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Part II:
Challenges in Maintaining New Business

Short Engagement Durations

Many Fractional Technology Leaders face challenges with brief client engagements. If not desired, projects that last only a few months can limit a FTL's ability to deliver deep impact. Short cycles also potentially reduce time to build trust, design solutions, and show measurable results. Few respondents reported having a business model that focused primarily on short term engagements (under 12 months).

SMB customers can view FTL as temporary fixes. To address this, Respondent B mentioned focusing on delivering high impact outcomes early. He identifies critical issues that can be resolved within months while also offering options for extending the role based on specific achievements. Respondent B also provides new case studies, targeted industry information and benchmarks to his customers regularly. The result is customer satisfaction and a strong referral pipeline.

Respondent B:

Focus on delivering high impact outcomes early.

Timeframe Distribution
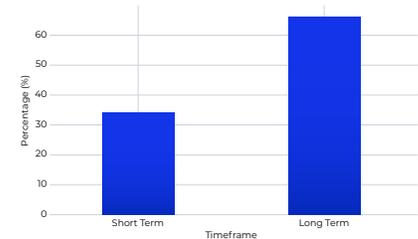
Question: Does your current business model focus on short term (under 12 months) or long-term (12+ months) engagements? Short Term 34% Long Term 66%

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Scope Creep and Misaligned Expectations

Many Fractional Technology Leaders struggle with scope creep. Customers often start with one set of goals but shift priorities during the engagement. Scope creep can lead to workload increases without added compensation. The most reported byproduct of scope creep by respondents was reduction in focused time and reduction in profitability for the FTL.

Misaligned expectations are another frequently reported problem. Clients may not understand what the FTL role includes or how decisions get made. They may expect the FTL to act as a full-time employee or solve issues outside of the agreed upon expertise to be provided by the contract.

Respondent C has found success overcoming scope creep by setting firm, clear agreements early. She includes clear scope definition, boundaries on hours, tasks, and decision authority. She also requires formal approval for scope adjustments and extra work and requires reasonable compensation when it does occur.

Respondent C:

Overcome scope creep by setting firm, clear agreements early.

Frequency Distribution
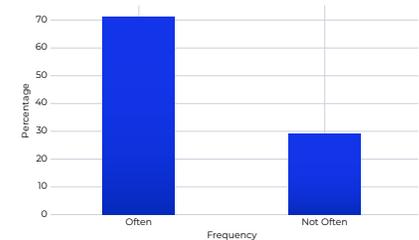
Question: How often do you experience scope creep when dealing with customers? 71% Often 29% Not Often

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Integration with Internal Teams

Many Fractional Technology Leaders face challenges joining existing teams. The FTL arrives as an outsider with limited authority and no history at the company. Team members may see the FTL as a short-term fix or even a threat to their roles. This can create resistance, slow progress, and limit your influence.

Respondent D deals with these challenges by building quick rapport with internal teams. He believes you need to understand company culture, decision processes, and alliances fast and that lack of awareness creates friction and misunderstandings. He positions himself as a partner, not a disruptor and focuses on quick wins that build credibility and trust.

Respondent D:

Build quick rapport with internal teams.

Survey Responses
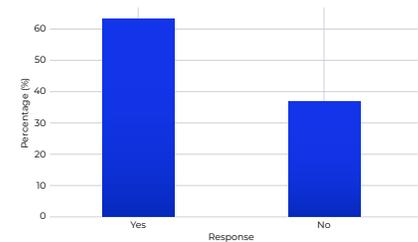
Question: Do you have challenges integrating with internal teams more than 25% of the time? Yes 63% No 37%

Balancing Multiple Clients

Balancing several clients is a core challenge for Fractional Technology Leaders. Each client expects priority attention, quick response, and full engagement. In order to be successful, the FTL must deliver high value without letting any account feel neglected. The risk is missing key deliverables or disappointing important stakeholders.

Respondent E shared a simple but effective approach. He built a weekly review process that he uses every Friday, revisits all open commitments and plans the following week in detail. He calls every customer for a brief update, even when there is little news. Respondent E also delegates administrative work to a virtual assistant so he can focus on value added tasks.

Respondent E:

Delegate administrative work so you can focus on value added tasks.

Question: How do you go about managing multiple clients? Open Response

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Proving Long Term Value

Fractional Technology Leaders must show more than quick wins. Many SMB Chief Financial Officers hire the FTL for a project or specific crisis, but hesitate to extend the role over time. They question the return on ongoing investment and may revert to old habits or look for cheaper solutions once the immediate need is met.

Many respondents report one of their core challenges is linking their work to sustainable business improvement, particularly when the engagement is not structured with long term impact in mind.

Respondent F described how she proves lasting value to an SMB CFO. After an initial technology overhaul, she sets up a quarterly review with the finance leader. She shares updates on system uptime, support ticket reductions, and actual monthly savings. She pairs financial data with staff feedback to show improvements in productivity and morale. Instead of pitching new projects, she asks how current results fit bigger company goals. This has led to new assignments and eventual long-term retainers.

Respondent F:

Share updates on business/product metrics: system uptime, support ticket reductions, and actual monthly savings.

Question: How do you demonstrate long term value with your clients? Open Response

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Administrative Challenges

Fractional Technology Leaders encounter significant administrative challenges in maintaining their businesses, particularly in developing standardized and scalable systems for client management. Many struggle to build repeatable processes and select effective tools that support consistent client engagement and operational efficiency. This lack of standardized infrastructure can lead to inefficiencies, increased time spent on non-billable administrative tasks, and difficulties balancing the demands of multiple clients. With limited sales and marketing resources, along with the need to maintain high responsiveness, FTL often find themselves stretched thin, impacting their ability to focus on delivering strategic value.

Respondent E reflected this challenge succinctly noting they treat their business like a business and builds systems. The secret to success with their systems is having the discipline to actually use them. The discipline to implement and consistently use systems, not just ad-hoc tools, emerged as a critical success factor among those managing multiple engagements effectively. This insight underscores the need for FTL to invest in client management platforms, automation tools, and administrative support wherever possible to sustain their business growth and operational resilience.

Treat your business like a business and build systems, then have the discipline to use them.

Marketing System Adoption - Tech Leaders
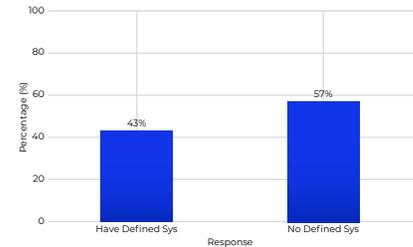
Question: Do you have a defined marketing and client management system for acquiring and maintaining clients?" Yes 43% No 57%

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Conclusion

Fractional Technology Leaders face real barriers, but each challenge presents clear actions for growth. Here are the core ideas presented in this report:

- Market awareness remains low.

- Reaching the right economic buyer requires the FTL to speak in terms of business outcomes, not technical features.

- Differentiation starts with a focus on tangible results to the client.

- Gaining trust means fast, transparent actions and visible wins.

- Limited sales and marketing resources slow the FTL pipeline.

- The FTL market is crowded.

- Reputation for specific results sets a FTL apart.

- Short projects force the FTL to deliver business impact quickly and advocate the benefit of extended engagements.

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- Scope creep and unclear expectations drain time and hurt relationships.

- Set boundaries and manage change intentionally.

- Integration with internal teams means the FTL must listen, adapt, and make value obvious.

- Balancing multiple clients requires predictable systems and regular updates so no account feels left behind.

- Proving long-term value demands the FTL connect projects to sustained business gains.

- Success comes when the FTL communicates in the financial language that decision makers trust.

- FTL win by acting with purpose. Sharing proof, showing results, and focusing each step on the priorities of those who do the hiring.

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Galson Research has developed a self-assessment for Fractional Technology Leaders to identify areas of strength and opportunity based on this research study. Establishing a baseline is a critical first step to meaningful professional development.

Take the assessment at https://galson.com/assessment

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