



IAITAM ACE

May 7-9, 2024 The M Resort  Las Vegas, NV

Balram Pandey, EY

How to build eye opening and convincing business case for SAM?



Finding your IAITAM Oasis

Today's topics

- About this presentation
- What is SAM?
- Business case – what and why?
- Approach to a business case
- Outline of a roadmap
- Final thoughts
- Q & A



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Short introduction

- Balram Pandey
- Technology Consultant @ EY
- 25+ years of industry experience
- Local and global roles
- Practitioner of multiple industry best practices
- Pragmatic thought leader!



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What does this PPT cover and does not cover?



- ☺ Two environments - Servers and End-Users
- ☺ Provides approach to create a business case
- ☺ Numbers and values are based on industry recommendations
- ☺ Can be refined for a specific need



- ☹ Cloud & DevOps environments
- ☹ It is not a business case
- ☹ License types and metrics



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What is SAM?

ITIL definition of SAM:

...all of the infrastructure and processes necessary for the effective management, control and protection of the software assets... throughout all stages of their lifecycle.

Goal of SAM is to **reduce** information technology (IT) **costs** and **limit** business and legal **risk** related to the ownership and use of software, while maximizing IT responsiveness and end-user productivity.

What about business insights in a broader context?



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What is a business case and why we need one?

What is a business case?

A formal justification of the value achieved by investing in SAM transformation

Why is it needed?

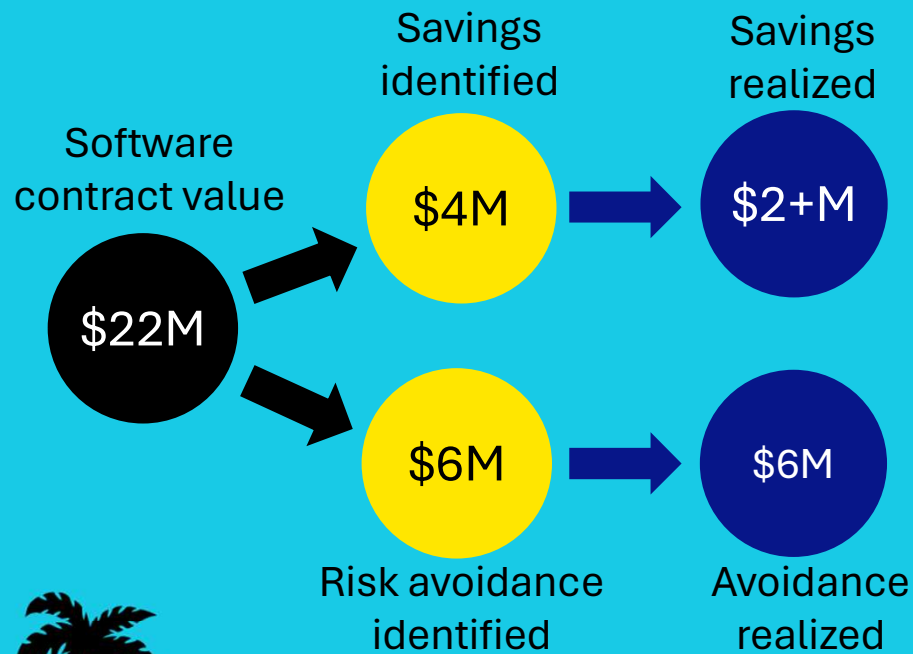
A rational and effective means to prioritize investments, set “value” expectations and evaluate achievement



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Eye opening numbers



Savings identified
~\$11M
Canadian company with 40K+ employees

Savings identified
~\$30M
Global company with 200K+ employees



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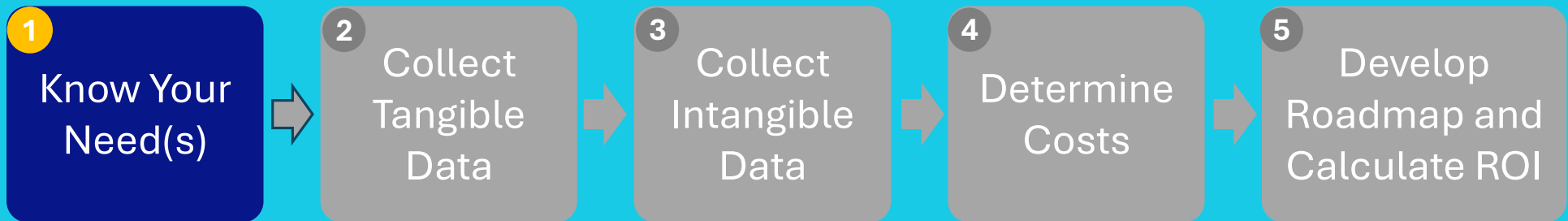
Approach to create a business case



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Approach to create a business case



- ◆ Cost Saving or Avoidance?
- ◆ Vulnerability and Security
- ◆ Audits and Compliance
- ◆ Application Rationalization



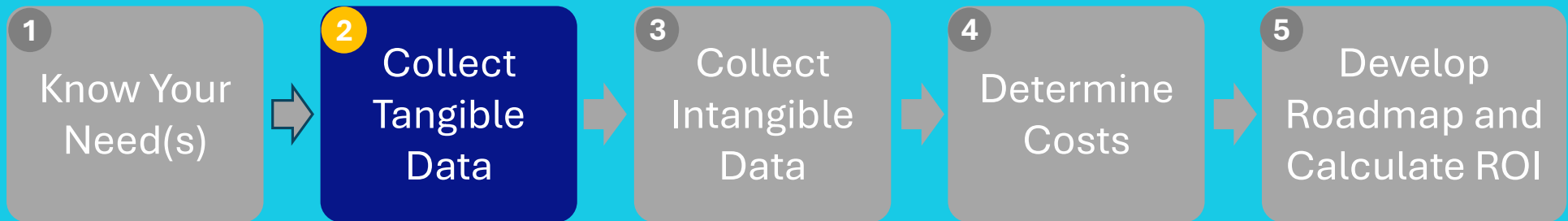
Reliable and trustworthy asset data provide valuable insights



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Approach to create a business case



- ◆ End-user software usage
- ◆ End-user software spend and growth
- ◆ Server software usage
- ◆ Server software spend and growth



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Approach to create a business case



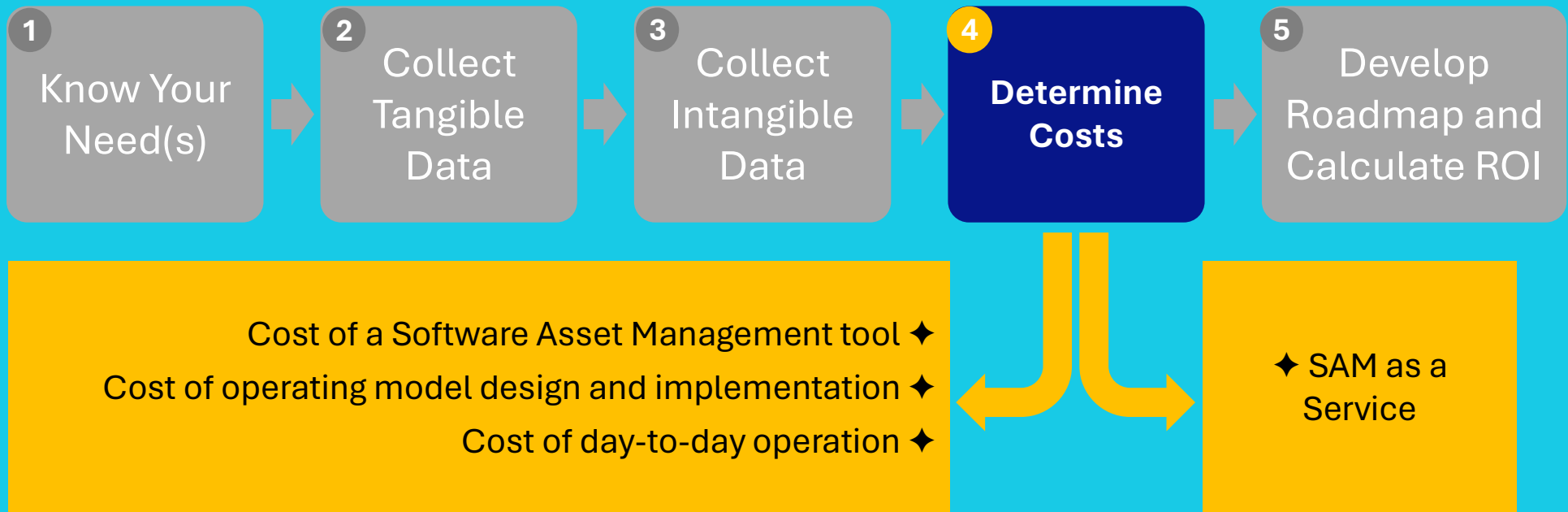
-
- ◆ Audits (frequency, effort)
 - ◆ Compliance/Security breaches
 - ◆ Resource/manual effort
 - ◆ Product support activities



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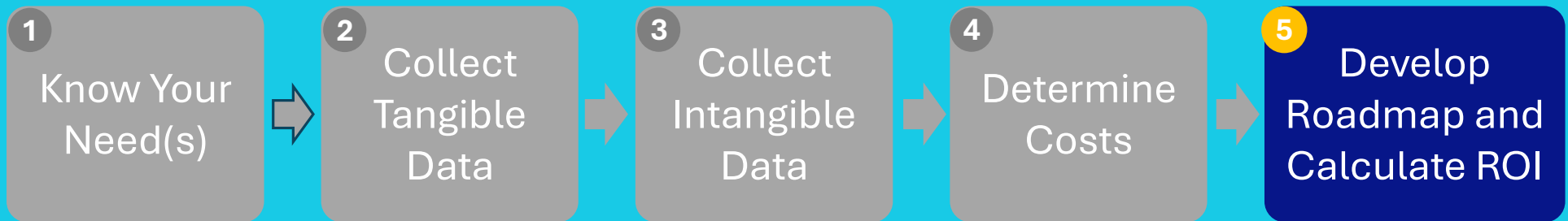
Approach to create a business case



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Approach to create a business case



- Prioritize products / vendors ✦
- Develop multi-year roadmap ✦
- Calculate annual costs ✦
- Calculate annual benefits ✦



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Outline of a roadmap

	Year 1	Year 2	Year 3	Scope
Server Software				Vendor: IBM, Oracle; Geography: All
				Vendor: Microsoft; Geography: All
End-User Software				Vendor: Microsoft; Geography: All
				Vendor: Adobe; Geography: All
Capabilities / Functions	<ul style="list-style-type: none"> • Catalog, Request • Effective License Position • CMDB integration 	<ul style="list-style-type: none"> • Extend capabilities • Add - procurement, change integration 	<ul style="list-style-type: none"> • Extend capabilities • Add - deployment, metering, harvesting 	
Costs	<ul style="list-style-type: none"> • Recurring: \$ • One-time: \$ • Total: \$\$ 	<ul style="list-style-type: none"> • Recurring: \$ • One-time: \$ • Total: \$\$ 	<ul style="list-style-type: none"> • Recurring: \$ • One-time: \$ • Total: \$\$ 	
Benefits	<ul style="list-style-type: none"> • Hard \$ (saving) • Soft \$ (avoidance) • Risk reduction 	<ul style="list-style-type: none"> • Hard \$ (saving) • Soft \$ (avoidance) • Risk reduction 	<ul style="list-style-type: none"> • Hard \$ (saving) • Soft \$ (avoidance) • Risk reduction 	



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Final thoughts

- 💡 Get a vendor to collect consumption data and estimate costs
- 💡 Do not boil the ocean, start small and show benefits
- 💡 Stay focused!



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Questions?

**Thank you
very much for
listening!**

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