

TBM Awards Nomination Questionnaire



IT Optimization Award

IT leaders are asked to build the plane while flying it – and promise a smooth ride. From modernization and standardization to rationalizing and aligning application, vendor and project portfolios, IT must do more with less. This award recognizes the strategic and bold use of data to drive decisions for technology efficiency, agility, quality, performance and business value. Winners of this award measure and can demonstrate their team’s successes with optimizing cost for performance and business alignment of the IT portfolio.

Key Attribute: Getting measurably more business value per dollar invested in IT

Successful nominees can demonstrate – through *measured outcomes* -- how they and their teams used TBM data and processes to:

- Through targeted activities to improve efficiency or shape demand, improve the unit rates (unit costs) of IT’s services, products or applications provided to the business
- Rationalize applications and/or services to create a more efficient and effective portfolio
- Employ benchmarking against industry peers, market rates and/or internally to help identify and drive actions to improve efficiency
- Consolidate data centers or other aspects of the IT estate
- Improve agility through the cost structure, such as by shifting workloads to public cloud
- Optimize vendors and contracts to get more value for money from third-party suppliers
- Maintain (or improve to) a high performance of service delivery to the enterprise



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IT Optimization Pacesetter Award

For each TBM award (IT Optimization, Strategy & Planning, Business Alignment), the TBM Council will recognize two teams that have made a significant impact to their business with TBM in a short period of time (<18 months). In doing so, their TBM programs have set the pace for the industry, demonstrating a preference for moving fast (through iterations) over a cautious, get-it-right-the-first-time approach. Successful teams are recognized not for having years of experience but instead for making progress, including measurable results, in months or quarters instead of years.

Key Attribute: Establishing a TBM program and making demonstrable progress in the award category in less than 18 months

Successful nominees must meet many of the award criteria but must also demonstrate they have:

- Implemented TBM tools, data and processes rapidly over the 18 month period
- Established their TBM office within the last 18 months, including a program director and any existing TBM analysts
- Relied upon the TBM program to enable or make possible many of the results achieved in the given award category (i.e., the TBM program must be a clear success factor in achieving the results claimed in the award category)
- Established key TBM processes, such as month-end close, monthly operating reviews, quarterly business reviews, etc., in the 18 month period
- Created and maintained a roadmap for improved capabilities and value from TBM

NOTE:

If you select <18 months for the question #5 “How long has your organization had a formalized TBM capability?”, you will automatically be placed in the Pacesetter award designation.



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SECTION I: Company Profile

Nominator Information: Full name, email address, company, role, industry, and number of employees.

1. Select your IT Budget range:

- <\$30M \$100-249M \$250-499M \$500-999M \$1,000-1,999 \$2,000-4,999 \$5,000+

2. Select your IT Employee range:

- <100 100-199 200-499 500-999 1,000-1,999 2,000-4,999 5,000+

3. The TBM Awards are designed to recognize teams! Please list all team members who are applying for the award. Include full name, title, and TBM role.

4. Who are your executive sponsors and/or champions of TBM?



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SECTION II: Why TBM?

5. How long has your organization had a formalized TBM capability?

- <18 months
- 18 months - 2 years
- 2 - 3 years
- >3 years

6. Have you established a TBM office?

Yes

If yes, how many people work in your TBM office?

- 1
- 2
- 3
- 4
- 5+

How are roles defined?

No

If no, do you have plans to establish one?

- Yes
- No
- Not sure

7. Has anyone in your organization received the TBM Executive Foundation Certification?

- Yes
- Scheduled to take the course
- No
- Not Sure

If yes, please list names and titles:



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8. What were your organizations top motivations to adopt TBM? Select up to three choices.

- | | |
|--------------------------------------------------------------------------|-------------------------------------------------------------------------|
| <input type="checkbox"/> Better financial transparency | <input type="checkbox"/> Improve investment allocation |
| <input type="checkbox"/> Increase cost efficiency | <input type="checkbox"/> Improve business interaction and alignment |
| <input type="checkbox"/> Change conversations with the business | <input type="checkbox"/> Accelerate move towards service-oriented model |
| <input type="checkbox"/> Improve demand management | <input type="checkbox"/> Drive agile transformation |
| <input type="checkbox"/> Understand cloud costs and usage | <input type="checkbox"/> Drive digital transformation |
| <input type="checkbox"/> Increase quality of services | <input type="checkbox"/> Others |
| <input type="checkbox"/> Improve planning (capacity, capital, financial) | _____ |
| | _____ |

For your organizations motivations selected above, please indicate where you fall on the scale below:

Motivation 1

- Not Started
- In progress
- Complete & value realized

Motivation 1

- Not Started
- In progress
- Complete & value realized

Motivation 1

- Not Started
- In progress
- Complete & value realized

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9. How have you measured the impact of TBM?

Only qualitative measurement so far; no plans to deploy quantitative assessments

Only qualitative measurements so far; **organization is deploying a quantitative benchmarking on qualitative dimensions**

Measured with ad-hoc internal benchmarking on some of the performance drivers (e.g. productivity, cost, quality, availability, timeliness of deliver). **Comparison with former figures is sometimes missing or not meaningful** (e.g. because partial misalignment in scope).

Measured with regular internal benchmarking on some of the performance drivers.

Measured with regular internal benchmarking on key performance drivers. **Value realized and results are compared with external best practices/peer results (e.g. external benchmarks).**

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10. What processes or tools does your organization have in place for financial management?

- Very basic or no tool in place to provide transparency into holistic IT cost structure. Most services still out of scope of the financial transparency tool. Most data updates into tool are still manual.
- Tool in place to create transparency into holistic IT cost structure, including application costs; tool does not yet decompose costs into fixed cost, and variable cost made up of unit volume and unit costs. Business in process of developing understanding of data/business rules used to calculate costs.** Most data updates into tool are still manual. **Metrics and data refreshed at least once every six months.**
- Tool in place to create transparency into holistic IT cost structure, including application costs; tool does not yet decompose costs into fixed cost, and variable cost made up of unit volume and unit costs. **Shared understanding of data/business/rules used for calculating costs between IT and business.** Most data updates into tool are still manual. **Metrics and data refreshed at least once a quarter.**
- Tool in place to create transparency into holistic IT cost structure, including application costs; **tool decomposes costs into fixed cost and variable cost made up of unit volume and unit costs.** Shared understanding of data/business rules use for calculating costs between IT and business. **Process in place to automatically refresh most of the data that feeds into financial metrics; several data sources uploaded manually. Metrics and data refreshed at least once a month.**
- Tool in place to create transparency into holistic It cost structure, including application costs; tool decomposes costs into fixed cost, and variable cost made up of unit volume and unit costs. Shared understanding of data/business rules used for calculating costs between IT and business. Process in place to automatically refresh data that feeds into financial metrics. **Metrics and data refreshed at near real time or at least daily granularity.**



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11. Describe how your organization has adopted the TBM taxonomy, model, and/or other methods to translate costs data into meaningful perspectives for technology and business decision makers. Include the standard metrics and KPIs used to measure and manage IT cost and value.

12. How has TBM affected the run-the-business vs. change-the-business spending mix of your organization?

- Significantly increased the run-the-business component Increased the run-the-business component Did not affect the spending mix Increased the change-the-business component Significantly increased the change-the-business component

If TBM has increased the change-the-business component, please provide an example/s.

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13. Please describe your company's initiatives that are supported by TBM? How is TBM helping to accelerate and complete those initiatives?

14. What are your end-state aspirations for where you want to take TBM?



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SECTION III: Category questions

15. Describe how TBM has helped your organization make informed staffing decisions.

Include the following areas in your response:

- Manage hiring of internal and external labor against plan
- Understand and compare average monthly cost of staff across geos and role types
- Identify outliers to responsibly shift internal/external labor mix or change hiring plans

16. Describe how TBM has helped your organization optimize labor spending.

Include the following areas in your response:

- Optimize the mix of labor between employees, contractors, consultants and other types of sources
- Review labor consumption by services, projects, business units and other factors to ensure proper alignment
- Benchmark labor spending against industry peers



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17. Provide an example/s how TBM has helped your organization understand infrastructure costs and trends.

Include the following areas in your response:

- Infrastructure unit costs vs. target/benchmarks
- See what's driving infrastructure costs across network, compute, storage and datacenter assets
- Monitor how much infrastructure costs goes to supporting applications
- Understand how infrastructure cost breaks down across internal and external, software, hardware, and facility/power costs

18. Provide an example/s how TBM has helped your organization manage your application portfolio for business value.

Include any or all of the following areas in your response:

- Quantify business alignment of applications are delivering by tying cost to business drivers
- Know the cost of your top 20 applications and how they break down across run vs. dev, infrastructure, and projects
- Show how each business units are consuming each application along with associated costs
- % of project spend on customer-facing initiatives

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19. How has speed of service delivery improved since TBM has been implemented?

- Not measured so far
- Up to 15% more** services delivered on time with slight/no reduction in average provisioning time
- 15-25% more** services delivered on time with **10% reduction** in average provisioning time
- 25-40% more** services delivered on time with a **10-20% reduction** in average provisioning time
- At least **40% more** services delivered on time with a **30%+ reduction** in average provisioning time

20. Provide an example/s how TBM has helped your organization improve performance.

Include any of the following in your response:

- % of business-facing services meeting SLAs
- Customer satisfaction scores for business-facing services
- % of projects or products delivered on-time, on-budget, on spec



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21. What kind of IT vendor management model does your organization have in place?

- Informal vendor management roles in place. Individuals playing vendor manager role have standard vendor management skills, but often lack technical expertise to understand cost drivers/technical alternatives.
- Formal vendor management roles in place. Vendor managers have standard vendor management skills, but often lack technical expertise to understand cost drivers/technical alternatives. Organization tracks vendor compliance to service levels and enforces actions (e.g. penalties) as needed.**
- Formal vendor management roles in place. **Vendor managers have both technical expertise to understand cost drivers/technical alternatives AND have standard vendor management skills.** Organization tracks vendor compliance to service levels and enforces actions as needed.
- Formal vendor management roles in place. Vendor managers have both technical expertise to understand cost drivers/technical alternatives, and have standard vendor management skills. Organization tracks vendor compliance to service level and enforces actions as needed. **Vendor managers use tools such as clean-sheeting of vendor cost (e.g. models to understand bottom up vendor costs), industry benchmarks, and multi-vendor RFPs. Vendor managers actively manage demand (e.g. mapping application requirement to the optimum solutions, optimizing volumes) in order to manage vendor spend.**
- Formal vendor management roles in place. Vendor managers have both technical expertise to understand cost drivers/technical alternatives, and have standard vendor management skills. Organization tracks vendor compliance to service level and enforces actions as needed. Vendor managers use tools such as clean-sheeting of vendor cost, industry benchmarks, and multi-vendor RFPs. Vendor managers actively manage demand in order to manage vendor spend. **Vendor managers often identify win-win cost saving ideas jointly with vendor. Vendor managers held accountable for targets (e.g. improve service levels, cost reduction) via positive/negative incentives.**



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22. Describe the results your organization has delivered with your vendor management model.

Include any of the following in your response:

- Spend - surface outliers and redundancies, manage outside of PO process
- Contracts - negotiations, proactively manage renewals, ARC/RRC unit variances, consolidate application contracts, manage performance SLAs across contracts
- Payments and committed spend – avoid over/underspending surprises, proactively manage committed vendor spend

23. Which statement best describes your organizations public cloud cost management?

- | | | | | |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <input type="checkbox"/> We do not utilize the public cloud; on premise only | <input type="checkbox"/> Public cloud is deployed; costs are not understood | <input type="checkbox"/> Total cost of public cloud spend is understood | <input type="checkbox"/> Manage consumption of public cloud spend by tagging and analysis | <input type="checkbox"/> Optimize public cloud purchases (e.g. reserved instances) and usage |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|



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24. Describe your organizations cloud strategy and the impact TBM has on each of the following areas:

- Understanding total cost of IaaS/PaaS public cloud spend
- Managing and governing consumption of IaaS/PaaS public cloud spend and tagging
- Optimizing IaaS/PaaS public cloud purchases (e.g. reserved instances) and usage

25. What tools and processes exist for benchmarking?

- We do not have a tool or process in place
- We utilize a third-party consultant and/or industry report and benchmark on an ad hoc basis**
- We utilize a third-party consultant and/or industry report and benchmark *annually*
- We have an on-demand tool and benchmark on an ad hoc basis. We sometimes rely on a third-party consultant and/or industry report.**
- We have an on-demand tool and benchmark on a *regular basis* (e.g. monthly).



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26. Describe how your organization has employed benchmarking and how you have made progress in any of these areas:

- Shared IT benchmarks with business partners to establish trust and demonstrate that we're making the best investment decisions.
- Justified a cost takeout or investment decision based on accurate cost, consumption, and performance benchmarks.
- Used benchmarking to perform alternate scenario analyses to inform budgeting or resourcing decisions.
- Identified areas of inefficient spend by comparing unit costs against peer benchmarks,
- Optimized IT costs by setting benchmark-informed unit cost targets and compare progress monthly against actual costs.

27. What financial impact has been achieved relative to **initial total IT cost baseline**?

- No reduction of initial total IT cost baseline
- Up to 10% reduction** of initial total IT cost baseline
- Up to 20% reduction** of initial total IT cost baseline
- Up to 30% reduction** of initial total IT cost baseline
- More than 30% reduction** of total IT cost baseline