VERSION 1

G-Cloud 13

SAM Service Definition

Date: May 2022

Contents

Who We Are - IT Starts With You

Version 1 proves that IT can make a real difference to our customers' businesses. Established in 1996, Version 1 is trusted by customers to deliver IT services and solutions which drive customer success. Our 2,000 strong team, works closely with our technology partners to provide independent advice that helps our customers navigate the rapidly changing world of IT. Our customers include many high-profile Public-Sector organisations across Local & Central Government, Health, Education and Bluelight as well as many FTSE 100 listed companies, Financial Services organisations, Utilities and Commercial sectors.

€195M
£166M Revenue

2000+ Employees

600+ Customers

12 Locations Including UK, Ireland, Spain, India & New York

98% Customer Retention

Best Large Tech Company (Digital DNA Awards 2021)

12 Global Acquisitions

25 Years Proving Value of I.T.

4 Leading Technology Partners

10 Years+ Voted as a Great Place to Work

Best Workplaces™
Large Organisations
Great Place To Work®
UK 2022

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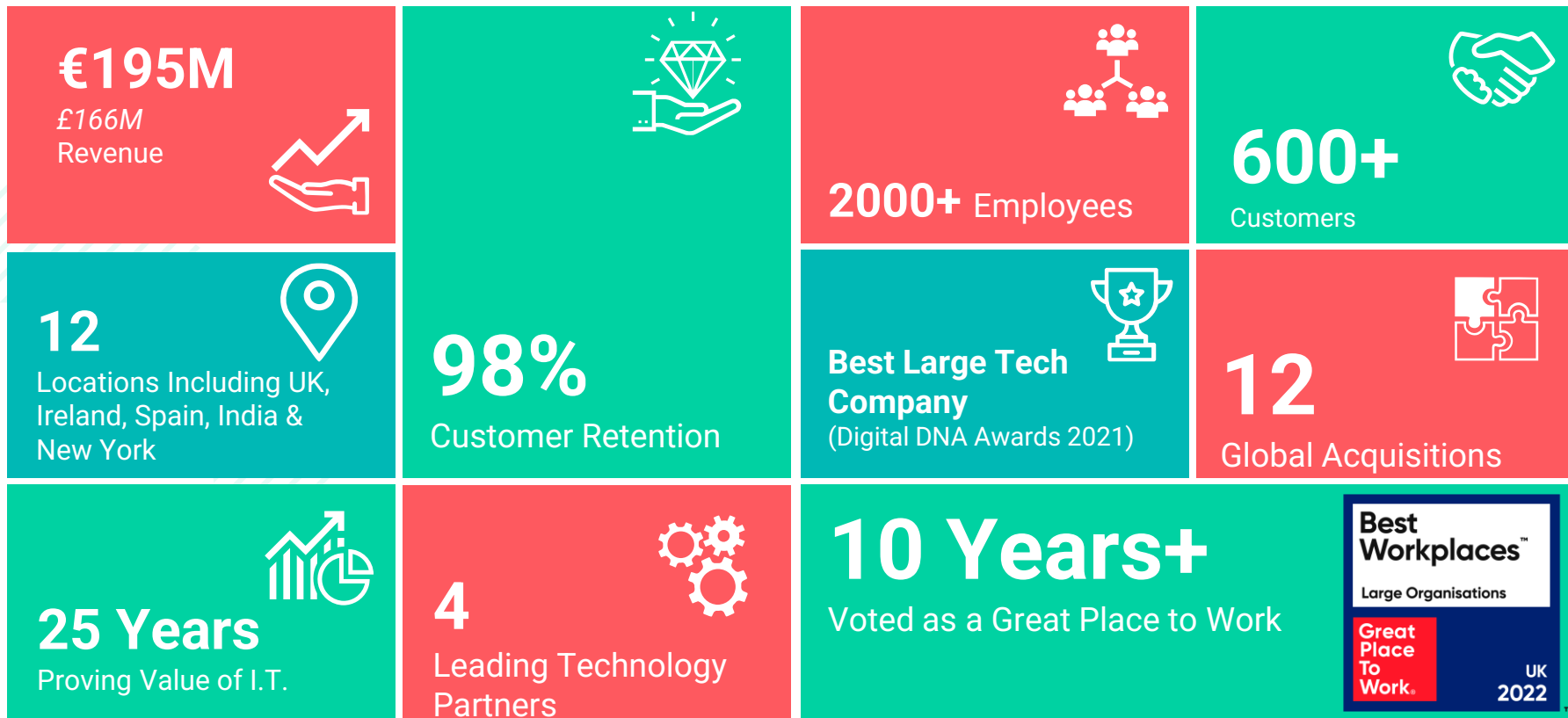
Our Difference – Strength in Balance

For the past 25 years we have worked hard to deliver on three commitments underpinned by commitment to our values; making a real difference for our customers, building an empowering culture and growing a strong organisation for the future. Those looking for a short term result or an easier road might sacrifice one benefit for another, but at Version 1 we never have, and never will. We know that our greatest strength is balance across all three; our customers, people and company. **This is The Version 1 Difference.**

Customer Success

Strong Organisation

Empowered People

● Customer Success

Making a real difference through long-term, outcome focused relationships – success that fulfils our people and fuels our growth.

● Empowered People

Deliberately selecting, empowering and trusting people who are wired to deliver customer success - an empowerment that drives customer loyalty and organisational strength.

● Strong Organisation

A high-performing, financially strong organisation of the highest integrity – a strength that empowers our people and delivers customer success.

▶ **WATCH OUR DIFFERENCE**

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Who We Work With

Driving digital transformation in the UK public sector

Our 600+ customers include many high-profile Public-Sector organisations across Local & Central Government, Health, Education and Bluelight as well as many FTSE 100 listed companies, Financial Services organisations, Utilities and Commercial sectors.

What We Do

Market Leadership Through Innovation

Data Analytics

- Empowering customers with the right information, at the right time to deliver faster and better decision making to their organisations.
- Services include Vision and Strategy Development, Capability Improvement, Data Warehouse, Integration and Advanced Analytic Services.

Cloud Services

- Experts in migrating and running complex enterprise applications in the Public Cloud.
- Services include Strategy and Adoption, Migration Services, Cloud Managed Services and Cloud Licensing Services.

Digital Services

- Version 1 provides best-in-class Digital Services that enable our private and public sector customers to efficiently deliver digital solutions.
- Services include Application Modernisation, Digital Government, Managed Services and DevOps.

Application Optimisation

- Optimising your core business applications to help users work smarter, faster and more effectively

Software Asset Management Services

- Helping enterprise organisations take control of their software assets.
- Services including License Audit Consulting, Cloud Licensing and SAM Managed Services

Enterprise Resource Planning

- Version 1 is committed to continuous innovation in Oracle Applications Unlimited and helping customers digitally transform through the next generation of Oracle Cloud Applications.

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Our Global Technology Partners

We partner with global technology leaders to provide our customers with the highest quality solutions and services. Our long-standing and enhanced partner relationships and market leading expertise in each partner's technologies allows us to tailor solutions to our customers' unique needs. You can view more on our technology partnerships here.

ORACLE PARTNER

Version 1 is the Platinum Partner of choice for Enterprise-scale customers across the UK and Ireland.

Gold Microsoft Partner

Version 1 is a Microsoft Gold Certified Partner, Microsoft's most highly accredited independent technical support provider.

Red Hat

Advanced
Business Partner
Solution provider
Container platform specialist

We are recognised by our customers for our expertise in developing and deploying innovative, enterprise solutions through Red Hat technologies.

aws partner network

Version 1 proudly holds the status of an AWS Partner Network Premier Consulting Partner.

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Our Cloud Credentials

Harness the Cloud Expertise of Version 1

Partnering with Version 1 enables businesses to overcome common Cloud challenges - We enable our customers to focus on what matters. Choosing Version 1 as your Cloud Partner provides your business with access to full stack, multi-disciplinary teams with unrivalled experience in:

- Application Design, Development and Management
- Legacy Application Modernisation and Transformation
- Database Management and Optimisation
- Software Asset Management and Licensing

Our consultants are experts in multiple areas of the IT industry, including the full lifecycle of Cloud services, from Cloud Strategy and Adoption through to Design, Transition (Migration to Cloud) and Operation and Optimisation (Our Cloud Managed Services).

Strategy
Realise the full potential of your cloud objectives

Adoption
Understand cloud adoption for your business

Design
Architect your cloud journey

Migrate
Migrate and build your cloud

Operate
Run your cloud

Optimise
Optimise your cloud

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Our Core Values

Every single decision we make, from the smallest to the largest, is governed by our six Core Values. They are simply stated, non-negotiable and ever present. Our Core Values are not aspirational – they are real and lived, it's how our people are wired and this is how we spot 'Version 1ers'– as values cannot be faked.

Honesty & Integrity

Telling customers what they need to hear – not what they want to hear.

Personal Commitment

Being accountable and keeping commitments

No-Ego

Having an open, helpful and 'No Job Too Small' attitude.

Customer First

Actively seeking customer feedback to understand your business.

Excellence

Good enough is never our objective. We solve tough problems and make innovative suggestions.

Drive

Our customers are accustomed to working with driven experts always striving to build something special.

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Award Winning Focus

Recognised for our commitment to business, technical and service excellence through a number of prestigious awards including:

6th Best Workplace Large Organisation UK (2022) (Top 10 2021)

2nd Best Workplace Large Organisation Ireland (2022)

Best Workplaces for Women Ireland (2022)

UK's Best Workplaces™ for Wellbeing (2022)

9th Best Workplace for Women - UK (2019,2020)

Great Place To Work India (2021-2022)

Top 10 Best Workplace in Europe (2017, 2018, 2019,2020)

Healthy Place to Work Ireland (2021-2022)

Healthy Place to Work UK (2019, 2020, 2021)

7 Awards UKOUG Partner of the Year Awards (2020-2021)

Best large Tech Company of the Year Digital DNA (2021)

ESG & Social Value

Version 1 monitor and improve our social value through our ESG strategy that delivers internal and external initiatives to improve the responsibility and sustainability of our organisation for our team, customers, partners, suppliers and communities.

Environmental & Sustainability
We are carbon neutral since 2021 and have set our target to become net zero by 2025. We plant a tree for every new member of our team and are committed to one beach/river clean up per office in 2022.

Education Collaboration
We will reach 1000 students in 2022, partnering with 100 education institutes to provide support to colleges, schools and universities. We will deliver at least 60 work experience and placement opportunities. It is vital that we provide this to help shape and encourage the next generation of employees in the technology sector.

Health & Wellbeing
With at least 1 initiative per quarter to support our team's financial, physical, and mental wellbeing, we have spent over £1m to ensure the comfort of our remote working team. We are a Healthy Place to Work.

Women in Tech
Version 1 are developing and nurturing our company wide Women in Tech movement. We are committed that 80% of our women to participate in one WIT activity each year, our organisation will be made up of 40% women by 2025, and that 40% of our management roles are held by women by 2025.
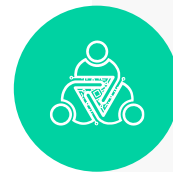
Community First
Our team volunteered over 1000 hours in 2021 to improve employability and skills in the communities we do business in, and in 2022 we are committed to: At least 25% of the Version 1 team personally contribute to their Community First initiatives. 1000 hours delivered in volunteering to improve employability and skills in the communities we work in over 2022. At least 30 new community initiatives launched by 2023.

Diversity, Inclusion & Belonging
We are an organisation dedicated to ensuring diversity, inclusion and belonging is at the heart of all do. We commit to delivering at least one inclusion initiative per quarter.
Alongside our GPTW awards, we are a Disability Confident Committed employer, a Diversity Mark NI (DMNI) Bronze awardee, and are beginning to work towards our DMNI Silver status, and National Centre for Diversity Bronze Level status.
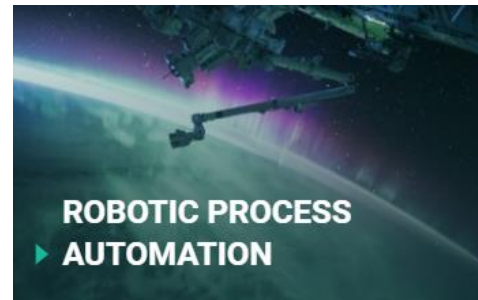
Social Value
Working with our customers to develop bespoke Social Value packages and to monitor and report on the ESG commitments of our organisation, Social Value generates tailored initiatives to deliver against our customers Social value strategies.

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Our Innovation Labs

Here at Version 1, we use innovation to drive customer success. As an innovative company from inception, we explore disruptive technology to showcase the value and impact it can have on our customer's businesses. As technology emerges, we're committed to ensuring we explore the latest technology in a repeatable and relevant manner.

Set up in 2018, our Innovation Labs develop innovative solutions and proof of value for customers to ensure Version 1 remain on the forefront of disruptive technology. With an annual investment of £1m into our Innovation Labs, explore past, present and future projects that our dedicated team have been working on.

ARTIFICIAL INTELLIGENCE

BLOCKCHAIN

CHATBOTS

INTERNET OF THINGS

ROBOTIC PROCESS AUTOMATION

VIRTUAL AND AUGMENTED REALITY

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About Software
Asset Management

VERSION1.COM/SOFTWARE-ASSET-MANAGEMENT

SAM Practice Overview

Vendor Specific License Consulting

- License Audit Defence
- Oracle ULA Lifecycle
- Microsoft EA & CSP Lifecycle
- IBM ELA, ILMT Management

Cloud Licensing & Management

- Cloud Readiness
- Cloud Transition
- Cloud Management
- Cloud Economics
- FinOps

Software Asset Management

- Processes & Methodologies
- SAM 4D based on ISO 19770 principles
- ITIL certified IT Service Management Staff
- Multi-Vendor

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SAM Practice Services – Our **Deep** License Expertise

Best In Class Independent Expertise

Hundreds of customer engagements from all sectors & geographies over last 19 years.

Deep Licensing Expertise

200+ combined, years experience of license consulting.

Breadth of Skills

Technical, commercial, contractual, SAM.

Broad Technical Licensing Expertise

Cloud, enterprise agreements, audit defence, virtualisation.

Client Outcomes First

Average discovered risk $7.6M * Average risk reduction of 82% * High ROI - Not motivated by license resell.

Tool Agnostic

We don't sell SAM tools. We use existing customer tools (as appropriate) as part of our engagements.

Enterprise Software Vendor Agnostic

Breadth of skills across Oracle, Microsoft, IBM and others.

* Per Engagement

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SAM Practice Services Overview

What **Business Objectives** do we address? What **Problems** do we solve?
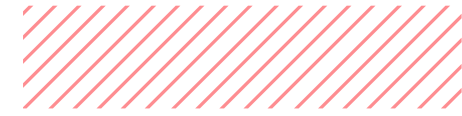
Complexity

- How do I understand/manage our software licensing in a complex changing environment?

- Help me understand how the latest license updates affect my estate?

- What are the licensing implications of a proposed infrastructure/architecture change?

- How does this merger/divestment/business change impact my license agreements?

Risk

- How do I avoid the reputational damage of non-compliance?

- How do we avoid unbudgeted spend from software vendor audits?

- How do we minimise the resource impact of a vendor audit?
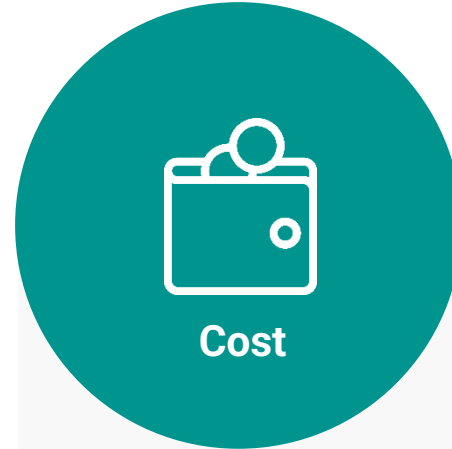
Cost

- Are there any opportunities to save cost within our software estate?

- How can we make the most of/re-use what we already own?

- Are we using everything that we own?

- Will this proposed change allow us to reduce our OPEX?

- Are there any benefits for us in moving to the latest metrics and price structure?

Vendor Relationship

- How do we maintain a strong vendor relationship?

- How do we achieve best price?

- How do we achieve flexible terms to allow for future business change?

- How do we gain vendor insight?

- When is the best time to buy? Do we need to buy?

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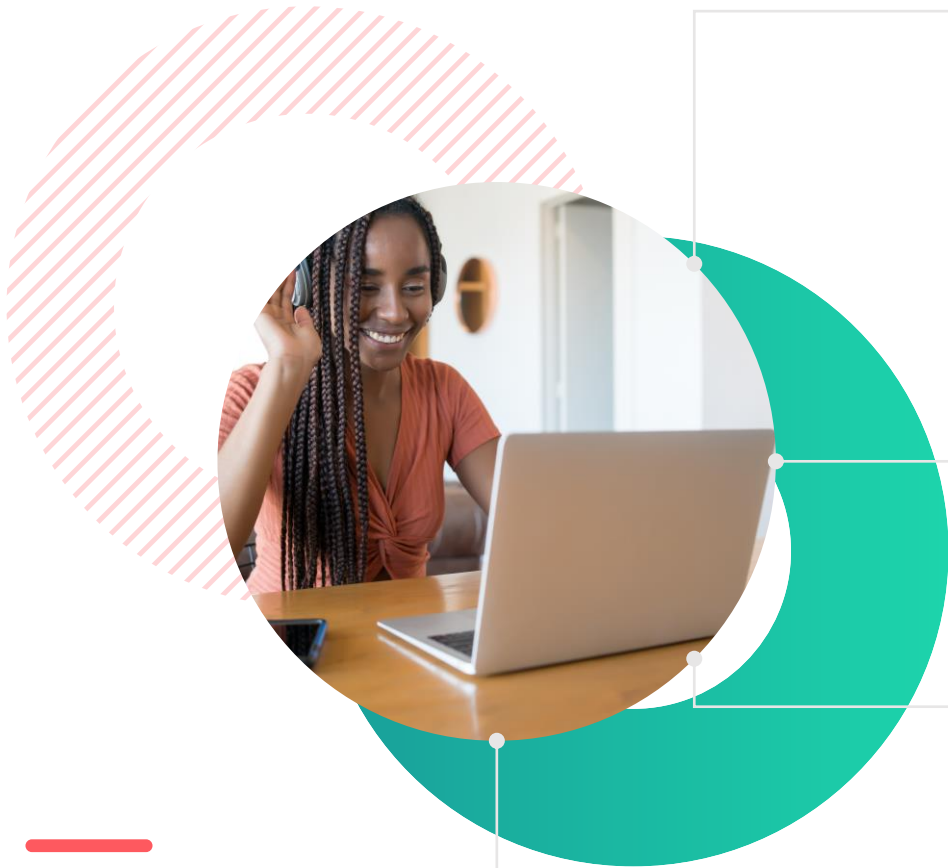
Benefits We Deliver

Reduce Business Risk
Through license compliance management.

Reduce Unnecessary Spend
Through effective SAM methodologies.

Improve IT Efficiency & Productivity
By outsourcing specialist licensing skills.

Improve Cloud Adoption Business Case ROI
Through effective right-sizing of license estate before, during & after transformation.

Improve Cost Control
Through effective buying strategies.

Improve Vendor Relationships
Focus on long term engagement strategy avoiding confrontational audits.

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Software Asset Management

Service Definitions

VERSION1.COM/SOFTWARE-ASSET-MANAGEMENT

SAM Assessment & Diagnosis

Service Descriptions

Version 1's License Management Assessment and Diagnosis service is a rapid, high value engagement designed to help an organisation determine their current risk profile and opportunities related to the management of software assets. The assessment is based around a maturity assessment against ISO and ITIL SAM standards.

The outcome of an engagement is a risk and opportunity assessment that identifies high level potential cost savings, cost avoidance and risks. Typical areas of risk assessed are audit, non-compliance, unbudgeted spend, 3rd party outsource dependencies and a general risk assessment. For example, using this service during planning for migration to cloud, virtualisation or refresh projects, the assessment would provide recommendations on risk mitigation and benefit optimisation.

The assessment can also be used to help support the creation of business cases for wider SAM programmes and provide an approach and high-level roadmap. This service is often used as a precursor to SAM projects, out-sourcing tools selection, cost reduction programs, vendor audit threats, infrastructure refreshes, virtualisation and cloud programs.

The assessment is based on the four areas of our Capability Maturity Model (CMM) and can either cover an overall assessment of all four areas or it can be focused on a subset that aligns to a particular customer need. Where possible we encourage a holistic approach as there are interrelationships between the 4 dimensions that can be used to drive maximum long term value.

The four areas of assessment are:

Cost management of software assets – including identification of potential cost savings.

Compliance – which can include an assessment of audit readiness and identify potential compliance risks.

Software purchasing – are current contracts fit for purpose and what are the implications of planned business changes.

Vendor relationship – an assessment of how well the software vendor relationships are managed.

The assessment follows a structured method, utilising standard templates and checklists, resulting in a final report delivered and presented back to the customer at the end of the engagement.

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SAM Assessment & Diagnosis

Key Benefits

Cost saving
Identification of cost saving opportunities through optimisation of software estate including RAG analysis identifies cost effectiveness of current contracts.

Risk mitigation
Identification of potential compliance risks with proposed mitigation actions.

Process improvement
Assessment of current procurement, compliance, cost and vendor management using CMM including identification of improvement areas.

Improved information
A consolidated view and summary of current contracts covering rights granted, constraints/dependencies, non-standard terms, risks/issues.

Pricing

This service is typically delivered on a fixed price/fixed scope basis priced from £10,000 to £40,000 depending on scope and complexity.

Deliverables

Assessment 'Diagnosis' Report
A summary of the information collected in workshops and interviews covering,
- Statement of engagement scope & objectives and key customer objectives in relation to SAM.
- Recommendations and suggested next steps covering, potential for support cost savings, possible compliance exposures and financial implications, potential risks and issues, potential future opportunities for cost optimisation, structure and shape of further phases of the service.

Support Cost 'RAG' Analysis
A spreadsheet based report showing contracts and support data listed by product line containing Product, ID, Quantity purchased, List purchase price per unit, List support price per unit, Theoretical renewal value, Discount calculated and RAG Rating. Identification of potential opportunities for cost reduction within this report.

License Contract Baseline Report
Catalogue of all license contracts and related paperwork have been provided/reviewed detail. Summary of areas where license contracts and related paperwork have not been provided/reviewed in detail. Inventory of all license entitlement identified. Summary of key contract attributes including,
- Entities covered, Rights granted, Constraints/dependencies, Non-standard terms and Risks/issues.

Capability Maturity Model (CMM) Assessment
A visual depiction of customer's current SAM maturity levels and target maturity levels against four dimensions - Vendor relationship quality, Compliance management, Procurement best practice, Software cost management. A set of recommendations and actions for increasing customer SAM maturity where current levels fall below desired target.

SAM Managed Services

Service Description

Version 1 Control is the market leading Software Asset Management (SAM) service. Built upon the consultative experience and expertise of the License Optimisation team, its aim is to control costs, optimise value and ensure compliance on an on-going basis. A recurring SAM process is the best way to extract maximum value from your existing investment, avoid unplanned or unnecessary license costs, and mitigate the risk of reputational or relationship damage caused by non-compliance.

The Version 1 Control SAM service consists of elements from the offering catalogue as follows:

- **Discovery** – Usage and entitlement data is analysed for software products in scope during Discovery. Detailed gathering of usage data is achieved using Version 1's Discovery toolset, any suitable in-house tools, manual analysis or a combination of these methods, dependent on needs.

- **Baseline** - After usage and entitlement changes are documented in the Discovery phase, Baseline identifies the optimal licensing model for the current usage as well as identifying discrepancies against the Inventory Balance (the inventory balance is an on-going record of existing usage and entitlement, based on known change.) This process also aids the management of shelving and recycling licenses across your organisation to maximize the value derived from software investments.

- **Optimisation** – As a result of on-going estate changes or the result of baseline, license requirements may change. Optimal management of change in license use can save overspend. Future plans and business objectives are considered in detail and are used during Optimisation to create recommended actions for a future-proof, optimal license position for the business. Business growth, M&A, additional projects, systems redesign and migration to new products are just a few of the events that can affect the final recommendations during Optimisation which form a basis for Resolution.

- **Resolution** – Where end user staff gains advice from, participate in, or are represented by us during any necessary vendor negotiations. Provision of on-going contract support and optional deal execution of the agreed outcome are also available.

- **Respond** – On-going support and advice, ensuring rapid response to the license implications of business and technology change. Support service to answer ad-hoc license, contractual queries and access to our pool of licence experts.

- **Inform** – Continual service, providing inventory balance statements and dashboard reporting including details of cost savings, renewal notifications and implications of vendor license changes. Knowledge sharing with relevant end user staff.

SAM Managed Services

Key Benefits

Validation of license types and grants
Determining the usage rights associated with current and proposed entitlements.

Determining license need
Validating actual requirement for license, aided by recycling methodology.

Modelling
Provision of commercial optimisation models.

Opportunities
Determination of commercial savings potential.

Proposal review
Measurement of fitness of purpose.

Migration advice
Review of proposed and alternative license migration potentials.

Cost management
Review, verify and optimise current costs.

Governance
Ensure transparency, maximise value, deliver policy, process and procedure.

Compliance
Support during M&A activity, highlighting SAM control levels, advising during audit activity.

Purchasing advice
Purchasing effectively, optimising timing and content of purchases, negotiation support.

Entitlement knowledge
Determining the extent of current and proposed entitlements.

Determine usage
Understanding what has actually been deployed.

Fit for purpose
Commentary on existing entitlement and usage.

Compliance report
Understanding how entitlement and usage come together to create a licensed position - highlighting areas of concern or future savings potential.

Basis for BAU SAM
Helps provide a firm foundation from which to launch and maintain best of breed software asset management

Semi Auto discovery overhead
Low impact and requires minimal intervention, resource and knowledge from existing staff.

What-if
Determine compliance position, shortfall or surplus based on client's potential business or technical change.

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SAM Managed Services

Deliverables

Discovery and Baseline Service – Inventory Balance

Once a definitive product footprint has been calculated (and any compliance or non-optimisation issues resolved), it is important that the client maintain on-going, continually optimised control of their position. Tracking usage will combine manually declared changes as well as a regular (timing to be determined with client) single audit carried out during the service period. Core to the on-going asset management service is an Inventory Balance which records license utilisation and entitlement.

- As a combined service, the above elements provide the following business benefits;
- Reduced risk and increased governance as a result of producing and maintaining an on-going view of compliance for software products.
- Ability to maximise use of available Company licenses through software 're-use' or recycling, utilising the on-going license Inventory balance.
- Optimised, fit for purpose, best-value product sets.
- Support, advice, guidance and representation of end user in any discussions or negotiations with vendors.

Deliverables (depending on scope/size of engagement)

- Commercial Models.
- Existing documentation review.
- Vendor Proposal review.
- Migration summary.
- Regular service dashboards.
- Verification audit report.

Compliance Report containing detail of:

- Current entitlement.
- Current usage.
- Entitlement commentary (based on contractual documentation, assumptions and experience).
- Usage commentary.
- Impact of potential commercial or technical change.
- Compliance position.

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Version 1 SAM4D Overview

A complete lifecycle management service for software asset management, helping customers maximise investment return, minimise risk and ensuring peace of mind.

We define, design, develop and deliver world class software asset management services to enterprise customers across the globe. We have over 10 years' experience running software asset management and license consulting services in the enterprise market. We are technology agnostic, providing a modular plug & play approach to each set of unique customer requirements.

We can provide packaged processes and procedures, tooling platforms, expert consulting and managed services for multiple software publishers. Coupled with Version 1's experience in operating and managing enterprise class, custom applications and services that are the differentiators to our customers businesses, we offer a complete and comprehensive service that outclasses the competitors in terms of flexibility and breadth of service whilst remaining small enough to provide a personal service not available from the sectors larger players.

What is Version 1's SAM4D?

Version 1 SAM4D is a service wrapper that binds together all the Version 1 delivery components that comprise an end-to-end software asset management and license compliance service.

Version 1 SAM4D is an evolution of our tried and tested software asset methodology with over ten years of evolutionary development. SAM4D will give our customers full control of their software license estate ensuring confidence in their compliance position. Designed to be modular and progressive SAM4D exposes all the components necessary to build and execute a modern software asset management (SAM) function in our customer's business.

SAM4D has four distinct phases, each phase covers an important evolution in the customer's implementation of a SAM function.

The distance a customer has travelled on their journey to a mature SAM implementation will govern their entry point into the SAM4D service catalogue. The phases are re-entrant and can be fully or partially implemented depending on the customer's SAM maturity.

SAM4D Phase Relationships

Define – The customer's goals

Whether your SAM journey is just beginning or is well advanced, our experienced consultants can help you understand the components you will need for complete software asset management. We will workshop with your key stakeholders to execute a requirements analysis and help you understand the components of SAM4D that you will need to implement.

Execution of this phase will always be required. Without this phase it will be impossible for our team to ascertain precisely what you want and/or need. Your end-goals for how complete (and therefore, complex) your SAM function will be governing all three further phases.

Design – The optimal solution

Armed with an understanding of your desires and goals for SAM4D we can cherry-pick the most appropriate components of our methodology to complement your existing technology and processes.

Each customer has a unique combination of software products from different publishers. Couple that with varied skillsets, technology platforms and overall SAM experience and you have a complex set of variable components.

By taking the time to understand your desires in the Define state we will be able to design a bespoke set of components and the necessary interfaces required to integrate all the components.

It may be that you have an existing repository for storing SAM data, or that you have developed internal processes for operating your SAM function. No problem for us, we can simply replace the equivalent component in our implementation architecture.

Greenfield site or No existing components?

We can provide you with off-the-shelf fully documented processes and procedures that encompass the best of industry expertise with our own hybrid service components to provide the complete suite of policy & procedures coupled with our own technology platform to execute a modern software asset management function in your business.

Develop – Customised integration

The integration phase builds on the Design phase and enables us to define data exchange and acquisition touch points, perform repository configuration for your chosen publishers and document their specific SAM architecture in an easily accessible enterprise web technology.

We use a cloud-hosted enterprise wiki to provide a set of online dynamic templates and interactive process documentation which is updated and configured for each unique customer configuration.

Deliver – Proactive and complete SAM service

In a constantly changing software landscape SAM is an on-going process. Our team will track both your software entitlement and usage data allowing an on-going compliance position to be maintained on your behalf. With your compliance position always available, we can truly optimise your license usage and enable advanced SAM processes such as license recycling and budgeting for new project requirements.

The Deliver phase of the service is the one that most customers will identify with as it includes the execution of the steps to implement and operate a SAM service.

SAM4D Phase Relationships – At a Glance
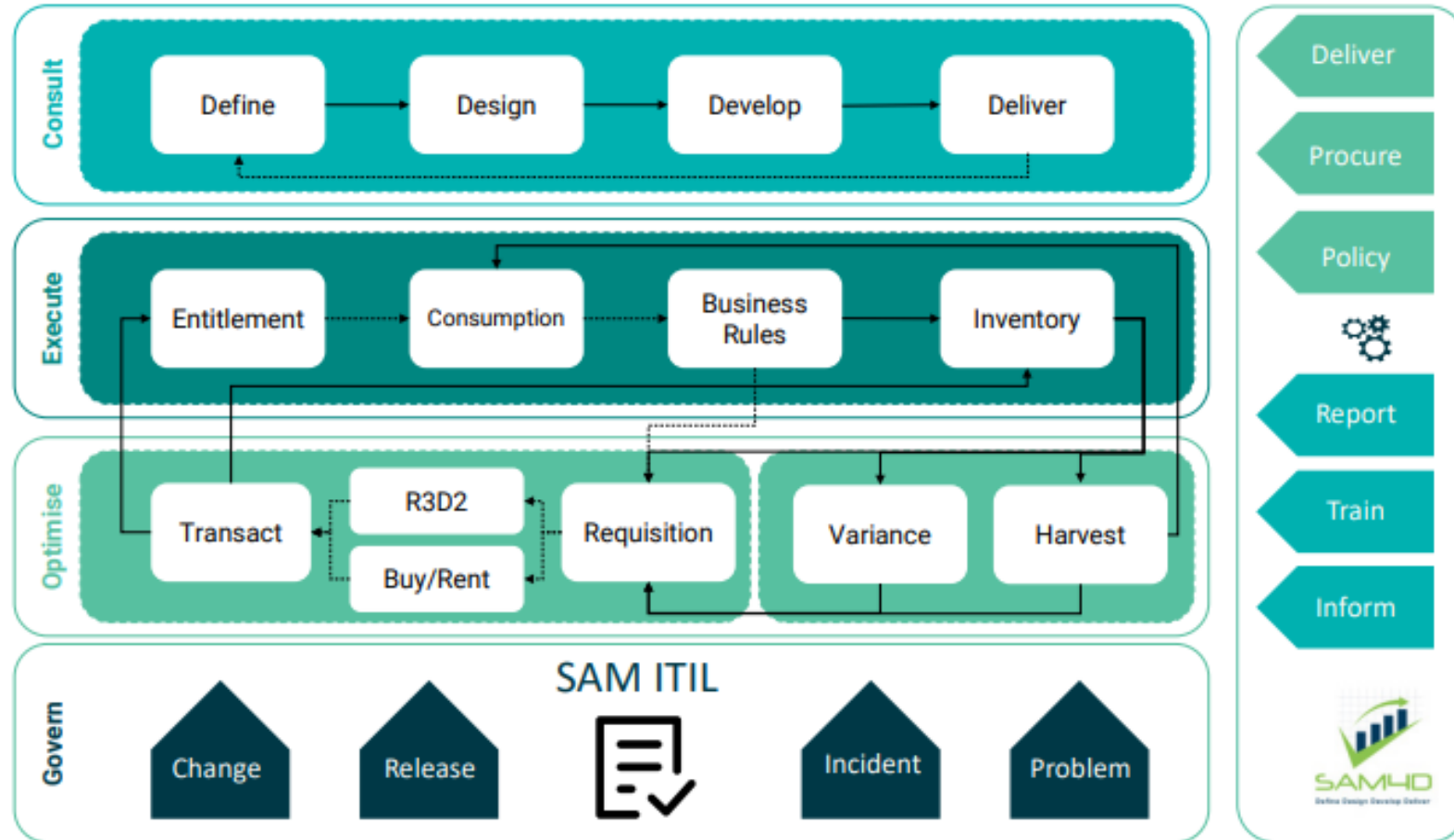
SAM4D Phase Relationships

Key Benefits & Deliverables

Benefits

Financial security

The complexities of managing software across an organisation make controlling costs a big challenge. Implementing a good SAM function controls costs with standardisation throughout the software life cycle. You can secure the information needed to choose the most cost-effective licensing programs, provide better IT forecasting for budgeting, and receive tax benefits associated with software depreciation.

Volume discounts for better price points

SAM can help you save when purchasing licenses, improve relations with software resellers, and give an advantage in future negotiations. These benefits and others are possible because a fully implemented SAM function gives a better understanding of what types of licenses—and how many— the organisation has purchased and deployed, and what is actually in use.

More liability control

A good SAM function helps avoid financial penalties and legal costs by ensuring that licenses are compliant, and helps prevent any potential damage to reputation that could arise from a lawsuit. SAM can also help achieve compliance with government regulations that require strict standards of IT governance and controls.

Good corporate governance

Effective corporate governance begins with two basic steps: identifying the risks facing the business, and controlling and mitigating those risks before they can have an impact. SAM can help identify business and compliance risks associated with software management (or lack thereof) and establish a set of well-defined best practices that help ensure consistent management of these assets throughout your organisation.

Increased employee satisfaction

A good SAM function will give employees the right tools they need to do their jobs. Trouble-free software and IT systems that function as they should will result not only in increased efficiency, but also in better overall employee morale.

Smoother operations

An entire organisation runs better with SAM. Initially, by providing better automation and standardising processes to help reduce complexity, SAM optimises software and IT resources and lets you focus on running their business. Infrastructure optimisation can take your business from a non-managed reactive state to a proactive, optimized, and dynamic state.

Reduce/eliminate waste and redundancy

Overlapping, non-integrated, and outdated applications are just harder to manage. SAM gives you the information they need to make the best use of their software assets and to pay only for what is used. Thorough and ongoing reconciliation can reveal software overlap, as well as software that is no longer in use and can consequently be retired but is still being maintained. SAM therefore enables you to reduce/eliminate maintenance plans and additional fees on software they no longer use. *Always check license agreements before transferring software. Certain agreements may limit the transfer or redeployment of software.

Better market position

SAM can help a business gain the competitive advantage it needs in the marketplace. Up-to-date licensing and an extensive, comprehensive documented media library can result in faster, easier processes and streamlined software functionality throughout the organisation; both with day to day activities and in times of mergers and acquisitions.

Increased long-term business value

Implementing SAM can increase an organisation's agility and enhance its future value by ensuring that they make strategic use of resources in times of changing business conditions. With consistent and effective SAM practices in place, a business is more efficient and can respond quickly to market conditions and opportunities. Following the best practices in your SAM function results in better information for decision making and a higher degree of operational excellence; ultimately driving long-term business value.

Flexibility for the future

SAM gives better insight into future software needs and provides a scalable foundation for growth. Instead of buying all the newest software and updates available, the business will be able to decide exactly what software is needed and when it will be needed.

Deliverables

- Design/Mobilisation report – detailing requirements and timescales,
- SAM Service process flow, success criteria and deliverables.

VERSION 1

Software Licence Consultancy

Service Description

During the course of a normal SAM lifecycle and service, specific one-off events may require specialist in-depth expert licensing advisory services. Events that trigger such requirements may include specialist high value license agreement negotiations, such as Oracle Unlimited License Agreements (ULA), Enterprise License Agreements (ELA), complex negotiation disputes, major vendor re-negotiations, Microsoft Select or Enterprise Agreements (EA) and migration or transfer of licenses e.g. the recent Crown agreements for SAP, Oracle and Microsoft. Version 1 has deep expertise in these complex high value vendor scenarios.

We have been pioneers of internal software markets, license pooling and cross charging in highly complex, multi country, global data centre, multi operations in high seat number situations for Oracle and Microsoft, across multi-vendor apps, database, middleware, operating systems and more. We have demonstrably and consistently yielded multi-million pound savings through cost avoidance, cost reduction and license pooling mechanisms, renegotiation and license restructuring. Our experts are used to interface into legal teams in dispute situations, as input into negotiation teams for insight and best practice, sometimes to front negotiations to give insight into vendor approval regimes and to share knowledge into the art of the possible and avoid the pitfalls of complex dynamic license and technical support situations.

Following an audit or compliance assessment, a client may find that entitlement is insufficient to cover current usage.

Alternatively, there may be a surplus or mismatch of licenses against current and future usage projections. Several options may be available to resolve such situations, and this service will help determine the best value solution for the client based on needs.
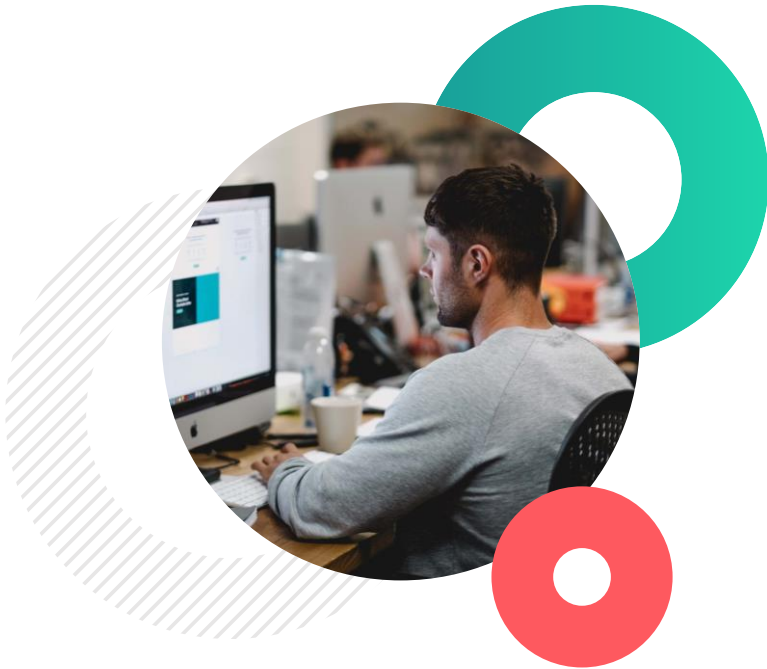
No organisation remains static for long and the optimal management of change in software license use can save overspend that can account for a large proportion of an IT budget. Future plans and business objectives are considered in detail and are used during an optimisation exercise to create recommended actions for a futureproof, optimal license position for the business, covering such events as business growth, M&A, systems redesign and migration.

During the exercising of optimal license models and positions our consultants use their extensive negotiation experience with software vendors to advise and prepare you for negotiation, or even perform the negotiation on your behalf. This can create the optimal balance between costs and license flexibility with a contract that covers all your needs.

We can also execute and manage any necessary license transaction and commercial and contractual administration.

VERSION 1

Software Licence Consultancy

Key Benefits & Deliverables

Key Benefits

- Validation of license types and grants: Determining the usage rights associated with current and proposed entitlements.
- Determining License need: Validating actual requirement for license, aided by recycling methodology.
- Modelling: Provision of commercial optimisation models.
- Opportunities: Determination of commercial savings potential.
- Proposal review: Measurement of fitness of purpose.
- Migration advice: Review of proposed and alternative license migration potentials.
- Cost Management: Review, verify and optimise current costs.
- Governance: Ensure transparency, maximise value, deliver policy, process and procedure.
- Compliance: Support during M&A activity, highlighting SAM control levels, advising during audit activity.
- Purchasing: advice Purchasing effectively, optimising timing and content of purchases, negotiation support.

Deliverables (Depending on scope/size of engagement)

- Commercial Models.
- Existing documentation review.
- Vendor Proposal review.
- Migration summary.

Pricing

- This service is typically delivered on a fixed price / fixed scope basis priced from £10,000 to £100,000 depending on scope and complexity.
- This service can be delivered on a day rate basis – by levels 5 to 7 (please refer to Rate Card).

VERSION 1

License Compliance Review

Service Description

These specific services focus on one or a small range of software vendors or categories, for instance Oracle, SAP, Microsoft products. Often such reviews are in response to a suspicion of over or under licensing, a vendor audit threat, a dispute, a cost reduction program or as a precursor to a specific vendor negotiation or proposal, for example, a Microsoft Enterprise Agreement (EA) or Select Agreement, Oracle Unlimited License Agreement (ULA) proposal or declaration agreement.

Compliance reviews generally include:

Entitlement review

Deployment assessment

Future needs analysis

Change analysis e.g. virtual or cloud migration

These activities lead to a report including identification of licensing gaps and over-licensing situations, compliance trends and process systems risks. Such services are often a precursor to outsourcing, shared services restructuring, vendor negotiation, cost reductions, infrastructure refresh, virtualisation, cloud migration adoption roll out or retirement of major systems, license optimisation and SAM solution implement programs.

During the review Version 1 ensures that the client understands their level of compliance with respect to its actual use of products. Additionally, where a client may be about to embark on tactical or strategic commercial or technical change, we are able to provide a review of the impact of such change on their compliance position.

Compliance reviews result in a compliance report which results in an initial license inventory balance, which can be fed into an ongoing SAM service.

Reviews of existing audit reports can be performed by our team of acknowledged experts.

Any existing entitlement and usage information can be reviewed, analysed, corrected as necessary, updated and commented upon as frequently as determined necessary.

Semi-automated discovery tools can be used to determine product usage, and input can be taken from the clients own operational framework tools (e.g. SCOM, SCCM) and augmented. Additional commercial and entitlement information can be provided by vendors and this would be stored and analysed within our bespoke processing engine.

VERSION 1

License Compliance Review

Key Benefits & Deliverables

Key Benefits

- Entitlement knowledge Determining the extent of current and proposed entitlements.
- Determine Usage Understanding what has actually been deployed
- Fit for purpose Commentary on existing entitlement and usage
- Compliance report
- Understanding how entitlement and usage come together to create a licensed position - highlighting areas of concern or future savings potential
- Basis for BAU SAM Helps provide a firm foundation from which to launch and maintain best of breed software asset management
- Semi Auto discovery overhead Low impact and requires minimal intervention, resource and knowledge from existing staff.
- What-if Determine compliance position, shortfall or surplus based on client's potential business or technical change

Deliverables (Depending on scope/size of engagement) Compliance Report containing detail of:

- Current entitlement.
- Current usage.
- Entitlement commentary (based on contractual documentation, assumptions and our experience).
- Usage commentary.
- Impact of potential commercial or technical change.
- Compliance position.

VERSION 1

Cloud Economics Assessment

Service Description

Version 1's Cloud Economics Assessment is a rapid comparative monetary analysis between existing on-premise workloads and Azure, including readiness levels and migration pathways. As many organisations embrace Cloud computing, acquiring Microsoft online services is becoming the new norm. Accurately assessing Azure requirements can be complex, time consuming and result in challenges such as:

Failure to identify right sizing opportunities

Poorly optimised procurement

Understanding the financial & operational impact of a migration

How to build a business case for Azure

Using a blend of data driven tooling, technical and software asset management expertise this foundation assessment supports organisations during the pre-planning stages of datacentre modernisation planning.

The high-level steps are:

1 - Discover	2 - Analyse & Verify	3 - Present & Recommend
Weeks 1-2 Initiation workshop designed to catalogue: • Business Goals • Technical requirements • Constraints • Post migration costs & considerations • Automated collection of asset intelligence	Weeks 3-4 Analyse data and categorise workloads by: • Type • Future State • Compile insights to enable rough order of magnitude estimate for migration & supplementary Azure costs • Draft findings validation Workshop	Week 5 Presentation of findings: • Readiness levels • Azure related cost estimates • Optimisation opportunities • Additional considerations & dependencies • High level migration plan including recommended next steps

VERSION 1

Cloud Economics Assessment

Key Benefits & Deliverables

Key Benefits

- Streamlined and right sized licensing
- Reduce risk of license non-compliance
- Control Cloud Costs
- Understand the financial and operational impact of a migration project
- Enable Workload Prioritisation
- Understand how to build a business case for Azure
- Gain Strategic Insight

Deliverables

- Server inventory, utilisation & readiness levels
- Identification of target Azure candidates
- Azure cost projections
- Guidance on dependencies & other prerequisites
- Outline of phased migration approach

Pricing

£900 to £1850 per person per day

VERSION 1

Microsoft SQL Server Assist

Service Description

Version 1's Microsoft SQL Server Assist service includes a combination of automated tooling, consulting and Microsoft SQL license expertise to deliver an SQL Server consolidation and capacity review.

Microsoft SQL Server capacity, performance and license management is a complex challenge faced by many organisations. Regular SQL licensing changes combined with the continual growth in data only adds to the complexity of managing environments that must support a business's need to convert large volumes of data into business insights. Without the necessary in-house Microsoft SQL licensing and capacity planning expertise, governance and data-driven insights, you could be spending unnecessarily on SQL Server.

Version 1's Microsoft SQL Server Assist service enables you to successfully address the challenges you may face with respect to the optimisation of your SQL Server estate. By combining deep technical and licensing expertise for SQL Server, Version 1 can work with you to provide independent customer-centric recommendations that reduce cost, manage risk and improve strategic planning. This service provides data driven insights associated with SQL implementations within in public Cloud, hybrid and on-premise environments.

Our Microsoft SQL Server Assist service includes the deliverables below and follows the three stages as follows:

Stage 1 – Initiate & Discover	Stage 2 – Discover & Analyse	Stage 3 - Report
• Initiation Workshop 　– Environment Q&A 　– Confirm approach 　– Tooling prerequisites • Commence data collection • Confirm proof of Microsoft licence	• Discover, capacity and performance data collection continued • Workshop on current platform • License position presentation • Workshop on target platform	• Target architecture plan • Advise on license optimisation • Monetised savings calculation • Capacity plan for servers, instances and databases

Microsoft SQL Server Assist

Key Benefits

Benefits

- Data driven insights for public cloud, Hybrid and on-premise SQL instances
- Manage risk & cost by verifying your SQL Server license position
- Validation of the overall health of your SQL environment
- Confirm current capacity & identify consolidation opportunities
- Avoid realignment of internal resources to validate your SQL Server posture
- Mitigate the risk of overspending on SQL Server licensing, hardware & support
- Leverage current & future state data insights to understand Cloud pathways for SQL Server

Pricing

£970 to £1850 per person per day

VERSION 1

Microsoft Enterprise Agreement (EA) Assist

Service Description

Version 1's Microsoft EA Assist service (either on-demand or ongoing managed service) is comprised of license advisory, baseline management and optimisation support. Microsoft EA Assist's purpose is to enable organisations to optimise Cloud and on-premise license procurement, reduce the complexity of license management, prevent license compliance risks, and support strategic planning enabling optimum Microsoft EA lifecycle management.

Microsoft's Enterprise Agreement helps organisations to respond to the rapidly changing technological landscape by enabling access to the latest cloud services and on-premises software. Microsoft EAs help organisations to streamline licensing, access volume discounts and avail of additional support benefits.

Annually, organisations must complete a Microsoft EA True-up involving the acquisition of software licenses based on consumption in the previous 12 months. Without the necessary in-house expertise, governance and data-driven insights, there is a heightened risk of both financial waste and license non-compliance where Microsoft EAs are not tightly controlled.

Our Microsoft EA Assist Service includes the deliverables below and follows four steps:

Contract Analysis	License Position Development	Current & Future State Analysis	Negotiation Assistance
Understand current and future Microsoft contractual position. Verify license entitlement and technology guarantees.	Compare license entitlements to deployment and usage data. Identify imbalances and target optimisation opportunities.	Confirm viability of license optimisation opportunities. Verify future state requirements and their associated licensing impact.	Develop right-sized true up and agreement renewal bill of materials. Negotiation strategy, formulation and assistance.

VERSION 1

Microsoft Enterprise Agreement (EA) Assist

Key Benefits

Key Benefits

- Cost Optimisation - Prevent Microsoft licensing waste and control cost
- Reduce Risk - Reduce software license non-compliance risk
- Strategic Planning - Support strategic planning and accurate software license forecasting
- Effective Resourcing - Avoid the need to allocate internal resources to manage Microsoft licensing solutions
- Improved Negotiations - Take control and optimise Microsoft negotiations
- Strengthened Relationship - Strengthen your Microsoft relationship with proactive EA management

Pricing
£970 to £1850 per person per day

AWS Control: Billing Service Optimisation

Service Description

One of the major factors driving companies to migrate to the Cloud is the minimal upfront cost of resource provisioning and an easy, pay-as-you-go operating model. These two factors, along with the disposable nature of the wide variety of available computing resources, and the ease of resizing those resources, makes Cloud an attractive alternative to large data centres.

However, balancing the demands of the business in terms of innovation and performance while delivering cost optimisation can be challenging. Organisations making a transition to the cloud or who have completed a transition will demand optimised costs but are unlikely to achieve this without an investment in operational excellence.

Version 1's AWS Control services can help you understand your monthly AWS bill and advise on how to best optimise your cloud costs. Specific actions we advise customers to undertake include:

- Identifying and suspending ghost and unattached storage instances
- Right-sizing AWS consumption elements to reduce costs to an optimal level without impacting performance
- Identifying, suspending, or terminating unused compute instances
- Uncovering opportunities to use reserved instances in order to drive cost savings from up-front investment

Constant tuning, management and automation of cloud assets is essential to achieve efficiency and cost optimisation.

AWS Control Billing Optimisation service from Version 1 gives customers access to best-practice Cloud optimisation guides and an opportunity to discuss and evaluate your cloud estate with our Cloud Optimisation experts. With Standard, Premium and Enterprise packages we have the right service to meet your individual needs.

DIAGNOSIS   MOBILISATION   DISCOVERY   RESPOND   INFORM   OPTIMISATION

BASELINE

RESOLUTION
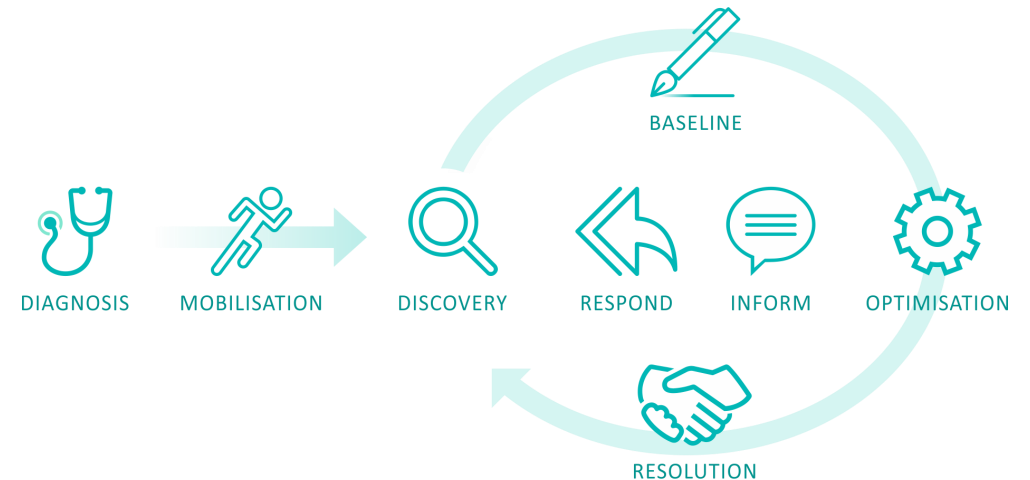
AWS Control: Billing Service Optimisation

Key Features

- Standard, Premium & Enterprise Service levels available
- Optimised AWS Billing service removes complexity
- Service Levels to match your requirements
- Savings advice helps lower your AWS bill
- Access to our cloud infrastructure experts

	Standard	Premium	Enterprise
Monthly Billing Reports	✓	✓	✓
Access Cloud Experts	✓	✓	✓
Savings Reporting	✓	✓	✓
Savings Recommendation	bi-annually	quarterly	monthly
Proactive Cost Optimisation			✓

VERSION 1

AWS Control: Billing Service Optimisation

Key Benefits

Benefits

- Control your AWS bill
- Optimised architecture guidance
- Evidence of consumption
- Predictable cost planning

Version 1 is a leader in Enterprise Cloud services and was one of the first AWS Consulting Partners in Europe. We specialise in migrating, running and optimising complex enterprise workloads in Public Cloud. We are trusted by global brands to deliver IT services and solutions which drive customer success. Our 1200 strong team works closely with AWS to help our customers navigate the rapidly changing world of IT.

Pricing

- Standard = Free
- Premium = £6k/pa
- Enterprise = £15k/pa + software cost

FinOps: Cloud Cost Optimisation

Service Description

Version 1's FinOps Assessment is a rapid discovery analysis of your cloud commitments, your FinOps maturity and your desired approach to cloud cost management. Using a blend of data driven tooling, technical and software asset management expertise this foundation assessment supports organisations start their journey into the Crawl, Walk, Run agile FinOps approach to enterprise cloud cost optimisation

Key Features

- 5-week foundation assessment
- Initiation workshop
- Automated collection of asset intelligence
- Draft findings workshop
- Presentation of findings
- High-level strategy plan
- ISO20000 and ISO27001 Compliant Service

FinOps – Cloud Cost Optimisation

Key Benefits

Key Benefits

- Cost optimisation & reduction - Take advantage of cloud cost optimisation techniques for improved cloud ROI. Reduce ongoing spend & cost through improved cloud procurement strategy.
- Avoid unnecessary spend - Take advantage of competitive pricing & avoid expensive last-minute spending.
- Accurate cost planning - Spread the cost of cloud accurately across the appropriate business units.
- Accurate spend forecasting - Predict peaks & troughs of cloud resource & therefore spend.
- Data & insights to evidence consumption - Make informed decisions through the availability of data & insights on your cloud consumption.
- Predictable cost planning - Take advantage of competitive pricing by resource reserving.

VERSION 1

Additional Information

Best Practices

Information Security Management System

Version 1 recognise that the relationship between information security and IT service management is so close that we implemented an Integrated Management System (IMS) that has been certified to ISO 27001:2013 and ISO 20000-1:2011 with matching scopes. Version 1 is also certified for Cyber Essentials Plus.

The Version 1 IMS is based on the guidance provided in the International Standard for the Corporate Governance of IT (ISO/IEC 38500) and the International Standard for Risk Management (ISO 31000).

The Version 1 IMS is audited every 3 months, alternately by internal and external auditors. An Information Security Officer along with the IT Governance Committee are responsible for maintaining the IMS, as well as providing advice and guidance on policy implementation

SAM Consultancy Delivery Approach

Version 1 Control is our market leading vendor targeted Software Asset Management (SAM) methodology which underpins all our service engagements. Providing structure and processes to help organisations defend against audits, right-size licensing costs and achieve compliance, the methodology is designed to then maintain this optimal position on an on-going basis.

DIAGNOSIS

MOBILISATION

DISCOVERY

BASELINE

RESPOND

INFORM

OPTIMISATION

RESOLUTION
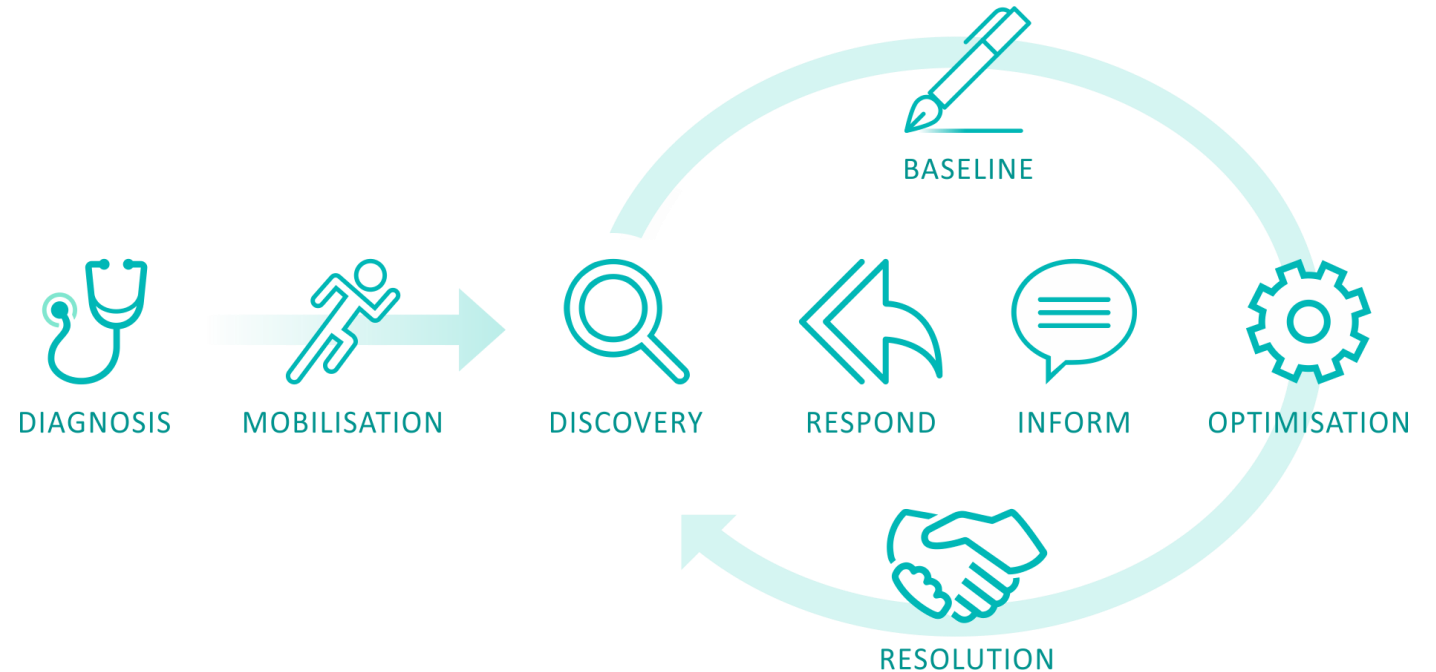
VERSION 1

SAM Managed Services Methodology

The Version 1 SAM offering is a consultancy driven lifecycle management service helping customers maximise financial investment return, minimise risk and cost, and ensure peace of mind. Version 1's bespoke SAM Managed Service is for organisations looking to achieve realistic results and measurable ROI from their software licensing and management activities.

SAM4D acts as a service wrapper to one or more Version 1 Control services (one per vendor) within a bespoke SAM program.

The delivery of SAM4D can be solely run by Version 1 staff or integrated with your existing staff and processes.

Version 1 Control will provide an ongoing SAM service for a single vendor that the Version 1 SAM team will execute and manage on your behalf. Control 'Essentials' offers a light touch advisory service.

Breadth of Service

SAM4D
Multi-vendor Software Asset Management & License Compliance Service:

Consult
Define
Design
Develop
Deliver

Execute
Entitlement
Consumption
Business Rules
Inventory

Optimise
Transact
Requisition
Variance
Harvest

Govern
Change Controls
Software Release
ITIL V3
Processes
Incident &
Problem Mgmt.

Vendor & Technology Expertise

Version 1 Control
Enterprise Vendor License Consulting & Managed Services:
Diagnosis | Mobilisation | Discovery | Baseline | Optimisation | Resolution | Respond | Inform

Oracle
ULA
Audit Defence
Virtualisation
Java

Microsoft
EA
CSP
Audit Defence
SQL

Other Vendors
IBM
VMware
RedHat
Audit Defence

Cloud M²
Cloud Assessment
Cloud Right-sizing
Cloud Cost
Optimisation & Management

VERSION 1