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SAMPLE DELIVERABLE · ILLUSTRATIVE DATA

IT Asset Management Capability Assessment & Roadmap

Prepared for a regional US commercial bank (“the Bank”)

This document illustrates the structure and depth of a Killarney Consulting assessment deliverable.
The client is anonymized and all scores, names, and figures are illustrative.

The Bank tracks assets — it does not yet manage them

OVERALL MATURITY

1.8

of 5.0 · “Repeatable”

Processes exist and recur, but depend on individual knowledge rather than documentation, tooling, and governance. Target: 3.5 within 24 months.

Assessed across 20+ process activities in four dimensions

Governance — 1.4

No ITAM charter, steering committee, or documented scope. Risks are known but untracked. Reporting measures inventory, not performance.

Process — 1.3

Lifecycle processes are informal and manual. License validation is absent from procurement; chain of custody is fragmented.

Technology — 1.9

Asset tool is adequate for hardware, but the SAM module is undeployed and nothing integrates — HR, finance, and contracts all move by hand.

Organization — 2.6

An experienced core team — the Bank’s strongest asset — but roles beyond it are undefined and SAM expertise is missing.

SCOPE & APPROACH

Four dimensions, assessed through people, paper, and data

1 Governance

Vision & charter, steering, target-setting & reporting, documentation and policy enforcement.

2 Process

Lifecycle activities from request & acquisition through deployment, control, reporting, audit, license handling, and retirement.

3 Technology

The tool landscape: repository, discovery, CMDB, and the integrations that keep them truthful.

4 Organization

Roles & responsibilities, staffing, skills & training, and the culture the program operates in.

EVIDENCE BASE

15+

stakeholder interviews across IT, procurement, finance & operations

1

half-day scoring workshop with process owners

20+

process activities scored on a five-level maturity scale

4

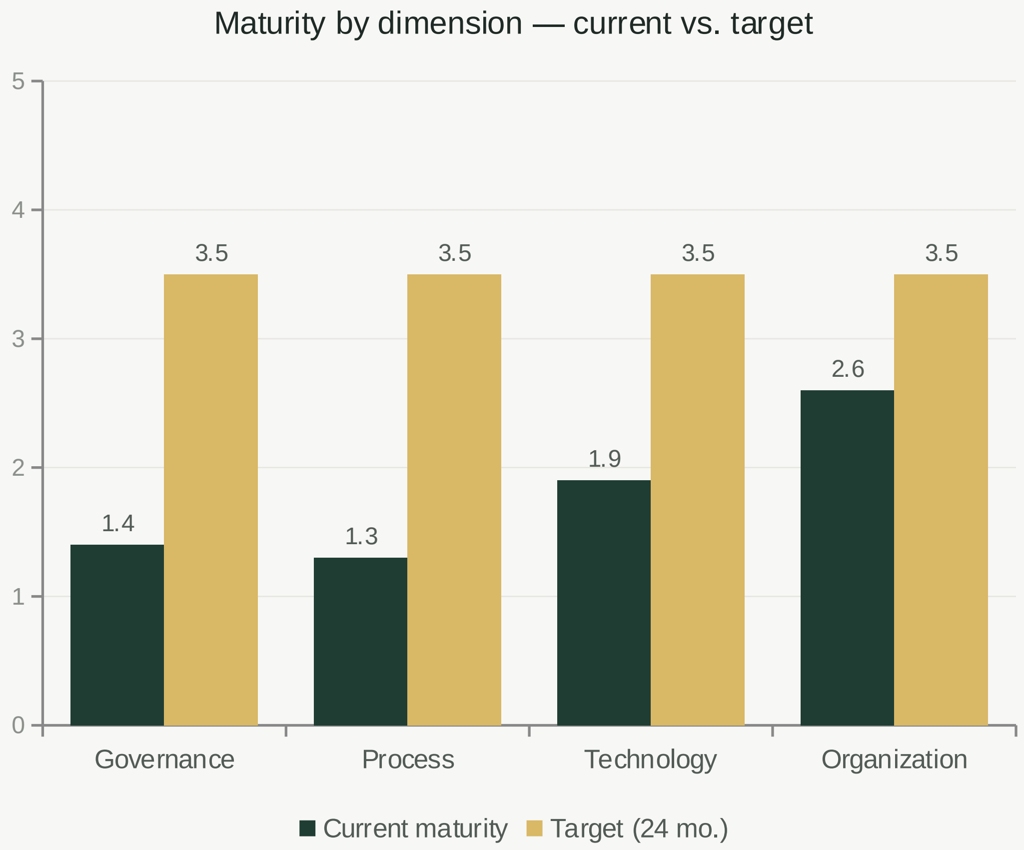
tool platforms examined, with extract-level data review

CURRENT STATE

Where the Bank sits on the maturity scale today

5	**Optimized** Continuous improvement, quantitative goals, predictive
4	**Controlled** Metrics-driven, enforced, integrated across groups
3	**Defined** Documented org-wide, consistent, tailored
2	**Repeatable** Basic & documented in places; fragmented
1	**Informal** Ad hoc, reactive, dependent on individuals

◀ **The Bank today: 1.8**



Governance: known risks, no owner

Activity	Score	Current state (evidence)	Leading practice
Vision & charter	0.9	• Cost-savings goals exist, but no end-state vision or approved ITAM charter • Function operates as an asset tracker, not an optimization capability • ITAM risks known but not documented, prioritized, or tracked	• Tactical (1–2 yr) and strategic (3–5 yr) plans documented and socialized • Charter approved by technology, procurement, security & finance
Steering	2.0	• Direct leadership values ITAM, but no cross-functional steering committee • Procurement plays a transactional role only; scope assumed, not documented • KPIs reviewed ad hoc, not used to drive improvement	• Senior steering body owns scope, plan & investment decisions • Metrics reviewed on a cadence and tied to improvement actions
Reporting	1.5	• Reporting is manual and limited to inventory counts • No trend analysis to direct attention where it is needed	• SMART metrics measured continuously for process effectiveness • Reporting confirms improvements actually institutionalize
Documentation	1.5	• Policies and processes sporadically documented • No single hub where staff can find the rules that govern assets	• Clear, current, findable documentation under change control • Changes communicated in a timely, consistent way

Software licensing is the deepest gap — and the biggest prize

Activity	Score	Current state (evidence)	Leading practice
License handling	1.0	• Licenses tracked by individual application owners in spreadsheets • No central view of entitlements vs. deployments — no license position • Entitlements and product use rights buried in contract documents • No metering or harvesting to reclaim unused software	• Central entitlement repository reconciled against discovery • License allocation managed through standard lifecycle processes • Usage trends drive re-harvesting and purchase deferral
Status & reporting	0.5	• Reports require manual effort across multiple inventory sources • A single vendor database audit would take weeks to answer	• Lifecycle status tracked centrally; discrepancies surfaced automatically • Audit-ready reporting available on demand
Asset control	0.9	• No license validation step in procurement; user-driven deployment & retrieval • Chain of custody fragmented from shipment to desk; destruction hard to audit	• Control enforced through change management with HR-event triggers • Certificates of destruction stored for rapid audit response
Tool integration	1.8	• SAM module owned but undeployed; multiple CMDBs barely federated • No automated links to HR, fixed-asset ledger, or contract data	• Asset repository integrated with HRIS, finance & ITSM tooling • Discovery normalized and reconciled into one trusted source

A three-tier operating model puts every decision in one place

STRATEGIC

Executive Steering Committee

Owns SAM scope, objectives & budget · approves policy · reviews program health quarterly. Members: IT, business units, security, finance, procurement, legal.

EXECUTIVE

Central ITAM / SAM Function

Runs license management, audit response, entitlement repository, policy & standards, contract coordination, and reporting. The single owner of the license position.

TACTICAL

Business-Unit & Regional Roles

Maintain deployed assets, coordinate with local operations, contribute specialized knowledge (e.g., regulatory requirements). Defined in the RACI — not assumed.

Success factors: board-level recognition of SAM ownership · documented decision rights at every tier · KPIs that flow up, policy that flows down

ROADMAP

Twenty-four months, three waves — each wave pays for the next

WAVE 1 · MONTHS 1–6

Foundation

- Charter, steering committee & policy set
- RACI across IT, procurement & finance
- Entitlement data gathered into one repository
- Quick win: harvest unused desktop licenses

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WAVE 2 · MONTHS 6–15

Core capability

- Lifecycle processes documented & enforced
- SAM module deployed; discovery normalized
- HR & finance integrations automated
- License position established for top 10 vendors

→

WAVE 3 · MONTHS 15–24

Optimization

- Metering-driven harvesting & purchase deferral
- Audit-response playbook tested end-to-end
- Chargeback & trend reporting to the business
- Maturity re-scored against the 3.5 target

Projected value: 10–15% of desktop software spend recoverable through harvesting alone · audit response from weeks to days · a license position finance can sign off on

NEXT STEPS

From findings to a funded program in three meetings

Review I

Validate findings & maturity scores with process owners

Week 1

Review II

Confirm quick wins and organizational readiness

Week 2

Review III

Approve roadmap, staffing model & Wave 1 funding

Week 4

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