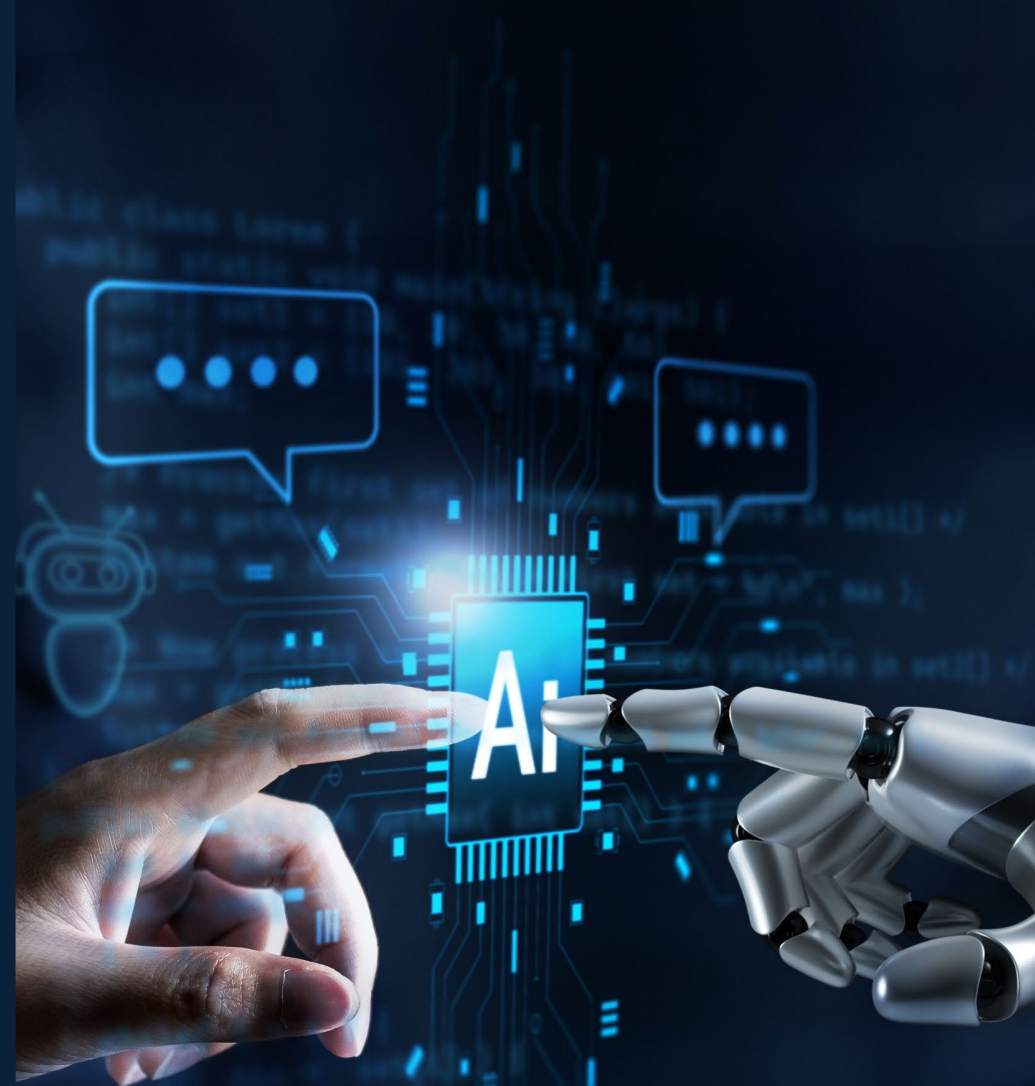




# CIO 2023: How SAM is Going to Evolve

Winning the New Game of Software Spend

Presented by: Mike Austin, CEO – MetrixData 360



# CIOs Are Flying Blind

- Multi-million-dollar renewals driven by vendor data
- 22%–38% overspend is the norm
- Real story: \$8M SQL shortfall found by Big 4 audit
- You need better visibility — not just defense



# SAM Today – Still Stuck in 2015

Reactive, audit -  
focused,  
spreadsheet -  
driven



Disconnected  
from IT,  
finance, and  
procurement



Most orgs can't  
tie SAM data to  
real financial  
decisions



Maturity gap  
= millions left  
on the table



# Market Pressures CIOs Can't Ignore

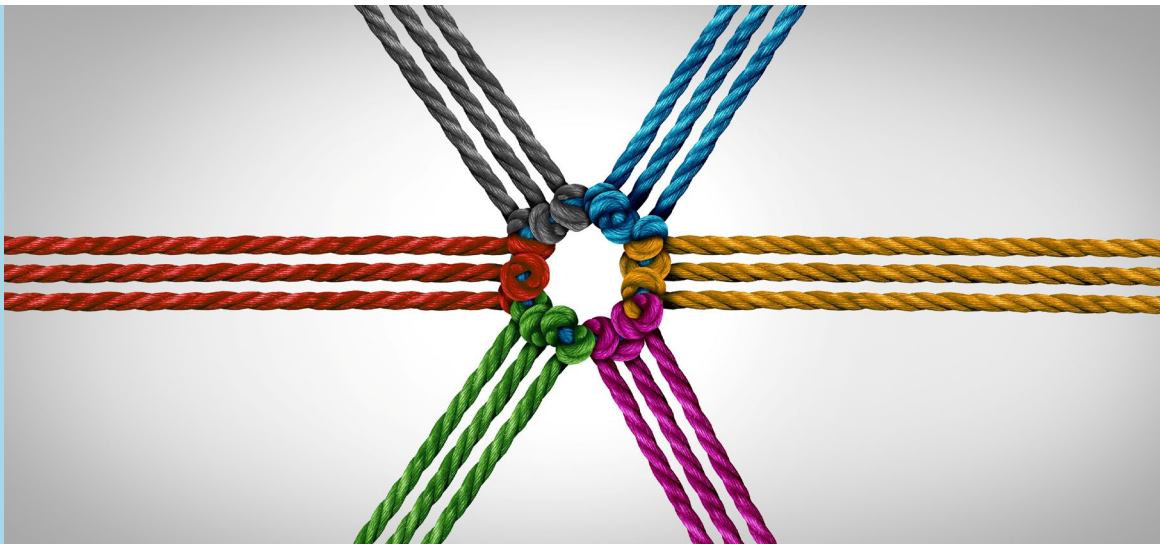
“Vendors are getting smarter. Are you?”

Vendor	Pressure Tactics	CIO Impact
Microsoft	E5, Copilot, discounts shrink	Higher baselines
Broadcom	Subscription-only, bundling	100–500% increases
Oracle	Java & OCI audits	Surprise audit risk
IBM	ILMT audit expansion	Compliance penalties
Salesforce	AI upsells, bundling	Shelfware, lock -in
SAP	RISE + HANA shifts	Future lock -in
AWS	Unattributed spend	30%+ cost waste

# The Great Convergence



- Sits between IT, Finance, and Procurement
- FinOps drives monthly accountability
- AI is altering licensing logic and pricing
- **“The tools you’re licensing are now watching how you license them.”**



# SAM in the Age of AI

SAM Isn't Just Using AI — It's Being Tracked by AI

**Descriptive:** Cleans and maps data

**Predictive:** Forecasts usage and cost risk

**Prescriptive:** Recommends licensing actions

**AI Tracking:** M365 bloat, Azure over-allocations, shelfware



# SAM Evolution: 2015 to 2030

If your SAM strategy still looks like 2015 — you're not ready for 2030.

Year	SAM Focus	Environment	Key Challenge
2015	Compliance & Audit	On-prem, datacenter	Spreadsheets, manual audits
2020	Cloud & SaaS Mix	Hybrid infrastructure	Shadow IT, tool overload
2025	Optimization & AI	Cloud-first, AI layering	License bloat, budget misalignment
2030	Autonomous Agents	AI-native IT environments	Real-time governance + automation

# Why Our Process Works When Others Fail



Built to defend AND optimize — not just produce a compliance snapshot



Aligns inventory, entitlement, usage, and strategy



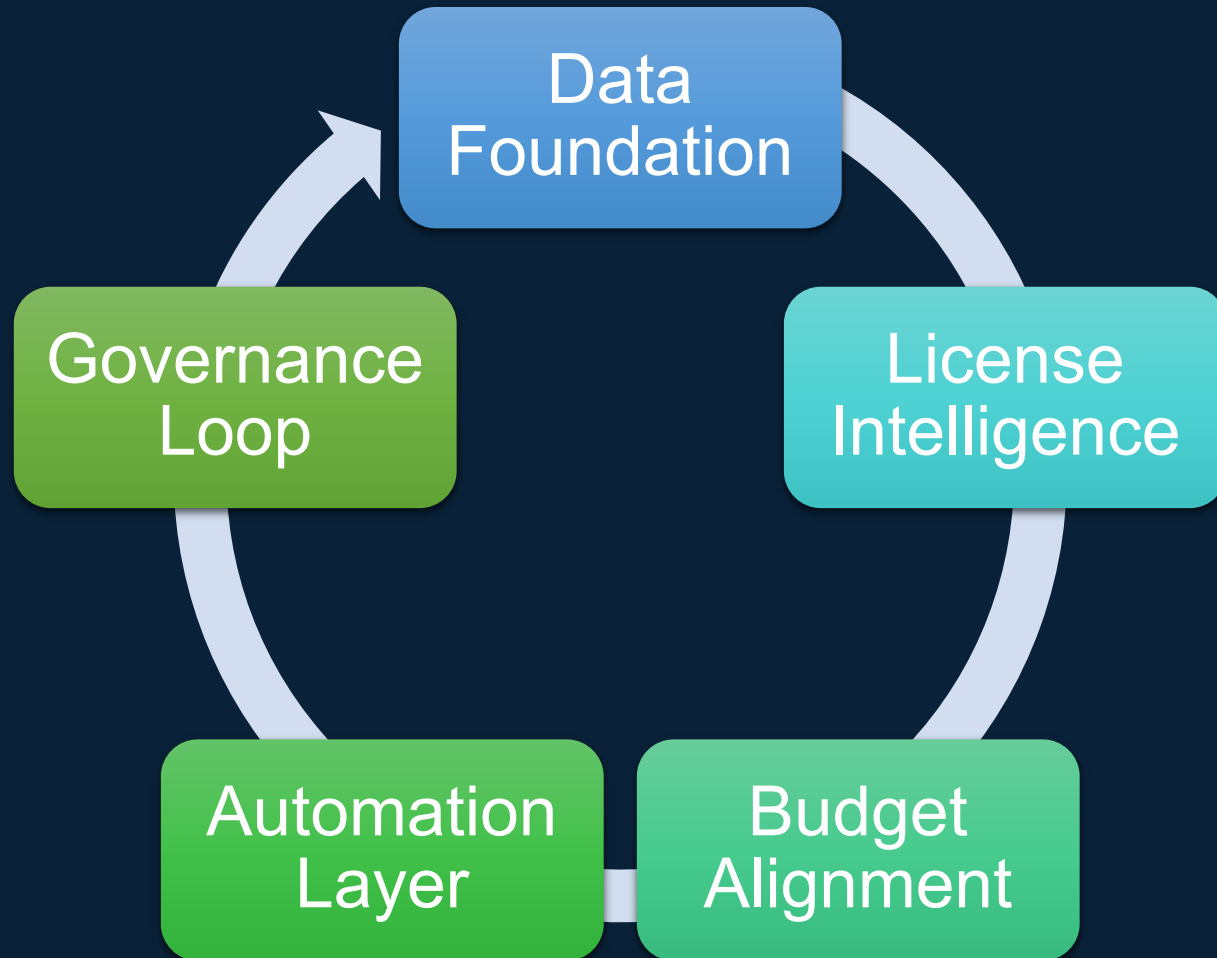
Designed to challenge vendor assumptions with defensible data



Powers licensing, budgeting, and negotiation decisions



# The SAM 2030 Framework



The Modern CIO's SAM System

# Why I Needed a Team to Catch the Blue Marlin

A few years ago, I had the opportunity to go deep sea fishing—chasing blue marlin. These aren't the kind of fish you catch on your own. You need a spotter, a captain, a deckhand, and coordination. Everyone has a role.

We hooked a massive one. If even one person had been off—we would've lost it. But because we had the right people, playing the right roles —we brought it in.

Strategic SAM is the same. You can't go it alone.

Let me show you what that SAM team looks like.



# SAM Is a Team Sport

## Strategic SAM Requires Cross - Functional Ownership

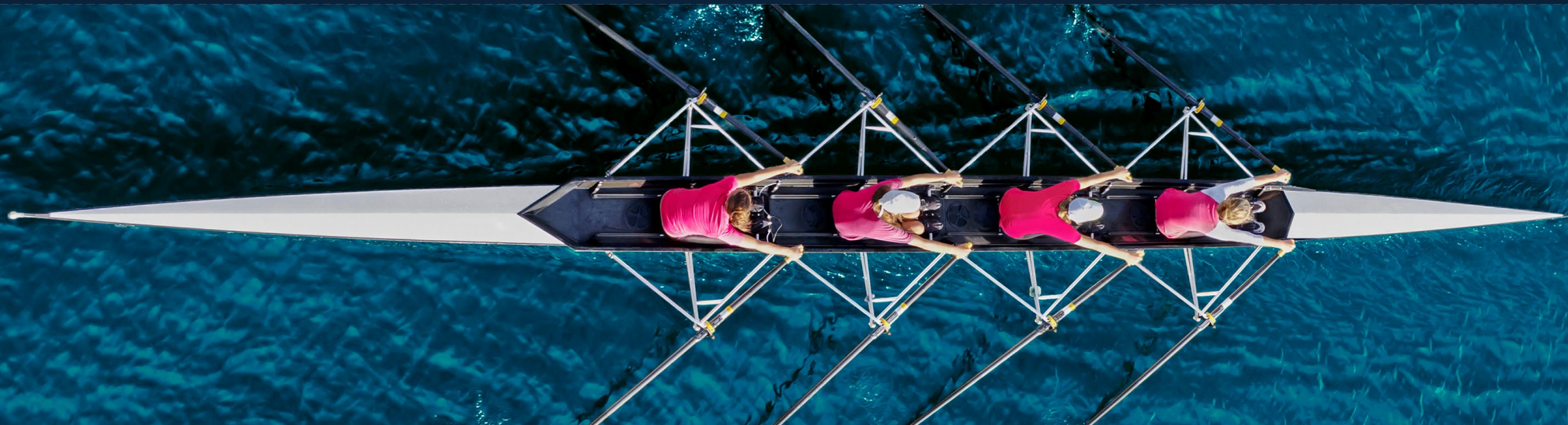
SAM isn't one person's job—it's a coordinated effort.

## Roles that need to be involved:

- SAM/ITAM Lead – data stewardship, tools, reporting
- Licensing Specialist – entitlement interpretation, compliance
- IT/Inventory – system discovery, software mapping
- Finance – budgeting, forecasting, cost validation
- Procurement – vendor negotiation, contract management
- Legal – audit defense, T&Cs, risk alignment
- CIO/IT Leadership – vision, prioritization, execution

## Making it Work

Successful programs have clear ownership, rhythm, and executive visibility.



# Lorem Ipsum Dolor

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# Real World Case Study

From \$2M Burn to \$1.5M Saved in 6 Months:

- Global firm spent **\$2M+** on Snow with Big 4 —no ROI
- We took over SAM execution
- Cleaned data, removed waste, delivered \$1.5M in savings
- Real governance, measurable results





# CIO Readiness

## Check How Ready Are You for SAM 2025?



Do you track M365 license waste monthly?



Can you predict SAM-related risk 90 days out?



Is your SAM strategy tied to finance?



Are AI licenses measured for actual usage?



Who owns SAM outcomes in your org?

# Program Management

Process Development ITIL, ISO, SAM, ITAM, HAM

## Audit Defense

## Contract Negotiation

Manual

Automate

**Populate CMDB**

- Will become the primary source of truth for your Inventory Data

**Existing Tools For Discovery** SCCM, ILMT, ADM, Excel

- Partial use of data required from tools
- Metering for Usage
- Publisher
- Version
- Physical / Virtual
- Hardware details (Processors, etc)

**Normalization Categorization in a SW Catalogue**

- How do you determine the most reliable & best source
- How do you develop when tools give different info
- How to determine actual source of truth based on vendor, rules, or audits

Vendor Expertise MSFT, SAP, Oracle, IBM, etc.

**Non-Standard**  
Licensing Metrics

**Software Contracts**

- T's & C's
- Amendments
- Use Rights

**Software License Metrics**

- SAM Tool
- Various License Metrics
- NUP, PVU, User, Device...
- Consolidated View
- ELP'S
- Reports (ITAM, SAM, etc.)

**Entitlement Database**

- Vendor License
- Statements
- Purchase Records
- PO'S
- Credit Cards
- Renewal Dates
- Financial Details

Continual process, ideally automated, however this is nearly impossible to do

# Get Your SAM 2025 Roadmap



## Book Your CIO SAM Planning Session

- 30-minute strategic SAM roadmap session
- Only 15 spots available this week
- Get your Free Microsoft EA T36 Playbook.

Exclusive for The American CIO & Cybersecurity Summit Attendees (reg \$2,500).

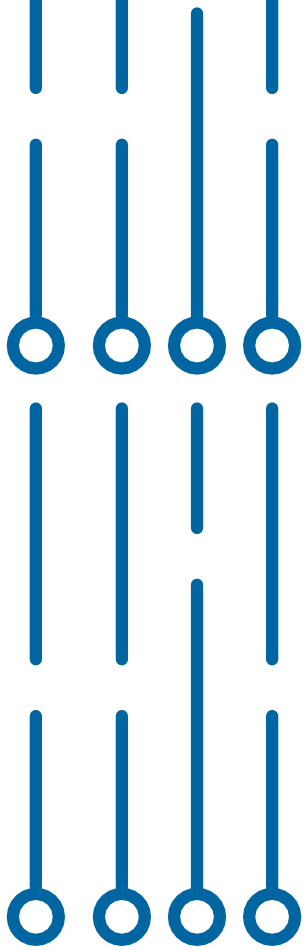


# Control or Be Controlled



“The vendors have strategy. They have AI. They have your data. If you want leverage — it starts with evolving your SAM.”

Let's build it.



**Thank You**

[metrixdata360.com](https://metrixdata360.com)

