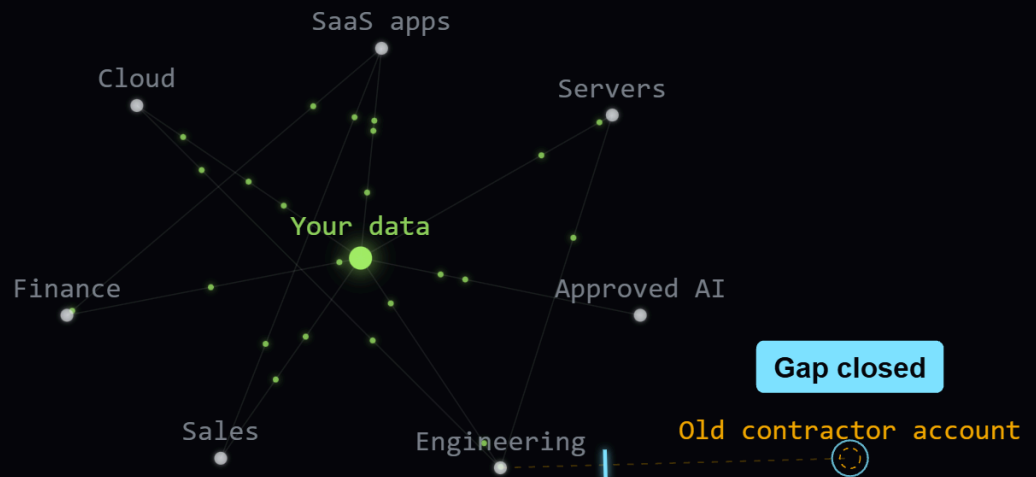




TECHNOLOGY SPEND MANAGEMENT

We set up a complete, agreed view of your technology spend (software, subscriptions, cloud, AI and licences).

Built on the recognised industry methods for managing technology and AI spend: the FinOps Framework, the FOCUS billing standard, ISO/IEC 19770 software asset management, and TBM.

We set up a complete, agreed view of your technology spend (software, subscriptions, cloud, AI and licences). Each team sees what it uses and what that costs, in units it recognises: per user, per seat, per device. Your team runs it from there, or we run it for you each month if you prefer.

1. WHY TECHNOLOGY SPEND NEEDS MANAGING, NOT JUST REPORTING

Most organisations can produce a list of what they pay for. Far fewer can answer the questions that follow: which team is that cost for, what does one user of that system cost us, and is it going up or down? The answers sit in different places. Finance holds the ledger, sorted by account codes that were never designed for technology. IT knows the systems, the seats and the devices, but not how they were paid for. Teams buy their own tools. AI adds new costs every month.

When costs are shared out by guesswork, every review turns into an argument: "I'm not paying for that, I don't even use it." The fix is agreed rules: every technology cost sorted the same way, given a unit everyone understands, and shown to the team that uses it. Once those rules exist, the picture has to be kept current, because new accounts, new tools and new staff arrive every month.

This service builds those rules with your finance and technology teams. Your team can keep them running from there, or we keep them running for you with our optional monthly service.

2. THE METHODS BEHIND IT

- **TBM** (Technology Business Management), the TBM Council's standard way to sort technology costs: by what was bought, what job it does, and who uses it. We sort your ledger's technology accounts into its categories and use its allocation methods to share costs out.
- **FinOps Framework**, the FinOps Foundation's method for running technology spend as a business discipline: its Inform, Optimize and Operate phases, and its Crawl, Walk, Run scale for how mature each part of your spend management is.
- **FOCUS**, the FinOps Foundation's common layout for bills, so every vendor's bill can be compared like for like.
- **ISO/IEC 19770**, the international standard for tracking the software an organisation owns, installs and uses, behind the licence reconciliation.

3. WHO IT IS FOR

Organisations that want their whole technology estate managed, sized by monthly technology spend:

Size	Monthly technology spend	Cost sources tracked each month
Small	Under USD 50,000	Up to 30
Medium	USD 50,000 to 250,000	Up to 60
Large	Above USD 250,000	Up to 100 per phase, one business unit at a time

A cost source is one bill, export or contract we collect and check each month. We agree the number with you when you sign, and we deliver exactly that number. If we find more while we map your estate, you choose: we re-cost for the new number, or you keep the agreed number and choose which sources to leave out.

Large organisations start with one business unit as the proof point. Once it works, we widen to further units in phases, each scoped and agreed with you.

4. HOW THE SETUP RUNS

Before we start. One or two calls to understand your size, your finance ledger, how you buy technology and who owns which costs. We send a scope document with the contract, a confidentiality agreement and our data-handling terms. Work starts when the scope is signed and the 50% setup deposit is paid.

Phase 1. Discovery and baseline (weeks 1–2). We interview your finance, IT and procurement leads and whoever buys AI, map every system you pay for, and you sign a baseline confirming the list is complete. We then report your spend, unused licences, renewals, savings and gaps, and the true cost of your AI use, and agree the plan for the rest of setup.

If you have had our cost review recently, we do not repeat it. We take its signed baseline, map and reports, refresh them to the current month with you, and go straight on to Phase 2. The scope and price reflect the work already done.

Phase 2. Your ledger, sorted (weeks 3–5). We take the technology accounts in your finance ledger and sort each one into the TBM categories: first by matching account descriptions, then by checking every suggestion by hand. Technology bought outside IT, for example on cards or in other departments' budgets, is found and included. Your finance lead validates the result. We then make it repeatable, so it runs again every month, with a change log.

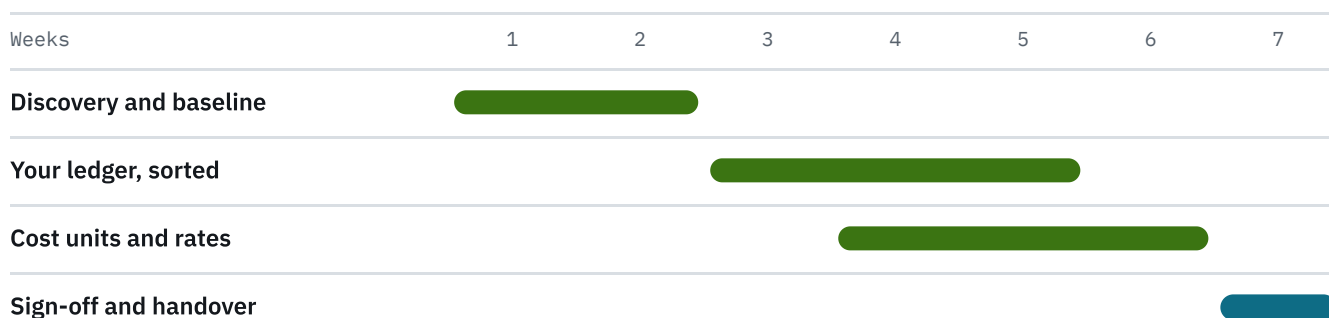
Phase 3. Cost units and rates (weeks 4–6). This is the heart of the service. In workshops with your finance team we agree how shared costs are spread. In workshops with your technical leads we agree the unit for each cost (per user, per seat, per device) and where the counts come from. We then build the rates

(the cost divided by the number of units) and the first reports showing each team its costs, and take them through two rounds of review with you.

Phase 4. Sign-off and handover (week 7). You sign off the units, rates and team reports. We take each team head through how to read their report, and set up the monthly routine: which exports arrive when, the report, and the review calendar.

Medium setups take about 12 weeks; a Large organisation's first business unit about 14 weeks. Most of the length is the time between workshops and review rounds, so your teams can do their part alongside their normal work.

5. WEEK BY WEEK (SMALL)



Smaller organisations. Medium setups take about 12 weeks; a Large organisation's first business unit about 14 weeks.

Week	What happens	Your people
Before	Scope, contract, confidentiality agreement and data-handling terms signed; deposit paid; data request list sent	Buyer; finance lead; IT lead
1	Kick-off; interviews; data arrives; system map built	Finance lead, IT lead, procurement, AI buyer (about 1 hour each); finance and IT preparing data
2	Map walkthrough; baseline signed; spend, savings and AI findings; discovery results meeting	Finance, technical leads, department heads (1 hour each); buyer and IT lead sign
3	Ledger extract cleaned, tagged and sorted	Finance lead (questions)
4	Sorting checked and validated; finance workshop on sharing costs	Finance lead and analysts (workshop about 2 hours); sponsor (validation)
5	Technical-lead workshop on units; mapping made repeatable; first rates and team reports	IT lead and technical leads (workshop about 2 hours); unit counts
6	Two review rounds on rates and team reports	Finance lead, IT lead, department heads

Week	What happens	Your people
7	Sign-off; team walkthroughs; monthly routine set up	Buyer, finance lead, IT lead, team heads
Month 1 onward	Your team runs the monthly routine, or our optional monthly service starts if you choose it	As below

6. THE OPTIONAL MONTHLY SERVICE

After setup sign-off your team has everything it needs to run the monthly routine itself. If you would rather we run it, our monthly service is an option, not a requirement. If you choose it, each month:

- your exports arrive and are checked;
- the ledger sorting is re-run, with new accounts sorted and recorded;
- unit counts and rates are updated, and teams' questions on their reports answered;
- the spend report and every team's report are refreshed;
- unusual jumps in cost are flagged, and renewals due in the next 90 days listed;
- AI cost per use is tracked against the thresholds in your scaling plan;
- savings and unused licences are followed through with the people who own them;
- you receive a one-page summary and a 30-minute review call.

Each quarter, we review governance with you: maturity scores, the system map, and whether the rules for sharing costs still hold. Medium and Large clients also receive a maturity roadmap and a forecast twice a year.

7. WHAT WE NEED FROM YOU

- **People:** a buyer who signs; a finance lead and an IT lead throughout setup; procurement and whoever buys AI for the interviews; technical leads and finance analysts for the workshops; team or department heads for the reviews and walkthroughs.
- **Data,** prepared and cleansed by your team: your chart of accounts and a ledger extract of technology spend; supplier payments and card lines; licence, sign-in and device counts; cloud and AI bills; larger contracts; headcount by team; your capitalisation policy. Our data request list says exactly what, from which systems, in what format, and by which week.
- **Each month, only if you choose the monthly service:** the agreed exports by the agreed day, and 30 minutes for the review call.

8. WHAT YOU RECEIVE

From setup:

1. **Discovery set:** ecosystem map, signed baseline, spend report, optimisation and gaps report, AI true-cost model and scaling plan.
2. **Ledger mapping:** every technology account sorted into the TBM categories, with a version and change log.
3. **Cost units and rates:** the agreed unit and rate for each cost, with how each is worked out, signed by your finance and IT leads.
4. **Team reports (showback):** each team's technology costs in those units.
5. **Monthly routine:** export schedule, report template and review calendar, so your team can run it itself.

If you choose the monthly service, each month: the monthly report and updated team reports. **Each quarter:** the governance review.

9. SCOPE

Included: the cost sources agreed at signing (up to the cap for your size); software subscriptions, cloud services, AI services and licences; the ledger accounts that carry technology spend; the legal entities and countries, business units and teams named in the scope document; the workshops and reviews above; one review round per setup deliverable, two for the units and rates.

Not included unless the scope document names them: what you do with the team reports inside your organisation (we show each team its costs; how you use that is yours to decide); changes to your finance system; carrying out the changes we recommend; negotiating with vendors; legal review of contracts; security testing; hardware, telecoms and staff costs.

Changes: any change of scope goes through a written change request, which we estimate and price and you sign before that work starts.

10. YOUR DATA

- **You prepare and send the data.** The work needs your actual data, including names where it depends on them (for example, who holds unused licences). Your data is covered by the confidentiality agreement and the data-handling terms.
- **If you would rather not send staff names.** You give each person a code and send us the data with codes instead of names. We work only with the codes and report in codes. You build and keep the list that matches codes to names. We can help you set up the coding.

- **A dedicated workspace.** Your work is done in its own workspace, used only for you. Your files are kept as an encrypted set of files in a protected space that only that workspace can reach.
- **AI assistance.** We use AI assistance in our work. Your confidential data is processed only on our own machines and is never sent to cloud AI services.
- **Very sensitive data.** We can work inside a remote workspace you provide, or give you an image of our workspace to run on your side. We agree this before the work starts, and the price reflects it.
- **Deletion.** When the service ends, on request, we delete everything and give you a signed certificate of deletion: what was held, where, when and how it was destroyed, and by whom.

11. PRICE AND PAYMENT

Typical prices for this service are on our Pricing page: roughdigits.com/pricing.html. They are based on the effort these engagements usually take. Your actual price depends on your needs and is agreed in writing before we start.

The setup stands on its own. The monthly service is optional: after setup your team can run the routine itself, or we run it for you.

The final price follows the scope we agree with you. Every client's needs are a little different, and where a change affects how the work is delivered, the price changes with it.

- **Setup:** 50% on signing; work starts once the scope is signed and this payment is made. 50% at sign-off of the completed setup.
- **Monthly service, only if you choose it:** billed monthly from the month after setup sign-off. The minimum term is 12 months; after that the service runs month to month, and either side can end it with 3 months' notice.

START WITH A CONVERSATION

Email dave.m@roughdigits.com or visit roughdigits.com. One call to understand what you spend on and what worries you; if an engagement fits, you get a written scope and price.