

A collage of images in diamond-shaped frames on a dark blue background. The images include: an astronaut in a white suit working on a NASA equipment box in space; a robotic arm with a blue light; a large industrial vessel at sea; a wind turbine on a platform over the ocean; a close-up of a red robotic gripper; a person in a blue shirt with "OCEANEERING" on the back working on a machine; and various other industrial and scientific equipment.

# Touring IT Cost with Business Units

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Sara Grimm

# Session Overview

## What You'll Learn Today

- A practical roadmap to demystify IT costs for business leaders
- How to run a successful IT budget “road show”
- Real-life lessons in building trust, transparency, and shared accountability
- Tools, templates, and conversation starters that actually work

# Meet Your Guide

**Sara Grimm | Houston, TX**

- Background in mathematics → telecom expense → IT finance
- 15+ years of translating tech spend into business impact
- Built two Offices of the CIO from the ground up
- Passionate about bridging gaps between IT and business leaders

“My job isn’t just managing numbers...it’s helping others understand what they mean.”

# IT Financial Management Role

Educate the Business and help show the value of IT to the organization.



**STEP 1**

## **ASSESS BUSINESS GOALS**

Align IT initiatives with strategic business objectives.



**STEP 2**

## **INVENTORY CURRENT IT ASSETS**

Review existing infrastructure, software, and services



**STEP 3**

## **FORECAST IT NEEDS**

Estimate future technology requirements and growth



**STEP 4**

## **ESTIMATE COSTS**

Calculate expenses for hardware, software, staffing, and services



**STEP 5**

## **PRIORITIZE PROJECTS**

Rank initiatives based on impact, urgency, and ROI



**STEP 6**

## **COLLABORATE WITH STAKEHOLDERS**

Engage business units, finance, and leadership

# Misconception of the Overall Cost of IT

Why is IT so expensive? Every year their budget goes UP!



## IT is just a cost center

Cutting IT funding leads to a costly system outage.



## Last year's budget is a good template

Reusing budget misses new cloud migration needs.



## All IT costs are predictable

Ransomware attack causes unplanned emergency spending.



## CapEx is better than OpEx

Buying servers limits flexibility compared to cloud services.



## IT budgeting is **only** for the IT department

Marketing launches an app without IT, causing integration issues.



# Why IT Costs Confuse Others

## Common pain points I see across industries:

- “IT just keeps getting more expensive!”
- Business units can’t see what’s in their spend
- Invoices, POs, and systems don’t always align
- Projects get left out or go over budget

It’s not just a budgeting problem. It’s a communication problem.

# The “Road Show” Approach

## What is it?

An annual process of meeting 1:1 with business units to:

- Walk through their IT costs (line by line)
- Identify gaps, surprises, or overlaps
- Plan ahead for upcoming needs
- Build mutual accountability

It's not a presentation. It's a conversation.

# Starting Where You Are

You don't need *perfect* data to start.

Ask:

- What systems do we have? (ERP, EA tools, TEM, etc.)
- What's in scope? (Just IT? Also hardware, software, cloud?)
- Who owns the decisions? (BU leads? Finance? PMs?)

# Road Show Tool Kit



BU Filterable Excel file with:

- Line items, cost centers, owners, risk & priority columns
- Use **SUBTOTAL**, not SUM



Add helpful tags:

- Contract dates (or terms like “auto-renew” / “month-to-month”)
- Usage levels, business justification



Pro tips:

- Include row/column headers in printouts
- Use unique IDs for tracking edits
- Always back up files
- Don't underestimate a well-placed smile

# Your Analysis

Review the file with your own analysis prior to meeting with the stakeholders.



## Auto-Renewals

Check for items set to auto-renew.



## Cost Trends

Identify cost increases over the years.



## Change Orders

Track count increases or change orders.



## Hardware Lifecycle

Consider hardware replacement timelines.



## Post-Go-Live Support

Confirm support is included for new projects.



## Duplicate Agreements

Look for multiple agreements for the same product.



## Redundant Tools

Identify tools serving the same purpose.

# Example Road Show File

Set these as a drop down list to normalize it

This makes an easy filter for having to create slides that explain variances, you can filter to increase and see what went up

1	A	B	C	D	E	F	G	H	I	J	K	L
2	Cost Center	GL	Vendor	Priorit	Risk	Business Unit	Business Sponsor (Name)	Notes	2026 Action	Jan	Feb	Mar
3	x0001	License	Moody's Analytics	8	Medium	Finance	Finance Mgr	used by treasury/vendor mgmt- credit stability of suppliers	Keep			
4	x0001	License	Duns & Bradstreet	8	Medium	Finance	Finance Mgr	used by treasury/vendor mgmt for validation	Keep			
5	x0003	SaaS	ServiceNow	9	High	IT	Infra Mgr	Year 2 of 3; looking at new modules	Keep			
6	x0003	Mgd Svc	XXX- SAP Support	7	Medium	IT	Apps Mgr	will increase due to counts	Increase; send to bid			
7	x0003	SaaS	Microsoft	9	High	IT	Infra Mgr	0365; User count: xxxxxx; Yr 2 of 5	Keep			
8	x0003	SaaS	Microsoft	4	Medium	IT	Infra Mgr	Visio	Drop- buy Lucid Charts			
9	x0002	SaaS	Enablon	9	High	HSSE	IT HSSE BA & Safety Mgr	HSSE incident mgmt, OSHA regs	Keep			
10	x0006	SaaS	AutoCad	9	High	Engineering	Drafting Mgr	2D modeling software to replace xxxxxx	NEW- Add			

Business Sponsor, Business Focal, etc.. It is "who" makes the decision about this line item

# During the Road Show sessions:

## Expect to hear:

- “I had no idea that tool cost that much.”
- “We don’t even use that anymore.”
- “Why is this in *my* budget?”

## For the first time, you may see:

- Surprise at the costs
- Uncertainty & Skepticism
- Frustration
- Curiosity

That’s progress.



# Reducing Cost the Right Way

Not everything can (or should) be cut. But we *can* prioritize.

Example Budget Item	Contract Info	Priority	Risk
Microsoft E1, E3, E5	Under contract	High	9
Microsoft Visio	Under contract	Medium	4
SAP FICO	Under contract	High	10
SAP SAC	Under contract	Medium	7
Snag It	Renew in 6mo	Low	3

## Risk:

- High: Critical to operations
- Medium: Workaround exists
- Low: Minimal impact

## Priority Alignment:

- Enterprise-wide, roadmap-aligned tools rank higher
- One-off or duplicate tools rank lower

# Post Road Show sessions:

## Continuous processes for Fostering Collaboration and Reliability

- Empower stakeholders with ownership in decision-making.
- Follow through on commitments—deliver what you promise.
- Be consistent and reliable in communication and delivery.
- Create feedback loops and act on suggestions.
- Self Reflection questions



Is there a process gap?



How can I find this information out earlier?



Are there any areas I can automate or improve?



Who needs or would benefit from a monthly budget meeting?



What went well?



What can I still improve on?



How confident are we with the data and line items?



Do I need to share the processes for any shadow IT items?

# Lessons Learned

- Budgeting isn't just numbers...it's detective work
- Never assume people understand how IT is funded
- Speak their language
- Meet them in person when you can
- Transparency + empathy = trust

# Final Thought

“The goal isn’t to ‘win’ a budget conversation. It is to build a shared understanding of where the money goes...and where it should be”

# Q&A

Let's talk:



A business card for Sara Grimm, featuring a circular profile picture of her in a pink jacket, her name, her title, and a QR code.

**Sara Grimm**  
IT Financial Mgmt | TEM | ITAM | IT Sourcing





Connecting What's Needed with What's Next™