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Wellcome Trust Case Study

The Wellcome Trust is a global charitable foundation dedicated to achieving extraordinary improvements in human and animal health by supporting the brightest minds in biomedical research and the medical humanities.

With an increasingly stretched internal IT team and poor licence compliance, the Trust chose Phoenix Software as its Software Asset Management Partner in an on-going engagement to manage the Trust's software and compliance position. The two organisations began working together in 2009 and have delivered cost savings and improved processes so significantly, that the partnership was extended for another three years in January 2014.

The Challenge

Back in 2009, Wellcome Trust's IT team realised it had little visibility of its software landscape: knowing what was installed on which machine along with their overall licence

compliance position at any given time. Software was also being purchased and installed without the involvement or knowledge of the IT team. As a result, licence compliance was poor at just 63%. There were multiple versions and variations of the same software installed across the organisation's 750+ IT users, in addition to the Trust's wider IT resources which were accessed by over half a million visitors to its public exhibition centre every year. As a result the Trust was spending tens of thousands of extra pounds on new and renewed software that it didn't need. Software was also being installed locally without application packaging, resulting in multiple desktop variations which caused compatibility, upgrade and testing issues across the organisation. ➔

KEY POINTS

Challenge

Moving from internal IT resource to working alongside an external partner that could provide support to identify, audit and report on its software position as well managing its Software Asset Management and licence compliance long term.

Solution

The Wellcome Trust enrolled in Phoenix Software's Focus Service to monitor and manage software licences long term. All new software purchases made through Phoenix Software are uploaded directly into the Focus Service web portal making tracking new licences and returning software much more manageable.

The Trust now receives a quarterly extract of software purchases and installations which reports on purchases, installations, compliance and unused software on a regular basis.





Choosing to source an external partner, the Trust needed support to identify, audit and report on its software position as well managing its Software Asset Management (SAM) and licence compliance long term. They needed a partner that would meet all of their business requirements, could be relied upon for their expertise and had knowledge of the latest technology and licensing advances. Until this point the Trust's IT services were predominantly delivered in-house by an increasingly overstretched IT team.

Mark Bramwell, Head of IT, Wellcome Trust, said "Despite having never faced an audit before, we knew it was only a matter of time. We could see that licence compliance was becoming an increasingly 'hot topic' and that the number of vendor audits was on the rise. Knowing how disruptive and expensive audits can be, we planned to get ahead of the game so we were ready when the audit came. We therefore sought out a partner to help us.

"Fundamentally we were looking for a partner, not a supplier. We wanted an organisation that would work alongside us and share their knowledge, expertise and ways of working with us. We saw Phoenix Software as that partner."

The Solution

The Wellcome Trust enrolled in Phoenix Software's Focus Service. This involved Phoenix implementing a number of processes to address both the initial software licence compliance issues while establishing systems to maintain the Trust's position in the future.

Phoenix Software initially established Wellcome Trust's licensing position by carrying out an audit using License Dashboard's SAM tool License Manager. This found that the compliance position was just 63%, due to much of the Trust's software being old, obsolete, duplicated or redundant. This identified that the Trust was incurring tens of thousands of pounds of avoidable and unnecessary software costs each year, while leaving it significantly vulnerable to un-forecasted licensing costs if it were ever audited.

Working with the Trust to improve its compliance position was only the first step however. The next step was to implement robust systems that would ensure that unnecessary expenditure and poor compliance could not occur again in the future. ➔

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KEY POINTS

Benefits

The Trust now has a more accurate and up-to-date view of its software landscape. The IT team is informed of software purchases and deployments thus avoiding duplicate software or multiple versions being installed which would previously have resulted in the incursion of unnecessary costs. Phoenix Software improved Wellcome Trust's overall licence compliance from 63% to 98%, however it was later found to be 100% compliant during two separate vendor audits.

Software rationalisation has enabled the Trust to reduce the number of applications it supports from over 1,000 to just 275, and as a direct result of Phoenix Software's strong vendor relationships it was able to avoid or save the Trust from over £820,000 in licensing costs.





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Mark Bramwell, Head of IT, Wellcome Trust

As part of the on-going partnership, Phoenix Software and Wellcome Trust developed processes that would continuously monitor and manage software procurement. Thus a quarterly report on purchases, installations, compliance and unused software was implemented. Instead of waiting to find out what software had been purchased and installed when they carried out an audit, the IT team at the Trust can now obtain an instant, accurate view of software licences purchased and deployed. In addition, all new software is procured via Phoenix Software so all new licences are immediately updated into the License Manager Web portal, ensuring every single licence is immediately recorded so the IT support and administration team is kept up-to-date and aware of all licences being purchased and installed. They can also keep track of returns, de-installs and decommissions by the same means. As a result, the Trust will no longer be sitting on unused licences.

The Benefits

Phoenix Software has delivered significant, tangible benefits for the Wellcome Trust, transforming the IT service and support the Trust provides, reducing costs and instilling industry best practices within the organisation.

Due to the systems and processes put in place, overall software licence compliance has significantly improved from 63% to 98%, protecting the Trust from significant financial risks resulting from an audit.

A quarterly report on purchases and installations gives the Trust the information it needs to make informed decisions about the software it purchases. But most importantly, it has given the Trust complete confidence in their compliance position.

In addition, the IT team is also able to see which applications are being used and which are not, therefore helping it to retire

any applications that are no longer needed. Previously without this up-to-date, accurate insight the Trust would have renewed every one of its licence agreements without question at the end of each year. As a result of this continuous improvement and management, the Wellcome Trust has also been able to rationalise the number of desktop applications from over 1,000 to just 275, while also formalising standard desktop builds which can be deployed from a single MSI file. In stark contrast to the 1,000+ variations of a desktop build the Trust operated previously, the Trust now runs a managed and sustainable Windows 7 desktop/laptop build where standardised builds of compatible, packaged and licensed applications can be delivered at the press of a button.

Despite never facing an audit before, the Wellcome Trust's proactivity paid off; as shortly after the Focus Service had been implemented it faced its first ever audit. ➔





“Our partnership with Phoenix is about much more than just a compliance project - it is now a long-term collaboration. Phoenix Software is a valued and important strategic partner of the Wellcome Trust.”

Mark Bramwell, Head of IT, Wellcome Trust

In fact, the Trust faced two audits by two different vendors at the same time! While normally something to cause panic, angst and concern among most IT departments, the Trust welcomed the audits as an opportunity to prove it was in control of its software. Working alongside Phoenix Software it was able to respond quickly to the audit requests without any significant disruption to the IT department's day-to-day operations. And the icing on the cake? In both cases the Trust was found to be 100% compliant with the vendors.

In addition to the significant licence compliance and management benefits, Phoenix Software can also be credited with helping to save and/or avoid the Trust at least £820,000 in licensing costs during software negotiations and renewals.

Bramwell concludes, “Without question our partnership with Phoenix Software has been instrumental in supporting the delivery of the Trust's IT strategy and realising continuous improvements in licensing. This would not have been possible without them.” He adds, “Aside from their professionalism and diligent approach to software licensing, it is the strength of Phoenix Software's relationships with vendors that is unquestionably one of their greatest assets. Not only has it saved us significant costs in licensing (which can be reinvested into supporting bio-medical research), but by introducing us to the right people at each of our strategic vendors, we have gained valuable insight into upcoming technology developments so we have confidence in our roadmap going forward.

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NEXT STEPS

For further information on the products and services available from Phoenix Software, contact a member of our team on:

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