SARM Renewal Process

End-to-End Renewal Workflow, Roles & Governance Framework

Dec 11, 2025

KEY OBJECTIVES

- Provide a clear end-to-end view of renewals
- Define roles and approval gates
- Standardize artifacts/deliverables
- Offer an at-a-glance timeline

SCOPE

Management of Software and Service renewals starting from initial report generation through to Purchase Order issuance and final supplier execution.

STAKEHOLDERS

- IT Procurement Lead
- IT Team
- SARM Team
- Business/Service Owners

- Budget Owners
- Architecture Team
- IT OpsCo
- Suppliers

EXPECTED OUTCOMES

- Approved Renewals
- Executed POs
- Updated CMDB
- Audit Trail

RACI Matrix

Roles & Responsibilities Assignment Map

Activity / Role	IT Proc. Lead	IT Team	SARM Team	Business Owner	Service Owner	Budget Owner	Arch. Team	IT OpsCo
Renewal Report Generation	R A	C	I					
Complexity Assessment & Routing	R A	C		I	I		C	
Stakeholder Identification	I	R		A	C			
Demand Challenge & Validation		R		A	C	I	C	
Technical Review		C					R A	I
IT OpsCo Approval		C		I	I		C	R A
SSL/SSR Checklist Completion		C	I	A	R			
Quote Prep & Selection	C		C	R	R	A		
Budget Approval	I		I	C		R A		

R Responsible (Doer) **A** Accountable (Owner) **C** Consulted (Input) **I** Informed (FYI)
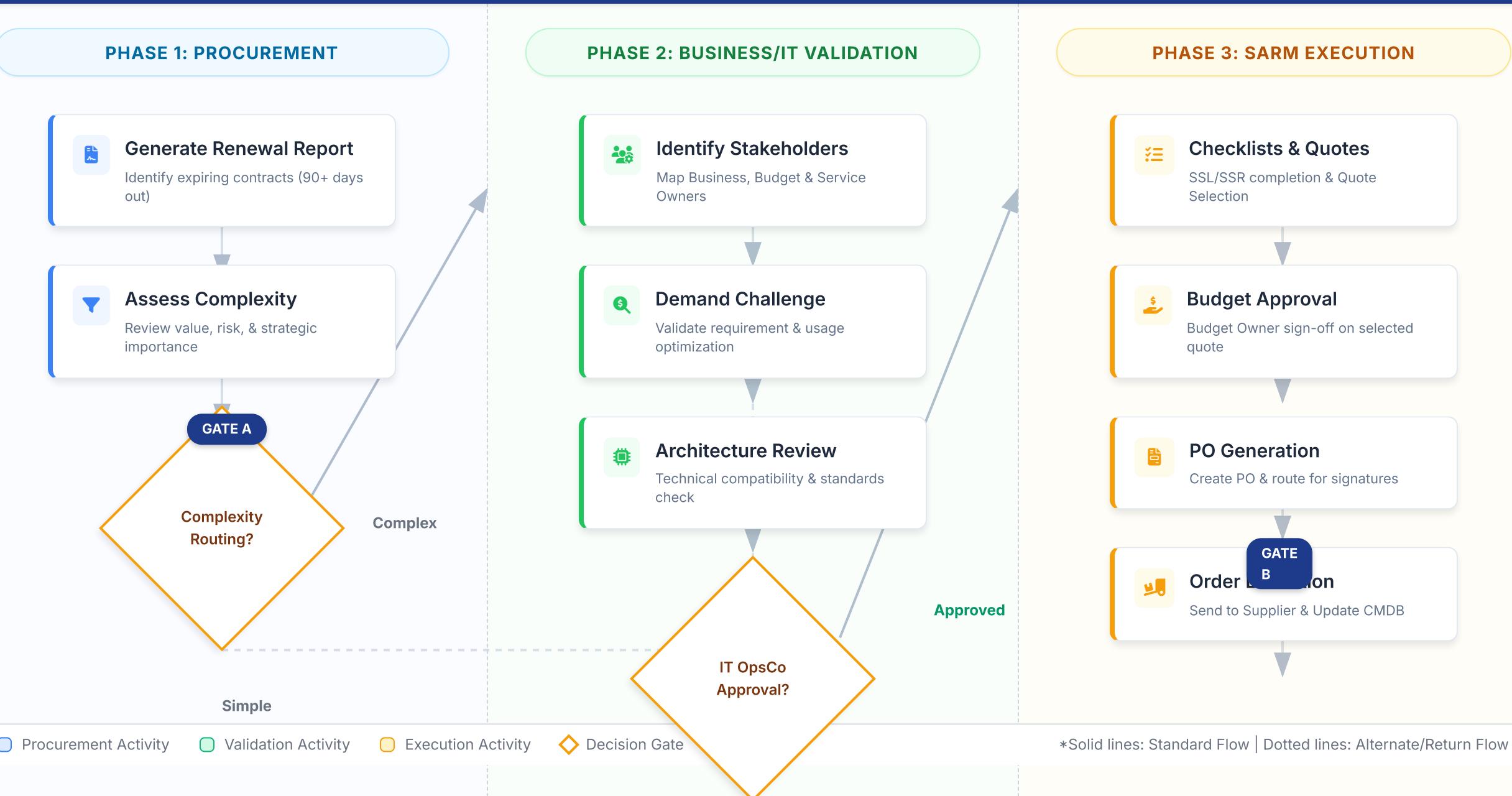
Process Flow Overview

End-to-End Lifecycle: From Renewal Report to Execution

PHASE 1: PROCUREMENT

Generate Renewal Report
Identify expiring contracts (90+ days out)

Assess Complexity
Review value, risk, & strategic importance

GATE A

Complexity Routing?

Simple

Complex

PHASE 2: BUSINESS/IT VALIDATION

Identify Stakeholders
Map Business, Budget & Service Owners

Demand Challenge
Validate requirement & usage optimization

Architecture Review
Technical compatibility & standards check

IT OpsCo Approval?

Approved

PHASE 3: SARM EXECUTION

Checklists & Quotes
SSL/SSR completion & Quote Selection

Budget Approval
Budget Owner sign-off on selected quote

PO Generation
Create PO & route for signatures

GATE B

Order **tion**
Send to Supplier & Update CMDB

○ Procurement Activity   ○ Validation Activity   ○ Execution Activity   ◇ Decision Gate

*Solid lines: Standard Flow | Dotted lines: Alternate/Return Flow

🗂 Process Workflow

1 Generate Renewal Report

Identify all software/service contracts expiring within the next 90-120 days.

Scope   Term   Current Cost

2 Assess Complexity

Evaluate renewal against risk and value criteria to determine routing path.

✓ Contract Value > $50k?   ✓ High Vendor Risk?

✓ Licensing Change?   ✓ Strategic Vendor?

3 Route & Delegate

Assign ownership based on complexity assessment.

Standard / Low Complexity
Delegated to **IT Team** for business validation.

Complex / Strategic
Managed by **Procurement Lead** with IT support.

◎ **PHASE OBJECTIVE**

To proactively identify upcoming renewals and ensure they are routed to the correct teams with sufficient lead time for validation and negotiation.

↳ **KEY INPUTS**

- Contract Management System Data
- Expiry & Renewal Notifications
- Prior Year Usage/Licensing Data

↦ **KEY OUTPUTS**

- Consolidated Renewal Report
- Complexity Classification Tag
- Routed Renewal Package
- Initial Timeline & Deadlines

👥 **ROLES (RACI)**

Process Workflow

1 — Identify Stakeholders
Map specific owners for the contract to ensure accountability.

Business Owner   Budget Owner   Service Owner

2 — Demand Challenge
Validate requirements against actual usage and future business needs.

? Is it right-sized?   ? Can we consolidate?

3 — Technical Review
Architecture team reviews for compatibility, standards, and security compliance.

🛡 Security   ≋ Standards

4 — IT OpsCo Approval
Present findings to IT Operations Committee for final go/no-go decision.

🔨 Governance Gate: Approval Required to Quote

◎ PHASE OBJECTIVE

To ensure every renewal is technically viable, financially justified, and aligned with business strategy before soliciting supplier quotes.

KEY INPUTS

- Routed Renewal Package
- Usage & Utilization Logs
- Architecture Standards

KEY OUTPUTS

- Validated Scope Definition
- Architecture Review Decision
- IT OpsCo Meeting Minutes
- Approval to Proceed to Quote

👥 ROLES (RACI)

R IT Team (Validation)   R Architecture (Review)

⚙ Execution Workflow

1 Checklist & Artifact Validation

SARM team collects and validates all required artifacts from Business Owners.

✅ SSL/SSR Checklist   📄 Approved Quote

2 PO Generation & Execution

Generate Purchase Order, route for internal signatures, and transmit to supplier.

✒ Signature Routing   ✈ Supplier Transmittal

3 Closure & CMDB Update

Confirm order fulfillment and update asset management records.

🗄 Critical Output: Update CMDB Asset Record

🎯 PHASE OBJECTIVE

To convert approved requirements into a compliant purchase order and ensure the new entitlement is correctly recorded in the asset repository.

⤵ KEY INPUTS

- Approved Supplier Quote
- Completed SSL/SSR Checklists
- Budget/OpsCo Approval Record

⤴ KEY OUTPUTS

- Executed Purchase Order (PO)
- Supplier Confirmation
- Updated CMDB/Asset Record
- Audit Trail Documentation

👥 ROLES (RACI)

Decision Points & Approval Gates

Key governance milestones ensuring compliance and value

GATE 1: ROUTING

▼ Criteria
- Value > $50k
- High Vendor Risk
- Complex Licensing

Complex Routing?

NO (IT TEAM)

YES (PROCUREMENT)

Delegated to IT Team

GATE 2: TECHNICAL
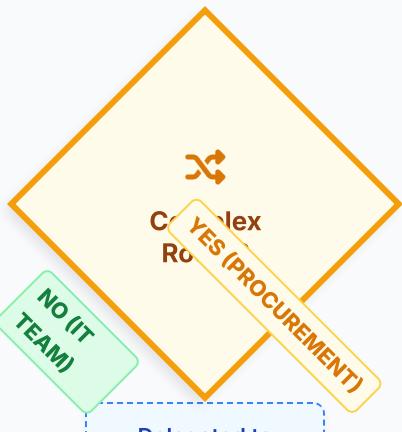
Criteria
- Standards Alignment
- Security Compliance
- Integration Fit

Arch. Approved?

NO

YES

Remediate & Re-submit

GATE 3: GOVERNANCE

Criteria
- Business Case Valid
- Demand Challenge
- Budget Forecast

OpsCo Approval?

NO

YES

Cancel or Re-scope

GATE 4: FINANCIAL
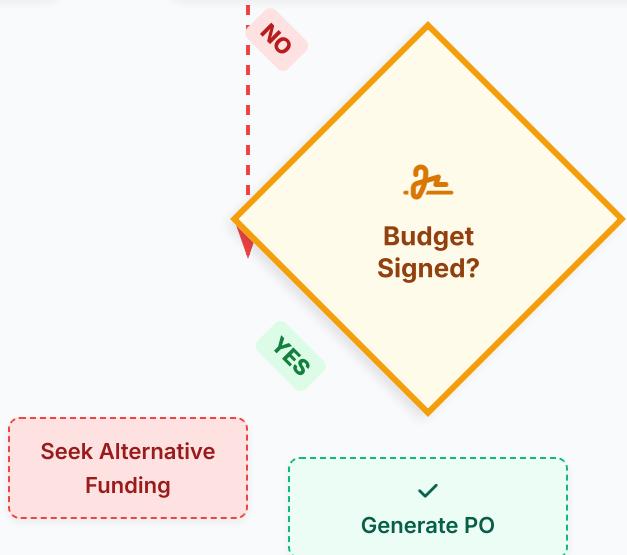
Criteria
- Quote Validity
- Budget Available
- Terms Accepted

NO

Budget Signed?

YES

Seek Alternative Funding
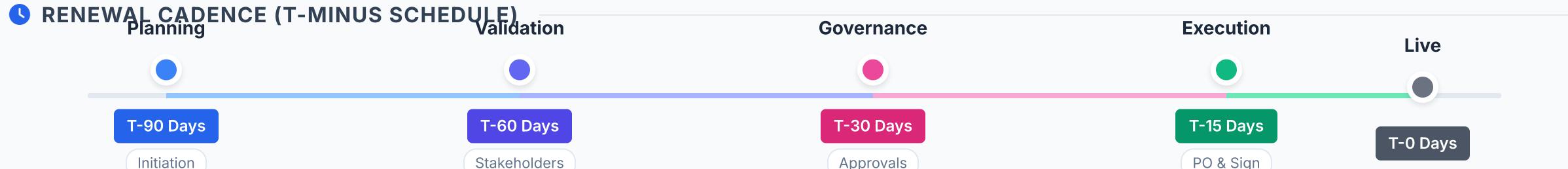
✓ Generate PO

⚠ Exception & Escalation Path

Urgent renewals (< 30 days) or non-standard terms require immediate escalation to **Procurement Head** and **OpsCo Chair** for expedited review.

Timeline & Deliverables

End-to-End Cadence and Required Artifacts

🕐 RENEWAL CADENCE (T-MINUS SCHEDULE)

Planning — **Validation** — **Governance** — **Execution** — **Live**

T-90 Days	T-60 Days	T-30 Days	T-15 Days	T-0 Days
Initiation	Stakeholders	Approvals	PO & Sign	

📂 DELIVERABLES MATRIX

Phase 1: Procurement
- 📋 Renewal Report (Excel)
- 🏷️ Complexity Classification
- ↪️ Routing Memo

Phase 2: Validation
- ✅ SSL/SSR Checklist
- 🖥️ Architecture Review Note
- 📈 Utilization Report

Phase 3: Approvals
- 🧾 Selected Supplier Quote
- 📌 IT OpsCo Minutes
- ✍️ Budget Owner Sign-off

Phase 4: Execution
- 📄 Executed Purchase Order
- 📧 Supplier Confirmation
- 🗄️ CMDB Update Form

📊 SUCCESS METRICS

| **100%** Renewals Tracked | **<5%** Emergency POs | **T-30** Approval Target | **0** Lapsed Contracts |