IT Budget & Efficiency Benchmark

Practitioners Guide

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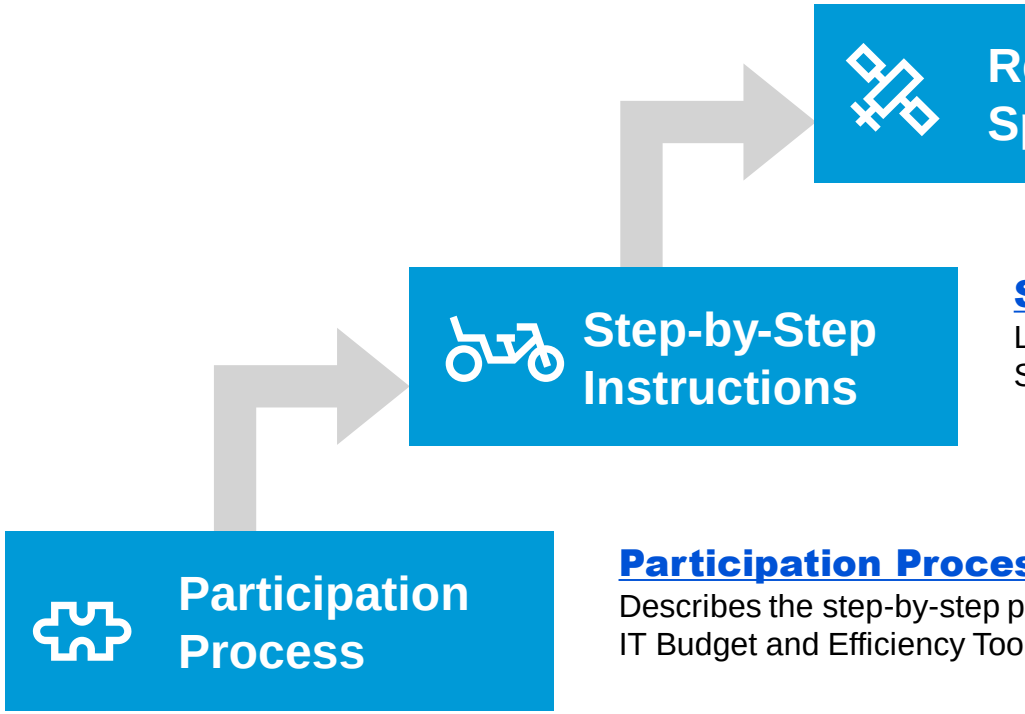
Overview



Recommended Sprints
Gartner-recommended sprints to cover various business objectives

Step-by-Step Instructions
Launch and Set Up Your Assessment Survey Delegation

Participation Process
Describes the step-by-step process included in the IT Budget and Efficiency Tool

IT Budget & Efficiency Benchmark Participation Guide

Use this document to help you complete the IT Budget & Efficiency Benchmark survey. This guide provides details on the mentioned topics.

It will be helpful, but you may need not to read each part of this guide before completing your survey; it is a reference guide. **We do recommend reviewing slides 15 through 20 prior to beginning the benchmark.** Please do not hesitate to contact us through the channels below if you have any questions throughout the survey process.

Have Questions? Notify your service team E-mail our team at **inquiry@gartner.com**

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IT Budget & Efficiency Tool comprises Enterprise IT budget and IT Security Benchmarking Tool

IT Budget & Efficiency Tool

IT Enterprise

The IT Budget & Efficiency tool provides CIOs and their teams with self-assessment tools to benchmark their organization vs. published IT Key Metrics Data cohorts. Benchmark results help identify where smarter spending opportunities may exist to improve cost management practices.

Gartner IT Budget and IT Security Survey Tool

IT Security

Provides a framework to define exactly what is included in IT security spending from a financial perspective and what is not. The framework also defines asset and operations distributions so you can understand what types of investments you are making.

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Participation Process

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Participation Process

Step 1: Gather and Enter Your Data

- Review step-by-step benchmark instructions
- Delegate sections of the survey to peers to complete. Submit your response using our online tool

Step 2: Review and Finalize Your Data

- Ensure all survey warning messages are resolved
- Check your responses against benchmark charts instantaneously
- investigate potential data input issues or outlier results

Step 3: Review Your Results

- Instantly interact with your results directly in our online tool
- Reach out to your service team if you would like to contextualize your custom results with an industry expert

Step 4: Take Action

- Build business case for action
- Use results to pursue cost optimization efforts.
- Ensure smarter budgeting for your company

Expert Support available upon Request:

Participation Support

- Receive an overview of the assessment
- Identify key stakeholders who will submit the survey and review results
- Provide context/clarification around survey questions

Survey Response Quality Review

- Review your submitted responses with our experts
- Review potential outliers and missing data
- Discuss peer group comparisons
- Review calculated metrics

Results Delivery

- Schedule a 30-minute report discussion to review results and discuss key findings
- Subsequent calls can be scheduled with your team to start taking action based on results
- Leverage Gartner's vast resources to develop next steps

Request Expert Support? Notify your service team E-mail our team at inquiry@gartner.com

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Step-by-Step Instructions

Launch and Set Up Your Assessment

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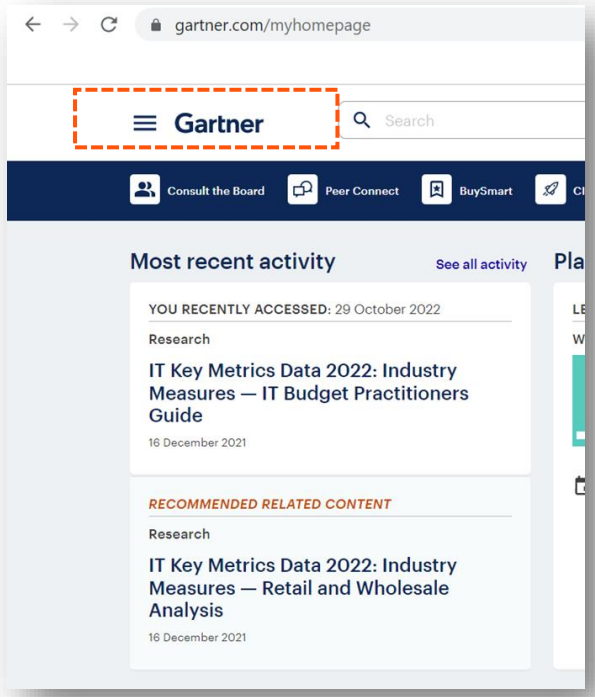
IT Budget Tool Location

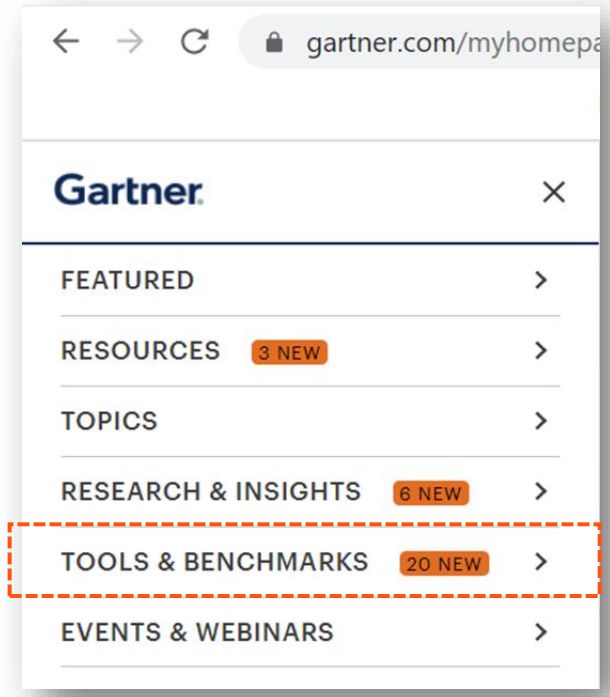
Vanity-link-
www.gartner.com/itbudget

Step 01



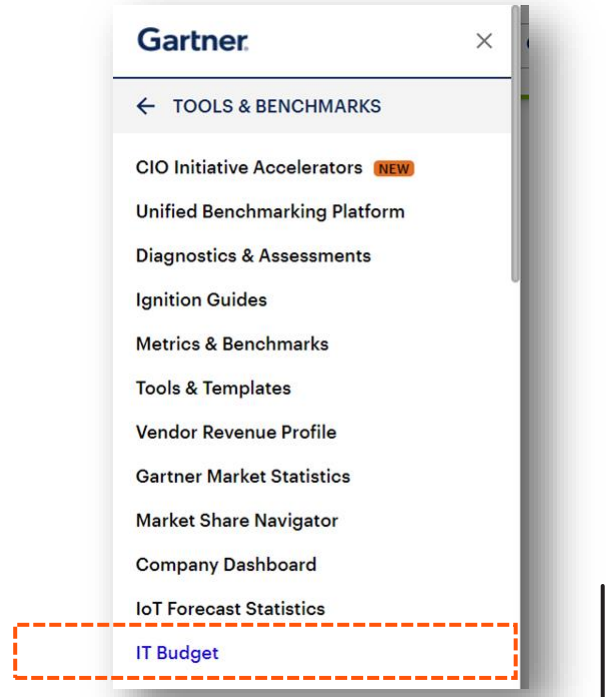
Select the bars near Gartner logo

Step 02



Click on “Tools & Benchmarks”

Step 03



Navigate Down To “IT Budget”

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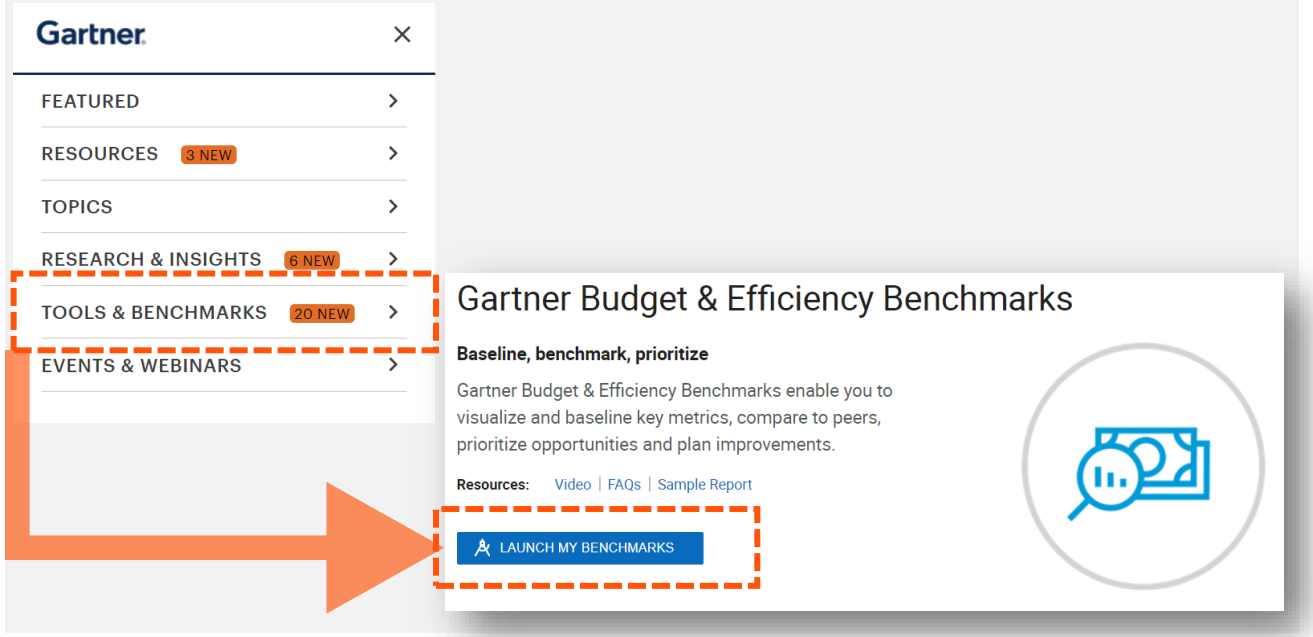
Launch and Set Up Your Assessment

Navigate to your Gartner Benchmarks homepage via Gartner.com.

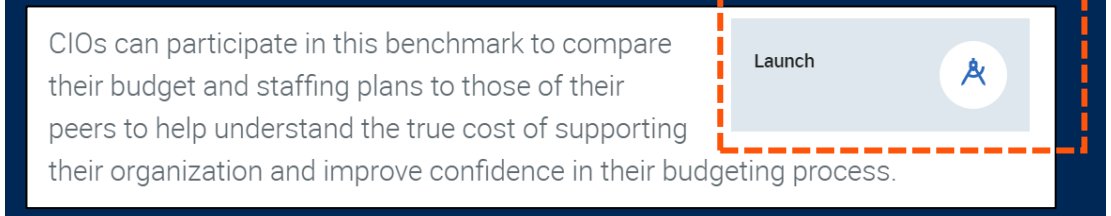
Option 1:

- ✓ Click on “Tools & Benchmark” in the list at the top left end of the page and select “IT Budget”.
- ✓ The page will be redirected to “Gartner Budget & Efficiency Benchmarks.” Select “Launch My Benchmarks”.



Option 2:

- ✓ Option 2: Search for the “IT Budget & Efficiency Benchmark” webpage and click “Launch”.



Note: Use the same navigation to return to in progress and completed benchmark assessments.

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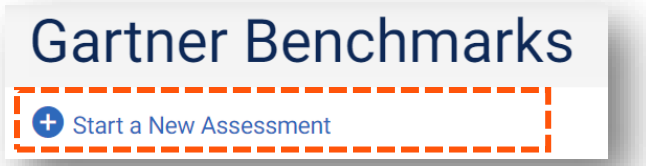
Launch and Set Up Your Assessment (Continued)

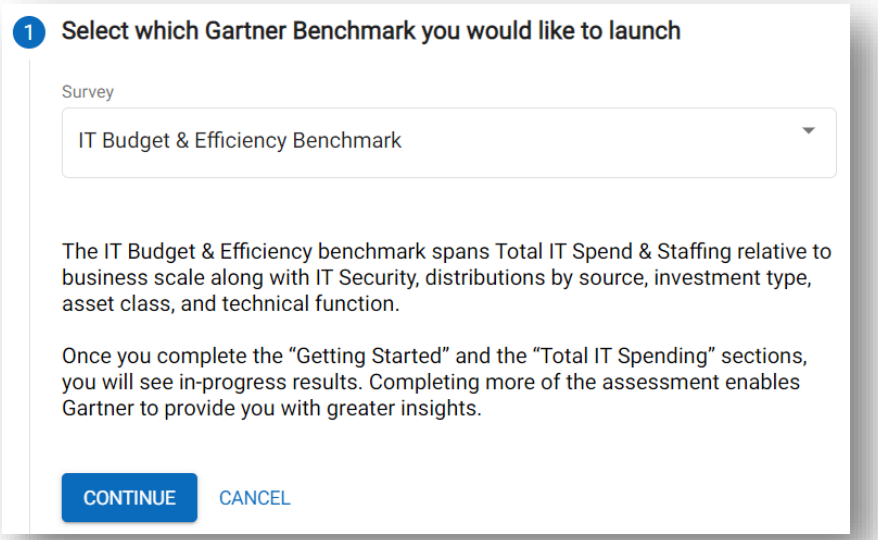
Click on “New Benchmark” to start a new assessment.



Your in-progress and completed benchmark assessments will appear in a list under the new benchmark button.

Input set up details.

Items one through three will be pre-populated with your membership specifications. Adjust those inputs as appropriate.



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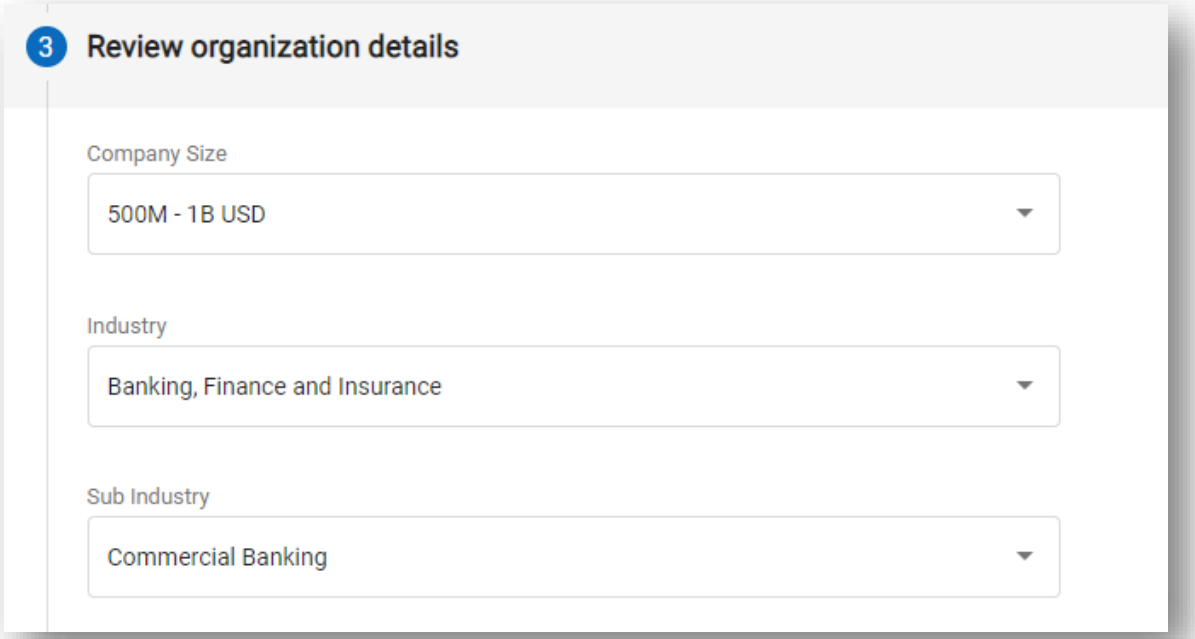
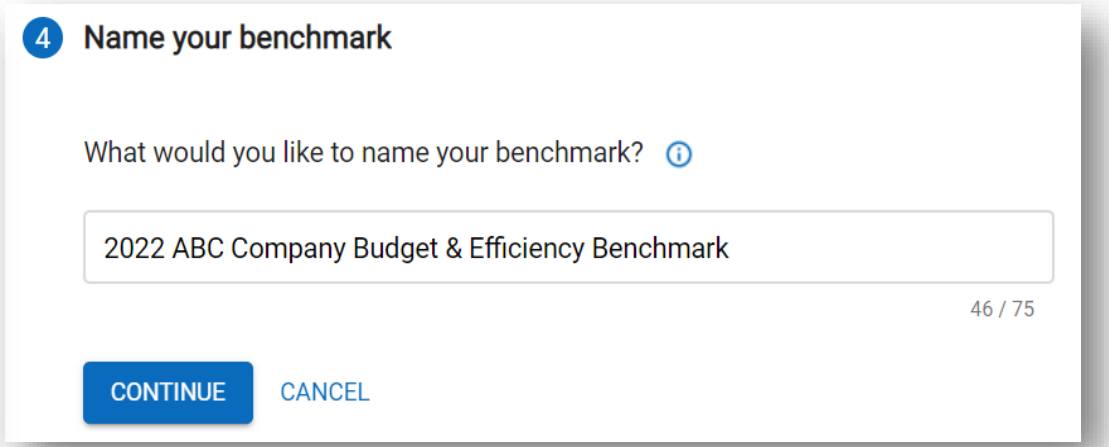
Launch and Set Up Your Assessment (Continued)

Input set up details (continued).



The industry selection here only represents the clients' general Gartner industry classification. It does not represent peer selection which uses a different categorization scheme and is set on the digital results page.



- ✓ *This name will appear on the first page of your report and allow you to identify your benchmark later.*
- ✓ *When naming your benchmark, we recommend including descriptors that will indicate the point in time and content. This is especially important as you add more benchmarks in the years to come.*

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Launch and Set Up Your Assessment (Continued)

Agree to the standard Gartner Note of Confidentiality and Privacy Policy.

About Confidentiality
Your individual responses, including personal information (e.g., your name; role), may be included in a report provided to your leadership and associates within your organization. Your survey responses may also be aggregated with other participants' responses to create an overall report for your organization. This aggregate survey report may also be used to identify and prioritize opportunities for improvement.

Agreement
By participating in this survey, you understand and agree that your responses will not be confidential within your organization. Your survey responses will be viewed by your organization for the purposes of evaluating a budget and/or headcount and planning improvement initiatives.

As a Gartner client or invited participant of the client, your input helps shape the insights the Gartner Benchmark tool provides to you and your peers. By completing a survey(s), you agree that your responses may be used by Gartner, in an aggregate and non-identifiable format (neither you nor your organization are identifiable), for future research purposes in the ordinary course of our business in accordance with Gartner's Privacy Policy.

Gartner will not disclose confidential information submitted via this survey to a non-agent third party except when required to do so by law. We use appropriate security controls to protect the information you provide, and where applicable, will take reasonable steps to permit you to correct, amend, or delete information that is inaccurate or incomplete.

Gartner products and services are subject to US Sanctions laws. As a result, prohibited individuals, as defined by law, or those located in certain Sanctioned countries (including Cuba, Iran, North Korea, Sudan, Syria and the Crimean region in Ukraine), are not authorized to participate in this survey. Please contact Legal and Compliance with any questions.

By continuing to the survey, you agree to these terms.

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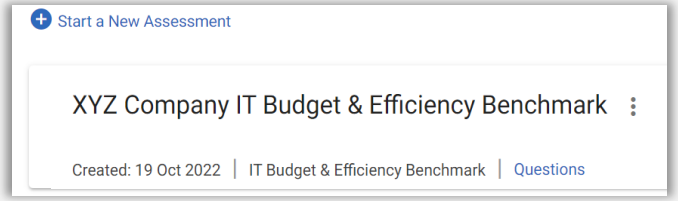
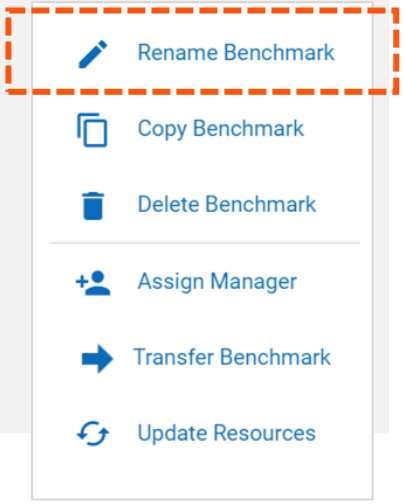
Create Additional Benchmark Assessments

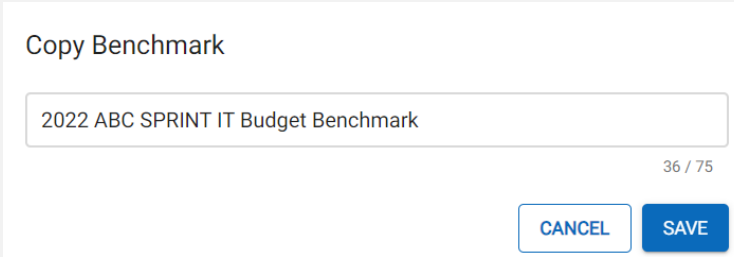
You can complete a benchmark assessment for different scenarios based on changes to your organization's demographic details or changes to functional resources:

1. Create a copy of your baseline assessment. Click the three vertical dots next to your assessment's name and a menu will appear. Select "Copy Benchmark". **Do not overwrite your actual benchmark data.**





2. Rename your new, copied assessment in the next step, describing the specific scenario and click save.



3. Make the necessary adjustments for your scenario to the copied benchmark assessment that will show under "My Benchmarks" and run a new report.

- ✓ *This name will appear on the first page of your report and allow you to identify your benchmark later.*
- ✓ *When naming your benchmark, we recommend including descriptors that will indicate the point in time and content. This is especially important as you add more benchmarks in the years to come.*

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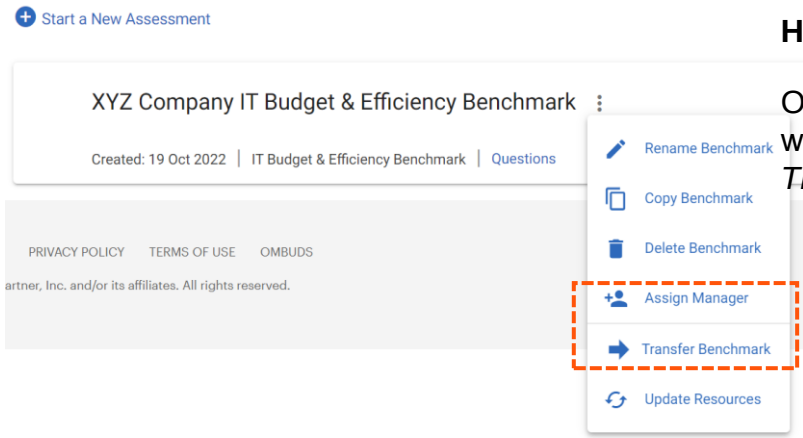
Survey Delegation

Although many clients complete the survey independently, there are three ways you can collaborate with your team.

1. Assign Manager	Assign an individual on your team to manage the question response input. This individual will have full access to the questions and the final benchmarking results.
2. Transfer Benchmark	Fully transfer ownership to an individual on your team. Common use cases include if you as the assessment owner are moving a new role or leaving the company. After doing so, you will no longer have access to the assessment.
3. Delegate Specific Sections	For support on individual sections of the survey, you can delegate the questions to an individual on your team. This individual will only have access to the questions delegated to them.

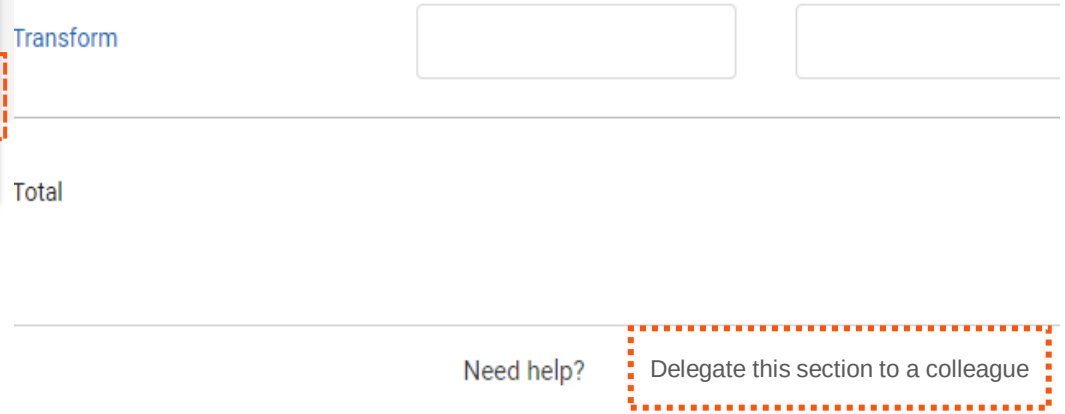
How to Assign Manager and Transfer Benchmark:

Click the three vertical dots next to your assessment's name and a menu will appear. Select "Assign Manager" or "Transfer Benchmark" as needed. Note that in order to transfer a benchmark your team member must be an active Gartner client. Your assessment manager does not need to be an active Gartner client.



How to Delegate Specific Sections:

Once in the survey, scroll to the bottom of the specific page you wish to delegate and click "Delegate this section to a colleague". *This individual does not need to be an active Gartner client*.



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Recommended Sprints

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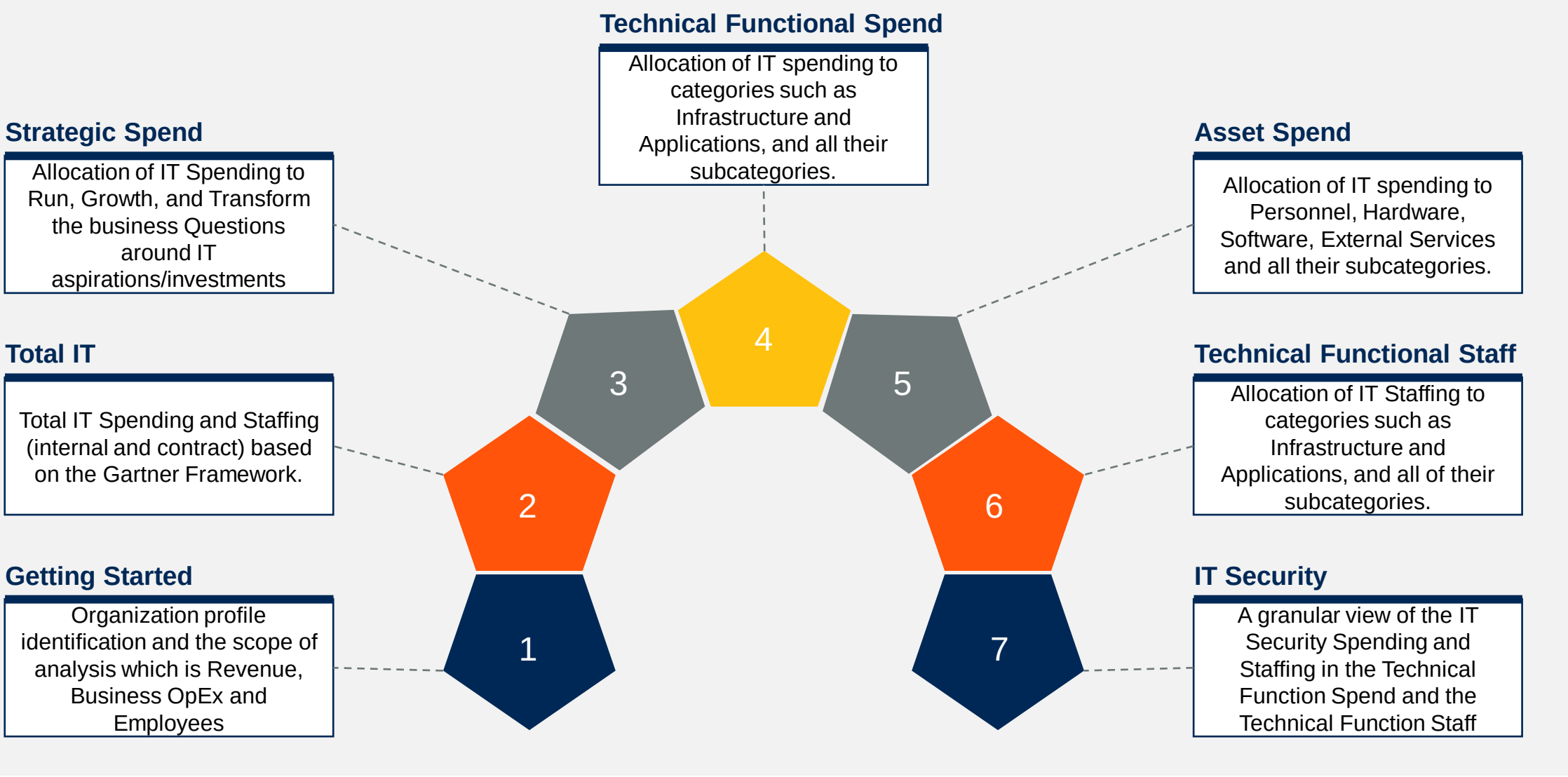
7 Sections under IT Budget Tool



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7 Sections under IT Budget Tool - Significance

Getting Started	Total IT	Strategic Spend	Technical Functional Spend	Asset Spend	Technical Functional Staff	IT Security
Significance	**Significance**	**Significance**	**Significance**	**Significance**	**Significance**	**Significance**
✓ Determines what IT Spending and Staffing will be included in analysis (only that which matches business scope) ✓ The basis for all top-level IT efficiency and productivity metrics (denominator)	✓ The basis for all top-level IT efficiency and productivity metrics (numerator) ✓ The data entered here will be allocated in other tabs to create all of distribution metrics.	✓ This exercise can help sharpen alignment with business perception around key investments ✓ Can help IT articulate spending variances due to business change and implications of cost cutting.	✓ Identifies deeper knowledge of the technology portfolio and highlight in-depth distribution around IT Technical Functions which signifies an overall IT Budget planning and execution	✓ Aids in understanding allocation and possible tradeoffs between types of assets e.g., Hardware versus IaaS, Personnel versus Traditional Outsourcing, Traditional Software vs SaaS	✓ Understanding of the types of functions where human capital is leveraged. ✓ Can aid in analysis around distribution of resources and/or sourcing decisions.	✓ Insight into relative level of security investment relative to Total IT, Employees and Revenue. ✓ Understanding of types of investments e.g. firewalls/anti-virus vs Vulnerability/ Analytics

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Ways to Leverage Results

- The IT Budget Tool has 7 different sections which gives you the flexibility to cover only areas you want to assess.*
- With the help of Recommended Journeys (on next slide), CIOs can achieve their objectives.

- The questions and distributions in each section is categorized as Level 1 and Level 2.
- It is recommended you take all the Level 1 questions. At the same time, diving into Level 2 questions will improve data quality and help you get granular results and benchmarks.

*Getting Started section being mandatory

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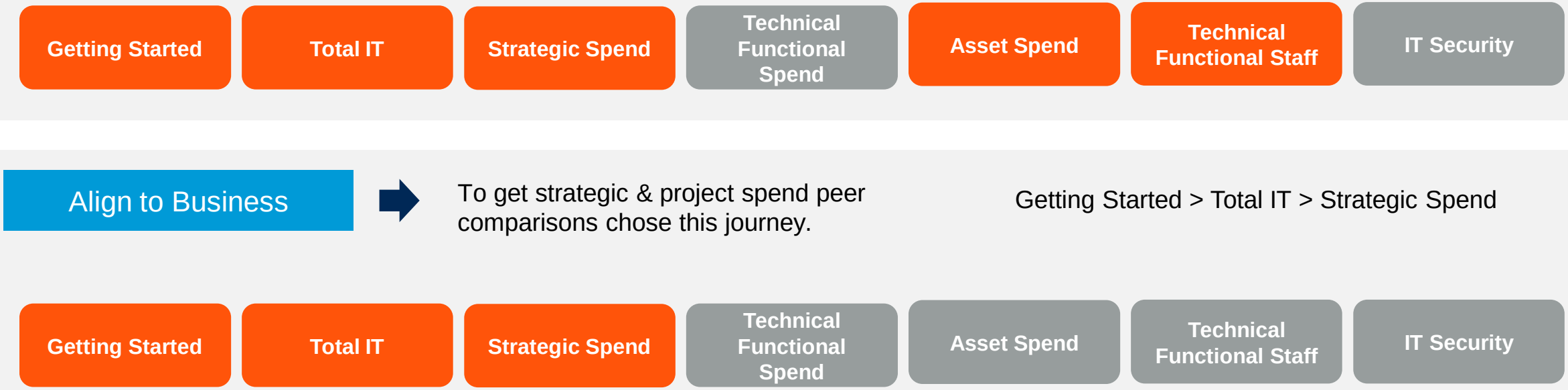
Recommended Journeys (1/3)

The IT Budget tool can be completed incrementally at different times by choosing different journeys. We recommend the below journeys/ sprints to shape your digital business optimization and transformation journey in order to achieve your strategic business outcomes.

Objectives	Description	Journey (Sections to Cover)
Establish Baseline	This will deliver high level benchmarks to establish a baseline. Additional detail can be added later to enhance your results and opportunities.	Getting Started > Total IT > Strategic Spend > Asset Spend/ Technical Function Staff
Align to Business	To get strategic & project spend peer comparisons chose this journey.	Getting Started > Total IT > Strategic Spend



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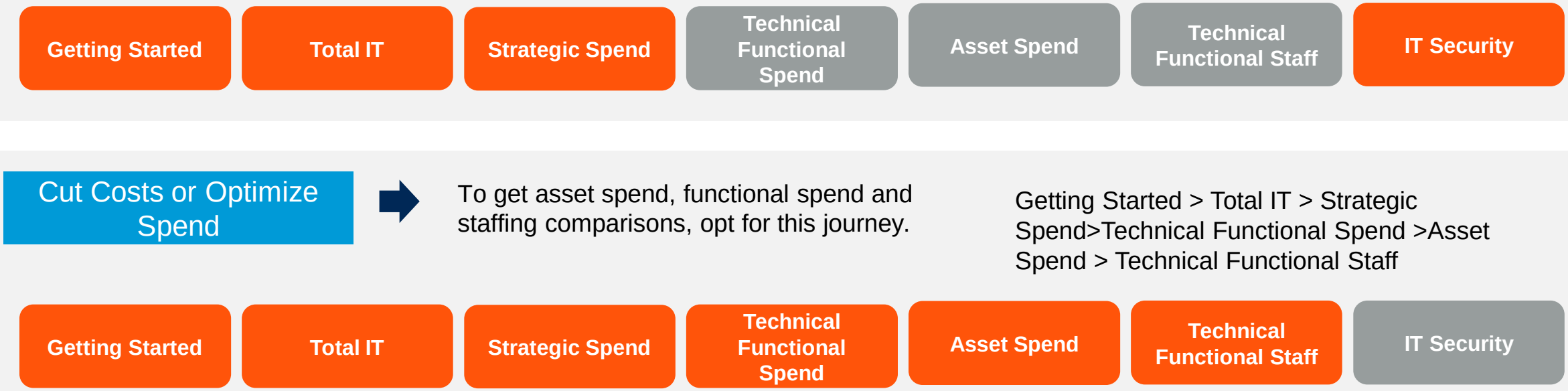
Recommended Journeys (2/3)

The IT Budget tool can be completed incrementally at different times by choosing different journeys. We recommend the below journeys/ sprints to shape your digital business optimization and transformation journey in order to achieve your strategic business outcomes.

Objectives	Description	Journey (Sections to Cover)
Measure IT Security	For IT Security comparisons, opt for this journey.	Getting Started > Total IT > Strategic Spend > IT Security
Cut Costs or Optimize Spend	To get asset spend, functional spend and staffing comparisons, opt for this journey.	Getting Started > Total IT > Strategic Spend>Technical Functional Spend >Asset Spend > Technical Functional Staff



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Recommended Journeys (3/3)

The IT Budget tool can be completed incrementally at different times by choosing different journeys. We recommend the below journeys/ sprints to shape your digital business optimization and transformation journey in order to achieve your strategic business outcomes.

Objectives	Description	Journey (Sections to Cover)
Invest to Grow	This includes all spend and staffing peer comparisons.	Getting Started > Total IT > Strategic Spend > Asset Spend > Technical Function Spend > Technical Function Staff

Sections to Cover

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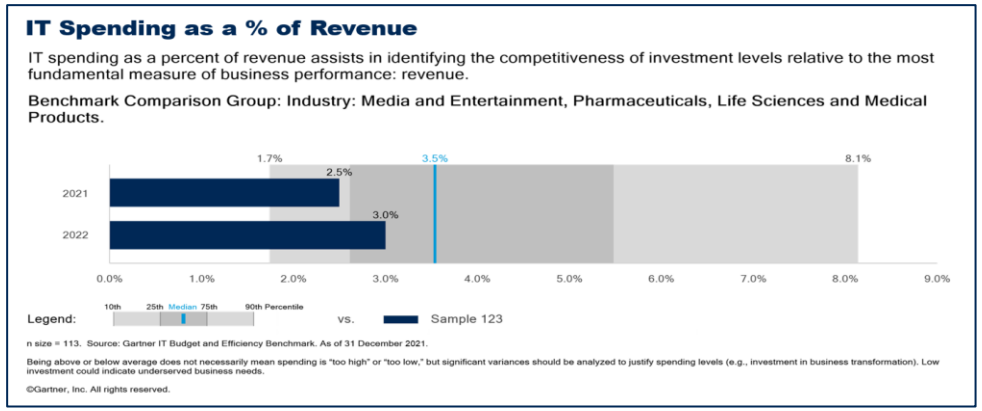
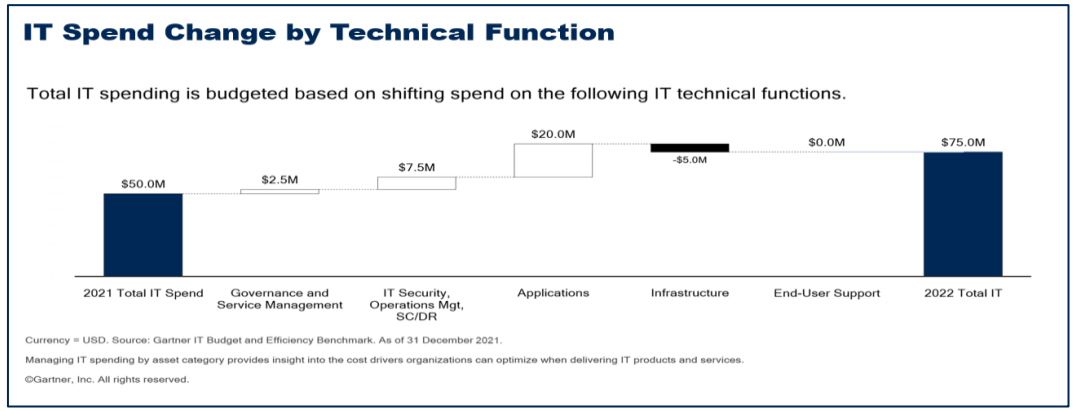
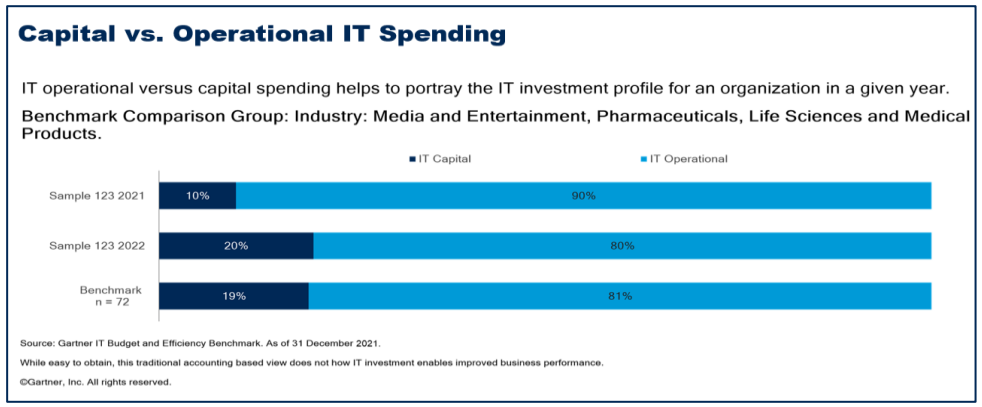
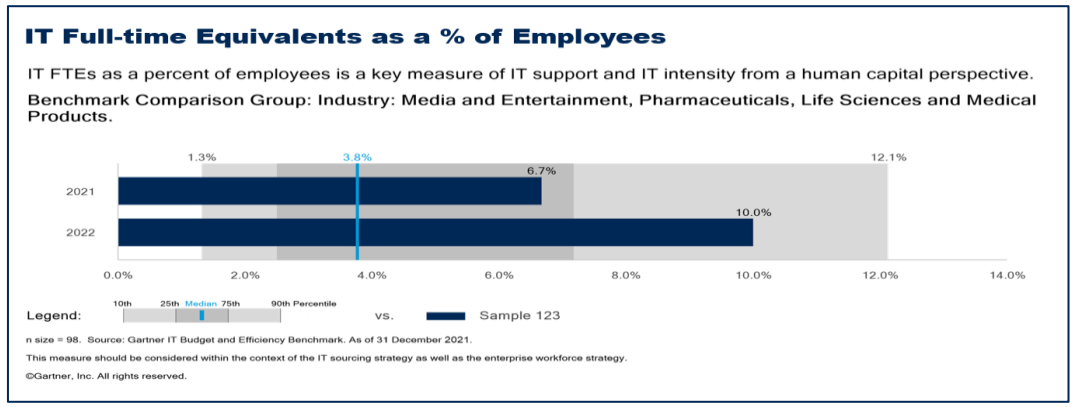
Sample report

What does the output look like?









Source: Gartner (2022)
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Recommended Readings

1. IT Budget & Efficiency Benchmark Application

2. IT Key Metrics Data 2023: Industry Measures — Framework Definitions

Additional Readings

3. IT Key Metrics Data 2023: Industry Measures — IT Budget Next Steps

4. IT Key Metrics Data 2023: Definition of Industries

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