COBIS CASE STUDY
FINANCIAL SERVICES, IBM ADVISORY
Erasing Risks and Achieving IBM Compliance

SoftwareONE IBM Advisory Services help COBIS prepare for growth.

Summary

COBIS business is expanding into new markets. For sustained growth, they require continuous high quality and availability of IT services, including risk management, control of software assets, and license tracking in all company and customer locations. COBIS engaged SoftwareONE’s IBM Advisory Services to review their contract risks and assess challenges across their environments using the IBM License Metric Tool (ILMT). At the outset, COBIS estimated a worst-case financial risk in the millions and with SoftwareONE’s assistance reduced that risk by 97.5% to thousands.

About COBIS Financial Agility Partners

COBIS is a US-based multinational banking software company established in 1953. Serving customers in North and South America, COBIS partners with financial institutions to identify technological needs and banking trends and develops sophisticated financial software to meet those needs. Their software is designed to adapt to market demands quickly and to help customers prepare for the future of banking.

The Challenge

COBIS was challenged to assure their continued expansion into new markets with new services for new and existing customers in North America, particularly in Mexico and the US. An essential part of their growth challenge was for the IT team to maintain high quality and availability of services in any part of the world where COBIS plans to innovate. That quality of services delivery requires management and control of all software assets and licensing across all company and customer locations.

Part of the COBIS objective is to fully understand the use and compliance of third-party software by all internal company areas, as well as within the customer base. They needed efficient and accurate cost distribution policies for all. Their own staff expertise and asset control tools were no longer sufficient to the task, and it was time to engage outside assistance – particularly to help with the management of IBM middleware assets that are licensed to be sold as essential components of the specialized COBIS financial software.

To achieve ongoing compliance, COBIS needed help with proper management of the IBM License Metric Tool (ILMT). The tool helps businesses measure and monitor software usage, enabling a clear understanding of potential risks or problems. They also wanted to stop paying for software that wasn’t being used or generating value. The push for efficient software use was also a directive from the COBIS executive team to improve expense controls for third-party software.

“We trust SoftwareONE’s knowledge and effectively use it for the benefit of our business.”

Emilio Casa, COBIS IT Manager

A tremendous benefit of the SoftwareONE IBM Advisory Services has been that they have talented technical experts. And they will keep you out of trouble because they also know what's in the fine print; the stuff that nobody reads.”

Emilio Casa, COBIS IT Manager
The Solution

COBIS raised their concerns about IBM contract risks in a regular meeting with their SoftwareONE account manager. That resulted in an engagement with SoftwareONE IBM Advisory Services to review their contract risks and assess challenges across their environments and infrastructure. At the outset, COBIS estimated a worst-case financial risk in the millions and with SoftwareONE assistance reduced that risk by 97.5% to thousands.

The Advisory Services review began by using the ILMT to evaluate software licenses used by developers and functions within COBIS. That was followed by assessments of individual customer installations, starting with one of their largest customers located in Colombia. “We knew they were not meeting all brand standards, and it was necessary to carry out an immediate risk review,” said Casa. “However, unlike our own facilities in Ecuador, permissions, and coordination with the client added complications that extended implementation and revision times. Even so, COBIS and SoftwareOne professionally overcame obstacles together, and recovered the pace of the project.”

As a financial technology company, COBIS has invested heavily in a flexible technology infrastructure that provided project advantages. Now, tools and processes are in place to more easily understand what is installed, how it is linked to licensing contracts, and how each software asset is being used.

When complete, the project is expected to reduce monetary risk to COBIS and their customers by 97.5% or roughly 2.5% of the estimated risk at the project’s start.

“The IBM ILMT is not a simple tool to use, and IBM licensing is complicated. SoftwareONE’s practical knowledge and expertise provided the consultancy, assessment, and implementation advice that clarified the manufacturer's rules and achieved the successful results we wanted.”

EMILIO CASA, COBIS IT MANAGER

Benefits

01 COBIS and their customers now fully IBM compliant
02 Reduced compliance risk and potential expense by 97.5%
03 Detailed knowledge transfer from SoftwareONE experts in licensing and the ILMT
04 Advisory Services have substantially reduced COBIS compliance management staff time
05 Ongoing trusted strategic partnership