

## Case Study | Banking

# Livingstone Group helps major Global Bank optimize Microsoft negotiation strategy and achieve new cloud savings

This Livingstone Group client is a major Global Bank and financial services institution, with the majority of its locations situated across Europe and the Americas, and additional online services available throughout the rest of the world.

The organization has a long-standing relationship with Livingstone Group, having first engaged its services over a decade ago when Livingstone's team of licensing experts came on board to support the organization's Microsoft contract negotiations. Livingstone helped the organization to prepare and execute intelligence-driven negotiation strategies as well as optimize contract renewals, something which it has continued to do ever since.

Last year the organization once again turned to Livingstone's team of experts, this time to assist with a multi-year, million-dollar cloud contract renewal. As a second-generation cloud customer, the organization was concerned about being able to re-negotiate a good deal with the vendor, and ultimately achieve all of its goals.

These included the optimization of its licenses and server estate, as well as the ability to flex its entitlement to accommodate changing market circumstances, something which became a larger focus as the coronavirus pandemic developed and increased the need for cloud-based applications. Indeed, the organization wanted to ensure its new contract was aligned with its future IT roadmap whilst also making cost-savings in the process. In addition, as a financial institution, it needed to do this securely to ensure it was remaining compliant with data protection regulations.

### Gathering evidence

The organization wanted to build a sustainable business case and a future-proofed contract that would encompass all its current and future requirements, and knew that Livingstone's team of experts were just the right people to help achieve its objectives.

With a dedicated team of experienced, multi-disciplined licensing consultants and industry experts, and armed with in-depth knowledge of the organization's needs and requirements thanks to a long-standing relationship, Livingstone Group was able to hit the ground running.

A photograph of two business professionals, a man and a woman, sitting at a desk and looking at a laptop. The man is on the left, wearing a light blue shirt, and the woman is on the right, wearing a blue striped shirt. They appear to be in a meeting or collaborative work environment.

“The biggest achievement for us during the entire process was that Livingstone was truly part of the organization. With clear roles and responsibilities and with strong teamwork, we were really able to integrate with the company to fully understand its needs and requirements.”

Head of Microsoft Consulting Practice  
Livingstone Group



Livingstone's team worked closely with the organization, involving procurement and IT teams as well as a number of executive-level stakeholders, to develop and execute an airtight negotiation strategy and an optimized budget. This process involved Livingstone's tried-and-tested optimization process of gathering data on usage, licensing and entitlement in order to build a realistic and optimized IT roadmap.

Gathering all the required data did present a challenge. The organization had previously appointed another third-party service provider to manage the data collection process but the quality of information available was not up to the required standard. Livingstone was able to overcome this hurdle thanks to its knowledge of the customer and its industry expertise. This was a particularly important step as the data gathering played an essential part in building a strong, evidence-based case that the organization could present to the vendor. This intelligence also helped Livingstone draw up an optimized budget.

This year Livingstone Group's team concluded the project ahead of the renewal date. Having had a significant lead-time to prepare ahead of the renewal, Livingstone was able to help the organization put together an intelligence-led, complete negotiation strategy that would ensure them the best possible outcome.

#### 95% of goals achieved

Thanks to Livingstone's team of Microsoft licensing and industry experts, the organization was able to achieve 95% of its intended goals during negotiations, gaining more flexibility, achieving regulatory compliance and optimizing its licensing costs.

Furthermore, when compared to its forecast, the new contract delivered costs savings of almost 20%. This was an unexpected but exceptionally good result considering the organization was starting from an already optimized position and had already migrated to the cloud.

Livingstone was able to further streamline the optimization process by involving all relevant stakeholders, from procurement to C-level. This ensured that the needs of every aspect of the business were taken into account ahead of the negotiations and that stakeholders across the board were aware of the importance of the optimization process.

#### Next steps

The organization is committed to optimizing its future software licensing needs and in engaging Livingstone Group to help it achieve its desired objectives and cost-savings. Livingstone will continue to help the organization with all negotiations going forward and in exploring continuous optimization services.

“With our expertise and knowledge of Microsoft, we feel we have been able to deliver the best possible outcome for the organization and look forward to continue growing the close relationship that we have built together.”

Head of Microsoft Consulting Practice  
Livingstone Group