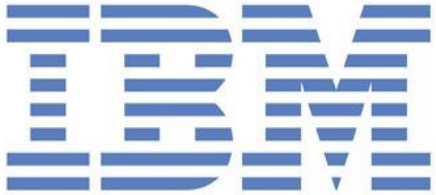
Platform Selection - A Smarter Approach



Version 2011-12-14 (December 2011)

Jointly Developed With:

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The Platform Selection Whiteboard

The purpose of this Whiteboard is to provide you with a framework for having an interactive "discovery oriented" discussion with a client or prospect using a whiteboard, a piece of paper, an easel or if in a restaurant, a napkin or tablecloth or just a conversation.

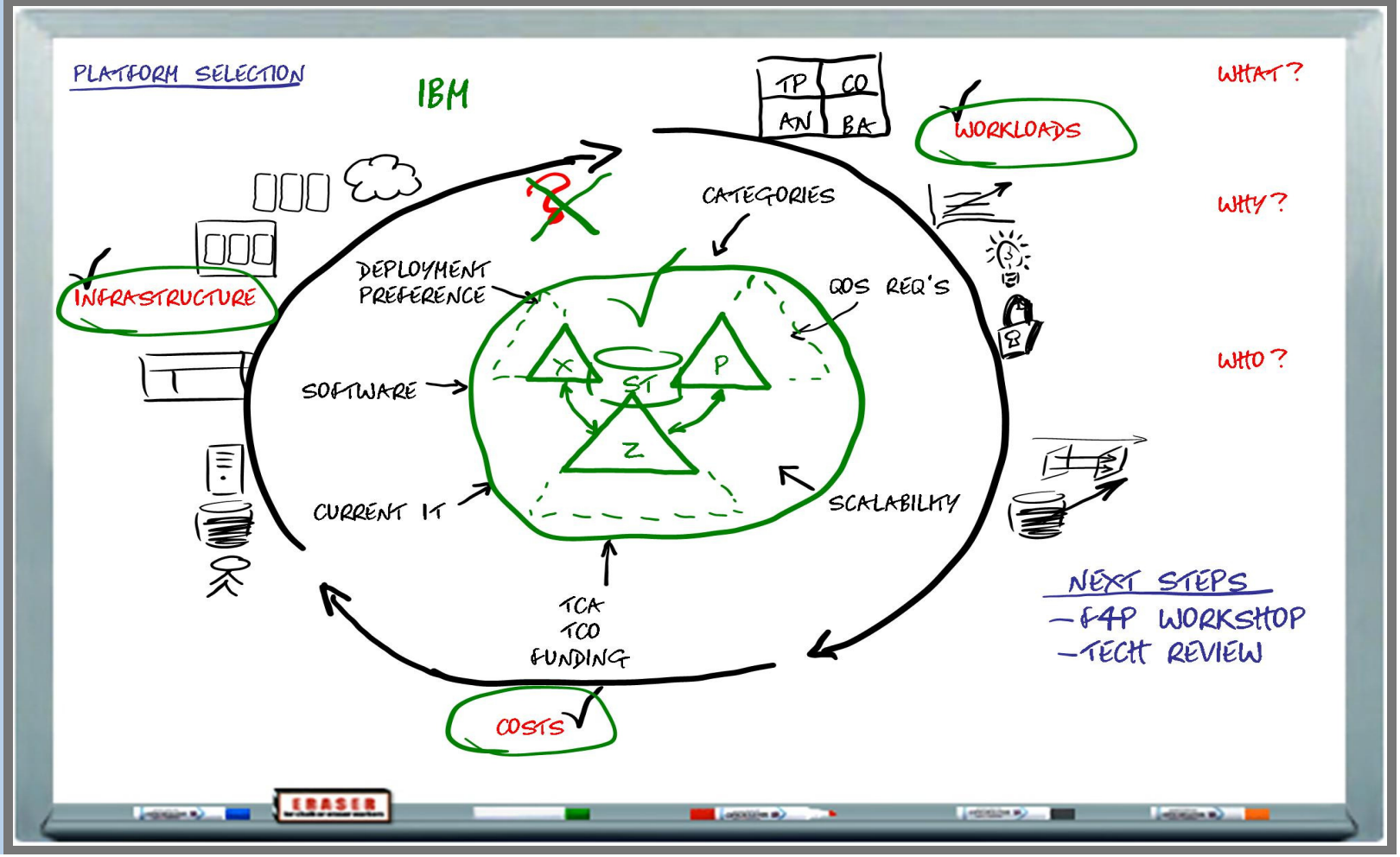
The content of this whiteboard has been designed to enable the presenter to provide the client with a view into IBM's approach to platform selection and to help both the presenter and the client "discover" the questions and "challenges" which need to be taken into account.

The end goal of the whiteboard discussion is to create enough interest to get the customer to agree to a next meeting or discussion that can go into more detail related to the specific platform decision that the customer is dealing with. **This follow-up meeting could be with an architect, a brand specialist or others as appropriate.**

The "power" of the whiteboard is that it gives YOU control over the conversation and the content and does NOT force you to follow a pre-defined path – one of the problems with PowerPoint. It allows you to align the conversation with the specific issues or challenges you uncover and at the same time provides key benefits of the IBM approach to platform selection.

Prior to your meeting, practice the whiteboard and come up with questions or challenges that are specific to the client. This will help you to further align the discussion to that customer and make the session more compelling for both you and the customer.

1 The Platform Selection Whiteboard



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Setting the Stage

Thanks very much for taking the time to meet today. When we set this meeting up you mentioned that you were starting a process to select a server platform. Is that still the case?

What I'd like to do over the next 25-30 minutes is provide you with a overview of a methodology that IBM has used with 1000's of customers who were in a similar situation to you and faced the question of:

1 **[Platform Selection]** Selecting a new server platform. Before I sketch out the process I have a few questions.

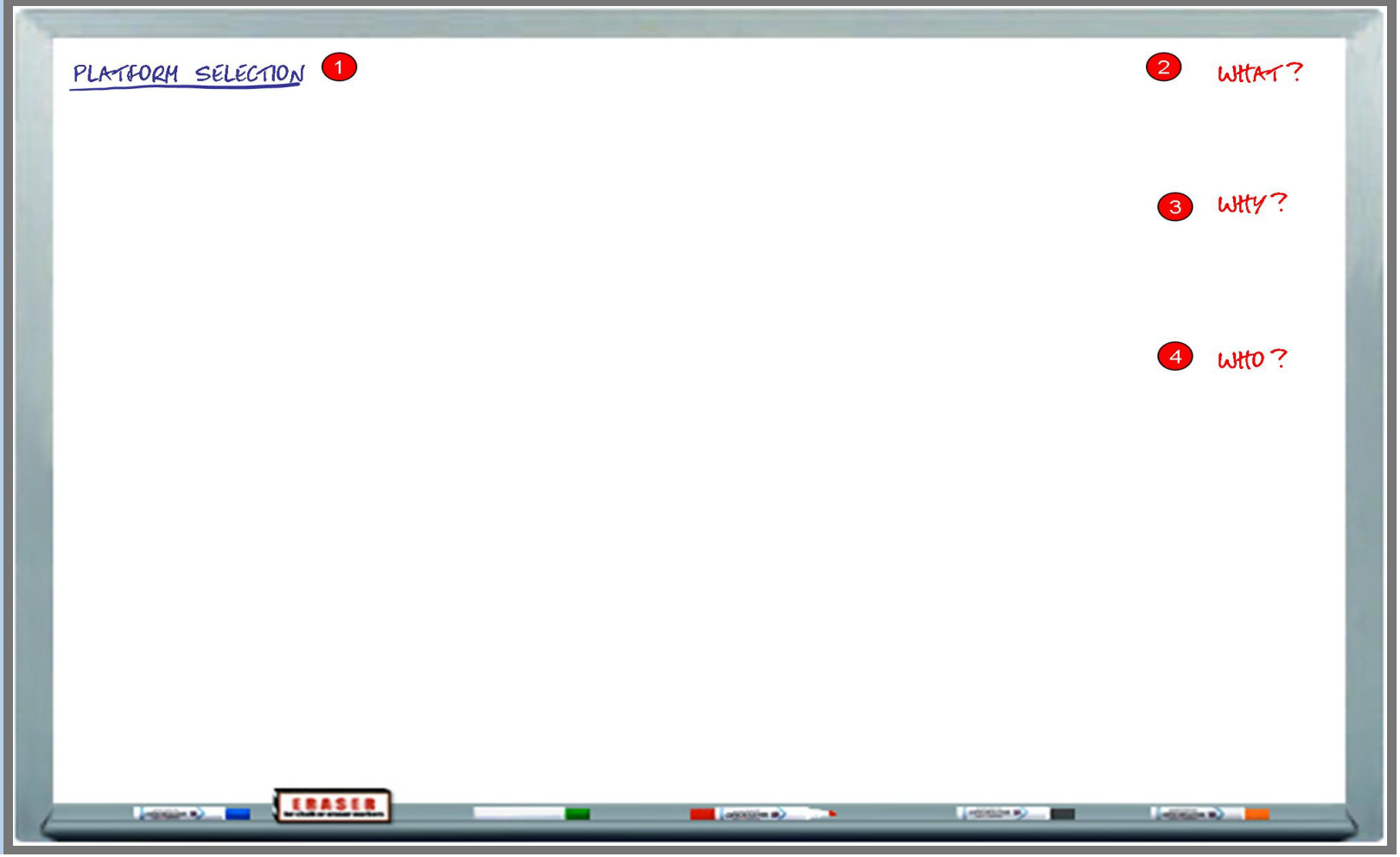
2 **[What?]** What specifically is the decision that is being made. Are you replacing a server? Upgrading an existing server? Looking for new storage capabilities? Can you give me some perspective on that?

3 **[Why?]** What's creating the need for change? What are the key objectives you are trying to achieve? Are there any organizational factors which will influence the decision?

4 **[Who?]** Who will be involved in making the final determination?

[Note to presenter – you should write on the "board" key elements from the answers]

2 Setting the Stage



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Platform Selection - The Big Picture

Thanks. As I mentioned IBM has worked with 1000's of customers in these types of decisions. Based on our experience we've found that the organizations who make the most informed decisions generally take into account three interconnected criteria:

1 **[Draw three connected arcs]**

2 **[Infrastructure]** This relates to the underlying computer systems, storage, network and software as well as the staff associated with the environment.

3 **[Workloads]** These are the processes and applications that deliver real business value. Some people might refer to this as "applications".

4 **[Costs]** And these are the total costs of providing and maintaining the infrastructure and workloads.

Each of these criteria are important to a platform decision and each has a number of key factors which should be taken into account.

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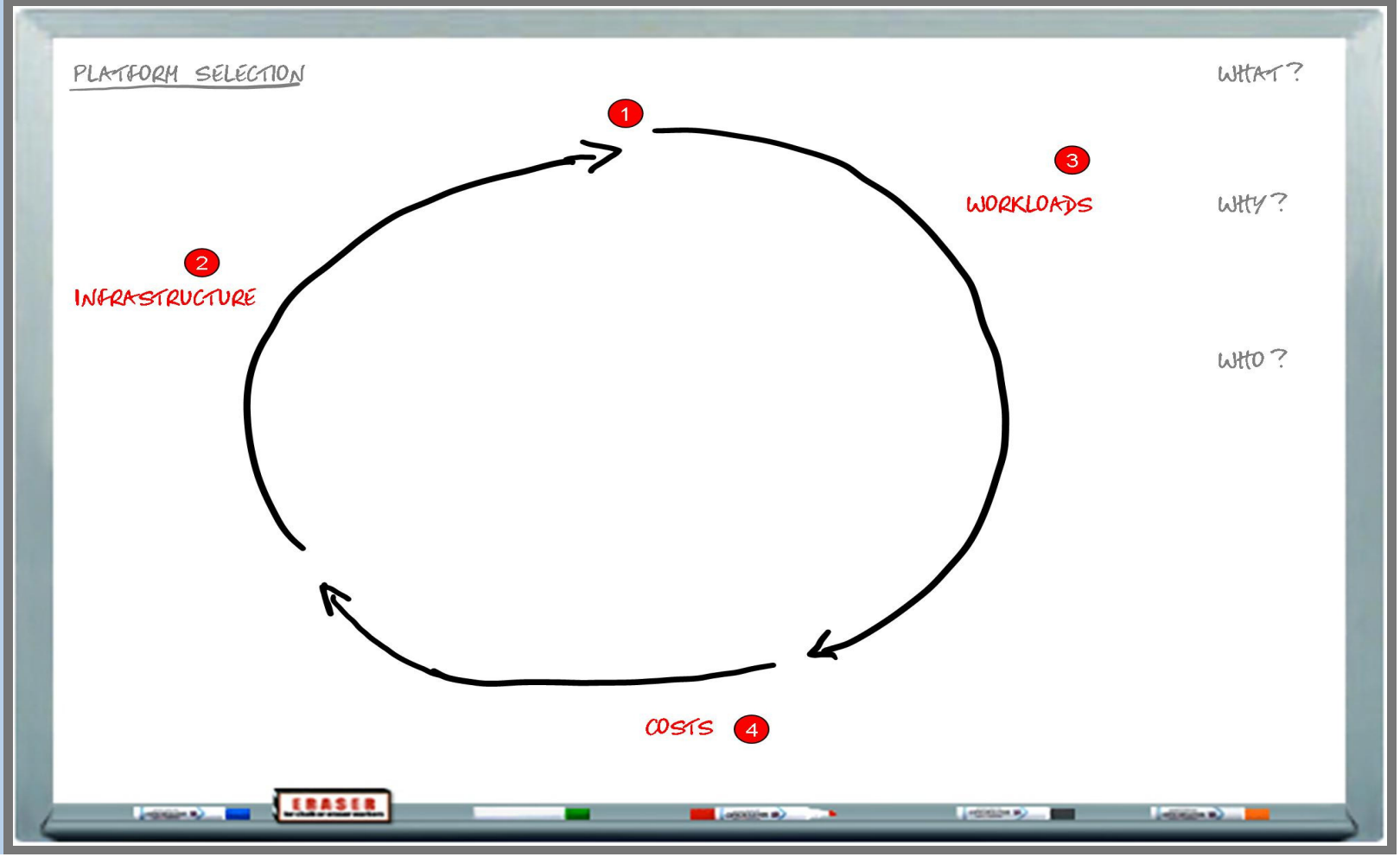
Platform Selection - The Big Picture



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Infrastructure - The Categories

[Note to presenter. This whiteboard has been designed so you can either use Icons (images) or words or both. The use of Icons can make the discussion more compelling and memorable but the discussion will work with only words]

I'd like to give you a sense of the key factors that you might consider in making a decision and some of the questions the team should be asking.

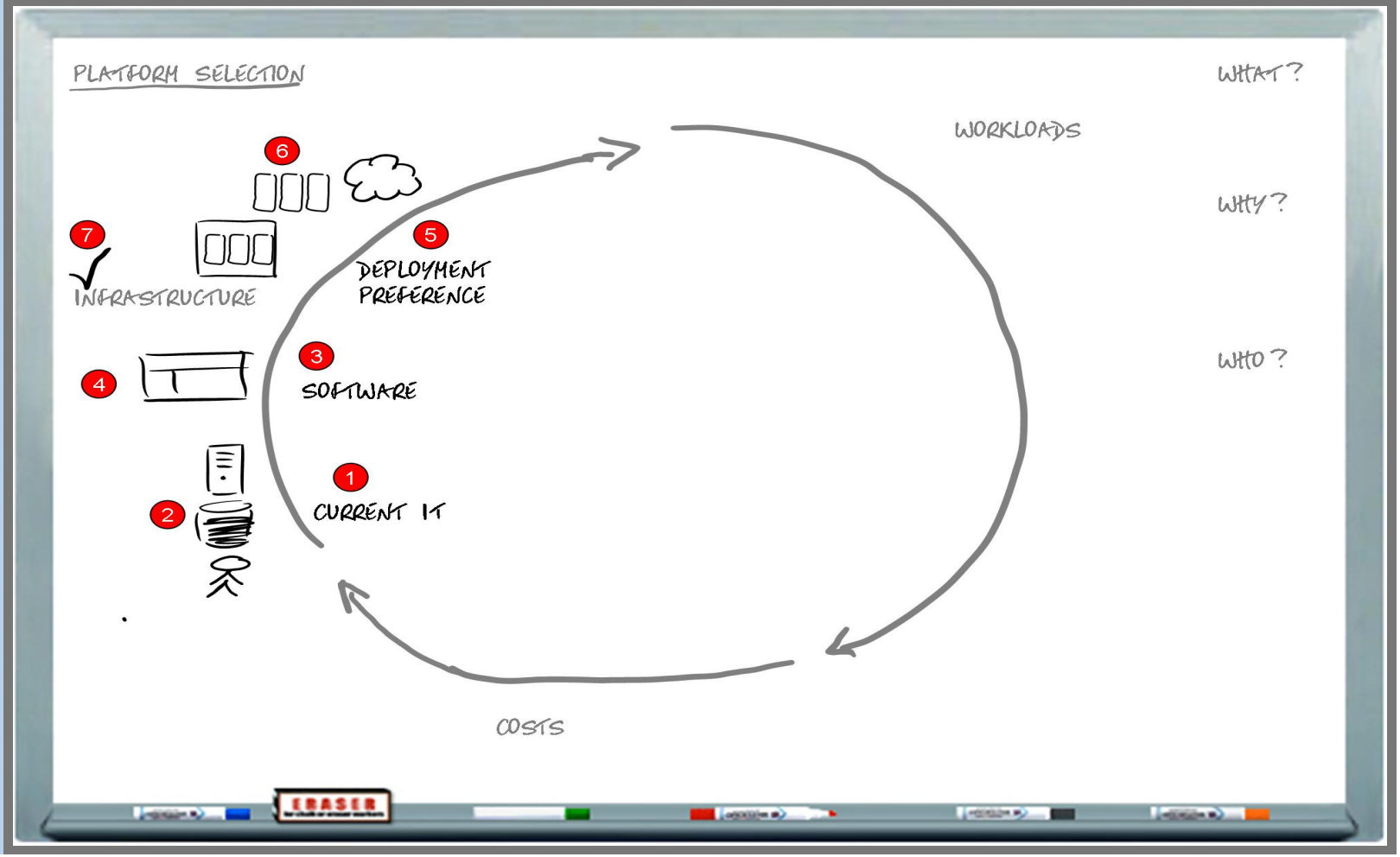
For Infrastructure:

1 **[Current IT]** What does your current platform environment look like? X86 (Intel)? Power (Unix)? System z? Where is most of the processing taking place? What is the skill level of the organization with respect to these platforms? What is the technology preference of the organization? What are the characteristics you are looking for from your server platform? Are you looking to increase your investment in your existing platforms or explore new ones?

2 **[Software]** What type of software needs to be supported or made available? Have you adopted specific open standards such as J2EE? Is there a specific ISV application, database, or piece of middleware software you are or will be dependent on?

3 **[Deployment Preference]** What is the deployment preference for this application or the preference for the IT organization? **Centralized** in order to maximize sharing of resources? **Virtualized** in order to consolidate existing systems and share resource? **Hosted/Cloud** in order to increase flexibility through delivery of IT resources as services? Or **Dedicated** to isolate applications from each other and allow for hosting in different geographic locations ?

4 Infrastructure - The Categories



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Workloads - The Categories

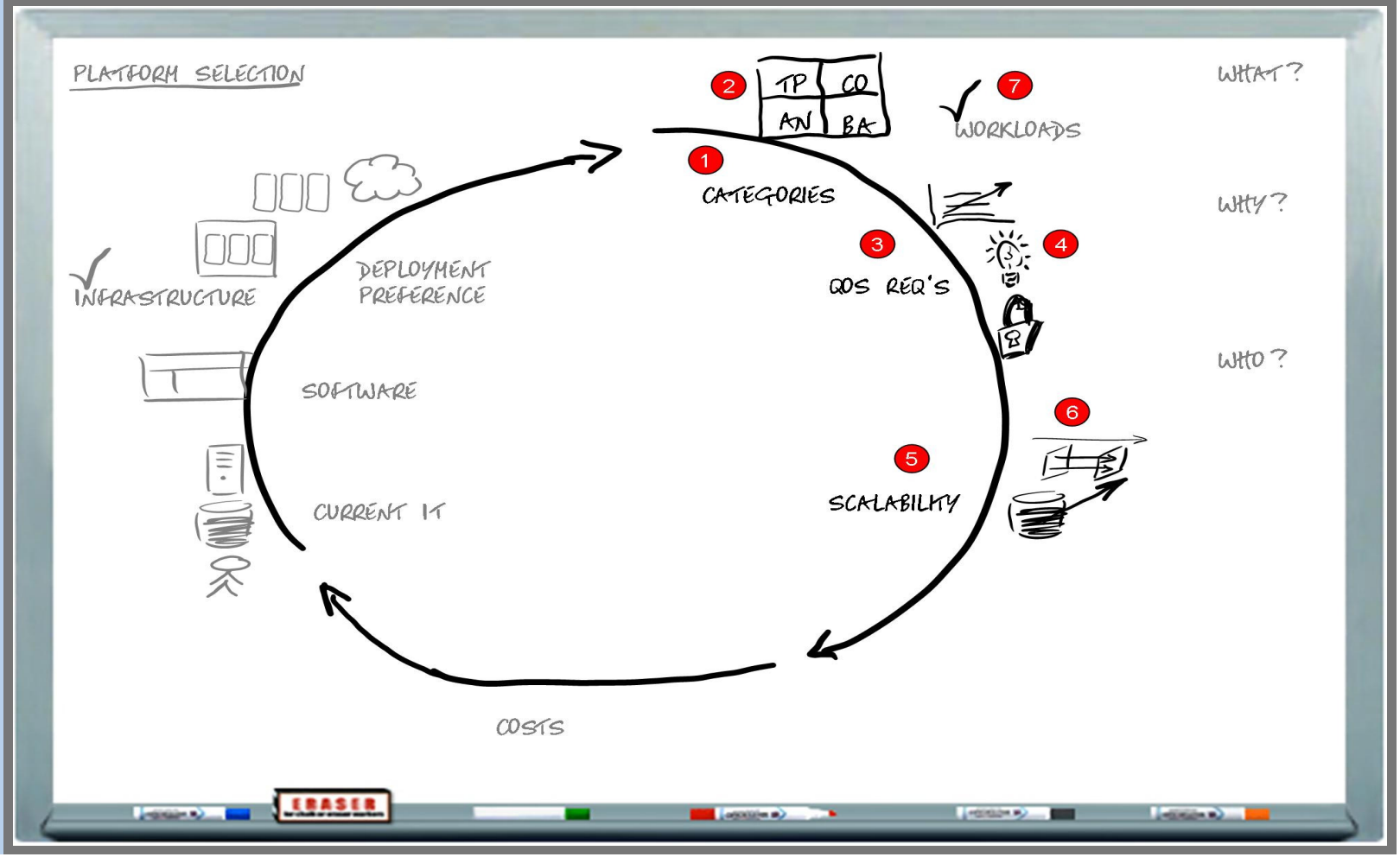
With respect to Workloads:

1 **[Categories] T**here are four general types of workloads – those that are focused on Transaction processing or are database oriented which need scalability, high quality of service and the ability to handle peak workloads; Web, Collaboration and Infrastructure which need high throughput and highly threaded, scale out systems; Business applications which need scale, high quality of service and large memory; and Analytic or high performance computing which are compute intensive and need high memory bandwidth and floating point support. What type of workload is planned for the new platform?

2 **[QOS Requirements]** What are the specific quality of service requirements with respect to reliability – both the underlying reliability and the ability to do concurrent maintenance? Availability – including redundancy, clustering / hot standby, and high availability? Security – including standards, role-based security or mandatory access control, and compliance?

3 **[Scalability]** What level of scalability is required for Performance, Capacity, Elasticity, Expansion without disruption – and what approach to scalability is preferred – scale-out, scale-up or both?

5 Workloads - The Categories



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Costs

With respect to cost, what factors are most important to this decision?

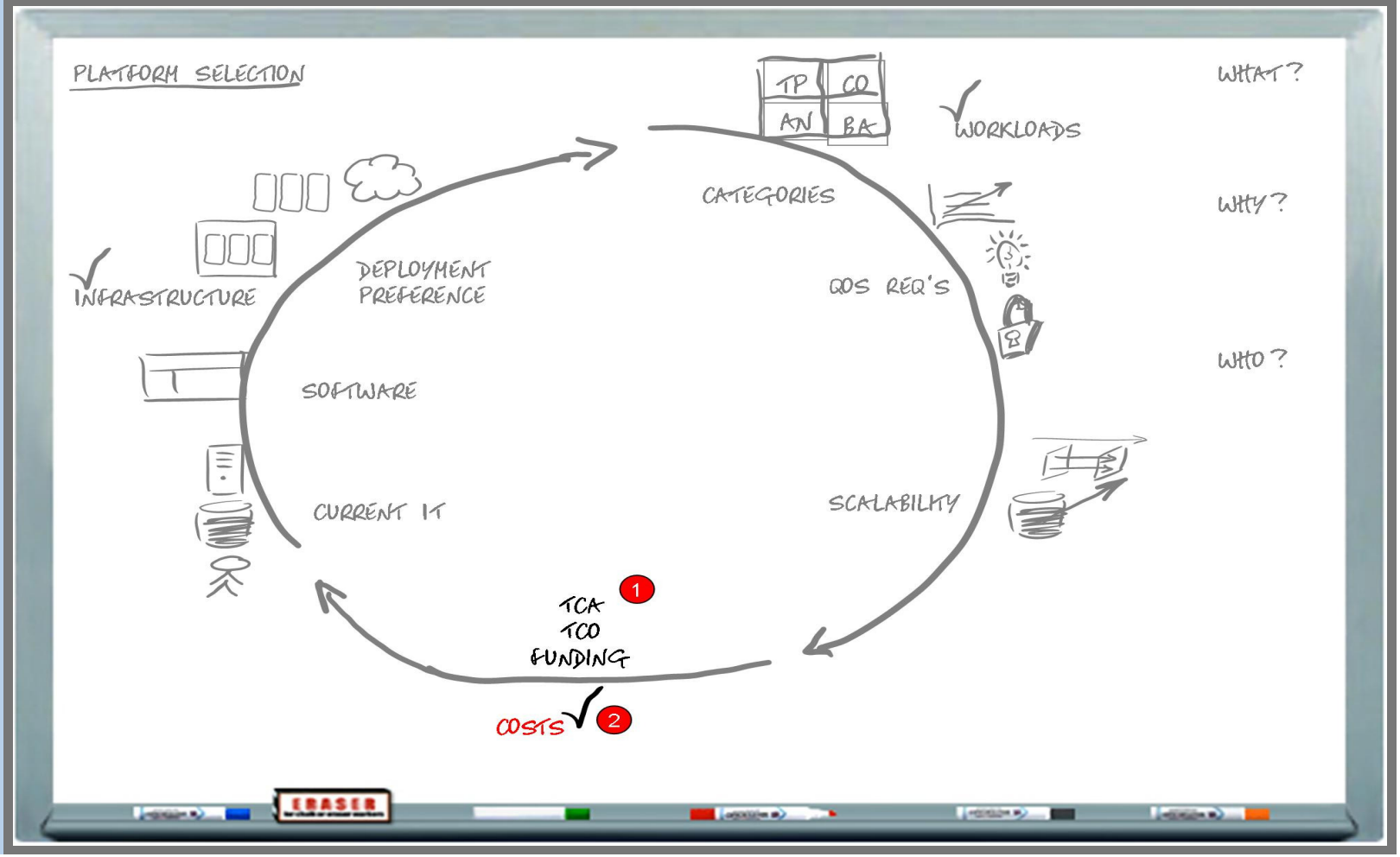
1 **[TCA-TCO-Funding]** How important relatively are total cost of acquisition, total cost of ownership, and financial costs? Are you looking for a platform with low initial costs or low costs long-term?

For acquisition costs, have hardware, software and building costs been factored in?

For ownership cost, what about recurring costs such as hardware and software maintenance or operational costs such as staff, premises, power and cooling?

Or is how you will fund or finance the platform the key consideration?

6 Costs



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Fit for Purpose

1 **["?"]** These decisions are not easy and they require that the organization answer the types of questions that we have just reviewed.

2 **[IBM]** Helping to identify and answer the "right questions" is where IBM can assist. As I mentioned, IBM has worked with 1000's of organizations in dealing with these types of decisions.

The key to approach that IBM has followed:

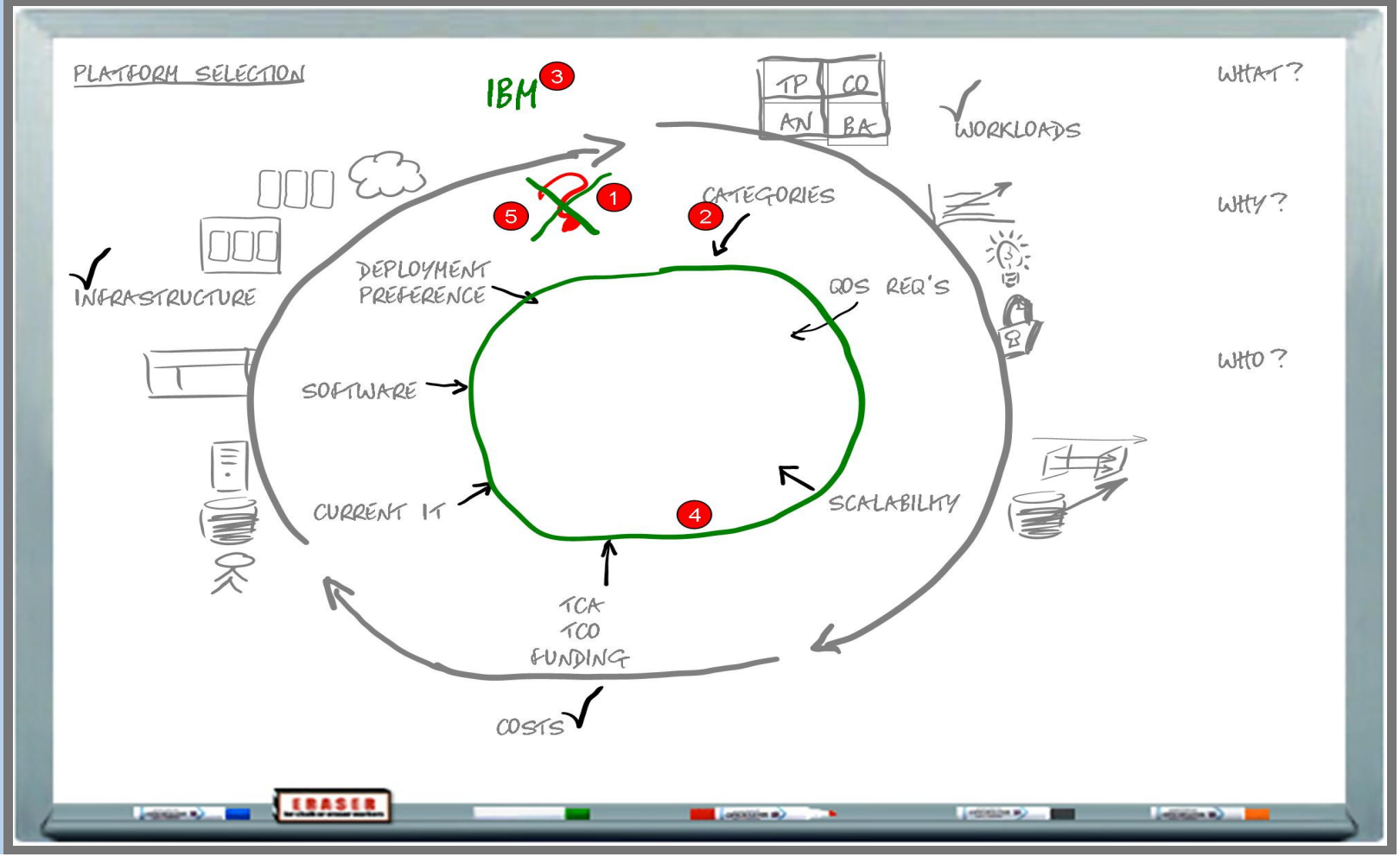
3 **[Arrows from 7 Factors]** ...is to take address the questions in each of the 7 factors within Infrastructure, Workloads and Costs and determine how important they are relative to the overall platform decision.

4 [Green Circle] We call this approach **Fit for Purpose**.

The goal of this approach is to:

5 **["X" through "?"]** ...take some of the guess work and some of the related risk out of making a platform decision and grounding it in what is really important to the organization now and for the future.

Fit for Purpose



IBM Platforms

If we take this approach and apply it to looking at IBM platform options in general, I think you'll get a sense of how it could be applied here at (*Name of Company*).

For example:

1 **[Triangle 'P']** Power can offer advantages for virtualized and cloud deployments where the workloads are databases or analytics and high levels of scalability and quality of service are needed.

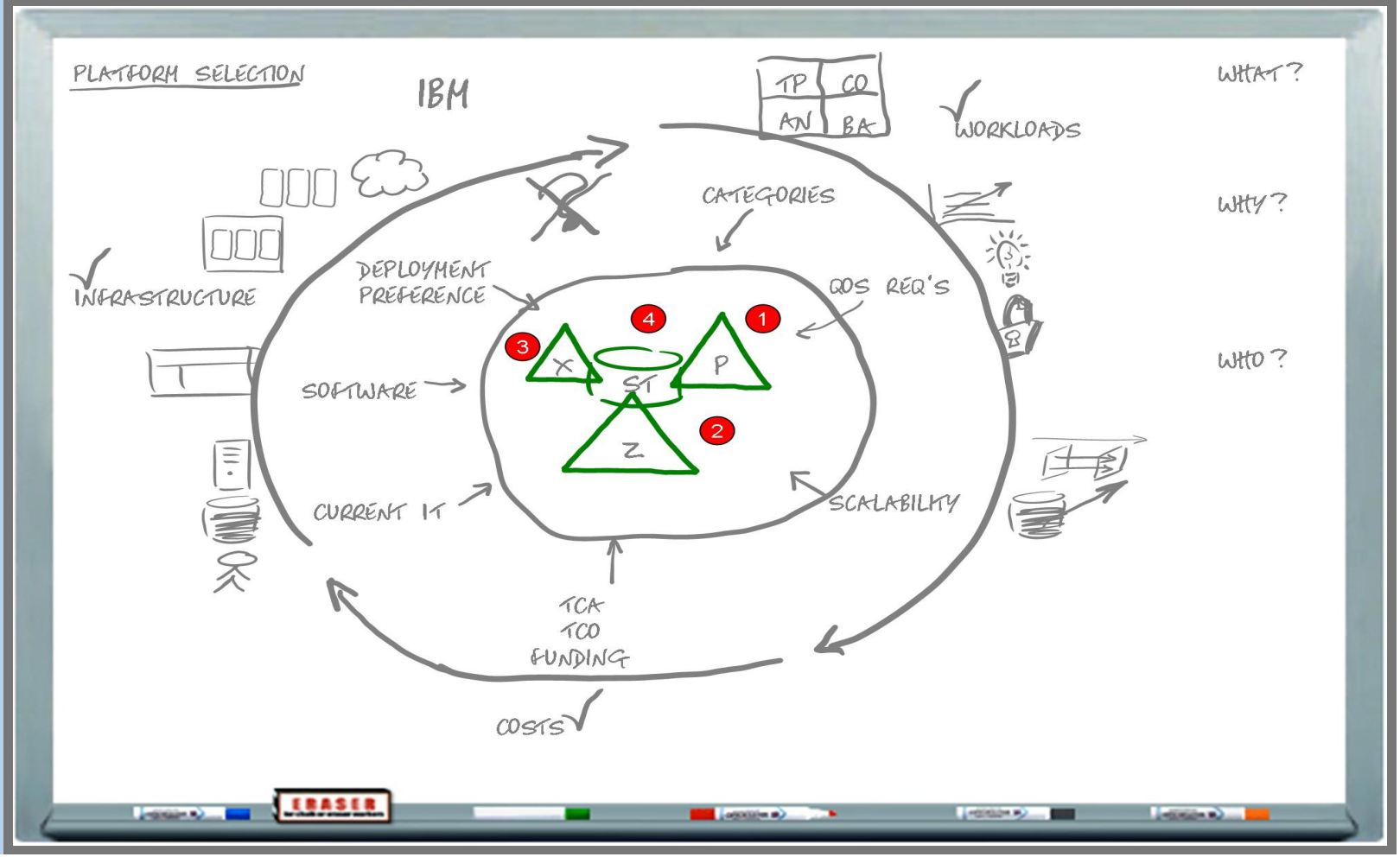
2 **[Triangle "Z"]** System z works well for centralized and virtualized environments where workloads are transactional, the highest levels of quality of service are desired, and long-term total cost of ownership is important.

3 **[Triangle "x"]** System x could be a good fit if your current systems are x86, you're looking to run web, collaboration and infrastructure workloads and low acquisition costs are most important.

4 **[Storage]** IBM Data Storage, Storwize, IBM XIV or SONAS can be key especially where large amounts of data need to be reliably and efficiently stored.

These general guidelines can help in narrowing down the decision, however, it is critical that the organization take into the **Key Factors** we discussed earlier. By answering the questions related to these factors can override other reasons for choosing platforms which is why we're so keen help you identify and understand these factors.

IBM Platforms



Meeting Requirements

The way that we apply the Fit for Purpose approach is to look at each of the factors that we discussed earlier and determine which of the platforms **best** meets the requirements that you have. And as you go through that process you begin to see that may be one or more servers that best fit the requirements. Let me give you a couple of customer examples:

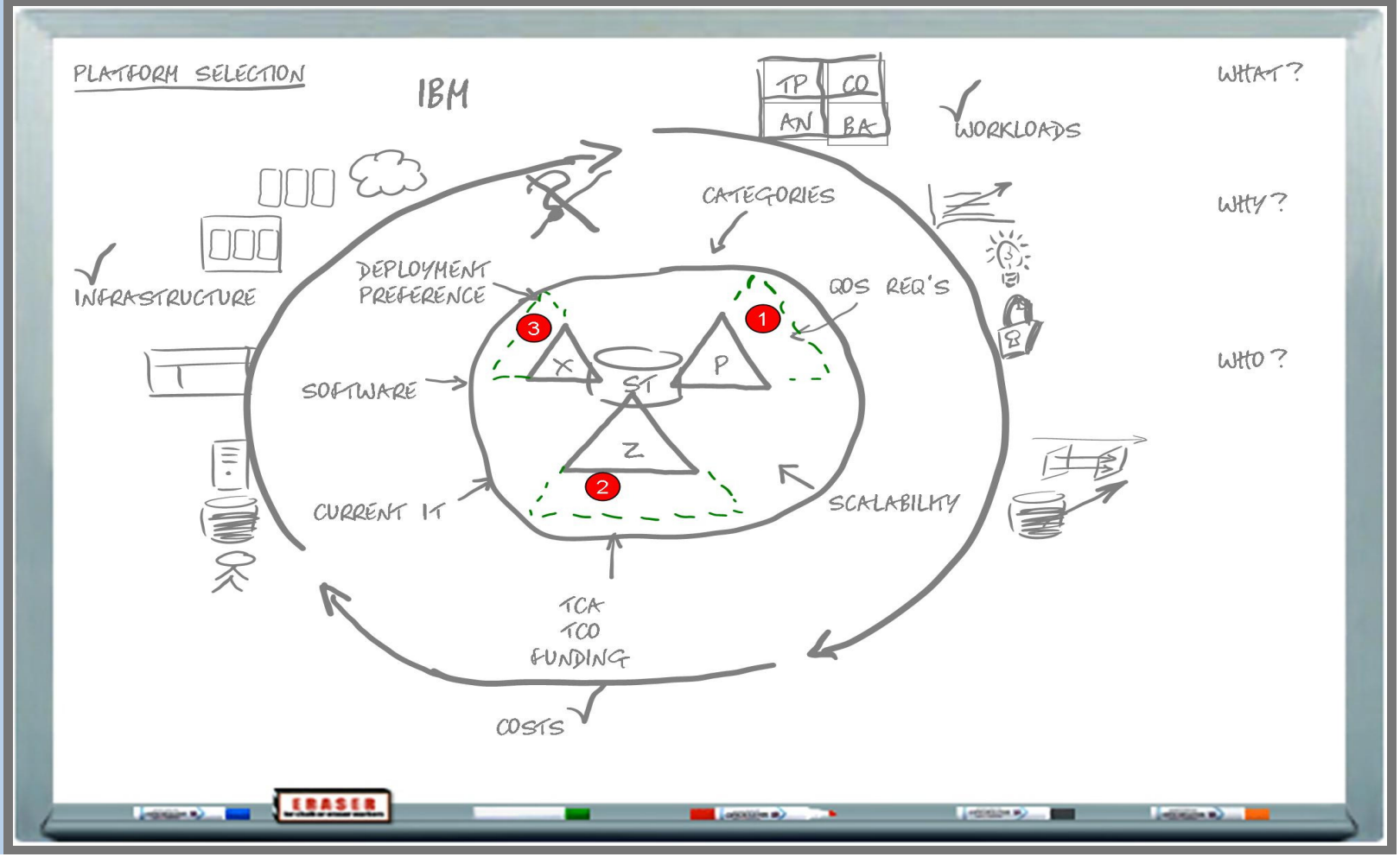
1 **[Expand Triangle 'P']**IT Informatik chose Power Systems servers leveraging PowerVM virtualization to run SAP applications under Linux with data in DS4700 storage. Virtualization ensures high utilization of IT resources, reduces administrative effort for staff, and saves more than 65 per cent of data center space.

2 **[Expand Triangle "Z"]**Svenska Handelsbanken has consolidated hundreds of distributed servers onto System z using DS8700 storage. By running Linux, Java and database workload alongside core banking systems on an IBM System z10, Handelsbanken benefits from a single easy-to-manage platform with rapid disaster recovery capabilities, and has reduced the operational cost of the environment by about 15% per year.

3 **[Expand Triangle "x"]** Acxiom is a leader in marketing services and technology and has been using IBM eX5 systems to transform its IT especially for its thousands of servers used to provide cloud computing for its clients. The IBM eX5 solution enables a high virtualization ratio and reduces power consumption, enabling cost effective expansion.

The key is look at how well the platform or platforms not only meet the requirements today but just as importantly how well they will meet future requirements.

Meeting Requirements



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Recap and Next Steps

1 **[Check mark]** The **Fit for Purpose** approach has enabled 1000's of companies to make less risky more successful platform decisions by looking at and answering the key questions related to:

2 **[Circle around Infrastructure]** Infrastructure and the key factors – the **Current IT** environment, required or mandated **Software** and **Deployment** preference.

3 **[Circle around Workloads]** What **type of workload** is it, what are the quality of service (**QOS**) requirements and what **scalability** requirements are critical.

4 **[Circle around Costs]** And finally **costs**. The key here is focus on what is really critical for the longer term and this often means not merely looking at the acquisition costs (**TCA**) but the long term recurring and operational costs (**TCO**).

5 **[Next Steps]** What we'd like to suggest as a follow on to today's session is (choose one) a more detailed **Fit for Purpose Workshop** with your technical architects (or) an in-depth discussion on the server platform that you're most interested in at the moment (**Tech Review**).

What makes sense to you?

Recap and Next Steps