

ADDITIONAL NOTES

SOFTWARE IMPACT ASSESSMENT	
Name of Software Being Assessed	
Name of Assessor	
Date of Assessment	

FINANCIAL INPUTS	
Gross Margin - Recurring Revenue	
Gross Margin - Services Revenue	
Headcount Benefits Cost + Tax Cost as a % of Salary	

COST INPUTS	
Cost of Software Subscription - Annually	
Cost of Software Implementation - Upfront (By Vendor)	
Cost of Software Implementation - Internal Team (Estimated Wages)	
Cost of Software Maintenance - Annually (Estimated Wages)	

PERFORMANCE ENHANCEMENT	
Does (alt: will) this tool improve performance in a measurable way?	
If yes, what metric do you hypothesize it will improve?	
What is the baseline value for this metric without the tool in place?	
What is the observed (alt: hypothesized) rate of relative improvement?	
Can this improvement in performance be tied to revenue in some way?	
If yes, how so?	
What is the annual recurring revenue impact of this performance enhancement?	
What is the annual, one-time service revenue impact of this performance enhancement?	

EFFICIENCY INCREASES	
Does/will this tool increase efficiency in a measurable way?	
If yes, does/will it save time or increase the rate of output (or both)?	
If this tool saves time, who's time does/will it save?	
How many hours/month of time does/will it save?	
What is the hourly rate of this person (alt: these people)?	
If this tool increases/will increase the rate of output, what % increase in output does/will it provide?	
How many hours of work/month does/will this equal?	
What is the hourly rate of the person that does this work?	
Monthly Wage Savings - Saved Time	\$0
Monthly Wage Savings - Increased Output	\$0

IMPROVEMENT IN UNDERSTANDING	
Does/will this tool improve our understanding of our business?	
If yes, does/will this improved understanding impact our business in a measurable way?	
If yes, what is the primary metric that this improved understanding impacts/will impact?	
What is the observed/hypothesized rate of relative improvement?	
Can this improvement in performance be tied to revenue in some way?	
If yes, how so?	
What is/will be the annual recurring revenue impact of this improved understanding?	
What is/will be the annual, one-time service revenue impact of this improved understanding?	

LOSS PREVENTION	
Does/will this tool prevent loss in any way?	
If yes, what loss does/will it prevent?	
What is the probability of this loss occurring (annually)?	
What would be the financial impact of this loss?	
Loss Prevented - Annual Financial Exposure	\$0

COST SUMMARY	
Cost of Software Subscription - Annually	
Cost of Software Implementation - Upfront (By Vendor)	
Cost of Software Implementation - Internal Team (Estimated Wages)	
Cost of Software Maintenance - Annually	
Cost of Software - Annually Recurring	\$0
Cost of Software Implementation - Total Upfront	\$0

REVENUE SUMMARY	
Revenue Gain - Annual Recurring Revenue	\$0
Revenue Gain - Annual Services Revenue	\$0
Cost Savings - Annual, Time-Related (Includes Benefits + Tax Cost)	\$0
Loss Prevented - Annual Financial Exposure	\$0

FINANCIAL SUMMARY	
Year 1 Payback Period in Years (Net Gross Margin)	
Year 1 ROI (Net Gross Margin)	
Year 2+ Payback Period in Years (Net Gross Margin)	
Year 2+ ROI (Net Gross Margin)	