

**Date:** \_\_\_\_\_ mm/dd/yyyy

**Prepared by:** \_\_\_\_\_

**Role/Position:** \_\_\_\_\_

**Document owner:** \_\_\_\_\_

**Role/Position:** \_\_\_\_\_

**Business Situation:** *Enter business situation here*

**Example:** Our mainframe environment is reliable but costly to maintain and dependent on a shrinking talent pool. The operational model lacks flexibility and adds risk to our long-term IT strategy.

**Business Challenge:** *Enter a concise explanation of the business challenge here: Identify the problems, challenges, and issues requiring attention*

**Example:** Rising costs, talent shortages, and modernization pressures are creating operational risk and limiting agility—making the current model unsustainable.

**Proposed Recommendation:** *Describe what you're recommending and why*

**Example:** Shift to a Mainframe-as-a-Service (MFaaS) model to improve how our core mainframe environment is managed and supported. This approach retains our current systems while transitioning infrastructure and operations to a specialist partner.

**Financial Impact:** *Enter expected financial outcomes here*

**Example:** 1) Projected [X]% reduction in total cost of ownership over three years. 2) Shift from CapEx to predictable OpEx. 3) ROI expectations within [timeframe].  
4) Cost avoidance for hardware refresh and talent acquisition.

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**Expected Outcomes & Value:** *Enter expected business outcomes and value here; focus on the benefits that resonate with executive stakeholders*

**Example:** 1) Cost reduction: Lower total cost of ownership. 2) Talent risk mitigation: Offload SME dependency and skills continuity risk. 3) Operational resilience: Enhanced SLAs, disaster recovery, and 24/7 support. 4) Agility and transparency: Scalable service model with cost and performance visibility. 5) Compliance: Alignment with audit/regulatory requirements.

**Risk Considerations & Mitigations:** *Enter risk considerations and mitigation strategies here; address potential objections directly*

**Example:** 1) Continuity: Phased transition ensures no disruption to operations. 2) Control: Governance retained; transparency via dashboards and reporting. 3) Compliance: Provider meets industry certifications and audit standards.

**Next Steps:** *Enter next steps here; be specific about what approval is needed; include dates*

**Example:** [Executive leadership] to approve engagement with shortlisted MFaaS provider to proceed with commercial due diligence and transition planning.  
Due: Month, Day