

# The Business Value of IFS Copperleaf



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# Business Value Highlights

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**\$742,429** in additional net revenue



**3%** increase in total economic value of capital portfolio



**469%** three-year ROI



**11-month** payback on investment



**17%** more efficient capital planning and management teams



**55%** more efficient at shifting capital



**18%** more productive asset managers



# Executive Summary

This document describes the value and benefits for organizations that use IFS Copperleaf as their asset investment planning (AIP) application to optimize their capital investment planning processes.

**Using IFS Copperleaf enabled these companies to gain a variety of benefits, including:**

- Aggregating their investment data and viewing it from an enterprise portfolio level
- Combining merged entities into a single capital investment bucket
- Optimizing their financial decisions for large capital investments in an objective way
- Justifying investments with quantifiable benefits

IDC conducted research that explored the value and benefits for organizations that use IFS Copperleaf to optimize their investment planning operations and processes.

**Based on an extensive data set and by employing its specialized Business Value methodology, IDC calculates that these customers will achieve benefits worth an annual average of \$17.5 million per organization and a three-year ROI of 469% by:**

- Better prioritizing capital projects based on strategic value, thereby ensuring alignment with long-term business goals and more informed decisions regarding capital expenditure
- Centralizing capital planning data while improving collaboration and stakeholder confidence through greater visibility and transparency
- Providing AIP solutions that enable the organizations to make transparent, defensible, and strategically aligned investment decisions
- Standardizing capital planning and governance across business units and promoting consistent evaluation and approval processes that reduce bias
- Automating workflows and reporting, thereby serving to increase efficiency by reducing manual effort and processes

# Situation Overview

AIP applications are strategic planning tools that help organizations manage their capital plans and make decisions about investment and risk. AIP software enables organizations to evaluate the full value, risk, and strategic impact of potential investments so that leaders can prioritize and fund the projects that deliver the greatest enterprise value and long-term asset performance. When evaluating between two projects or among several, AIP software helps companies make financially smarter and more strategic decisions, optimizing their limited resources and contributing to their bottom lines.

Asset investment planning is currently a hot topic in the asset management space. Asset life-cycle management applications typically follow assets from procurement to maintenance, repair, and overhaul, through to the end of life. However, what companies often miss is how to determine which projects to fund in the first place. AIP can also aid with decisions at the other end of the process: whether to continue investing in their current assets or decommission them. In these vital decisions, many companies are often limited to the gut feel of managers and executives or to using basic tools such as spreadsheets. Companies have a tremendous number of ways to spend limited resources, but they often do not carefully evaluate which assets or projects to fund.

**IFS Copperleaf helps companies balance benefits and costs in ways that are measurably profitable for the customer.**

# IFS Copperleaf Overview

As both a pioneer and innovator in the AIP applications space, IFS Copperleaf has a track record of enabling organizations to make informed decisions on project funding and asset investment across the whole asset life cycle. Its applications allow companies to evaluate and quantify risk, make objective trade-offs, and assess the value of investments across diverse industries and business contexts.

Ultimately, IFS Copperleaf helps companies balance benefits and costs in ways that are measurably profitable for the customer. It also has the flexibility to apply to asset-intensive industries that need to balance a combination of asset purchases and project funding, as well as other industries that focus primarily on projects.

**IFS Copperleaf offers its customers multiple solutions and is one of the world's premier AIP vendors. Its products allow enterprises to answer vital questions, including:**

- How do we align investments with strategic objectives?
- How can we most effectively mitigate risk within budget constraints?
- How do we quantify and meet ESG targets?
- How can we make objective investment decisions about projects from different company divisions with different evaluation criteria?
- How do we identify a value framework that we can apply to any division, business, or project?

In helping clients to answer these questions, IFS Copperleaf leans on its vast experience in the space, its global footprint, its ability to drive industry standards, and the trillions of dollars of assets it manages. IFS Copperleaf enables organizations to increase the value of their capital portfolios by aligning investments with strategic goals, optimizing funding allocation, and mitigating risk. The platform also provides clear guidance on asset investment throughout the entire life cycle.

More than any other AIP software solution, IFS Copperleaf uniquely empowers asset-intensive organizations to anticipate future investment needs and optimize capital deployment, ensuring that every decision drives sustained performance, resilience, and strategic value.

# The Business Value of IFS Copperleaf

## Study Firmographics

IDC conducted research that explored the value and benefits for organizations using IFS Copperleaf to optimize their capital investment planning, strategy, and management. The project included seven interviews with organizations that use IFS Copperleaf and have experience with and/or knowledge about the benefits and costs of its use. During the interviews, IDC asked the companies a variety of quantitative and qualitative questions about the offering’s impact on their IT/financial operations, core businesses, and costs.

**Table 1 (below)** provides an overview of the organizations IDC interviewed for the study. The seven participating organizations span the energy and utility sectors, with four based in the United States, two in the United Kingdom, and one in Canada. These companies varied significantly in scale, with employee counts ranging from 550 to 29,000 and annual capital expenditures of between \$49 million and \$12.6 billion. The data reflects a diverse set of organizations, providing a broad perspective on the value IFS Copperleaf delivers across different operational contexts.

**Table 1**  
**Firmographics**

Firmographics	Average	Median	Minimum	Maximum
Number of employees	12,007	8,000	550	29,000
Total organizational revenue	\$12.1B	\$8.4B	\$198.0M	\$30.0B
Annual capex	\$5.2B	\$3.7B	\$49.0M	\$12.6B
Total value of assets	\$62.8B	\$25.0B	\$6.4M	\$187.5B
Countries	United States (4), United Kingdom (2), Canada			
Industries	Energy (4), Utility (3)			

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

## Choice and Use of IFS Copperleaf

The organizations that IDC interviewed described the criteria involved in their selection of IFS Copperleaf. Study participants emphasized the platform's ability to unify disparate capital investment processes, particularly in complex environments where different asset types previously required separate planning approaches. IFS Copperleaf's portfolio-level visibility was a major differentiator, allowing organizations to aggregate and analyze thousands of projects simultaneously. This capability helped optimize investment decisions and provided a consistent framework for evaluating risk and value across the enterprise. Additional reasons for adoption included the need for a standardized decision-making platform, better regulatory support, and improved investment justification.

### Study participants offered the following comments:

#### **Consolidated approach to future planning (publicly owned organization):**

*"My company merged coal, gas, and hydro units together into one capital investment bucket. This was challenging because they are very dissimilar units in terms of assets and operational characteristics. We managed this with a lot of different spreadsheets, and we needed to get better at planning for the future and at looking at global risk. This led us to select IFS Copperleaf. My unit started using it in 2016, and about three years later, the enterprise selected it as a complete portfolio suite."*

#### **Data aggregation (privately owned organization):**

*"IFS Copperleaf was appealing because of their portfolio approach. Many other solutions that we looked at were good at managing project-level investments and benefits but could not give us an aggregated view of our entire portfolio. Basically, we needed to look at thousands of individual projects together. IFS Copperleaf helped us get our hands on an aggregated data view, which helped optimize our portfolio. It was a key differentiator."*

#### **Consistency (privately owned organization):**

*"My company needed a consistent, common platform for decision-making in asset management, as there was a lot of siloed thinking around our asset base. IFS Copperleaf offered an agile solution with an embedded valuation framework that aligned with the asset management principles we wanted to promote. It allowed us to assess investment opportunities based on risk and value rather than who shouted the loudest."*

**Optimization and justification (privately owned organization):**

*"Ultimately, my organization selected IFS Copperleaf because we want to optimize across our asset life cycle. We found that IFS Copperleaf not only provides optimization, but it also provides investment justification with quantifiable benefits and values."*

**Regulatory support (privately owned organization):**

*"IFS Copperleaf addressed our need for a more formalized and robust asset management strategy to support our regulatory filings."*

**Table 2 (below)** provides insights into how interviewed organizations are using IFS Copperleaf within their environments. On average, these organizations operate across 1,021 offices. Internally, IFS Copperleaf supports an average of 386 users per organization. The platform plays a critical role in capital planning, supporting 99% of capex on average.

**Table 2**  
**Organizational Usage of IFS Copperleaf**

IFS Copperleaf Environment	Average	Median
Offices	1,021	20
Internal users	386	200
Percent of revenue supported	73%	100%
Capex supported %	99%	100%
Value of capex supported	\$5.0B	\$3.7B

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

# Business Value and Quantified Benefits

Study participants reported a wide range of benefits of using IFS Copperleaf to optimize their capital investment planning. The solution enabled them to prioritize capital projects based on strategic value, thereby ensuring alignment with long-term business goals. Participants also reported that the platform provided the visibility and transparency necessary to centralize capital planning data, improve collaboration, and strengthen stakeholder confidence. The solution also supported real-time scenario modeling to evaluate the impact of funding and timing decisions and helped various teams adapt to changing marketplace conditions. In addition, IFS Copperleaf served as a way to standardize capital planning and governance across business units, thereby promoting consistent evaluation and approval processes that reduced bias. Finally, it automated workflows and increased overall efficiency while also significantly reducing manual effort.

## Interviewed customers described the most significant benefits in detail:

### Investment prioritization (privately owned organization):

*"IFS Copperleaf provides my organization with the ability to value the benefits, costs, and prioritization of assets. It helps us prioritize investments more scientifically than in the past by using math to make value-based decisions."*

### Single source of truth (publicly owned organization):

*"IFS Copperleaf provides my organization with a single source of truth for our capital investment and planning process. Previously, data was scattered, and little made it into the system until execution. Planning was mostly in spreadsheets and folders. Now, we've consolidated everything and gained better insight into what needs investment, enabling a longer planning horizon."*

### Strategic investment management (privately owned organization):

*"IFS Copperleaf has given my organization greater visibility and transparency by centralizing project development and business cases, which were previously siloed in spreadsheets. This has enabled us to do true strategic investment management instead of being reactive. It has helped us think more intentionally about how and why we invest."*

### Greater investment transparency (publicly owned organization):

*"A significant benefit of using IFS Copperleaf is that my organization now has an enterprise-level solution for project and investment planning that provides us with greater transparency into our investment processes. IFS Copperleaf also provides a lot*

*of functions and capabilities that integrate nicely with our asset risk framework and general processes.”*

**Value-based decision-making (privately owned organization):**

*“IFS Copperleaf helps our organization make the best use of allocated capital dollars by enabling value-based investment decision-making.”*

Using its standard ROI methodology, IDC quantified benefits across the categories of investment and business impact. Factoring in deployment time, these calculations found that, on average, participants achieved \$17.5 million in annual benefits.

**Organizations achieved these gains in the following areas:**

- **Investment impact (\$16.7 million annually):** IFS Copperleaf enabled organizations to prioritize capital investments based on strategic value, improving alignment with long-term business goals and delivering measurable outcomes.
- **Business impact (\$773,000 annually):** IFS Copperleaf delivered significant business benefits by centralizing data for capital planning and assets, which streamlined workflows, improved asset reliability, and enhanced reporting efficiency.

## Investment Benefits of IFS Copperleaf

IDC employed its Business Value methodology to evaluate a series of specific benefits related to investment management. Study participants reported that IFS Copperleaf enabled their organizations to make more strategic, data-driven decisions about capital allocation. They noted that the platform helped quantify and measure the value of investments, shifting decision-making from subjective judgment to objective, value-based trade-offs. The use of IFS Copperleaf’s value models was especially impactful in justifying project prioritization and optimizing budget allocations. Interviewees noted that the platform provided deeper insights into the full spectrum of investment benefits, including non-financial factors such as safety and regulatory compliance, which legacy systems often overlook. Additionally, IFS Copperleaf improved long-term visibility into capital planning, allowing organizations to forecast cash flow, borrowing needs, and resource allocation more effectively.

### Study participants offered the following comments:

#### **Quantifiable value (privately owned organization):**

*"IFS Copperleaf has helped our investment management team quantify and measure value. It has helped us build an investment management capability. Our entire organization is starting to think about value as a decision point when shifting projects around. Instead of someone's word, there are quantifiable measurements that teams can use to make trade-offs."*

#### **Value models (publicly owned organization):**

*"Our investment management team relies heavily on the IFS Copperleaf Value models. They help justify which projects need to go ahead. That optimization has been key for us in terms of setting budgets."*

#### **Deeper benefit insight (publicly owned organization):**

*"IFS Copperleaf has provided better insight to our investment managers because they are consistently using it. It does a nice job of capturing the total benefit of an investment. Our old systems were very restricted, in that they were purely economic, instead of taking into account soft things like safety or regulations. It helps them more accurately capture benefits."*

#### **Greater visibility (privately owned organization):**

*"Before IFS Copperleaf, enterprise-level visibility into investment plans was limited to in-flight projects, making budgeting and forecasting difficult. Now, we have longer-term visibility into upcoming work, which supports better cash flow forecasting, borrowing, and resource planning."*

IDC validated this anecdotal reporting by quantifying benefits, beginning with the impacts on capital planning and management team efficiency ([Table 3, next page](#)). IFS Copperleaf helped these teams streamline capital planning by centralizing data, enabling value-based prioritization, supporting scenario planning, and improving long-term investment strategies.

As a result, the teams were able to make faster, more strategic decisions regarding capital allocation and could work with 17% greater efficiency. In real-world terms, this meant they needed 12.4 fewer FTEs to manage their capital planning in comparison to their previous approach. This freed up the time of highly skilled individuals to focus on other important initiatives. IDC valued this efficiency gain at \$1.24 million per year.

→ **Table 3****Capital Planning and Management Team — Efficiency Gain**

Efficiency Gain	Before IFS Copperleaf	With IFS Copperleaf	Difference	Benefit
Total FTE count	73.4	61.0	12.4	17% gain
Value of staff time per year	\$7.3M	\$6.1M	\$1.2M	17% gain

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

IDC then looked at the impact of IFS Copperleaf on the economic value of capital portfolios (**Table 4, below**). By enabling more strategic prioritization of high-impact projects and aligning investments with long-term business goals, IFS Copperleaf helped interviewed companies increase the overall value of these portfolios. IDC calculated a 3% increase in economic value following adoption, translating into a total benefit of \$154.4 million. For the sake of the model, IDC annualized this gain over 20 years and valued it at \$7.7 million. One organization emphasized this value-add, stating: *“The economic value of our capital portfolio has increased about 13% with IFS Copperleaf. This is because IFS Copperleaf has helped us prioritize investment planning and make sure that what we are doing within a limited budget gives us the most value.”*

→ **Table 4****Impact of IFS Copperleaf on Economic Value of Capital Portfolio**

Impact	Before IFS Copperleaf	% Increase in Value with IFS Copperleaf	Total Value of Benefit	20-Year Annualized Value
Economic value of capital portfolio	\$4.9B	3%	\$154.4M	\$7.7M

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

**Table 5 (next page)** addresses the economic impact of shifting capital with IFS Copperleaf. Organizations reported being 55% more efficient in moving capital with the platform, especially when utilizing scenario-based analysis. This enabled them to identify and eliminate low-value projects and reposition funds based on their strategic importance. The improvement resulted in \$24.25 million in capital savings. IDC annualized this impact over a three-year period, which resulted in \$8.0 million for the purposes of the model.

**To further elaborate on the importance of this benefit, study participants made several specific comments that underscore IFS Copperleaf’s role in fostering informed, value-driven decisions across the enterprise:**

**Capital shifting (publicly owned organization):**

*“IFS Copperleaf has significantly impacted our efficiency at shifting capital. It has been huge for my company, really a night-and-day difference from before. Having all capital information in one place, rather than in a million different silos, has probably made us 90% more efficient.”*

**Business case consistency (privately owned organization):**

*“The fact that the process for creating a business case for investments is in IFS Copperleaf means that our business cases are more consistent. This helps decision-makers get familiar with the process and understand how the value system works.”*

**Platform transparency (privately owned organization):**

*“The visibility in IFS Copperleaf is great; decision-makers and investment requesters can see everything. Specifically, the data points regarding value delivery and impact across different strategic drivers — like safety, reliability, etc. — have greatly helped decision-making.”*

**Project trade-off scenario prioritizing (publicly owned organization):**

*“The first year we had IFS Copperleaf, we had a coal plant project with an executive sponsor. My team ran the project through IFS Copperleaf, and IFS Copperleaf pushed it off and did not recommend it. The problem was that our executive wanted it and wanted it forced into the plan, regardless of the recommendation. However, IFS Copperleaf helped my team come up with a list of 15 projects that would have to be pushed out for this one coal plant project. This insight helped the executive team agree that they could not push out so many other projects; it was not the right thing to do. That was one of our very first wins with IFS Copperleaf. It provided us with a risk trade-off, which we could not easily do before.”*

## → Table 5

**Economic Impact of Shifting Capital with IFS Copperleaf**

<b>Economic Impact</b>	<b>With IFS Copperleaf</b>
<b>Organizations were 55% more efficient at shifting capital with IFS Copperleaf.</b>	
<b>Capital saved from efficient capital shifts</b>	<b>\$24.3M</b>
<b>Three-year annualized impact</b>	<b>\$8.1M</b>

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

## Business Benefits of IFS Copperleaf

IFS Copperleaf helped the interviewed organizations realize a range of business-related benefits that stemmed from their strengthened decision-making capabilities. They found that the platform enabled structured, data-driven project analysis that provided strategic resource justification rather than intuition-based allocation. It also simplified complex workflows, which, in turn, made project authorization more efficient and manageable. Asset managers gained clearer visibility into asset-related activities through integrated dashboards. These dashboards often replaced manual reporting and improved overall operational transparency. IFS Copperleaf also supported more confident decision-making by providing detailed insights into assets. Additionally, it helped organizations present credible investment plans to regulators, which often led to tangible financial gains.

### Study participants discussed these and other key benefits:

#### **Data-driven asset management (privately owned organization):**

*"There's a lot more rigor that goes into justifying projects for our asset managers with IFS Copperleaf. They use a more data-driven approach to valuing and prioritizing projects, rather than feeling-based."*

#### **Asset management workflows (publicly owned organization):**

*"On our asset management side, all of our project authorization is done through IFS Copperleaf workflows. Those workflows have provided critical simplification for our organization; this is especially important because there are so many assets to manage."*

#### **Project visibility (privately owned organization):**

*"Our distribution integrity management teams really like IFS Copperleaf because of the data and dashboarding provided from its asset management tool. They now have a*

direct link to planned and completed work; these were very manual processes before. It is easier for them to do reporting because they no longer have to piecemeal information together.”

**Better decision-making (privately owned organization):**

“IFS Copperleaf helps with resource planning. Asset managers can make more informed decisions with greater levels of certainty because they know the operational phase and location of assets.”

**Evidence-based revenue gains (privately owned organization):**

“IFS Copperleaf has helped my organization effectively provide the evidence of our investment needs through our five-year business plan to regulators. As a result, regulators have assessed our business plan, which dictates the rates we can bill customers, and effectively added 17% additional annual revenue.”

To evaluate the quantitative impact of business-related benefits, IDC first assessed asset manager productivity. By streamlining workflows, reducing manual effort, and enabling consistent, data-driven decision-making, IFS Copperleaf helped organizations improve asset manager productivity by 18%. This meant that teams of 25.4 FTEs could work at the equivalent productivity level of having 4.4 additional FTEs on staff. IDC valued this productivity enhancement at \$311,150 annually (**Table 6, below**).

→ **Table 6**  
**Asset Manager Productivity Gain**

Productivity Gain	Before IFS Copperleaf	With IFS Copperleaf	Difference	Benefit
Equivalent productivity level, FTEs	25.4	29.8	4.4	<b>18% gain</b>
Value of staff time per year	\$1.8M	\$2.1M	\$311,150	<b>18% gain</b>

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

Finally, **Table 7 (below)** outlines how IFS Copperleaf contributed to business enablement and revenue growth by centralizing data, improving reporting, and supporting strategic investments. Organizations reported that the platform helped justify cost increases and enhanced asset reliability, which led to measurable financial benefits. On average, companies reported an additional gross revenue of \$4.95 million per year by using IFS Copperleaf. Utilizing an assumed operating margin of 15%, this resulted in additional annual net revenue of \$742,429.

→ **Table 7**

**Business Enablement: Higher Revenue**

<b>Business Enablement: Higher Revenue</b>	<b>Per Organization</b>	<b>Per \$10M of Capex Managed</b>
<b>Total additional gross revenue per year</b>	<b>\$5.0M</b>	<b>\$9,767</b>
<b>Assumed operating margin</b>	<b>15%</b>	<b>15%</b>
<b>Total additional net revenue, IDC model</b>	<b>\$742,429</b>	<b>\$1,465</b>

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

## ROI Summary

IDC's three-year ROI analysis of IFS Copperleaf usage among energy and utility organizations revealed substantial overall economic impact. On average, participating organizations realized \$41.8 million in benefits over three years, compared with \$7.4 million in investment costs. This translated into a 469% ROI, with a payback period of just 11 months (**Table 8, below**).

**Table 8**  
**Three-Year ROI Analysis**

Three-Year ROI Analysis	Per Organization	Per \$10M of Capex Managed
Discounted benefits	\$41.8M	\$82,562
Discounted investment	\$7.4M	\$14,515
Net present value (NPV)	\$34.5M	\$68,047
→ <b>ROI</b>	<b>469%</b>	<b>469%</b>
→ <b>Payback</b>	<b>11 months</b>	<b>11 months</b>
Discount factor	12%	12%

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

## Challenges/Opportunities

There are challenges in the current AIP space, with the first being inertia. To get companies to adopt a new, more expensive solution than they are currently using, AIP application vendors must convince enterprises to replace legacy decision-making tools, which might range from spreadsheets to in-house tools. Vendors can easily demonstrate the software's utility and its ability to deliver greater value than in-house tools and make the sale if they can overcome the inertia.

Another challenge is large global enterprise software vendors that are marketing their ability to provide in-house AIP capabilities along with their other enterprise applications.

As AIP applications have become more prominent over the last three to five years, these in-house efforts from enterprise application vendors have visibly increased, with the goal to provide additional benefits to customers that they may currently be getting from a third party.

The competition and increased visibility of the AIP space provide an opportunity for third-party providers such as IFS Copperleaf. Its software's features and functionality exceed the in-house solutions of even the largest enterprise application vendors, and increased enterprise attention on AIP applications presents an opportunity for the company to gain the notice of new organizations.

## Conclusion

Enterprises need a better way to evaluate assets and projects than the in-house solutions they currently employ. They need to better align investments with objectives, manage risk, and evaluate investment decisions, regardless of the division or company it comes from. IFS Copperleaf provides enterprises with an evaluation tool that can meet all these goals, as well as the ability to place an objective value on the benefits, costs, and prioritization of assets and projects. It provides visibility and transparency that allows enterprises to select and prioritize competing company objectives in a measurable, meaningful way that positively impacts the company's bottom line.

As this Business Value paper determined, IFS Copperleaf delivered an average benefit of \$5.69 per dollar invested, achieving a three-year ROI of 469% and a payback period of just 11 months.

# Appendix A: Financial Summary

**Table 9 (below)** presents a summary of IDC's Business Value calculations per previous sections, with a total average annual benefit of \$17.5 million accruing per organization annually.

**Table 9**  
**Specific Calculations: Benefits from Use of IFS Copperleaf**

Category of Value	Average Quantitative Benefit	15% Margin Applied	Calculated Average Annual Value*
<b>Investment Impact</b>			
Capital planner/management efficiency gains	17% more efficient, worth 12.4 FTEs; \$100,000 salary	No	\$912,475
Impact on economic value of capital portfolio	\$154.4M in economic value, annualized over 20 years	No	\$7.7M
Impact on shifting capital	\$24.3M in economic value, annualized over three years	No	\$8.1M
<b>Business Impact</b>			
Asset manager productivity gain	18% higher productivity, worth 4.4 FTEs; \$70,000 salary	No	\$228,321
Business enablement: higher revenue	\$742,429 in additional net revenue	Yes	\$544,791
<b>Total average annual benefits</b>		<b>\$17.5M per organization per year</b>	

Note: \*includes 9.6 months of deployment time in year 1

n = 7; Source: IDC Business Value In-Depth Interviews, August 2025

# Appendix B: Methodology

IDC utilized its standard ROI methodology for this project, gathering data from current users of IFS Copperleaf as the foundation for the model.

**Based on interviews with organizations using IFS Copperleaf, IDC performed a three-step process to calculate the ROI and payback period:**

- 1. IDC gathered quantitative benefit information during the interviews using a before-and-after assessment of the impact of IFS Copperleaf.** In this study, the benefits included IT cost reductions and avoidances, staff time savings and productivity benefits, and revenue gains.
- 2. IDC created a complete investment (three-year total cost analysis) profile based on the interviews.** Investments go beyond the initial and annual costs of using IFS Copperleaf and can include additional costs related to migrations, planning, consulting, and staff or user training.
- 3. IDC calculated the ROI and payback period.** It conducted a depreciated cash flow analysis of the benefits and investments for the organizations' use of IFS Copperleaf over a three-year period. ROI is the ratio of the NPV and the discounted investment. The payback period is the point at which cumulative benefits equal the initial investment.

**IDC bases the payback period and ROI calculations on several assumptions, which are summarized as follows:**

- Multiplying time values by burdened salary (salary + 28% for benefits and overhead) quantifies the efficiency and productivity savings. For this analysis, IDC has used assumptions of an average fully loaded \$100,000 per year salary for IT staff members and an average fully loaded salary of \$70,000 for non-IT staff members. IDC assumes that employees work 1,880 hours per year (47 weeks x 40 hours).
- IDC calculates the net present value of the three-year savings by subtracting the amount that organizations would have realized by investing the original sum in an instrument yielding a 12% return to allow for the missed opportunity cost. This accounts for both the assumed cost of money and the assumed rate of return.
- Further, because IFS Copperleaf requires a deployment period, the full benefits of the solution are not available during deployment. To capture this reality, IDC pro-rates the benefits on a monthly basis and then subtracts the deployment time from the first-year savings.

*Note: All numbers in this document may not be exact due to rounding.*

# About the IDC Analysts



## **Brian O'Rourke**

**Research Manager, Enterprise Asset Management and Smart Facilities, IDC**

Brian O'Rourke brings an extensive and unique background to his role as research manager for Enterprise Asset Management and Smart Facilities. O'Rourke's research will focus on how enterprises of all types use technology to efficiently employ their entire range of assets, including inventories, equipment, and property. With vast experience in competitive intelligence, O'Rourke will analyze the impact of technology, including IoT, AI, and sensors, on the enterprise management of everything from their production lines to the buildings to their real estate management strategies.

[More about Brian O'Rourke →](#)



## **Megan Szurley**

**Business Value Manager, Business Value Strategy Practice, IDC**

Megan Szurley is manager for the Business Value Strategy practice, responsible for creating custom business value research that determines the ROI and cost savings for enterprise technology products. Szurley's research focuses on the financial and operational impact of these products for organizations once deployed and in production. Prior to joining the Business Value Strategy practice, Szurley was a consulting manager within IDC's Custom Solutions division, delivering consultative support across every stage of the business life cycle: business planning and budgeting, sales and marketing, and performance measurement. In her position, Szurley partners with IDC analyst teams to support deliverables that focus on thought leadership, business value, custom analytics, buyer behavior, and content marketing. These customized deliverables are often derived from primary research and yield content marketing, market models, and customer insights.

[More about Megan Szurley →](#)

# Message from the Sponsor



**Capital planning is one of the most strategic levers organizations can use to navigate uncertainty and deliver results. Infrastructure-heavy industries face pressure from regulatory demands, decarbonization goals, climate resilience, and rising service expectations.**

At IFS Copperleaf, we help leading organizations move beyond spreadsheets with an AI Native Agentic Platform that brings transparency, defensibility, and a consistent view of value to every investment. Our AI-powered modeling enables confident resource allocation and quick adaptation to changing conditions; whether the goal is financial performance, risk reduction, or ESG impact.

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— Lance Olmsted, President, IFS Copperleaf

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