



IAM WEBINAR

**Jerry Holdsworth
& Trevor Taylor**

**Introducing SAM2025 – A New
Era in Asset Management
Assessment**

14 Jan 2026

TIMES
05:00 PT
08:00 ET
13:00 GMT

**Introducing SAM2025 – A new era in asset management
assessment...**

Jerry Holdsworth and Trevor Taylor



A brief history...



PAS 55-Assessment Methodology

Launched in 2008 as part of the IAM tool kit, together with **PAS 55** and the **Competence Framework**

Self-Assessment Methodology

The Self-Assessment Methodology (SAM) was first launched in April 2014 to accompany the release of **ISO 55001:2014**

Self-Assessment Methodology +

Subsequently enhanced to SAM+ in June 2015 to consider the broader evolution of asset management maturity and its assessment, including the **IAM Anatomy V2**.

SAM2025

To review and refresh SAM+ to align with the updated **ISO 55001:2024** and the **IAM Anatomy V4**, incorporating the Pathway to Excellence and the 10-box model.

Our Challenge

- **SAM+ has become a trusted resource for asset management assessment globally, but there has never been any formal analysis of usage.**
- We knew there were some technical issues with SAM+.
- We knew there were regional variations in adoption.
- We knew there were modified and hybrid versions.
- We knew the marketplace had evolved.
- We knew of updates to other materials and resources.
- **But what was the extent of all of this??**
- This initiative presented us the opportunity to gain some deep insights into these areas across asset owners, consultants, and regulators.
- Plus an opportunity to better understand the drivers behind some of the tool adaptations.

These insights helped shape a more robust, responsive, and future-ready assessment methodology.

Huge global interest

We were fortunate to have **73** enthusiastic volunteers from **18** countries, allowing us to establish a structure that effectively leverages their diverse experiences to tackle the various elements of this initiative...

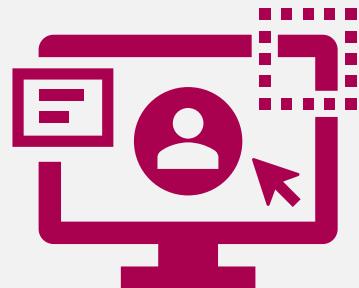


Establishing a great team...

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Steering Group

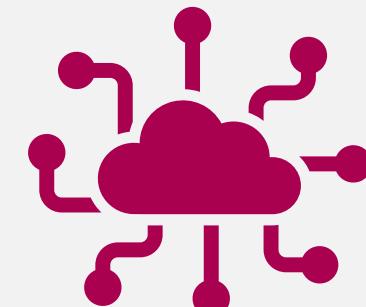
User Experience Group



Insights Group



Technical Group

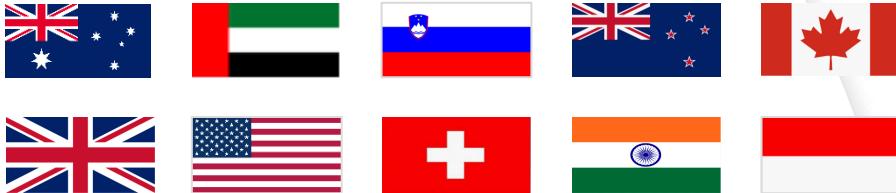


IAM Office Support

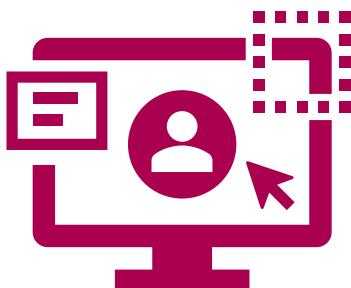


Steering Group (9 Members)

	First name	Surname	Company and location	
1	Sean	Anderson	Scottish Water	UK
2	Mike	Beck	Meliorate GmbH	DE
3	Ursula	Bryan	Institute of Asset Management	UK
4	Jerry	Holdsworth (Chair)	Moran Group Limited	UK
5	Martin	Jones	Black & Veatch Corporation	USA
6	Mary	Reidy	National Grid	USA
7	David	Salisbury	TWPL	UK
8	Tammy	Whipple	AMCL	USA
9	Panos	Yianni	KPMG	UAE



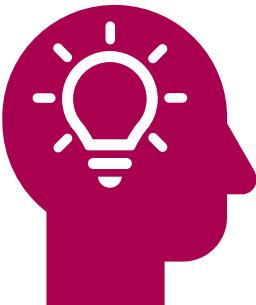
User Experience Group (27 Members)



	First name	Surname	Company and location	
1	Warren	Adams	GHD Advisory	AUS
2	Samara	Ahmed	Dubai Municipality	UAE
3	Andrej	Androjna	QUANTUM Consulting	SLO
4	Kevin	Chan	GHD	NZ
5	Iain	Cranston	iClndrastructure	CAN
6	Craig	Demanuele	TWPL	UK
7	Margaret	Gadzic	Arcadis	USA
8	James	Green	Arup	UK
9	Michalis	Hadjiandreou	Worley	UK
10	Stephen	Hodson	Worley	UK
11	Lilian	Iheukwumere-Esotu	National Gas	UK
12	Brian	Kaiser	Life Cycle Engineering	USA
13	Aurelien	Lair	LAIR Consulting Sarl	SWI
14	Melody	Laven (Co-Lead)	Palm Beach County Water Utilities	USA
15	Steven	Little	Arcadis	UK
16	Bridget	Malinowski	Aecom	UK
17	Shanmugasundaram	Muthaiah	Independent	IND
18	Mark	Norris	TWPL	UK
19	Kingkof	Opoku-Ohemeng	Independent	UK
20	Grace	Obeso-Silva	Palm Beach County Water Utilities	USA
21	Anita	Pharmatisanti	PLN	IDN
22	Tristan	Richardson	AtkinsRéalis	UK
23	Abdus	Salaam	Central Bedfordshire Council	UK
24	Michael	Smith (Co-Lead)	AECOM	UK
25	Anne	Thurston	AtkinsRéalis	UK
26	Amalia	Tsalanidis	Ofwat	UK
27	Miles	Wyatt	AECOM New Zealand	NZ



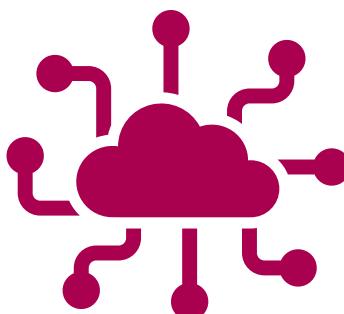
Insights Group (30 Members)



	First name	Surname	Company and location	
1	Melanie	Abuel	Accenture	PHL
2	Ahmad	Abushamah	Hilton	UAE
3	Mohamed Abdulla AlNuaimi	Ahmed	Dubai Municipality	UAE
4	Margaret-Avis	Akofio-Sowah	WSP	USA
5	David	Allen	Ayrshire Roads Alliance	UK
6	Froilan Antonio	Bacungan	International Water Partners	KSA
7	Enrique	Bernal	The Mosaic Company	USA
8	Jasper	Coetzee	AM-Tech Consulting Engineers	RSA
9	John H.	Daly III	Acme Infrastructure Management	USA
10	John	De Bono	Silver Fern Farms	NZ
11	Simon	Edwards (Co-Lead)	Wessex Water	UK
12	Joachim	Ezeji	DELPHI Analytech	UK
13	William	Fuentes	KPMG	CL
14	Michael	Garnham	TWPL	UK
15	Bernard	Gaudreault	Norda	CAN
16	Rudolph	Jauregui	Accenture	NL
17	Mike	Jones	Stantec	UK
18	Angus	Middlehurst	Scottish Water	UK
19	Tony	Muparadzi (Co-Lead)	Amey	UK
20	Nasreen	Padamshi	Jones Lang LaSalle	UAE
21	Daniel	Penny	National Grid	UK
22	Alexander	Piquer	1898 & Co.	USA
23	Andreas	Purnomoadi	PT PLN (Persero)	IDN
24	Qais	Qawaqneh	Dubai RTA	UAE
25	Soundara Pandian	Srinivasan	Independent consultant	IND
26	Kwok Hei	Tam	Coast Mountain Bus Company	CAN
27	Jessie	Wang	King County Metro Transit	USA
28	Brantford	Warner	Jacobs	UK
29	Andrew	Wilson	Whitetree	UK
30	Robert	Zinatsa	UK Power Networks Services	UK



Technical Group (31 Members)



	First name	Surname	Company and location	
1	David	Allen	Ayrshire Roads Alliance	UK
2	Froilan Antonio	Bacungan	International Water Partners	KSA
3	Enrique	Bernal	The Mosaic Company	USA
4	Frederic	Blin	AECOM	UK
5	Paul	Dix	Mott MacDonald	UK
6	Simon	Edwards	Wessex Water	UK
7	Margaret	Gadzic	Arcadis	USA
8	Oswaldo	Godoy Neto	Assetsman	BRA
9	Michalis	Hadjiandreou	Worley	UK
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11	Rudolph	Jauregui	Accenture	NL
12	Peter	Jay (Reviewer)	Independent	UK
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15	Aurelien	Lair	LAIR Consulting Sarl	SWI
16	Melody	Laven	Palm Beach County Water Utilities Dept	USA
17	Bridget	Malinowski	AECOM	UK
18	Tony	Muparadzi	Amey	UK
19	Shanmugasundaram	Muthaiah	Public Works Authority (Ashghal)	QAT
20	Mark	Norris	The Woodhouse Partnership Limited	UK
21	Kingkof	Opoku-Ohemeng	Independent	UK
22	Anita	Pharmatisanti	PLN	IDN
23	Qais	Qawaqneh	Dubai Road & Transportation Authority	UAE
24	Tristan	Richardson	AtkinsRéalis	UK
25	Navil	Shetty (Reviewer)	Independent	IND
26	Soundara Pandian	Srinivasan	Independent consultant	IND
27	Trevor	Taylor (Lead)	Network Rail	UK
28	Anne	Thurston	AtkinsRéalis	UK
29	Amalia	Tsalanidis	Ofwat	UK
30	Andrew	Wilson	Whitetree	UK
31	Miles	Wyatt	AECOM	NZ

Identify the opportunity

Goal: Update SAM2025 to align with ISO 55001:2024, GFMAM AM Landscape V3, and the IAM Anatomy V4.

Research: Not just a simple technical refresh. Crucial research was undertaken to inform the technical work.

Opportunity: Improve the tool based upon what IAM members want.

Steering Group

User Experience Group

To gain some deep insights into how organizations and individuals are using SAM+, how usage varies globally, and where modifications or hybrid approaches have emerged.

Insights Group

To research what has changed in the marketplace over the last decade since the launch of SAM+ in 2014

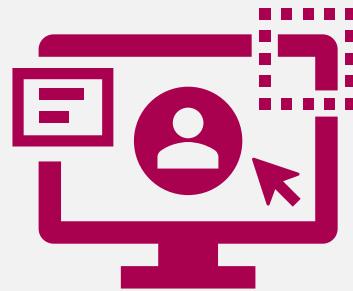
Technical Group

To update and refresh SAM+ to align with both ISO 55001:2024 and the IAM Anatomy V4, whilst ensuring its long-term suitability and effectiveness

IAM Office Support

User Experience Group

User Experience Group



To gain some deep insights into how organizations and individuals are using SAM+, how usage varies globally, and where modifications or hybrid approaches have emerged.

- Participants identified, engagement plan and survey developed.
- Survey distributed to **118** people – **54** questions over **seven** categories:
 - **Context and purpose** (communicating objectives and scope and using results).
 - **Usability** (intuitiveness, navigation and use).
 - **Functionality** (performing intended functions without errors or limitations).
 - **Clarity** (how clearly questions, instructions, and outputs are communicated).
 - **Overall experience** (user satisfaction while interacting with SAM+).
 - **Effectiveness** (achieving the goal of assessing maturity and performance).
 - **Innovation-adaptability** (modernity, flexibility, and responsiveness).
- **63** completed surveys – UK (46%), E-ME-APAC (35%), and NAM (19%).
- **Six** deep-dive interviews conducted based on survey insights.
- Hybrid models identified and discussed.
- Feedback collated, analyzed, evaluated, summarized and presented to SG.

Example findings...

Key Positives from Respondents

64%


Using SAM+ is a positive experience

83%


Use SAM+ to improve business performance

65%


Using SAM+ made Gap Analyses more efficient

53%


Felt confident using SAM+ after their first use

Opportunities for Improvement

27%


Say the SAM+ layout is confusing

35%


Would like SAM+ to remain in Excel

30%
6 **10**

Want 6 and 10 Box Model options

27%


Want SAM+ to measure maturity trending

User Experience Group – Summary

Positive

- Many feel SAM+ is simple once you get used to it or have relevant background and Excel skills.

Neutral

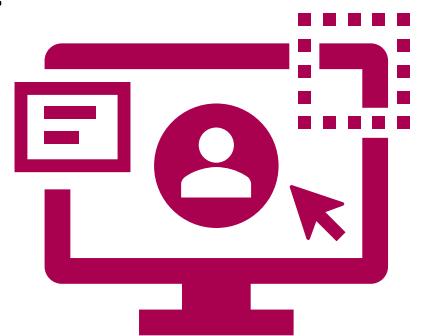
- Many find it functional but in need of clearer instructions, better navigation, and, in some cases, sector-specific content.

Negative

- Common complaints include an outdated design, clunky interface, steep learning curve, and flexibility issues or limitations caused by Excel-based macros.

Most Significant Pain Points:

- Usability and outdated Excel-based interface, which affects how simple and user friendly it feels.
- The need for greater flexibility and improved data handling and reporting.
- Language and terminology refinements, while important, are less urgent but will support clarity and wider applicability.



Insights Group

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Insights Group

Insights Group



To research what has changed in the marketplace over the last decade since the launch of SAM+ in 2014

- Participants identified and plan developed.
- Insights questionnaire developed and issued to **65** asset managers, covering:
 - **Usage** (changes to current and future user requirements).
 - **Effectiveness** (achieving Asset Management improvements).
 - **Relevance** (agnostic approach versus sector-specific solutions and functionality).
 - **Impact of changes** (ISO 55001, Asset Management Landscape, Anatomy etc.)
 - **Technology** (fitting within a more digital and technology-driven landscape).
 - **Enhancements** (developments and changes required or desired).
 - **Platform and other tools** (research into other assessment tools and systems).
 - **Best practice and evolving methodologies** (organisational and industry).
- **30** completed feedback forms received.
- Some Insights Group members provided the user group with their own experiences of SAM+ and other similar assessment tools.
- Feedback collated, evaluated, summarised, and presented to the SG.

Example findings...

Usage

Widely used, but heavy customization is evident.
Some challenges with accessibility and structure.
Industry differences tend to shape adoption.

Effectiveness

Generic nature of questions should be retained.
Subject maturity levels based on organizational context.
Store evidence documents and link weightings.

Relevance

Retain agnostic core but improve sector customization.
Consider the relevance and redundancy of PAS 55.
Align with ISO clauses but consider IMS environments.

Standards

Consider ESG, resilience and climate risk maturity themes.
The core SAM+ architecture remains relevant.
Incorporate all new ISO 55001 clauses (value, risk etc).

Technology

Integrate AI to enhance and automate data capture.
Address digital integration and Cybersecurity
Enable progress tracking and improved visualization.

Enhancements

Simplify and make the tool easier to use.
Support broader use of customization & benchmarking.
Support modular integration with other tools, risk management.

Platforms

Many consultant bespoke, customized, or organizational.
Hybrid approaches are commonplace.
Many similar 'compliance' tools for other ISO standards.

Best Practices

Evolve beyond a compliance checklist - link maturity to value.
Consider Digital Readiness and AI Integration.
Maintain a generic framework, improve usability and support.

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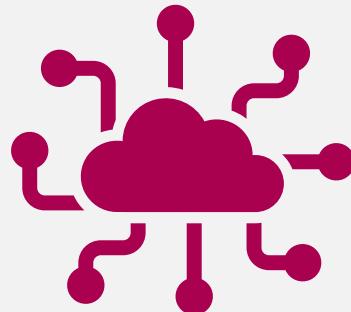
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IAM Office Support

Informing the Technical Group

Technical Group



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Technical direction

- **48 suggested improvements** were identified from the research.
- Logged and categorized using a **MoSCoW Model** and then prioritized based on importance and effort.
- **11 top level recommendations** and 32 enabling actions were agreed.
- 8 recommendations and 8 enablers were deferred or deemed out of scope.

Must Haves

- Retain SAM+ as a legacy tool.
- Use the same core Excel platform, architecture and framework.
- Improve usability, accessibility, navigation.
- Further research into online platform options.

Should Haves

- Improve progress tracking / visualization.
- Additional functionality for assessment evidence
- Improve multi-user functionality.
- Improve flexibility and customization capability.

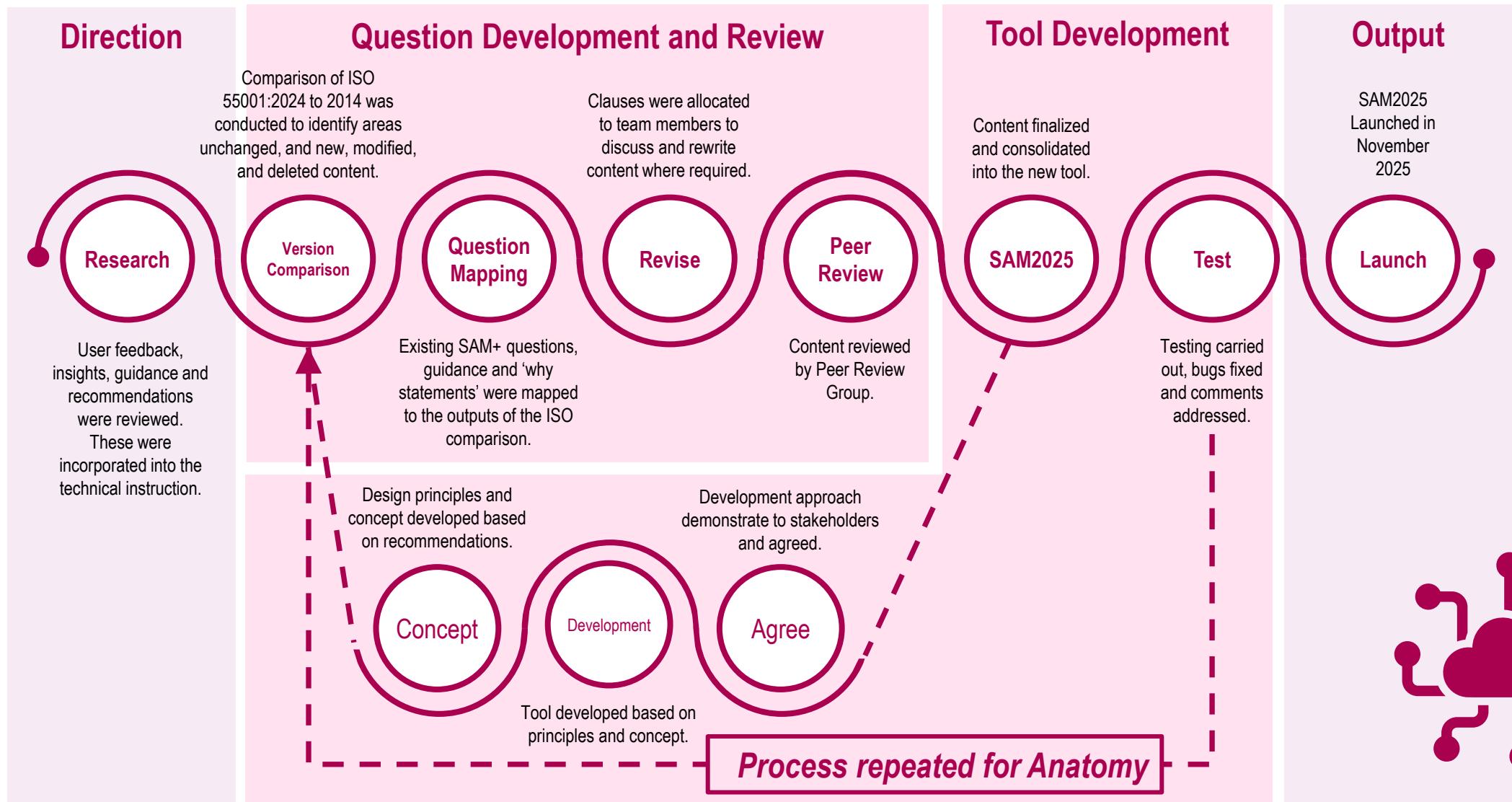
Could Haves

- Improved user interface.
- Support changing nature of assessments, and improved IMS integration.
- Scaling insights from individual depts' to corporate-level assessments.

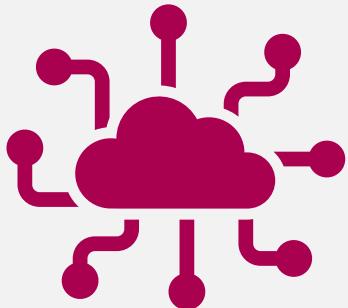
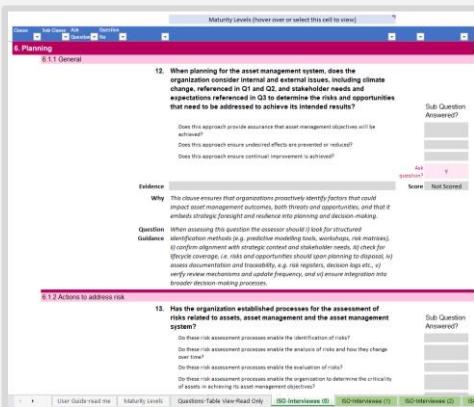
Wont Haves

- Benchmarking.
- Advanced platform.
- Digital integration.
- Expand maturity model.
- Mult-language versions.
- Lightweight version.
- Knowledge-sharing forum for users;
- Structured post-assessment workshops

The development process



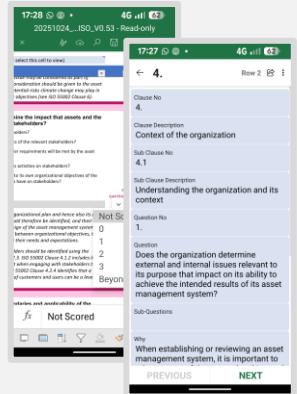
What's New?

12. When planning for the asset management system, does the organization consider internal and external issues, including climate change, to determine the risks and opportunities that need to be addressed to achieve its intended results?

13. Has the organization established processes for the assessment of risks related to assets, asset management and the asset management system?

There is a new look and feel to the assessment form

12. When establishing or reviewing an asset management system, it is important to:

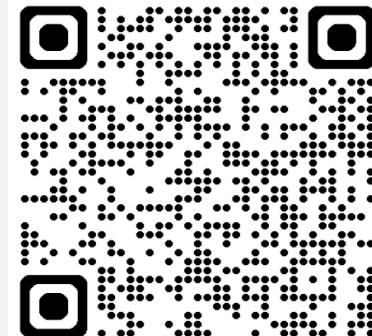
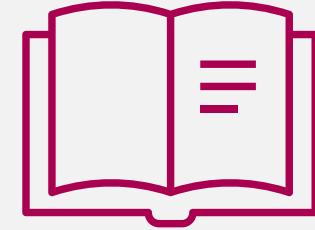
13. Has the organization established processes for the assessment of risks related to assets, asset management and the asset management system?

Works on mobile devices and browser-based versions



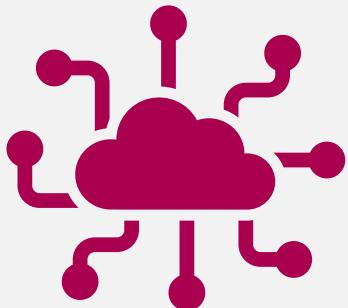
Sub Clause	Sub Clause Description
4.1	Understanding the organization and its context
4.2	Understanding the needs and expectations of stakeholders
4.3	Determining the scope of the asset management system
4.4	Asset management system
4.5	Asset management decision-making
5.1	Leadership and commitment
5.2	Asset management policy
5.3	Roles, responsibilities and authorities
6.1.1	General
6.1.2	Actions to address risk
6.1.3	Actions to address opportunities
6.2.1	Strategic asset management plan (SAMP)
6.2.2	Asset management objectives
6.2.3	Planning to achieve asset management objectives
6.3	Planning of changes
7.1	Resources
7.2	Competence
7.3	Awareness
7.4	Communication
7.5	Documented information

Unprotected, allowing users to export data more freely

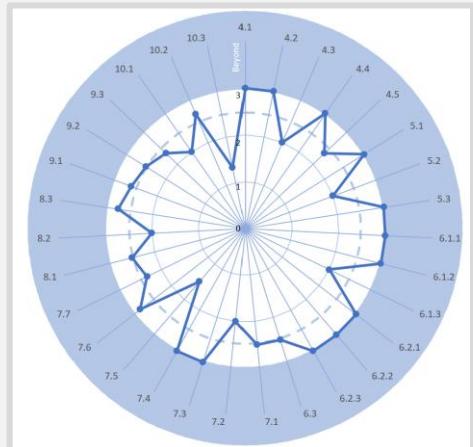


Built-in user guidance, FAQ, and bug reporting

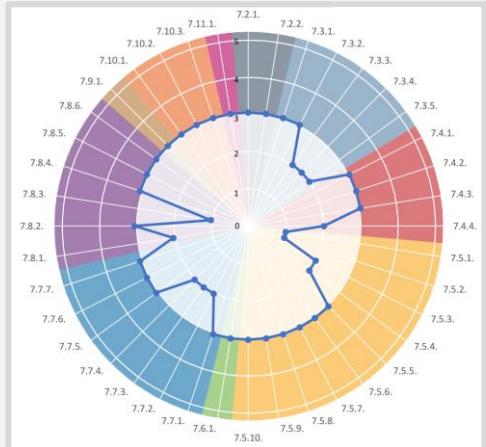
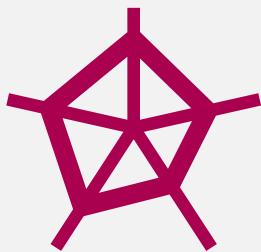
What's New?



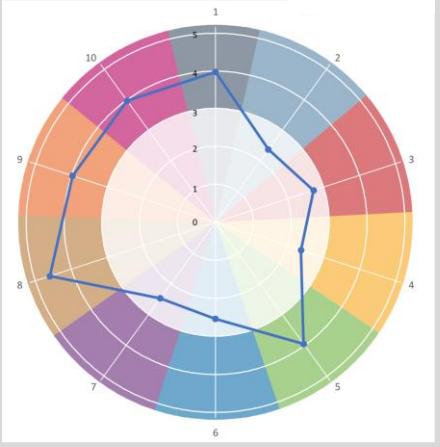
SAM2025 comprises two tools (ISO and AMA)



Better visualizations for ISO 55001:2024



Enhanced visualizations for AMA 'core' assessments



10-Box 'higher' maturity assessments, and combined



SAM2025

Any Questions...

