DEALCRAFT ADVISORY

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The Estimate Changes

How partner tools and SAP's new migration assistants reshape an SAP S/4HANA bid: line by line, what to assume, what to make the buyer confirm, and who carries the risk.

CODE	DATA	TEST	ADOPT
smartShift · SAP Custom Code Assistant	SNP · Natuvion · cbs	Tricentis · SAP Test Management Assistant	WalkMe · Cloud ALM

Written for SAP bid teams, solution architects, programme leaders and the procurement teams who evaluate their estimates.

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EXECUTIVE SUMMARY

Every line of the estimate is moving

On 28 October 2026, during SAP TechEd, SAP published its seven migration and modernization assistants, four of them already in use with early adopter customers. Buyers will read the same news and expect smaller bids.

SAP's session at TechEd puts it plainly: agent-led assistants are "rewriting the economics of migration and modernization".[3] The assistants cover data quality, testing, custom code and configuration today, with system analysis, project management and rollout assistants planned.[1] They sit alongside a partner ecosystem that has been taking effort out of S/4HANA programmes for years: smartShift for code, SNP, Natuvion and cbs for data and cutover, Tricentis for testing, and WalkMe, now part of SAP, for adoption.

None of this makes estimating easier. It makes it more exposed. A bid that ignores the tools looks expensive. A bid that takes every vendor claim at face value looks cheap and then overruns. The winning estimate shows the baseline, the saving each tool brings, the assumption behind that saving, and who carries the risk if it doesn't arrive.

7

SAP migration and modernization assistants; 4 with early adopters, 3 planned

SAP News, 28 Oct 2026[1]

8%

of completed S/4HANA migrations in Horváth's study finished on schedule

Horváth via CIO.com, Mar 2025[4]

+30%

average time overrun; testing and data migration among the underestimated phases

Horváth via CIO.com, Mar 2025[4]

THE SHORT VERSION

Estimate the baseline first, then show each tool's saving as a separate, visible line, never buried in a lower rate.

Apply savings only to the work a tool actually automates, and keep human review, business testing and cutover rehearsals at full weight.

Tie every saving to an assumption the buyer confirms (code volume, data quality, test scope) and say who pays if it proves wrong.

Treat early-adopter and planned features as options, not as the basis of a fixed price.

THE ESTIMATE, LINE BY LINE

Where the effort sits, and what now changes it

A typical S/4HANA bid prices eight lines of work. The table shows, for each, what drives the effort, which tools now change it, and what stays human. The tools are named as they appear later in this paper; placement is our judgement from vendor and SAP material.

LINE	WHAT DRIVES EFFORT	TOOLS THAT CHANGE IT	WHAT STAYS HUMAN
System analysis	Landscape size, custom objects, interfaces, data volumes	SAP Readiness Check; SAP System Analysis Assistant PLANNED; smartShift and SNP scans	Deciding what to keep, retire and redesign
Custom code	Objects in use, findings per object, fix complexity	SAP Custom Code Assistant EARLY ADOPTER; custom code migration agent in Joule for Developers GA Q2 2026; smartShift	Complex business logic, review of AI fixes, clean-core decisions
Data migration	Objects, volumes, quality, number of rehearsals	SAP Data Management Assistant EARLY ADOPTER; SNP Kyano; Natuvion DCS; cbs Enterprise Transformer	Data ownership, cleansing decisions, sign-off of each load
Configuration	Fit-to-standard gaps, org structures, localisations	SAP Business Configuration Assistant EARLY ADOPTER; Rollout Assistant PLANNED	Design authority, deviations from standard
Testing	Scenarios, cycles, regression scope, test data	SAP Test Management Assistant EARLY ADOPTER; Tricentis (Test Automation, Enterprise Continuous Testing, Change Impact Analysis)	Business acceptance, exploratory testing, defect triage
Cutover	Downtime window, volumes, rehearsals	SNP, Natuvion, cbs near-zero or reduced-downtime approaches	Go/no-go, business continuity, rollback
Adoption	Users, roles, process change, training	WalkMe (part of SAP since 2024); Joule Work	Leadership, role redesign, change networks
Project management	Workstreams, governance, reporting	SAP Project Management Assistant PLANNED; SAP Cloud ALM	Decisions, escalation, commercial change control

READ ACROSS THE LAST COLUMN

The work that stays human is where programmes go wrong: decisions, ownership and acceptance. Those lines should not shrink in proportion to the tools. If anything, faster automated work puts more pressure on the business to decide and sign off on time.

SAP'S NEW ASSISTANTS

Seven assistants, four in use

SAP describes the assistants as covering the migration lifecycle, with SAP Cloud ALM as their operational foundation.[1,2] Status matters for a bid: four are with early adopter customers through SAP's Early Adopter Care programme, three are planned without dates, and SAP has not published effort-reduction figures.[1]

ASSISTANT	WHAT SAP SAYS IT DOES	STATUS
Data Management	Analyses data quality, ranks issues by business impact, recommends and helps apply fixes	EARLY ADOPTER
Test Management	Defines test scope and critical scenarios, generates test cases and test data; execution handed to SAP Test Automation by Tricentis	EARLY ADOPTER
Custom Code	Assesses custom code, classifies findings by complexity, applies automated fixes where available, recommends the rest	EARLY ADOPTER
Business Configuration	Recommends and applies configuration by industry and goals, flags deviations from SAP targets, keeps an audit trail	EARLY ADOPTER
System Analysis	Builds a customer-specific picture of systems, configuration and custom development for the other assistants	PLANNED
Project Management	Real-time project insight, risk flags, coordination across teams	PLANNED
Rollout	Aligns global templates with regional requirements for local rollouts	PLANNED

Separately, a custom code migration agent in SAP Joule for Developers reached general availability in Q2 2026. It runs readiness checks across whole custom code packages, applies high-confidence fixes automatically and leaves lower-confidence proposals as comments for developers, recording changes in transports.[5] The only effort figure SAP has published in that context is a customer one: Bosch Digital reported a 20% productivity gain from Joule for Developers, with SAP noting that benefit figures are estimates.[5]

The first named customer is AkzoNobel, which uses the Data Management Assistant on its RISE with SAP programme. Its master data lead said it "reduced analysis effort, accelerated our planning".[1] That is a real signal, and it is about analysis and planning, not yet about the whole migration.

> **WHAT THIS MEANS FOR AN ESTIMATE**
>
> Price what you can contract today. If a saving depends on an early-adopter assistant, make it conditional on access and show the price with and without it. If it depends on a planned assistant, leave it out of the fixed price and offer it as an option once SAP gives a date.

PARTNER TOOLS, BY LINE

Who takes effort out, and where

CUSTOM CODE

smartShift, alongside SAP's code assistants

smartShift analyses custom ABAP and remediates it automatically, with dual maintenance to shorten the code freeze (covered in Part 2). Its vendor-reported Jabil case cites around 5 million lines in five weeks.[13] With SAP's own Custom Code Assistant and migration agent now in the toolchain, a bid should say which tool does which part, and why, rather than list both.

DATA AND CUTOVER

SNP, Natuvion and cbs

SNP (Kyano platform, covered in Part 1) and **Natuvion** (Data Conversion Suite, Part 2) move data selectively and rehearse the cutover; both report shorter downtime windows than planned in named projects.[12,13] **cbs Corporate Business Solutions** offers its Enterprise Transformer for greenfield, brownfield and hybrid migrations, including carve-outs and mergers, and claims "almost zero downtime" migrations drawn from more than 2,000 transformation projects.[11] SAP runs a Selective Data Transition engagement with qualified partners.[14] The estimate question is the same for all of them: how many rehearsals, how much downtime, and who owns the data quality going in.

TESTING

Tricentis

Tricentis tools are sold by SAP as solution extensions: SAP Test Automation by Tricentis, SAP Enterprise Continuous Testing by Tricentis and SAP Change Impact Analysis by Tricentis.[6,8] In May 2026 Tricentis added AI-generated test cases from natural-language prompts and self-healing tests to Enterprise Continuous Testing, consumed through SAP AI Units.[6,7] SAP's Test Management Assistant now hands its test cases to Tricentis for execution.[1] Tricentis reports more than 3,000 customers.[6] Automation shrinks script building and regression runs; it does not remove business acceptance or the cost of AI Units.

ADOPTION

WalkMe, now part of SAP

SAP completed its acquisition of WalkMe on 12 September 2024.[10] At TechEd 2026, WalkMe presented Enterprise CUA, which uses the user interface where no API exists, built and governed from Joule Studio.[15] For estimates, digital adoption reduces training and hypercare effort only if the guidance content is built, owned and maintained; that build is a line item.

GOVERNANCE

SAP Cloud ALM

All seven assistants run on SAP Cloud ALM.[2] That makes Cloud ALM set-up, roles and data feeds a prerequisite to any assistant-based saving. Put it in the plan, with an owner, before counting the saving.

THE METHOD

Seven rules for an estimate that holds

1. **Baseline first.** Estimate each line as if no tool existed, from measured volumes, not ratios. Then show each tool's saving as its own line.
2. **Apply savings to the automatable share only.** A tool that "cuts remediation by 70%" cuts the part it can automate. Analysis, review and retest stay.
3. **Add the new work.** Reviewing AI-generated fixes, setting up Cloud ALM, building WalkMe content and buying AI Units or licences are real effort and cost.
4. **Tie each saving to a confirmed assumption.** Custom objects in use, data quality score, test scope. If the buyer's numbers change, the saving changes.
5. **Price status, not promise.** Generally available: in the fixed price. Early adopter: conditional. Planned: an option.
6. **Show where the saving lands.** Fewer weeks, fewer people, or a shorter downtime window. A saving that doesn't move the plan isn't one.
7. **Agree who carries the shortfall.** If a tool underdelivers, does the integrator, the tool vendor or the buyer pay? Say so in the bid.

An illustrative custom code line

Illustrative numbers to show the method. They are not benchmarks.

STEP	PERSON-DAYS
Baseline: analysis 120, remediation 400, review and unit test 160, functional retest 120	800
Vendor claim: 70% less remediation. Share of remediation that is automatable pattern fixes: 60%	
Saving: 400 × 60% × 70%	−168
New work: reviewing AI fixes (10% of the automated volume)	+24
Estimate with the tool (an 18% reduction, not 70%)	**656**

The headline was 70%. The defensible number is 18%, with two assumptions the buyer can check. A bid that shows this working wins trust in evaluation; a bid that claims 70% invites a clarification question it can't answer.

AFTER TECHED

What changes in RFP responses

Buyers will arrive with SAP's own AI roadmap

SAP is adding an AI readiness assessment to the RISE with SAP Methodology that maps business priorities to AI use cases and produces an adoption roadmap, planned for Q1 2027.[9] Responses that ignore it will look out of touch. Respond to it line by line: accept, adjust or challenge, with reasons.

AI governance becomes a scoped workstream

SAP announced an AI Governance Assistant that proposes EU AI Act risk classifications from existing system documentation, planned for Q4 2026.[9] Public-sector and regulated buyers in Ireland and the EU will start asking how AI in the programme is classified, documented and re-tested. Give it a workstream, an owner and an estimate.

Dated assumptions for features not yet generally available

Several TechEd announcements are planned for Q1 2027, including the Enterprise AI Gateway and Business Data Cloud access from Joule Studio.[9] If the solution relies on them, state the dependency and the fallback. Evaluators reward honesty about dates more than they punish it.

Certified people in the staffing section

SAP launched a Joule Studio developer certification, free until 31 December 2026, and a new SAP Business AI Platform solution architect certification.[9] Named, certified people are an easy point to score.

Custom code is now a clean-core conversation

SAP says ABAP development is moving from AI-assisted to agent-led, including the migration and modernisation of existing code, and that AI now helps make custom code compliant with clean core.[15] Estimate retirement as well as remediation: the cheapest object to migrate is the one you switch off.

CHECKLISTS

Questions for both sides of the table

Eight checks for bid teams

- [ ] 01 **Is the baseline visible,** with tool savings shown as separate lines?
- [ ] 02 **Does each saving name its tool, status and licence cost,** including SAP AI Units?
- [ ] 03 **Is the saving applied only to the automatable share** of the work?
- [ ] 04 **Is review of AI-generated output estimated** as its own task?
- [ ] 05 **Are Cloud ALM set-up and data feeds in the plan** before any assistant-based saving?
- [ ] 06 **Are early-adopter features conditional and planned features optional?**
- [ ] 07 **Does every saving move the plan:** fewer weeks, people or downtime hours?
- [ ] 08 **Is the risk of a shortfall allocated** between integrator, tool vendor and client?

Eight questions for buyers to ask bidders

- [ ] 01 **What is your estimate without the tools,** and what does each tool save?
- [ ] 02 **Which of SAP's assistants do you rely on,** and do you have early-adopter access today?
- [ ] 03 **What volumes did you assume** for custom code, data and test scope, and from what source?
- [ ] 04 **What happens to the price** if the automatable share turns out lower?
- [ ] 05 **Which licences and AI Units are in your price,** and which do we buy?
- [ ] 06 **How many data rehearsals and what downtime window** are you committing to?
- [ ] 07 **Who reviews AI-generated code and tests,** and how is that evidenced?
- [ ] 08 **What stays fully human in your plan,** and is it staffed at full weight?

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Sources and notes

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Also in the series: Part 1, How SNP De-risks the SAP Transformation; Part 2, The Partner Toolchain.

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