



**Software Asset Management – Where (and Why) is your SAM Program Struggling?**

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**LET'S TALK!**

**SAM**  
 Software Asset Management



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**AGENDA**

- Introduction to Anglepoint
- What is SAM?
- The Software Optimization Challenge
- Elements of Sustainable SAM
- Prioritizing Publishers
- What is Software Normalization?
- Strategic Planning Workshop
- Q&A

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**A better way to manage software.**

Anglepoint is the leading IT Asset Management consulting firm, driving cost optimization, risk mitigation, & operational excellence within the hardware & software licensing estates of the world's most complex organizations. We address point-in-time needs, including program strategy development, tool selection, & implementation, and deliver end-to-end managed services to the Global Fortune 1000.



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Anglepoint

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### Anglepoint at a Glance

*Trusted advisors, real human beings.*

#### Key Facts

- Founded in 2009 to evolve beyond the limitations of the 'Big-4' advisory model
- Focused entirely on SAM Managed Services
- No conflicts of interest; no auditing, no reselling, tool agnostic
- Operate as 1 global firm; no outsourcing, no offshoring
- Physical presence in 7 countries with 160+ professionals
- Expertise in 80+ software publishers
- Serve 32 Fortune 500 customers; 18 of the Fortune 100

#### Strategic Alliances

Partnerships, Industry Associations & Community Involvement

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### What is SAM?

According to [ITIL](#), SAM is defined as “...all of the infrastructure and processes necessary for the effective management, control, and protection of the software assets...throughout all stages of their lifecycle.”<sup>[1]</sup> Fundamentally intended to be part of an organization's information technology [business strategy](#), the goals of SAM are to reduce [information technology](#) (IT) costs and limit business and legal risk related to the ownership and use of software, while maximizing IT responsiveness and end-user [productivity](#).<sup>[2]</sup>

1. ITIL's Guide to Software Asset Management

2. "International Standard", International Organization for Standardization and International Electrotechnical Commission, 2006-05-01

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## The Software Optimization Challenge

Supply that exceeds demand = waste.

- It's important to negotiate from a position of knowledge.
- Not understanding full INTITLEMENT or actual optimized NEEDS always yields leverage to publisher.

Actual DEPLOYMENT of Software  
Actual License Entitlement  
Actual USAGE of Deployed Software  
Actual NEEDS Based on Optimized Usage & Configuration

Publisher Anticipated "True-Up"  
"Shelfware" or Over-Purchasing

Extent of "Unmanaged" Software  
Extent of "Unoptimized" Software

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## The Software Optimization Challenge

Prioritize what is **installed**, **licensed**, and **needed**.

INSTALLED  
UNINSTALL  
Installed; Not Licensed; Not Needed

LICENSED  
UNINSTALL & CANCEL SUPPORT  
Installed; Licensed; Not Needed

NEEDED  
REMEDiate  
Installed; Not Licensed; Needed

OPTIMIZE  
Installed; Licensed; Needed

INSTALL  
Not Installed; Licensed; Needed

PURCHASE  
Not Installed; Not Licensed; Needed

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## Why the Software Asset Lifecycle Matters

Identify Need  
Submit Request  
Procure License  
Assign License  
Distribute License  
Deploy Software  
Monitor Deployment  
Decommission Software

License Consumed  
Where liability is created.

Entitlement Granted  
Where money leaves the organization.

Vendor Management  
Infrastructure  
SAM

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## The SAM Challenge

**People**

- Collaboration – how can I engage the necessary people who don't have time and don't see value in ITAM Program
- Getting Executive commitment and buy in
- Difficult to find experienced people

**Process**

- Understanding how and what to load as entitlements into a SAM tool
- How to define processes and policies to drive ITAM program results
- How to develop a SAM program at an enterprise level that delivers actionable and sustainable results
- Audits are an unplanned spend and oftentimes result in having to defer technology innovation
- Understanding who the material publishers are and how do I get them into my SAM tool

**Technology**

- Understanding what we have and what we need
- Accurate data, license re-harvesting – how do I move from reactive to proactive license management
- There is no "Magic Button" with any of the SAM tools. It requires ongoing management which can be both difficult and tedious to maintain on an ongoing basis
- Cloud licensing – BYOL/IaaS/PaaS
- Shadow IT

Too often, the investment that is needed to drive the business outcomes is not understood. Typically, you should expect to spend 3 to 5% of your total software spend on their SAM Program (all inclusive).

Approach is critical. Need an analytic approach that is going to deliver maximum value with limited resources.

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## Critical Elements for Success - Definitions

**People.** Defined as the personnel involved and associated roles in ITAM/SAM.

**Process.** Defined as the activities and workflows developed to implement policy and facilitate ITAM/SAM strategy.

**Technology.** Defined as the software, tools, or systems leveraged to drive automation, scalability, and repeatability.

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## Critical Elements for Success - Stakeholders

**Executive Sponsorship is critical**

Stakeholders – What is in it for them...

- **Sourcing/Finance/ Vendor Management** – needs reliable data to negotiate from a seat of power and to budget in a more predictive manner, both short and long term value in ITAM vendor relationships.
- **IT Service Management** – needs to be proactive to support the user community, proactive break fix.
- **Security** – needs to understand software end-of-life timelines as it relates to installed software.
- **Internal Audit/Legal** – needs to understand risk.
- **Executives** – balance of risk/reward to technology innovation – they do not want to stifle business agility but have to be mindful of risk.
- **Infrastructure Management** – needs to understand a strong understanding of the overall estate to understand strategic initiatives (e.g. move to cloud).

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### What is Software Normalization? Before – Raw Data

Anglepoint

**Software Category**

**Normalized Manufacturer Name**

**Version & Edition Detail**

**Number of Installs**

**License Type**

**Entitlement vs. Consumption**

**Product**

**Product Detail**

**Entitlement**

**Upgrade/Downgrade Rights**

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### What is Software Normalization? After – Raw Data is Normalized by Application

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### Strategic Planning Workshops – The Call to Action...

Where you are today, where you want to get to, & how to go from here to there.

#### Establish the Foundation for Success

**PROGRAM FOUNDATIONS**


- Establish goals, objectives, success criteria
- Determine program requirements: functional, technical, organizational
- Identify program challenges, limitations, options
- Define roles & responsibilities; develop RACI across asset lifecycle
- Identify desired approach for sourcing, renewals, cost allocation
- Identify needed asset lifecycle policies, processes, workflows



#### Ensure Completeness & Accuracy

**TOOLING NEEDS**


- Review & assess current SAM tool(s) (automation, scalability, normalization capabilities, integrations, etc.)
- Determine state of Discovery & inventory tool coverage
- Outline SAM- & publisher-specific data requirements
- Discuss & establish the role of tools, dealing with gaps in functionality
- Discuss & establish tool & data limitations
- Determine state of Proof of Enrollment records
- Identify key cost optimization opportunities among top publishers




#### Focus on the Right Targets


**PRIORITIZED ROADMAP**

- Assess publisher prioritization:
  - Total Spend
  - Compliance Risk (and audit history)
  - Contract events
- Cost optimization/saving opportunity
- Prioritize gaps & recommendations according to program offerer
- Identify quick win opportunities for cost savings
- Document a plan to maximize risk reduction and cost optimization in future phases





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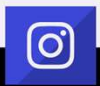
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