


Lessons from Auditing IT Assets Across 20,000+ At-Home Users and 500+ Locations After a Merger

Ryan Laber
Vice President, Cascade

Thomas Watson
CEO, AMI AssetTrack



iaitam.org | Peace, Love & Asset Management | ACE 2022

1

LET'S TALK!



(Really Big Customer)



(Cascade)







iaitam.org | Peace, Love & Asset Management | ACE 2022

2

Agenda

- Why Reconcile?
- Project Elements
- Workstreams
- Database Management
- Lessons Learned







iaitam.org | Peace, Love & Asset Management | ACE 2022


3

Why Reconcile?

- 1. Security**
Map the device footprint to scope the type and state of units in service.
- 2. Financial**
Estimate the value of devices.
- 3. ITAM Maturity Assessment**
Identify differences from the acquirer's maturity level.


iaitam.org | Peace, Love & Asset Management | ACE 2022




4

Project Elements

- Infrastructure
- Database
- Stakeholders
- Timelines




500 Plus Locations
United States only




20,000 + Field and
At-Home Employees

During COVID-19




iaitam.org | Peace, Love & Asset Management



5

Project Elements


- Infrastructure
- Database
- Stakeholders
- Timelines



PC Hardware

- Device Config
- Location
- User


Data was not updated regularly.




Networking

- Device Config
- Location

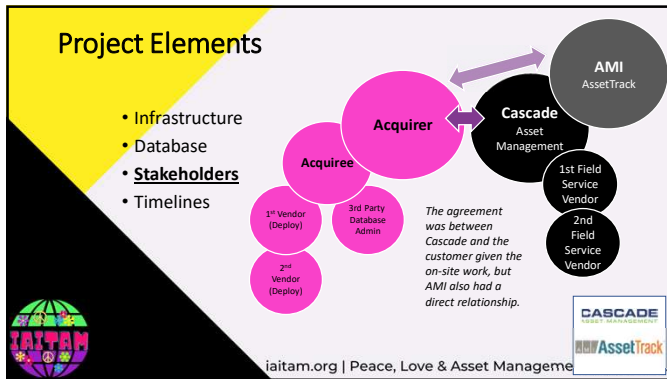
Data was largely from a single widespread installation project



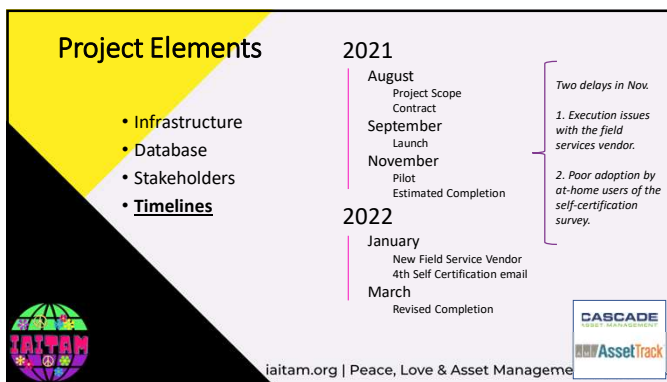
iaitam.org | Peace, Love & Asset Management



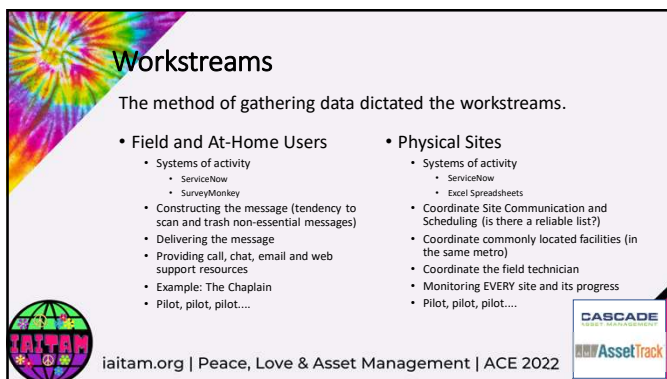
6



7




8




9

Database Management

- Reality test data quality at the beginning
- Reality test processes for database administration
 - Credentialing all the necessary roles.
 - Survey building and delivery
- Walkthrough how results will be incorporated into the database




iaitam.org | Peace, Love & Asset Management | ACE 2022




10

Lesson #1 Set Realistic Outcomes

- Scope goals in terms of their gap from the current state. Don't just define the end and hope for the best. Understand the effort.
- Recognize the unpredictable mix of new stakeholder groups, workflows, technologies and processes required to get the job done.
- Discuss the impacts of one piece not working. Exp: What if a stakeholder group is unresponsive?




iaitam.org | Peace, Love & Asset Management | ACE 2022




11

Lesson #2 Define the Data End State

- What data elements need to be updated?
 - Device Information
 - Staff Assignment
 - Location
 - Other criteria?



iaitam.org | Peace, Love & Asset Management | ACE 2022



12

Lesson #3 Mobilize ALL Stakeholders


- Identify all organizations and people involved
- Define roles, expectations, and the anticipated bandwidth requirements
- Set recurring project meetings
- Identify escalation paths
- Set the tone, don't let one party play arm-chair quarterback
- Mergers & Acquisitions bring stress




iaitam.org | Peace, Love & Asset Management | ACE 2022





13







Ryan Laber
Vice President
cascade-assets.com
rlaber@cascade-assets.com



Thomas Watson
President & CEO of AMI
amitracks.com
tom.watson@amitracks.com



iaitam.org | Peace, Love & Asset Management | ACE 2022

14
