IAITAM ACE
May 7–9, 2024   The M Resort   Las Vegas, NV

The One Thing: Your Next Best Step

for

Software Asset Management

Alan Bain

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What is your one thing?

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Thesis

Having worked with hundreds of clients over the years and reviewing countless implementations of SAM programs, there is "The One Thing" that will improve your SAM program. But you must figure that out. What is the one thing for your program? Let's try to figure that out.

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Agenda

- Context
- Software Asset Management Lifecycle
- What is your one thing? Your next best step?
- Conclusion

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Context

- ISAM has completed many SAM Maturity Assessments
- Our work and ratings as based on the following SAM Lifecycle
- No client has ever been perfect or 'done'
- All clients ask, "What's the next best step"
- In other words, where do I begin to improve
- The answer depends on goals and priorities
- In all cases it begins with the end in mind

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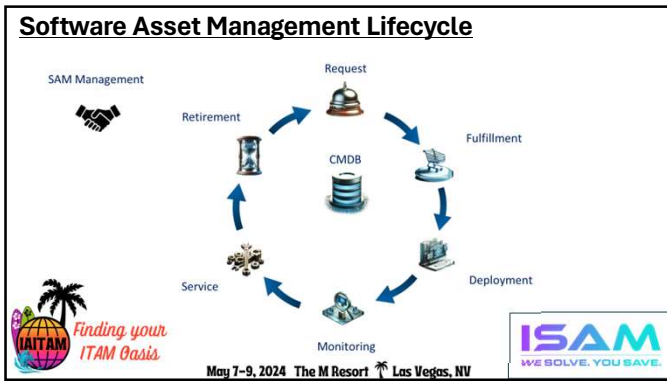
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Software Asset Management Lifecycle

SAM Management

Request
Fulfillment
CMDB
Retirement
Deployment
Service
Monitoring

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Begin With the End in Mind

• What's your goal?

• Where have you found success?

• What is important to...
  • You?
  • Your team?
  • Your leadership?
  • Your C-suite?

• ISAM's Opinion – SAM is all about compliance
  • How do you reduce risk?

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What's your One Thing?

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Next Best Step 1

If this is all new to you...

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A SAM Assessment may be your next step

- Consider the presented SAM lifecycle
- Don't focus on what you don't have, focus on what you do have
- Remember, SAM is everyone's responsibility
- Include
  - IT and business leadership
  - Software and hardware infrastructure teams
  - Legal
  - Service Management

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SAM Sample Questions and areas of focus

- What is your role in the organization? How is it related to SAM?
- Who else is involved in SAM?
- What are SAM goals and key performance indicators?
- How is success measured
- Focus areas
  - Data capture and repository
  - Software and hardware inventory
  - Position reporting
  - Technology Acquisition
  - Governance

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Next Best Step 2

If you have had an audit finding...

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Building and testing ELPs may be your next step

- Start by identifying the vendors who make up 80% of your software costs
- Identify at-risk vendors
- For these vendors
  - Document entitlement
  - Identify available tools to track deployment
- Report and address compliance regularly

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Effective License Positions

- The approach can be simple
- ELP = Entitlement – Deployment
  - Positive is good
  - Negative needs to be addresses
- Don't let perfect get in the way of good
  - A spreadsheet will do just fine

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Next Best Step 3

If you are unclear on your response to an Audit Letter...

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An Audit Response Team may be your next step

- A sitting team tasked with coordinating and responding to audit requests ensures that letters don't fall through the cracks
- A sitting team is educated and knows the words to use and steps to take
- When not in an audit, team can test ELPs, and support software procurements as needed

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Make-up of an Audit Response Team

- Team lead should be responsible for SAM and in a full time SAM role
- Team should include a cross-section of business and IT
  - IT leadership
  - Procurement for contract knowledge
  - Software and hardware infrastructure teams
  - Legal

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Next Best Step 4

If you have a tool in place and are still struggling...

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A Refocus of your effort to utilize the tool

- Ensure that the included CMDB is your single source of truth
- Ensure that purchased software (entitlement) is loaded into the tool
- Ensure that all sources of deployment data are loaded into the tool
- Include all platforms – Desktop, Server, Mainframe – but start small
- Consider a pilot to restart your project

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Questions to Consider

- Is the tool part of a larger architecture? Is part of the tool working?
- Did you or would you consider a pilot of a single vendor?
- What are your goals?
  - Compliance
  - Procurement support
  - Service management support
- When automating, what is the goal?
  - Ensure that all components are loaded before testing or embarking on automation

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Next Best Step 5

If you feel like you are paying too much for software...

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Market Research in Procurement may be your next step

- Build product requirements
- Utilize RFI/RFP processes
- Review alternatives
- Benchmark deals with reputable data sources
  - Not your reseller
  - Not your vendor
  - Not your auditor

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Market Research

- Complete for every new and renewed contract
- Ensure leadership buy in to the process
- Review requirements
- Establish and review alternatives
- Ensure vendors understand your process
  - You can argue with people, you can't argue with a process
- Consistently measure success

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Next Best Step 6

If you feel like you are on an island of SAM, all alone...

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SAM Awareness training may be your next step

- When you assess your program...
  - Ask your executives what they think of SAM
  - Ask staff what SAM means
- Do you have a policy for SAM?
- Is SAM in your HR manual?
- Are staff required to sign-off on SAM training
- The goal should be for the CIO to ask about SAM regularly

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SAM Awareness

- New employee orientation
- Annual training review and sign-off
- More extensive training for systems administrators
- All SAM practitioners should be certified
  - CSAM
  - ITIL Foundations

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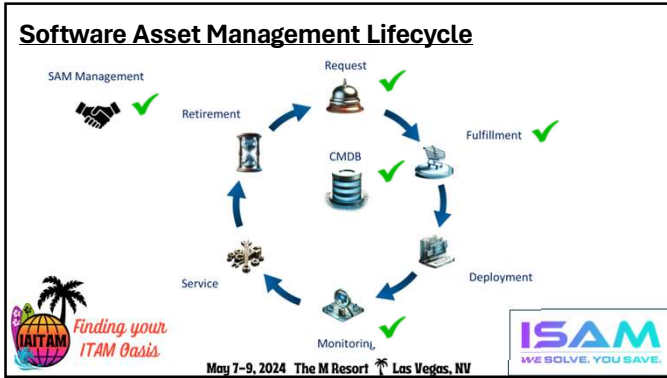27

Software Asset Management Lifecycle

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Conclusion

• SAM is everyone's responsibility
• SAM maturity is not a number
• Start with the end in mind
• In all cases, the end is compliance
• When you are stuck, look for the next best step

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