IAITAM ACE
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You want to win at ITAM? Create your playbook!

Finding your IAITAM Oasis

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Bo Guilbeault: IT Asset Management Evangelist & Practitioner.

Individual IAITAM Member

IAITAM Certifications: CAMP, CHAMP, CSAM, CAMSE, CMAM & CITAD

Disclaimer:
All content and statements (Verbal & Written) throughout my session are solely my own opinions and are derived from my professional experiences as an ITAM practitioner. **I AM NOT REPRESENTING MY EMPLOYER IN ANY DIRECT OR IMPLIED MANNER.** I am strictly representing myself to share my knowledge with IT Asset Management industry professionals.

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The 12 Key Process Areas of ITAM

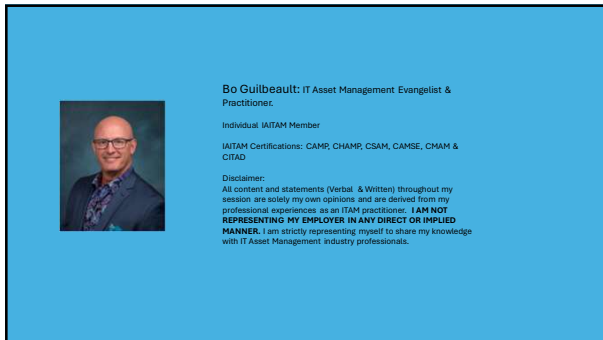|		
Program	Policy	Communication
Acquisition	Asset I.D.	Compliance
Disposal	Documentation	Financial
Legislation	Project	Vendor Management

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Identify the team

The Owner(s) = Executive Sponsor(s)

Head Coach = ITAM Leader

Offensive/Defensive Coaches = Hardware, Software, Mobile and Asset Disposal

Players = Business disciplines (Sales, Finance, Security & Operations) **driving the investments.**

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Examples of what IT Asset Managers Think About?

Offense

Securing and Protecting the organizations I.P. and Brand
- Program Management
- Policy Management
- Communication Management

Financial Analytics (TCO, ROI)
- Right Sizing Spend
- Lifecycle Management

Defense

Governance
- Contractual Compliance
- Legislative Compliance
- Operational Efficiency

Inventory Tracking
- Discovery/Audit
- Chain of Custody
- Vendor Management

Special Teams
ITAM Governance Committee
Audit Response Team

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Program Management

Create your Mission Statement

Set your Goals (Short & Long Term) **and/or Roadmap** (including timeline)

Identify your primary technology needs: Discovery Method(s) and Central Repository

Understand your Budget

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Policy Management

Policies are created to drive the behavior of employees relating to the responsibilities of the proper handling of technology thru the lifecycle.

They must be reasonable and enforceable, otherwise it's only a suggestion.

What are the current documented policies relating to technology and its usage?

Are they:
- Still relevant?
- Being enforced?

Optional: Create a task force

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Communication & Education Management

The framework for providing leadership and fellow employees timely and accurate information related to our Technology operations.

- Determine what you want to communicate.
- How will you communicate to the organization?
- What is the Frequency of communication efforts?

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Acquisition Management

Provides our company the framework to conduct business with a 3rd parties enabling the usage of desired technologies within our environment.

- Creating and enforcing the usage of Master Services/Purchase Agreements
- Understanding the market and key players
- Creating and maintaining Standards – Building a catalog

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Acquisition
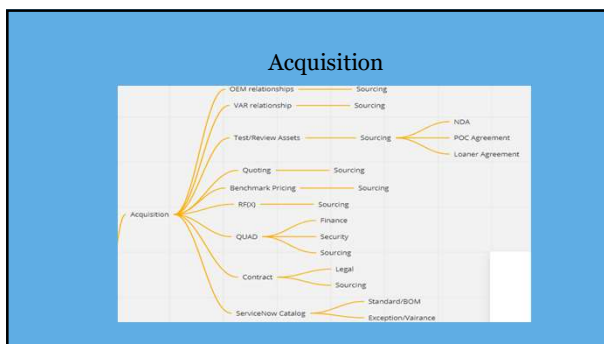
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Asset I.D. including Discovery/Audit

Providing the ability to provide timely and accurate line of sight to the technology investments of the company.

Network, Semi and Fully Automated Discovery: UPC Tag
• Serial Number
• MAC Address

What are the required data attributes to be collected?

The primary drivers for "physical" asset tags can be:
• Data Bearing
• Cost
• Mobility
• Disposal tags

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Compliance – Contracts & Legislation

Mitigating the possibilities of going to court.

Current State:
• Who reviews and has ability to execute/sign the contracts?
• What terms of the contract need to be communicated and understood by team members?
• When does the term of the contract expire?
• Where are the current contracts currently residing? (individual or centralized in sourcing or legal)

Response team:
• How do we respond as an organization to a "potential" infraction related to our legal responsibilities?

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Disposal Management

What do we do with the technologies that are no longer wanted?

Internal questions to ask:
- What do we want to outsource to a 3rd party?
  - Logistics Management
  - Freight Haul
  - Data Security – External validation of Data being destroyed
  - Donating and/or Selling the no longer wanted technology
  - Landfill avoidance

Remember Outsourcing functionality to a 3rd party does not exonerate your organization from liabilities.

Exercise Due Diligence!!

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Disposal
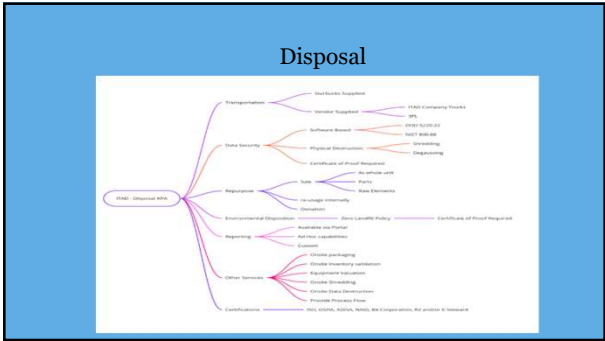
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Documentation

What are the important documents/artifacts required to understand and prove "due diligence" efforts.

Where will they be stored and who should have access?

Examples:
- Evaluation Contracts
- Purchasing contracts
- Statement of Work Documents
- Inventory check in/out sheets
- Bill of Lading (BOL)
- Bill of Sales
- Transfer of Title

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Financial Management

How do we as an organization "right size spend?"

Financial Models
- Purchase
- Lease
- (X) as a Service

Example analytics:
- Cost Benefit
- Annual Operational Cost
- Total Cost of Ownership
- Return on Investment

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Project Management

What are the current activities directly or indirectly impacting ITAM?

Examples:
- Company divesture or purchase
- Lifecycle (upgrades & refresh)
- New Technology
- Removal Technology
- Vendor Change

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Vendor Management

Providing the Framework for evaluating and contracting services from 3rd party organizations.

Considerations:
- Experience
- Financially sound
- Leadership
- Scorecards
- Onboarding
- Offboarding
- Sole Source, Champion/Challenger
- Frequency of operational performance reviews
- Evaluation Teams
- RF(X)

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ITAM – What is important to know and understand

$20B	$1B	$100B	$200M	$800M
RISK MITIGATION 20% Market Impact of Data Breach	CONTRACT VALUE Technologies to be purchased	BRAND MARKET VALUE	ANNUAL BUDGET Spend on technology and services	ASSET VALUE 100K serialized devices

- Protecting (XXX) Brand and I.P.
- Proving compliance as related to Contractual and Legislative obligations
- Calculating Financial data for impactful business decisions
- Following the Chain of Custody of our technology inventory and assets

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Thank you

Questions?

I am happy to connect and share experiences.

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First things First – The Program
Examples:

Create your Mission Statement:
Design and deliver the ITAM framework necessary for impactful decision making based on the most accurate data available; including but not limited to internal policies, financial implications, contractual obligations and inventory controls

Set your goals – short term and long term
1. Protect the Brand by understanding the chain of custody during the entire lifecycle and beyond for our technology-based assets.
2. Identify opportunities for "right sizing" budgets and spend relating to technology.
3. Identify opportunities to capture residual value of technologies no longer in production environment.
4. Contribute data points for our environmental goals and efforts

Identify your technology needs
1. Discovery methodologies
2. Central Repository

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