



# IAITAM ACE

May 7-9, 2024 The M Resort  Las Vegas, NV

**Carlos Garcia-Moran**

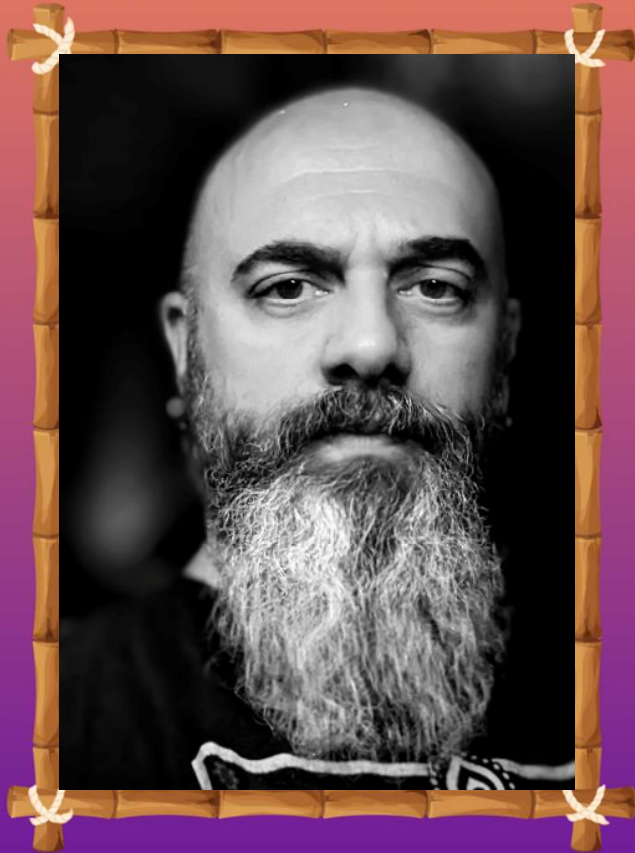
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**I.C.E. – Inventory, Control and Education**

**Foundational Pillars of SAM**

*Finding your IAITAM Oasis*





- With a rich tapestry of experience woven over a quarter-century in the dynamic realm of Information Technology,
- Carlos stands as a stalwart figure in the industry. Currently donning the cap of Director of Software Asset Management (SAM)
- Carlos is a seasoned professional known for steering the ship of organizations towards optimal software utilization and compliance. A true maestro he possesses a profound command over the orchestration of systems and software to guide us in the right course of Licensing and Compliance



*Finding your  
ITAM Oasis*

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# Connect with Me



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# Inventory, Control, and Education

.....*Oh my!*

- These are some of the basic foundations of a strong SAM program
- Ride with me on this journey as we will go over them in some detail and how they're all related in the ecosystem of our daily operations.
- Understanding these topics will help propel your SAM game to the next level



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# Inventory - Overview

## Control and Visibility

- A good inventory provides the organization with a clear view of your software assets. Helps track installed applications, versions, licenses, and usage patterns.

## Cost Optimization

- Can avoid penalties for unauthorized software usage
- Understanding software usage can optimize license allocation, avoiding unnecessary purchases and reducing costs

## Security and Risk Mitigation

- Helps identify outdated or vulnerable software versions
- Tracking inventory helps detect unapproved or shadow IT applications



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# Inventory – First Steps

As a SAM Program Manager, you need to understand **everything** present in your organization.

You should be gathering information around your inventory. There are a number of considerations you should be aware of:

- What tools are currently in place? *Are there any?*
  - Discovery tools, spreadsheets, offline tools, etc.
- What are the gaps present with these tools? How can SAM supplement these areas?
  - Is this all the inventory?



## Understand your organization

- Understand if there are discovery tools in place and how SAM can leverage them?
- Get to know the existing IT infrastructure, procurement processes, and business objectives

## Inventory Hardware Assets

- How many different operating systems exist in the org?
  - Where are they located (on-prem / in cloud, geographic)
  - What is the split of endpoints (servers, endpoints, client devices, etc.)

## Discover Installed Software

- Use discovery tools to uncover all software footprints on all endpoints
  - Ensure that all devices are tagged appropriately (test / dev, production, etc.)
  - Automate where possible

## Discover Software Purchases

- Work with Procurement and Finance to identify how your organization acquires software
  - AP Spend
  - Pcard Spend



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# Control / Governance - Overview

## Governance

- Develop a policy that articulates how SAM supports overall business goals and objectives
- Create a communications plan to convey SAM information to relevant stakeholders (end-users and senior management alike)

## Scope Management

- Define what is in scope and what isn't
  - Platforms
  - Business units
  - Geographic scopes
- Define priorities within scope to prevent unlicensed software installation on unmanaged devices

## Data Quality & Validation

- Understand the required data feeds and enforce quality controls *before* data reaches SAM tool (SAM Language)
- Validate that all use rights are being maximized and contractual terms are adhered to



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# Control / Governance *Deep Dive*

**A well-structured SAM approach not only optimizes software management, but also fosters collaboration and informed decision making**

**Building a program around control and governance**

## Policy Framework

- Develop a comprehensive policy that outlines SAM practices, roles and responsibilities
  - Involve stakeholders from various departments (Security, Legal, Procurement, IT)
- Clearly define control mechanisms, compliance standards, and governance protocols. This framework sets the tone for effective SAM!

## Centralized Oversight

- Regularly review software usage, licensing, and vendor relationships. Implement controls to prevent unauthorized installs and ensure adherence to license terms

## Audit Readiness

- Implement automated tools where possible for tracking assets.
- Being audit-ready ensures transparency and minimizes risks



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# Education – SAM Terms / Language

## Do we all Grok the same?

- One of the pitfalls of SAM can be the way we use words to categorize systems, infrastructures and metrics
- We all use words like Corp, Prod, Test, Customer, Socket, Cores, Seats, concurrent, Named Entity and others
- Are all your peers using them with the same understanding? Ofttimes Corporate Test systems and Development test systems are governed by different metrics, but we use the same terminology on them which can lead to confusion and compliance issues.
- Coming up with an agreement on how terms are used across the board becomes a critical path to make sure your metrics are being applied correctly.



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# Education

## Quarterly Compliance Reports

- Provide quarterly license compliance reports around major vendors to stakeholders to track software usage, overall compliance and adherence to policies
- Use these reports to enhance transparency and enable informed decision-making by management and business owners

## Stakeholder Engagement

- Proactively communicate with major stakeholders through quarterly newsletters (SAM Advisories)
- Use the communication to shine light around licensing news for major tools your organization uses, SAM best practices, and other software licensing topics on compliance

## Intranet Updates

- Create a hub that allows members of your organization to access the latest information around software licensing, compliance, and emerging technologies (AI??)



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Question , Comments or Concerns?



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# Conclusion

As you leave today here's some wisdom to take on the road with you.

- Always Remember to Educate and Elevate
- Because Knowing is half the Battle
- Balance is the Way



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