



# IAITAM ACE

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

**Entitlement Data Dos and Don'ts:  
Best Practices for collecting data for a New SAM Tool**

Kristy Stroud

*Finding your IAITAM Oasis*





Kristy Stroud

Lead Business Value Consultant

[Kristy.Stroud@snowsoftware.com](mailto:Kristy.Stroud@snowsoftware.com)

512-466-7881

<https://www.linkedin.com/in/kristy-stroud-35972b10/>



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# Agenda

- My Story
- Base License Position
- On-going Purchases
- How to get started
- Data Elements
- Key Takeaways



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# My Story



Software Acquisitions &  
Software Asset Manager

- Negotiated and Managed Software Contracts
- Implemented ITAM Program
  - 12+ Years



IT Asset Services Sr. Advisor

- SAM transition lead for clients outsourcing their ITAM activities
  - 3+ Years



Lead Business Value Consultant

- Assist customers in use of Snow portfolio and ITAM program
  - 8+ Years



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# ITAM Maturity

## LIMITED CONTROL

- ITAM not defined
- Incomplete visibility

## GAIN CONTROL

- Actionable insight
- Increased productivity

## REDUCE RISK & COST

- Resource optimization
- Reduced unbudgeted expenses

## ACCOUNTABILITY

- Efficient use of budget & resources
- Improved ownership

## STRATEGIC

- System integration
- Cloud adoption



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# Base License Position

Establishing a  
**Base License Position**  
is the act of accumulating all past purchases up until a set point in time and entering the consolidated data as a “baseline” entitlement.



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# Base License Position – Data Sources

## Publisher statements

- Typically include data necessary to establish complete entitlements.

Critical data elements include:

- **Application Name** with current version and edition
- **Maintenance Dates**

## Reseller Reports & Internal Procurement Records

- May not include all the data necessary to establish complete entitlements for compliance.
- Purchases not represented by the Publisher will need to be verified.



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# On-going Purchases

Once the Baseline for a Publisher is established, **on-going purchases** should be added at regular intervals, so all owned entitlements are represented.



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## On-going Purchases – Data Sources

### Reseller Reports

- Auto delivered procurement report from reseller(s).

### Internal Procurement Records

- Purchases not made through resellers.



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# How to get started



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# Develop a Publisher Plan

- A **Publisher Plan** is a strategy for collection of data to populate the SAM tool.
- Items to consider include:
  - **Audit risk** – What is the audit history of the publishers in your environment? Are you at risk for audit?
  - **High license requirement** – What publishers or titles are most commonly requested/installed?
  - **Business financial impact** – Based on financial data, what publishers represent significant spend? Is there an opportunity to positively impact budget?
  - **Upcoming Contract/Maintenance Renewal** – What renewals are coming up in the next few months that could present a savings opportunity?



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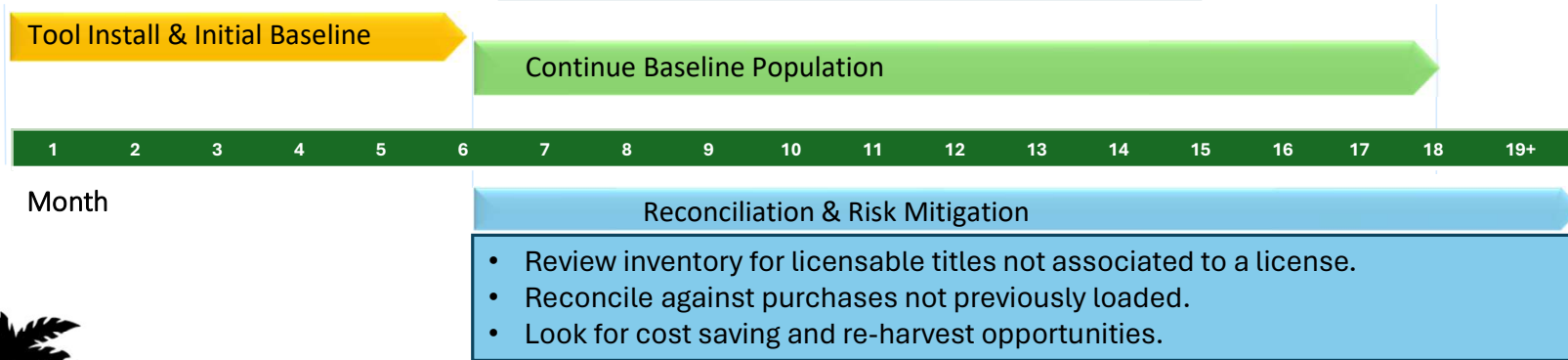
# Tool Population – Setting Expectations

## First 3 - 6 Months

- Tool Install & Training
- SAM Process Review
- Top 3 – 5 Publisher

## Next 12 Months

- Prioritize publishers based on Contract/Maintenance renewals.
- Populate tool as renewals are processed.



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What data do you currently have?



What format is it in?



How accurate is it?



How complete is it?



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# Data Elements



**Essential**



**Recommended**



**Business Data**



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# Agreements

## Essential

- ✓ Agreement Name/Number
- ✓ Manufacturer/Publisher
- ✓ Agreement Type  
(License/Maintenance)
- ✓ Legal Entity
- ✓ Automatic Upgrades (Yes/No)
- ✓ Subscription (Yes/No)
- ✓ Agreement Begin & End Date

## Recommended

- ✓ Alerts/Notifications
- ✓ Reseller/Vendor
- ✓ Contact Information
- ✓ Notes/Descriptions
- ✓ Terms & Conditions



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# Licenses

## Essential

- ✓ Application Name, Version and Edition
- ✓ Purchase Date
- ✓ Legal Entity
- ✓ License Metric
- ✓ Quantity Owned

## Recommended

- ✓ License Name (if different)
- ✓ Upgrade Rights
- ✓ Downgrade Rights
- ✓ Subscription (Yes/No)
  - ✓ Begin and End Date
- ✓ Maintenance Begin & End date
- ✓ Cross Edition Rights
- ✓ Purchase Price & Currency



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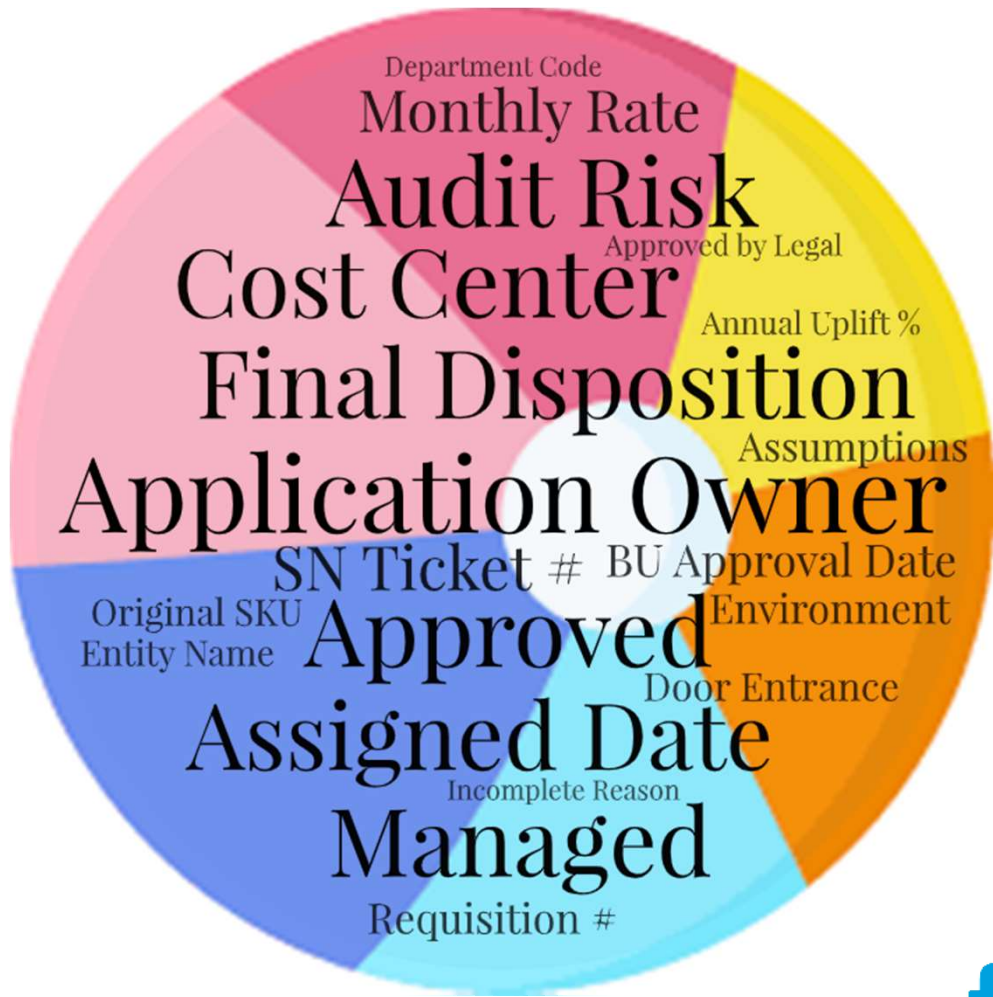
“Sometimes letting things go  
is an act of far greater power  
than defending or hanging on.”

Eckhart Tolle



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# Key Takeaways



Collect Baseline Positions



Establish Ongoing Purchase Processes



Create a Publisher Plan



Document Data Elements



Record the Data



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“Without questions,  
there is no learning.”

- W. Edwards Deming

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