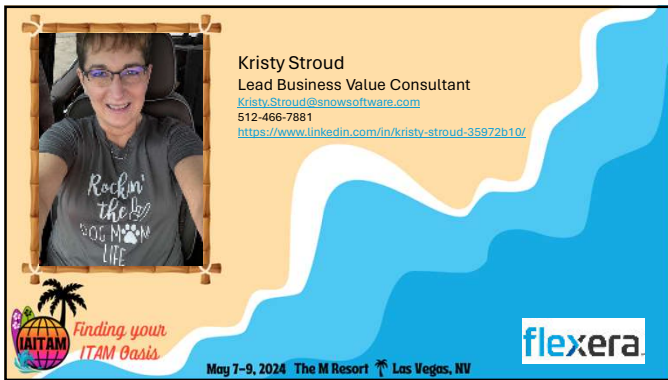




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My Story



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

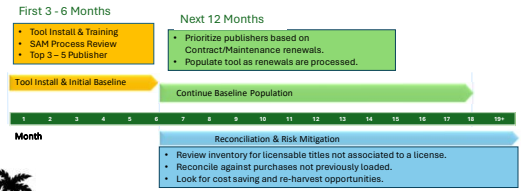
- Tool Install & Training
- SAM Process Review
- Top 3 - 5 Publisher

Tool Install & Initial Baseline

Next 12 Months

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

Continue Baseline Population



Reconciliation & Risk Mitigation

- Review inventory for licensable titles not associated to a license.
- Reconcile against purchases not previously loaded.
- Look for cost saving and re-harvest opportunities.

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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	Recommended
✓ Agreement Name/Number	✓ Alerts/Notifications
✓ Manufacturer/Publisher	✓ Reseller/Vendor
✓ Agreement Type (License/Maintenance)	✓ Contact Information
✓ Legal Entity	✓ Notes/Descriptions
✓ Automatic Upgrades (Yes/No)	✓ Terms & Conditions
✓ Subscription (Yes/No)	
✓ Agreement Begin & End Date	

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Licenses


Essential	Recommended
<ul style="list-style-type: none"> ✓ Application Name, Version and Edition ✓ Purchase Date ✓ Legal Entity ✓ License Metric ✓ Quantity Owned 	<ul style="list-style-type: none"> ✓ License Name (if different) ✓ Upgrade Rights ✓ Downgrade Rights ✓ Subscription (Yes/No) <ul style="list-style-type: none"> ✓ 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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