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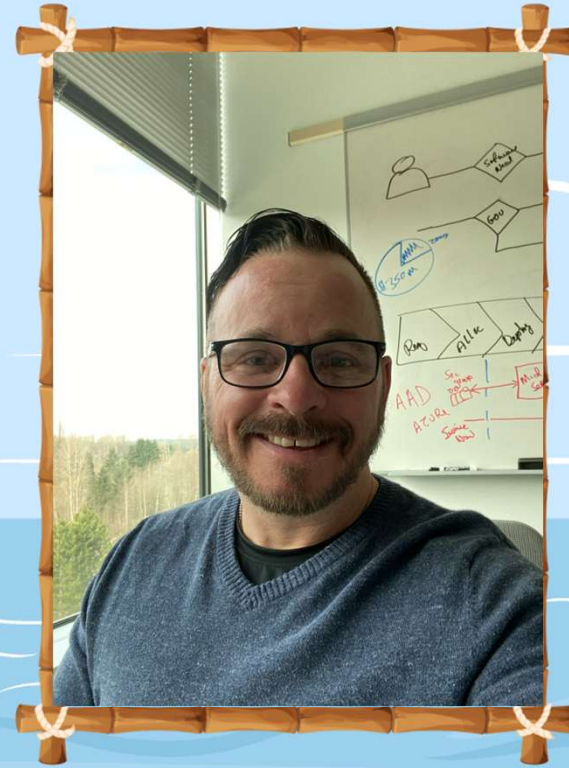
Failing an audit is not a problem, it's a symptom!

Mike Temple, ServiceNow

Patrick Graff, Microsoft

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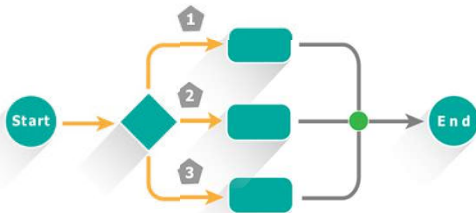servicenow | Microsoft

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Agenda

- IT Asset Management process common pitfalls
  (Mike Temple, ServiceNow)

- How to mount an audit defense
  (Patrick Graff, Microsoft)

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What you will and won't hear today

Definitions

In an IT context, can be related to:

- IT Hardware
- IT Software
- SaaS usage
- IaaS/PaaS usage

audit [aw-dit]

noun

1. an official examination and verification of accounts and records, especially of financial accounts.

2. a report or statement reflecting an audit; a final statement of account.

SEE MORE

verb (used with object)

6. to make an audit of; examine (accounts, records, etc.) for purposes of verification:
   The accountants audited the company's books at the end of the fiscal year.

7. to attend (classes, lectures, etc.) as an auditor.

SEE MORE

verb (used without object)

9. to examine and verify an account or accounts by reference to vouchers.

Types of Audit

Internal audit

Regulatory audit

Compliance audit

Security audit

Financial audit

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How do I not fail?

1. Layered approach

2. It's all in the Process/Workflow

3. Exception Management

Layers?

Cake!
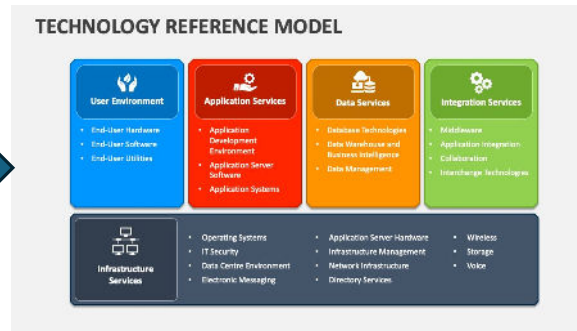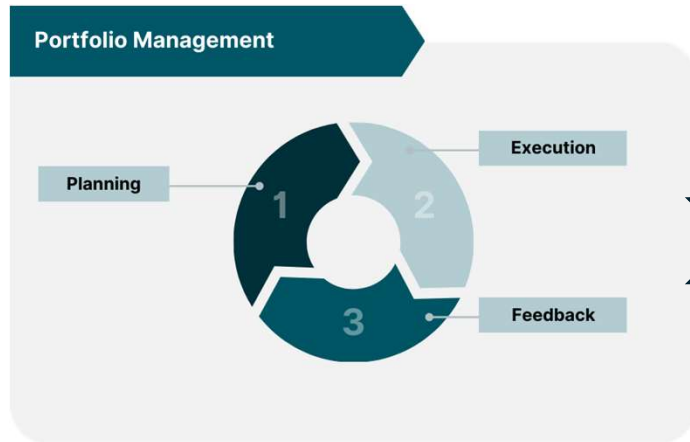
Process/Workflow:

i.e. How to make the sausage!

Making the sausage – Demand/Request

- ITAM leadership seat at Demand table
- Catalog for onboarded technology
- Track assets back to projects, initiatives, user requests
  - Ended projects, changed initiatives, offboarded or changed users
- Closed feedback loop on outdated technology

Demand

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Making the sausage – Fulfill (Procure/Inventory)

- Keep the receipts (Software and SaaS)
- Advanced Ship Notification (Hardware)
- Reservations/True-up (Hybrid, SaaS)

Fulfill
$

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Making the sausage – Deploy

- Task-based deployment
- User/Location assignment (Hardware)
- Workflow-based provisioning (IaaS/PaaS)
- Auto check of available licensing (Software/SaaS)

Deploy

Making the sausage – Manage

- Normalize (Hardware, Software, SaaS)
- Enrich (Hardware, Software, SaaS)
- Self-audit
- Low-usage tracking (Software, IaaS/PaaS)
- Reclamation/License harvesting (Software/SaaS)
- Rightsizing, Business hours (IaaS/PaaS)

Making the sausage – Service

- Integrate with Install/Move/Add/Change (Hardware, Software)
- Integrate with Incident
- Integrate with Change
- Robust Loaner and RMA processes (Hardware)

Making the sausage – Retire

- Integrated HR Onboarding/Offboarding process
- EUC Refresh (Hardware, Software)
- Robust, proactive, technology obsolescence process
- Robust reclamation
- Disposal/Donation/Resale process (Hardware)
- Deprovisioning process (Software, IaaS/PaaS)

Retire

Exception Management

- 80/20 rule
- Document!

So what are my next steps?

Glad you asked...

First Step!

- Executive Buy-in for a seat at the table here:

Portfolio Management

Planning — 1

Execution — 2

Feedback — 3

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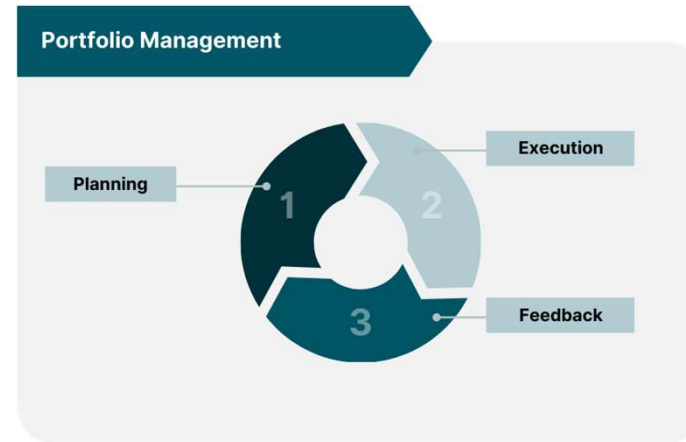
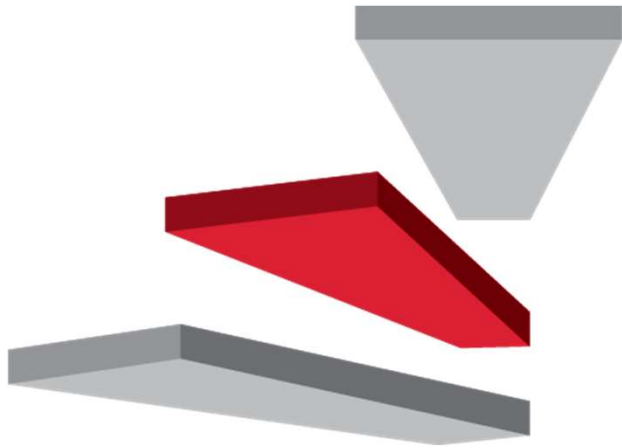**May 7–9, 2024   The M Resort   Las Vegas, NV**

Second Step

- Review the processes outlined here:
  - What can be improved
  - What can be streamlined
  - What aren't you doing?
  - What's the risk of not doing it?
  - Who cares?
- Identify low-hanging fruit

Third Step

- Document current state
- Fix
- Document end state
- Enjoy your promotion

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Mounting an Audit Defense

Patrick Graff, Microsoft

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