IAITAM ACE 2025

ITAM - Another Brick In The Wall

Do Your SAM Policies Match Your Reality?

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- Provides SAM Managed Services to Federal, State and Commercial entities
- Manages Service Delivery for ISAM
- Actively involved with SAM for more than 30 years
- Certified Software Asset Manager

April 22-24, 2025 | The M Resort Spa Casino | Las Vegas, NV

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About ISAM

- Independent, tool agnostic consulting form
  - Audit Defense
  - SAM Maturity
  - Negotiation Support
  - Compliance Support
- 29 years of happy clients
  - Federal, State, Commercial
  - Some for 15 consecutive years

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Agenda – Truths about SAM

- SAM is not a checkbox – It takes real work
- Policies, Procedures and Processes are only the beginning
- SAM is not just the staff that carries a SAM title
- Its not about the tool
- Awareness is the key
- Executive buy-in will lead to staff buy-in
- Conclusion – Two truths and a Lie

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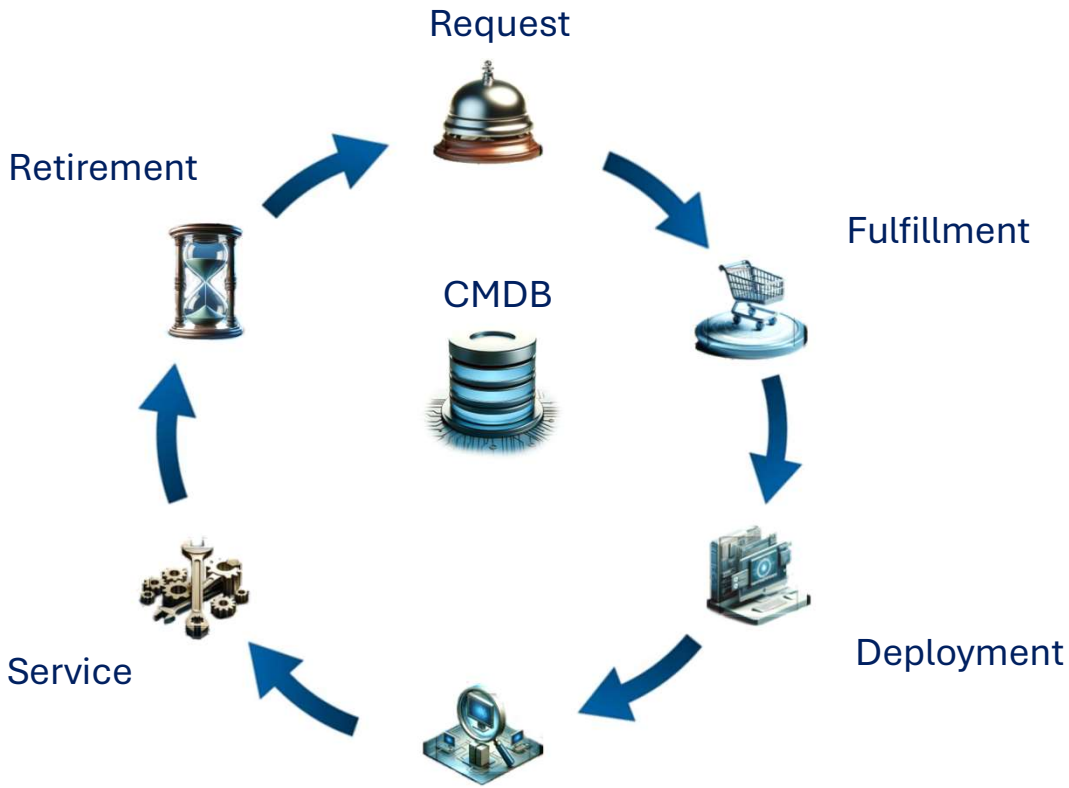
SAM is not a checkbox

- SAM can’t be relegated to a back office, warehouse function
- Lack of SAM will be expensive
  - Overbuying of software
  - Audit findings
  - Security
  - Architecture and Planning
- SAM is an enterprise-wide function

SAM is not a checkbox - Lifecycle

SAM Management



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Just the beginning…

- Policies
  - Define SAM and the organizations beliefs
- Process
  - Define the implementation of the Policies
- Procedures
  - Tactics to carry out the effort of the SAM Lifecycle

Example Policies - Federal

Agency Software Strategies – Centralizing and Improving Software Management

FITARA provides new authorities and responsibilities that CIOs can use to improve their agencies' IT management policies and practices. To improve covered agencies' software management practices, CIOs, in coordination with CAOs and CFOs, [must]:

- [Appoint] a software manager that is responsible for managing, through policy and procedure, all agency-wide commercial and COTS software agreements and licenses. The software manager shall report to the agency CIO and will work in collaboration with the offices of the CIO, CAO, CFO, and other organizations as appropriate.
- Maintain a continual agency-wide inventory of software licenses, including all licenses purchased, deployed, and in use, as well as spending on subscription services (to include provisional (i.e., cloud) software as a service agreement (SaaS)).
- Analyze inventory data to ensure compliance with software license agreements, consolidate redundant applications, and identify other cost-saving opportunities.[86]

CAPITOL BUILDING

Example Policies – State

The Department is required to establish and maintain an inventory of all information assets, including information systems, information system components, software, and information repositories both electronic and paper. The inventory shall contain a listing of all programs and information systems identified as processing, storing, or transmitting State information.

This Policy establishes requirements for maintaining an inventory of and effectively managing all software assets and licensing requirements.

Example Policies – State

The State prohibits the use of unlicensed software.

State employees are required to comply with copyright and license agreements. Computer software sold for use on State computers is copyright-protected, and State employees are to comply with the license agreements that accompany the proprietary software they use.

The State will:

- Conduct a 100% inventory of its software.
- Detect and remove illegal and unlicensed software.

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Example Policies – Commercial

Employees are not permitted to place any electronic materials, files or software on any organizational computing device without prior written approval.

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Policies – CSAM

- Goal 1
  - Required SAM policies are effectively implemented
    - Awareness
    - Visibility
- Goal 2
  - Policies must be enforced
    - Uniform
    - Clear evidence
- Goal 3
  - Policies are reviewed and periodically updated

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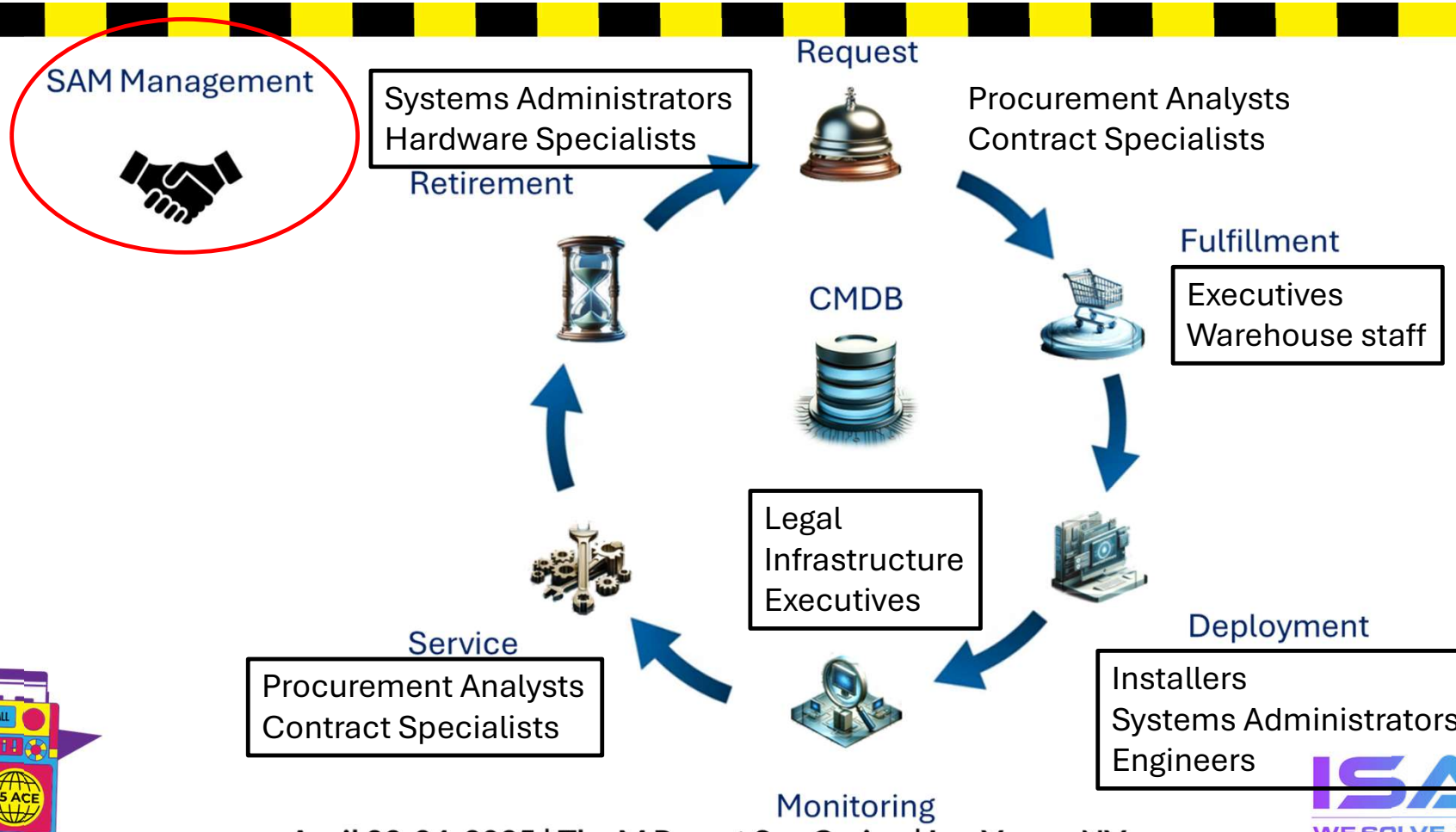
SAM is not just for SAM Staff



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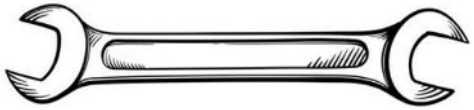
Its Not About A Tool

- All our clients have a tool
  - SAMPro
  - Flexera
  - Belarc

- At some point, all our clients have been out of compliance
- Why?
  - A tool gives a false sense of security
  - A tool accuracy needs to be tested and retested
  - A box of wrenches doesn't make me a mechanic



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Awareness is the Key – Procurement Executive

- What does SAM mean?

I would view it as a holistic approach to obtaining and managing the software tools that we rely on for our organization to run in the most efficient/cost effective way possible.

- How is success measured?

I think for cost there are comparisons (best in class, above average, etc.), but I'm not sure how that may take into account governmental requirements (i.e. certain purchasing programs, standard T's and C's, etc.). I am also assuming there are other comparative metrics available for organizations, such as the number of tools for given jobs, etc.

Awareness is the Key – CIO

- What does SAM mean?

Software Asset Management is the tools and processes necessary for effective management, tracking, and control of our software assets through the entire lifecycle from procurement to retirement.

- How is success measured?

A KPI that is actionable including recommendations for improvements. Establishing baseline metrics so we can measure the effectiveness of our changes and improvements to the program.

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Awareness is the Key

- New employee orientation
- Ongoing training
- Peer reviews
- Management oversight
- Compliance monitoring

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Executive Buy-in Leads to Staff Buy-in

- Before Buy-in
  - Chaos
  - Multiple tools performing the same function
  - PCard purchases
  - Departmental negotiations
- After Buy-in
  - Centralized acquisition
  - Review of redundant tools before acquiring another one
  - Industry benchmarks
  - Focused negotiations

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Executive Buy-in Leads to Staff Buy-in

- Results
  - Staff owns the process – Pride in ownership
  - Cost savings and avoidance
  - Reduction of tools – Reduction of tool management
  - Reduced risk through improved compliance
    - Centralized inventory and tracking
    - Centralized vendor communication

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Two Truths and a Lie

- A perfect policy will lead to compliance
- SAM Awareness through regular training and review will lead to reduced compliance risk
- SAM is everyone's job

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