

Help the company's ITAM implementation project succeed, so the company doesn't waste time or money!









Mrs. Annaliza Bradley, MSIT

Annaliza has been an IT leader for 15+ years managing entire end-to-end ITAM lifecycles (HAM, SAM, ITAD) by building transformational ITAM programs at Fortune 500 companies from the ground up. She's passionate ITAM leaders have a fiduciary duty to implement tool-agnostic policies & processes that enforce compliance & governance while reducing costs & mitigating risks. She has saved millions in USD throughout her IT career adhering to industry best practices & those funds were reinvested into sustainability & scalability. Annaliza holds a Master of Science in IT & ITAM certifications through IAITAM (CITAM, CHAMP, CSAM, CMAM, CITAD (consecutively since 2013)) & ServiceNow (CIS-HAM, CIS-SAM).

Disclaimer: All my content and statements (verbal and written) throughout this conference are solely my own opinions and are derived from my own professional experience as an IT Asset Management (ITAM) practitioner. **I am not representing my employer in any direct or implied manner.** I am strictly representing myself to share my knowledge with other ITAM industry professionals.



Session Description: Has the company hired a professional services vendor to implement a shiny new ITAM solution for its hardware, software and/or cloud assets? Please don't sit back & let the vendor scramble blindly while burning project hours to ash because nobody is ready to shift the company culture & hold stakeholders accountable to take the necessary actions to make the shiny new ITAM solution successful. Let's get together and talk for an hour about some best practices the company should complete proactively before its ITAM implementation project kicks off.





Step 1: Confirm the prerequisites

- Review the Hardware Asset Management functionality (HAM) to ensure it aligns with business objectives.
- Confirm that your Configuration Management Database (CMDB) is healthy and that discovery sources are set up.
- Organize your team and HAM data.
- Engage an implementation team with HAM expertise.



Tip: Take the time to understand your Hardware Asset Management solution's capabilities and features as you consider what you'll need to realize the value you expect from your implementation.



Confirm the underlying platform functionality:

- Consider or confirm your use cases for hardware asset management, such as lifecycle management, stock rooms, and inventory control.
- Know how you expect HAM to meet your business objectives because the core platform functionality must support these objectives.
 - For example, have you deployed a discovery tool, such as Microsoft System Center Configuration Manager (SCCM), JAMF, Device42, BMC Helix, ServiceNow, etc.?
 - Is your CMDB set up properly?
- Verify that your CMDB is healthy and that it has a known and active process owner.
- Upgrade to the most recent release/version whenever possible.



Tip: If you have an existing CMDB and your hardware models are not normalized, complete that work before you add any additional functionality to your Hardware Asset Management solution.



Organize your team and hardware data prior to starting the project:

- Appoint a hardware asset management process manager if you haven't already done so.
- Identify all owners and sources of hardware asset management data.
- Gain executive support to obtain hardware data and hardware related data from business and technical stakeholders.
- Ask all hardware asset management data owners to update their inventories and provide those documents to the hardware asset management process manager.





Collect and document the following data:

- Document who owns hardware asset management:
 - Is ownership consolidated with one hardware asset manager?
 - Is it distributed by department or some other grouping?
 - Is there a hardware asset governance or steering committee?
- Determine who can purchase or lease hardware:
 - Is hardware purchasing/leasing centrally controlled?
 - Are there checks and balances in place for hardware acquisitions?
 - Do you have a shadow IT person who purchases hardware?
 - Does someone on the team have the authority to put controls in place and enforce them?



Tip: Shadow IT is when users go rogue and purchase or use hardware or software without IT or the Security department's knowledge or approval (non-compliance, not secure or backed up, etc.).



Collect and document the following data:

- Uncover each place hardware data is stored:
 - Is hardware data in the CMDB, in spreadsheets, and/or in another database?
- Make sure you have a healthy CMDB:
 - Is there a CMDB owner you can meet with?
 - Has the data in the CMDB been updated by a discovery tool?
 - Have the inventories been updated and/or validated recently?
 - Have the health issues identified on the CMDB dashboard been mitigated?
- Clarify how hardware is distributed:
 - Does your organization have automated hardware installation via a service catalog or similar mechanism?



How are installations tracked?



Collect and document the following data:

- Establish if the hardware is reclaimed:
 - Does your organization have a way to reclaim hardware when it's no longer needed or during offboarding?
 - How is hardware recovery tracked and reconciled with hardware asset management?
- Confirm how hardware audits are currently conducted (physical inventory):
 - Is there governance and process around audits, both internally and by vendors?
 - How are audit metrics tracked and reconciled?





Identify the scope for the initial launch:

- Identify and document the scope for your initial launch.
- Make sure your assets and CIs are created correctly without duplicates.
- Review the following areas to determine how to meet business needs:
 - Asset refresh
 - Audit
 - Disposal
 - Normalization
 - Procurement
 - Stock management



Tip: Ensure you understand the Asset/CI relationship and the data points are synchronizing between the two records when necessary.



Step 2: Refine your vision, business objectives, and measures of success

- Document your key goals and identify the potential risks.
- Confirm how you'll measure success and how you'll communicate it.





How to support your company objectives:

- Verify that your business goals and objectives have defined measurements that can be tracked and measured.
- Include your executive sponsor in the scope and obtain signoff approval.
- Use the following Success Checklist on the next two slides to ensure your vision cascades into clear and measurable business outcomes.



Tip: If you already have an implementation project plan that includes your documented outcomes and goals, get approval from your executive sponsor before moving forward.



Suggested Hardware Asset Management business outcomes:

- Define the asset/CI creation strategy.
- Identify the types of assets that will be tracked by asset tag and those that will be considered consumable.
- Automate hardware lifecycle management.
- Use centralized purchasing power for cost savings.
- Set up stock rooms/vending machines for distribution.





Suggested Hardware Asset Management success metrics:

- **Reclaim unused hardware:** Identify and reclaim/recover distributed hardware that Discovery has not recently scanned.
- Eliminate purchasing silos and excess hardware: Track the cost savings from centralizing hardware management.
- Create a standardized refresh program: Proactively manage the refresh cycle to ensure hardware is exchanged before its end of life.
- Increase revenue/Track expenditures: If budgets are decentralized, institute chargebacks or throwbacks. Consider a centralized IT budget to simplify asset reclamation/recovery and redistribution.



Tip: Make sure you have a snapshot of these metrics in your present state that you can use as a baseline to compare with your post-implementation metrics.



Step 3: Assess your team readiness

- Identify and prepare your team members.
- Make sure your team has had proper training.
- Confirm that team members are available to fulfill their roles during the project.



Tip: There are multiple teams involved, and specific skills required to implement and maintain hardware asset management. Do not finalize your resourcing and project plans until you've assessed the team's readiness.



Confirm your implementation and maintenance resources:

- Identify a project manager for implementation. This person should be experienced with leading hardware asset management implementation projects and using agile methodology.
- Confirm that your executive sponsor is committed and fully engaged.
- Confirm that your hardware process owners are committed and fully engaged (typically senior managers to VPs).



Tip: If you're engaging external ITAM experts for implementation, make sure your internal maintenance team is involved in the implementation design and configuration work, so they can own and grow the HAM solution after implementation.



Confirm your implementation and maintenance resources:

- Identify these roles specific to hardware asset management:
 - Hardware asset manager: Owns the program and sets goals
 - Hardware asset analyst: Runs the day-to-day management and handles reporting
 - Hardware asset management administrator: Owns the hardware asset management platform
 - Service catalog manager: Creates and updates catalog items
 - Liaison from tech support server/desktop: Provides insight on how discovered data maps to actual inventory
 - Procurement manager: Sources requests; could be a hardware asset
 management role or Enterprise Resource Planning (ERP) role





Confirm your implementation and maintenance resources:

- Confirm that your team has the skills needed for implementation and maintenance, including:
 - System administrators: Should be experienced in HAM implementations and have taken courses to support the HAM solution being implemented
 - Testing resources (UAT, QC): Should have appropriate testing skills
 - **Developer resources:** Should have any required coding or scripting skills
- Encourage system administrators and developers to develop their skills by taking courses and/or reading articles online before the implementation.







Step 4: Create a structure for governance

• Establish a strategic and operational implementation governance committee for Hardware Asset Management.



Tip: Implementation governance supports a successful go-live, and post-implementation governance supports the long-term success of hardware asset management in your environment.



Create an implementation governance committee:

- Include your designated platform owner, business process owners (hardware asset management process owner, hardware asset management manager, service catalog manager, procurement manager, contract manager), IT service desk lead, partner representative, project manager, and other business and technical stakeholders as required.
 - Your executive sponsor should chair this committee.
- Establish a common, documented understanding of who has decision rights using a RACI chart or similar tool.





Create an implementation governance committee:

- Define a meeting cadence, standard agenda, and decision process.
- The standard agenda includes:
 - Project objectives: Identify and prioritize these objectives.
 - Metrics review: These measures of success for the enterprise, IT, and operations should come from the goals and metrics you discovered in Step 2.
 - List the organizational change management (OCM) activities (communications and trainings) that support hardware asset management.



Tip: Executive leadership needs to hold stakeholders accountable to ensure assigned tasks are completed and decisions are made in a timely manner to prevent project delays and/or project scope creep.



Create an implementation governance committee:

- The governance committee may create the following :
 - Processes to prioritize known technical obstacles and strategies to resolve them
 - A standard demand intake and prioritization process to review requests for new hardware asset management functionality
 - Policy documents defining asset purchasing, reclamation/recovery, and disposal
 - Additional policy documents required to support your specific business objectives and regulatory audit requirements



Tip: The governance structure you establish for implementation should set an initial baseline for the governance you'll need to perform maintenance after go-live, especially to manage demand.



Step 5: Plan for communications and user trainings

- Build a marketing plan to encourage adoption and explain the benefits.
- Build a training plan for all user types.



Tip: Good proactive communication is especially critical to hardware asset management project success.



Build a communications and training plan:

- Confirm that you have the leadership support and an executive sponsor for the OCM activities.
- Include a budget for a program lead and/or solution expert.
- Ask the leadership team to provide an explicit definition of their communications and training plans.
- Conduct a readiness review to measure how prepared your stakeholders are for the organizational change needed to support hardware asset management. This should be conducted *before* design discussions.



Tip: Change can be difficult. Implementing hardware asset management can make people feel power is being taken away from them and/or too much overhead or visibility is being added.



Build a communications and training plan:

- Use your team readiness review along with the OCM activity list to create a plan and develop an impact analysis and risk assessment.
- Develop a communication strategy to make sure everyone uses the best modes of communication.
- Establish a regular meeting cadence to keep the plan on track.
- Create a functional training plan for end users so they're prepared to use the system at go-live. This is separate from the technical platform training for systems administrators and Business As Usual (BAU) teams.



Tip: Consider how implementing hardware asset management will affect your organization. Some groups may perceive the changes as negative and will need training to understand the value hardware asset management brings to the organization.



Step 6: Plan for implementation design

- Learn about your current processes. Collect supporting documents and update them if they're outdated.
- Document the integrations you'll require.
- Identify your priorities for a phased approach.
- Be prepared to improve your processes rather than customizing old processes onto the new platform.



Tip: Stop trying to boil the ocean. Do not demand unrealistic outcomes by forcing the project team to undertake impossible tasks or make tasks unnecessarily difficult. To empower project success, focus on smaller, more manageable goals that are achievable.



Plan for a phased rollout:

• Create a limited-scope pilot plan to initiate before your main rollout. Feedback from a small rollout can build confidence in the project and/or help you avoid pitfalls in the main implementation.



Tip: Hardware asset management information is usually scattered throughout the organization with different owners, formats, and varying degrees of accuracy. Organizing your team and data can take several months, depending on the size of your organization and how distributed the current hardware management process is. This is another reason to consider phased or pilot rollouts.



Plan for a phased rollout:

- Deploy service catalog items to a small group or geographic region.
- Modify inventory audit methodologies for a small group of fulfillers to gain insight into the process and technology changes.
- Limit other deployment features to a subset of your employee base to gain feedback before your main rollout.
- Verify that the foundational integrations are set up before implementing Hardware Asset Management, such as Microsoft System Center Configuration Manager (SCCM), JAMF, Device42, BMC Helix, ServiceNow Discovery, etc.



Tip: Implementing Hardware Asset Management can feel overwhelming. However, starting with a limited scope with low risk such as implementing by facility or geography—helps your team members build skills and confidence, which prepares them for the next step.





Common risks	Impact	Correction
Lack of executive sponsorship or ownership	 No common point for escalation No ultimate decision-maker No one to champion the vision No one owns the Hardware Asset Management program 	Make sure you have an active sponsor/owner with the appropriate span of control to manage issues, enforce decisions, and keep objectives on track.
Lack of buy-in from participating and affected parts of the organization, for example, the procurement group, asset management team, or CMDB owner	 Inability to make decisions or get consensus Scope creep Requirement churn Siloed communications Resistance Conflicting priorities Opting out Watered down final product that does not provide value Confused expectations Turf battles and infighting Project delays Resources without enough time to complete their tasks 	 Make sure that all affected organizations: Have informed executive sponsors who will hold stakeholders accountable Are onboarded and have provided their buy-in before you start implementing the new HAM solution Understand the project's goals and support the vision
Lack of documented governance and/or processes	 No one manages checkpoints or process reviews A process that may not support your objectives and metrics A process that's not clearly communicated or easy to follow Overengineered processes that need an overhaul The necessity to update processes during implementation, which causes delays and confusion and generates rework 	Make sure your processes and technical specifications are documented and reviewed before you start the implementation project, so you can minimize costly scope changes and rework during the project.



Hardware Asset Management implementation risks:

Common risks	Impact	Correction
Expectations that the platform will solve all issues	 Users could believe that the project: Is just a technology project Is a plug-and-play cure-all Replaces the need for process owners Can easily manage all of hardware asset management immediately 	Communicate expectations to all stakeholders. Understand that no technology can be implemented successfully without an involved, cross-functional team. Focus on a subset of IT assets, end-user-compute (EUC) or data center (DC), for example.
Unhealthy CMDB or no discovery tools deployed	 Complicates any efforts to implement Hardware Asset Management Limited ability to identify and track installed hardware without a discovery tool for infrastructure, such as Microsoft System Center Configuration Manager (SCCM), JAMF, Device42, BMC Helix, ServiceNow Discovery, etc. Limited ability to identify installed hardware and to build reclamation/recovery tools for unused hardware because there's no discovery source 	Make sure the CMDB is healthy (not perfect!), that appropriate discovery tools have been implemented and are working properly, and stakeholders are held accountable to ensure their teams are keeping their hardware asset management data updated.



Tip: Don't hire specialized experts and then tell them what to do! Trust their judgment, allow them to guide you, and be prepared to change the way you do your job today, rather than dictating specific actions or solutions yourself, as they are the ones with the most indepth understanding to help you get out of your own way.

Connect with Me!



+01 (805) 512-1847



AnnalizaBradley805@gmail.com



in htt

https://www.linkedin.com/in/annaliza805