IAITAM ACE 2025

ITAM - Another Brick In The Wall

From Zero to Hero: Building an ITAM Program From Scratch

The OPERS Journey
April 23, 2025
Greg McLaughlin

OPERS
Ohio Public Employees Retirement System

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01

Overview

- OPERS
- Program Vision and Strategy
- Project Timeline

02

Project Milestones

- Assess
- Build
- Improve

03

Real World Examples

- Systems & Process Integrations
- SW License Compliance
- Key Performance Indicators

01 Overview

The Ohio Public Employees Retirement System (OPERS)

- Since 1935, the Ohio Public Employees Retirement System (OPERS) has meant security and peace of mind to millions of Ohio's retired public workers and their families. OPERS provides retirement, disability and survivor benefit programs for public employees throughout the state who are not covered by another state or local retirement system.
- With total investment assets of $114.1 billion as of Dec. 31, 2023, the Ohio Public Employees Retirement System is the largest state pension fund in Ohio and the 14th-largest state pension fund in the United States.
- Employers (3,689) – State, County, Municipalities, Miscellaneous, Libraries, Townships, Villages, Law Enforcement/Public Safety
- Pension Plan Membership (1,248,633)
  - Active Members – 297,827
  - Inactive Members – 730,139
  - Retired Members – 220,667

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01 Overview

The Ohio Public Employees Retirement System (OPERS)

- OPERS is a quasi-state agency in Ohio providing pension benefits and health care access for retired state employees
- Primary business functions include institutional investing, finance, IT dev and ops, pension processing and member services
- Employees – 490
- Locations – Corporate Offices and Disaster Recovery Site
- Work Arrangements – In Office and Work-From-Home

ITAM Specifications

- Device Assets
  - Computers – 1,925
  - Servers – 576
  - Peripheral Assets (network, monitors, docking) – 1,929
- Software Applications
  - Commercial - 496
  - Component - 664
  - Freeware - 621

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01 Overview

Where did we start?

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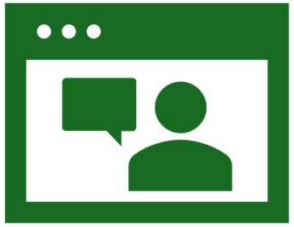
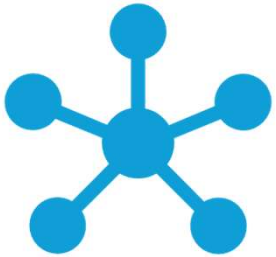
01 Overview

Vision and Strategy

Organizational Engagement



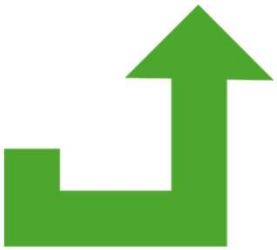
Source of Truth



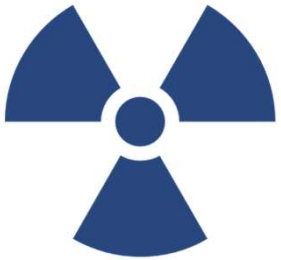
Centralized Services

Six Primary Program Objectives

Quality Analytics



Positive ROI



Risk Mitigation

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01 Overview

Project Timeline – Year 1

Q1 2023

- Industry Research
- Strategy Build
- Program Assessment
- Project & Team Build

Q2 2023

- Project Kickoff
- Policy, RACI & Process Development
- Inventory Assessment
- Systems Evaluation
- Process Review

Q3 2023

- Systems Training
- HW Asset Data Analysis
- Lifecycle Process Development
- Issues Tracker
- Trend Reporting

Q4 2023

- Systems Upgrade
- SW License Baseline
- Thin Client Integration
- Procurement, PO, Invoice Integration

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01 Overview

Project Timeline – Year 2

Q1 2024

- Build SaaS Presence
- Set Inventory Schedule
- Program Reassessment
- Add Servers to HAM

Q2 2024

- Reporting Schedule
- Build Program KPIs
- Analyze Data Anomalies
- Add Network Devices

Q3 2024

- Structure Internal Audits
- Develop Contract Database
- Automate Reporting
- Integrate Value-added Processes

Q4 2024

- Pursue License Compliance
- Explore NIST Standards
- Begin Continuous Improvement Strategy

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Project Milestones

1. Assess the program's current state
2. Build the project plan and team
3. Institute policy, governance and procedures
4. Build data repository
5. Develop software license baseline
6. Integrate value-added processes
7. Implement key performance metrics and reporting
8. Begin continuous improvement strategy

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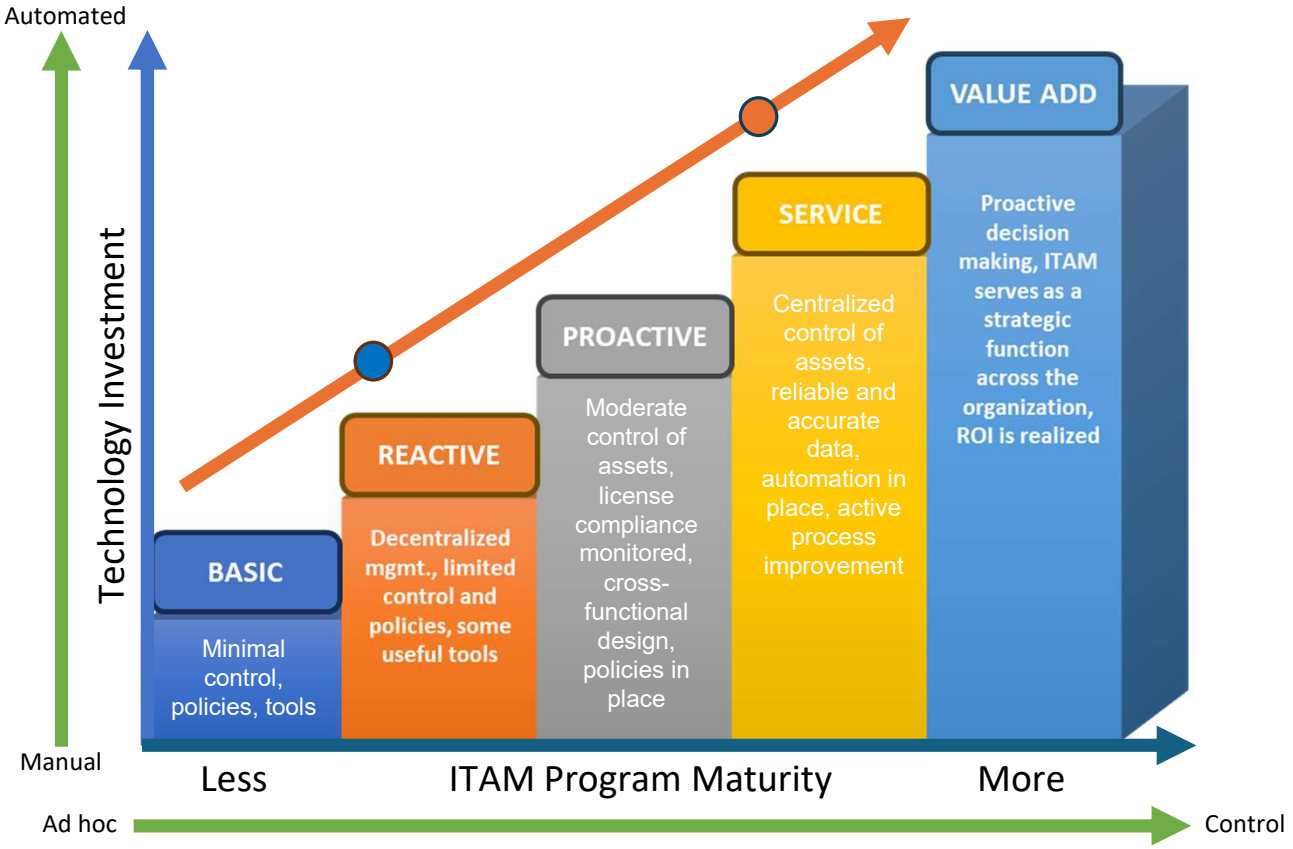
02 Project Milestones

1. Program Assessment

Q1 2023

- Industry Research
- Strategy Build
- Program Assessment
- Project & Team Build



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02 Project Milestones

1. Program Assessment

- People Functions Include:
  - Authority
  - Plan
  - Team
  - Stakeholders
  - Program Management
  - Project Management

- Process Functions Include:
  - Integration
  - Improvement Plan
  - Periodic Evaluation
  - Transition
  - Request
  - License and Contract
  - Acquisition
  - Deployment
  - Disposal/Reclaim

- Technology Functions Include:
  - Hardware Inventory
  - Software Inventory
  - Entitlement
  - Reporting
  - Verification

- Management Functions Include:
  - Best Practices
  - Comm/Education
  - Financial Mgmt
  - Compliance and Legal
  - Policy Mgmt
  - Vendor Mgmt

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02 Project Milestones

1. Program Assessment

People		Basic	Reactive	Proactive	Service	Value Add
Planning	Develop and execute plan					
Program Management	Delivery engagement					
Process						
Integration	Process integration management					
License and Contract	Compliance responsiveness					
Procurement	Process maturity					
Technology						
HW Inventory	Effective tracking of HW					
SW Inventory	Effective tracking of SW					
Management						
Communication	Awareness/understanding					
Policy Management	Managed/defined policies					

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02 Project Milestones

2. Project & Team Build

Q1 2023

- Industry Research
- Strategy Build
- Program Assessment
- Project & Team Build

ITAM Program Implementation

Ohio Public Employees Retirement System (OPERS)
Week ending: 4/12/2024
Effective Date - January 1, 2025

Task Number	Category	Summary Tasks	Team Owner	Milestone Date (Due Date)	Completion	January				February				March					April				May					
						5	12	19	26	2	9	16	23	1	8	15	22	29	5	12	19	26	3	10	17	24	31
		System Upgrades (Jan - Mar 2024)																										
1	Improvement	SaaS Implementation - Okta - Phase 1	RS	1/12/2024	X																							
2	Improvement	Blade, EOS/EOL Updates	GM	1/12/2024	X																							
3	Improvement	License Baseline Completion	GM	1/19/2024	X																							
4	Improvement	Server Agents Installed	RS	1/19/2024	X																							
5	Improvement	Client Agent Update	MG	2/2/2024	X																							
6	Improvement	SaaS Implementation - Direct - Phase 2	RS	2/23/2024	X																							
7	Improvement	Application Remediation	MG/RS	3/22/2024																								
		SAM Governance (Jan - Mar 2024)																										
8	Governance	Process Development	GM	1/19/2024	X																							
9	Governance	Role Assignment	GM/JS	1/26/2024	X																							
10	Governance	Team Feedback	ITAM Team	2/2/2024	X																							
11	Governance	Process Testing	GM/JS/MG	2/16/2024																								
12	Governance	SAM SOP Documentation	GM/JS	3/22/2024																								
		Data Integration (Feb - May 2024)																										
13	Integration	Great Plains Adapter	JS/NN	2/16/2024	X																							
14	Integration	Recast Adapter	MG	3/29/2024																								
15	Integration	MECM Adapter	ITAM Team	5/3/2024																								
16	Integration	User Account Data Updates	MG	5/31/2024																								
		Procurement Process Integration (Mar- Mar 2024)																										
17	Procure/Integration	Evaluate manual process	ITAM Team	3/1/2024	X																							
18	Procure/Integration	Determine "to be" workflow	ITAM Team	3/1/2024	X																							
19	Procure/Integration	Discuss technical needs for integration	ITAM Team	3/8/2024	X																							
20	Procure/Integration	Define business requirements	ITAM Team	3/8/2024	X																							
21	Procure/Integration	Build integration processes	TBD	3/22/2024	X																							

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02 Project Milestones

2. Project & Team Build

Q1 2023

- Industry Research
- Strategy Build
- Program Assessment
- Project & Team Build

Steering Committee	Director Level, IT Mgmt, ITAM • Risk Management
Project Leads	IT Mgmt, ITAM • Project Priorities • Tactical
Project Team	IT Mgmt, ITAM, Procurement • Project Tasks

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02 Project Milestones

2. Project & Team Build

Q1 2023

- Industry Research
- Strategy Build
- Program Assessment
- Project & Team Build

IT Divisional Teams

- ITAM
- Service Desk
- Infrastructure
- Desktop Support
- Security

Cross-functional Teams

- Procurement
- Process Management
- Communications
- Finance

Vendor Support

- Operational Support
- Technical Support
- Program Support

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02 Project Milestones

3. Policy, RACI & Process Development

Q2 2023

- Project Kickoff
- Policy, RACI & Process Development
- Inventory Assessment
- Systems Evaluation
- Process Review

Roles and Responsibilities

It is the responsibility of all IT staff to work within the spirit of the IT asset management policy to minimize the loss of equipment due to lost or stolen equipment, and to assist the IT asset management team in managing the full lifecycle of equipment, including inventory. They are also encouraged to reinforce this with end users, as appropriate, making sure users are educated about security and appropriate use of equipment.

A RACI chart will identify who will be:

(R) Responsible:	• The person or team who actually gets the job done
(A) Accountable:	• The person who ultimately accountable for the task being completed appropriately
(C) Consulted:	• People who need to provide input to the task but do not fulfill the task. • Typically referenced as subject matter experts (SME), or stakeholders
(I) Informed:	• People who receive information about process execution and quality. • They need to stay informed regarding the progress of the task.

HAM Processes and Tasks	Director of IT	Director of Finance	ITAM	Service Support	IT Mgmt	IT Security	Procurement	HR	Business Unit Leaders	Legal
Policies and governance	A	I	R	C	C	C	C	C	I	I
Strategy	A	I	R	C	C	C	I	I	I	I
Data entry & quality management	A	I	R	R	C	C	R	I	I	I
Risk management and asset security	A	I	R	I	C	R	C	I	I	I
Process compliance auditing	A	C	R	C	C	C	C	I	I	I
Awareness, education, and training	A	I	R	C	C	I	I	C	I	I
Hardware contract management	A	I	C	I	R	C	C	I	I	I
Workflow review and revisions	A	I	R	C	R	C	C	I	I	I
Budgeting	A	I	I	I	R	I	C	I	I	I
Asset acquisition (Inspection and Acceptance)	I	I	A	R	R	I	R	I	C	I
Asset deployment	A	I	I	C	R	I	C	I	I	I
Asset consume/maintain	A	I	C	R	C	I	I	I	I	I
Asset retire / reuse	A	I	I	C	R	C	I	I	I	I
Asset Inventory (Input/Validate/Maintain)	A	I	R	I	R	C	C	I	I	I

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SAM Processes and Tasks	Director of IT	Director of Finance	ITAM Manager	Service Support	IT Mgmt	IT Security	Procurement	Business Units	Legal
Policies and governance	A	I	R	I	C	C	C	I	I
Strategy	A	I	R	I	C	C	I	I	I
Data entry and quality management	A	I	R	R	C	C	R	I	I
Risk management and asset security	A	I	R	I	C	R	C	I	I
Compliance auditing	A	C	R	C	C	C	C	I	I
Awareness, education, and training	A	I	R	C	C	I	I	I	I
Contract lifecycle management	A	I	R	I	C	I	C	I	C
Workflow review and revision	A	I	R	R	R	C	C	I	I
Budgeting	A	I	I	I	R	I	C	I	I
Software acquisition	I	I	I	C	A	I	R	C	I
Controls and reporting	A	I	R	C	C	R	C	I	I
Optimize License Harvesting	A	I	R	C	C	I	I	I	I
Software deployment, moves and changes	A	I	R	I	R	I	C	I	I
Software Disposal	A	I	R	I	R	C	I	I	I

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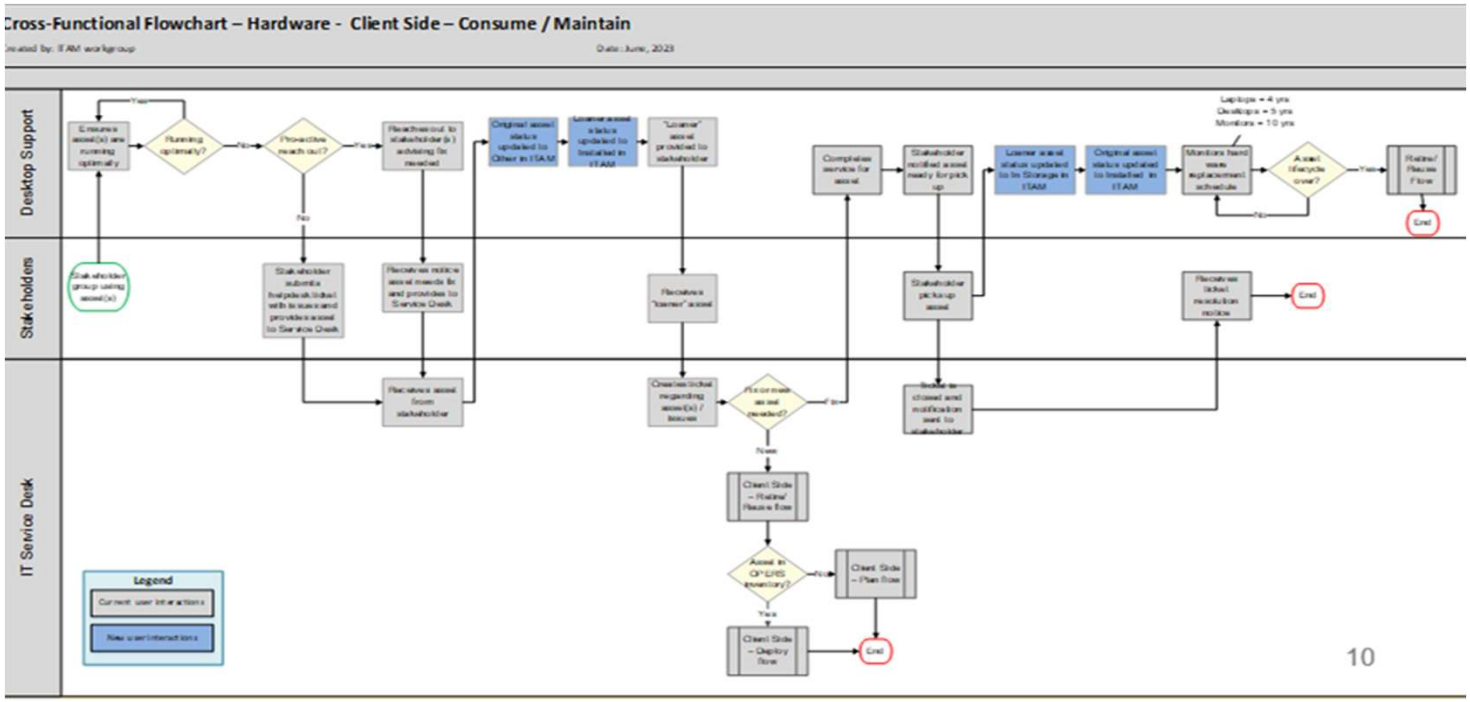
02 Project Milestones

3. Policy, RACI & Process Development

Q2 2023

- Project Kickoff
- Policy, RACI & Process Development
- Inventory Assessment
- Systems Evaluation
- Process Review



02 Project Milestones

4. Build Data Repository

Q3 2023

- ~~Systems~~ Training
- ~~HW Asset Data Analysis~~
- Lifecycle Process Development
- Issues Tracker
- Trend Reporting

Asset Types

- Laptop
- Workstations
- Thin Client

Asset Locations

- Office
- Work-From-Home
- Disaster Recovery

Asset Roles

- Prod/Dev
- Test
- Cold Standby

Asset Statuses

- Installed
- In Storage
- Retired

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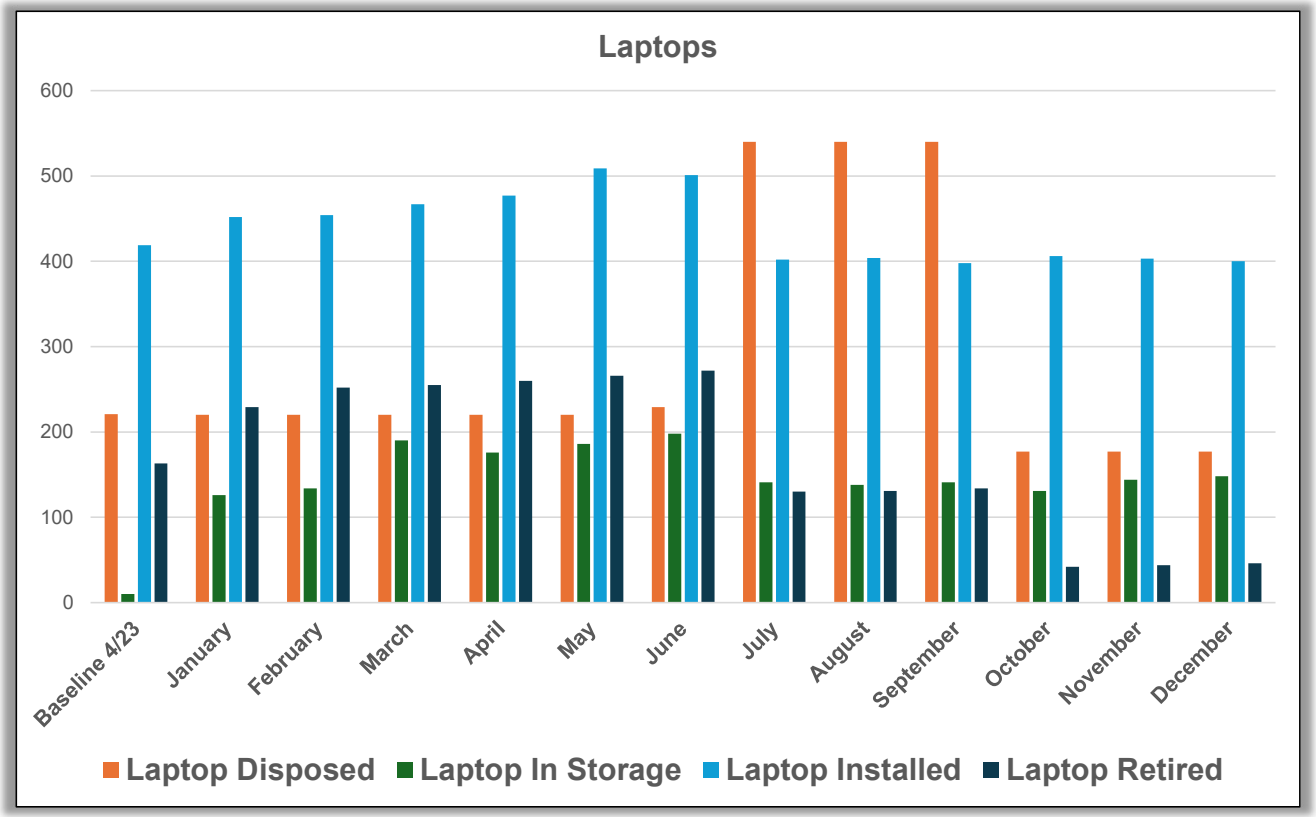
02 Project Milestones

4. Build Data Repository

Q3 2023

- Systems Training
- HW Asset Data Analysis
- Lifecycle Process Development
- Issues Tracker
- Trend Reporting



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02 Project Milestones

5. SW License Baseline

Q4 2023

- Systems Upgrade
- SW License Baseline
- Thin Client Integration
- Procurement, PO, Invoice Integration

What licenses do I track?

- High Volume
- Organizational Value
- Audit Risk
- Dollar Value

What data is important?

- Cost
- Purchase, Install & Use
- Use Rights
- Exclusions

How do I reconcile?

- Product Owner
- Vendor Portal
- Systems Support
- Vendor

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02 Project Milestones

6. Value-Added Processes

Q4 2023

- Systems Upgrade
- SW License Baseline
- Thin Client Integration
- Procurement, PO, Invoice Integration

Data Integrations

Automated Notifications

Data Retention

SW Onboarding

Service Desk Processes

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02 Project Milestones

7. Key Performance Indicators & Metrics

Q2 2024

- Reporting Schedule
- Build Program KPIs
- Analyze Data Anomalies
- Add Network Devices

Critical Success Factors
- Cost Savings
- Risk Mitigation
- Corp Goal

KPI
- Improve Accuracy
- Reduce Risk
- Improve Performance

Metrics
- Dollar amount
- Percentage
- Days

Program Metrics
- Financial
- Operational
- System

Hardware Metrics
- Asset Mgmt
- Lifecycle Mgmt

Software Metrics
- Compliance
- Performance
- Utilization

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02 Project Milestones

8. Continuous Improvement Strategy

Q4 2024

- Pursue License Compliance
- Explore NIST Standards
- Begin Continuous Improvement Strategy

Program Assessment

Process Review

Data

Policy

Relations

System

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03 Real World Examples

OPERS' World Today

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03 Real World Examples

Systems & Process Integrations

Systems

- Dell Wyse Thin Client Integration
- SCCM Non-Device Asset Integration
- Great Plains Invoice and PO Files
- SaaS Direct and Indirect Integrations

Process

- Monthly HW Device Review
- SW Renewal Notifications
- SW Onboarding Process
- Device Disposal Process
- Data Retention Process

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03 Real World Examples 1

Software License Compliance

Who's Involved?

- Product Owner
- Systems Admin
- Desktop Support
- Procurement
- ITAM

What Information?

- Purchase Info
- ITAM System Reports
- Contracts
- SOW
- Vendor Reports

Action Steps

- Gather Data
- Analyze T&C
- Compare ITAM, Vendor, Purchase Data
- Determine Root Cause(s)
- Implement Change

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03 Real World Examples 1

Software License Compliance

What could possibly go wrong?

- Use Rights
- Device Role
- Version Upgrade
- License Type
- Unlicensed User
- Assigned Application
- Exclusion
- SKU

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03 Real World Examples

Key Performance Indicators

Category	Metric	Baseline	Goal	Current
System	Active devices not inventoried for more than 30 days	2.83%	<10%	1.71%
Asset Management	Inventoried devices not recognized as assets	1.90%	<2%	1.95%
Lifecycle Management	Laptops more than 4 years old	23.24%	0%	0.50%
SW Compliance	Commercial applications with > n-2 versions	9.76%	<10%	6.41%
SW Utilization	License entitlement usage percentage	26.69%	>85%	17.79%
SW Utilization	License entitlement installation percentage	85.23%	>90%	31.88%

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Questions

1. We identified 8 key milestones in our program development process. What other program milestones were critical in your journey?
2. How do you assess your program maturity? How often?
3. What has been the most challenging aspect of program development or growth?
4. What process or data integrations have provided the most value? Least value?

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Key Takeaways

1. Pace yourself
2. Find what fits the needs of your organization
   a. Program size
   b. Scope
   c. Value
3. Be willing to try new things
4. Build functions and processes that bring value
5. Measure, measure, measure
6. Make lasting connections with key stakeholders

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