

IAITAM ACE 2025

ITAM - Another Brick In The Wall

2XXX

The SAM Maturity Blueprint: Executive Buy-In, Build, Lead, Win

PRESENTED BY: CARLOS ROBLES





Carlos
Robles



7 years as a **Big-4 software auditor**, managing over **1,000 software audits for multiple publishers**



I've seen the **pitfalls of organizations that struggle with SAM**—and what successful companies do differently



Over the past **5 years**, I've shifted to **helping organizations build and mature their SAM programs**



Now, I lead the **Global SAM team at Sandisk**, where I focus on **governance, cost savings, and creating win-win strategies for sustainable SAM success**

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DID YOU KNOW?

75%

Lack of Governance

75% of SAM projects fail due to governance gaps

(Gartner ITAM Report)

53%

Inability to show value

53% of IT teams struggle with visibility into software investments
(Flexera 2024)

\$M

Overreliance on tools

Companies spend millions on SAM tools but lack proper process alignment
(Anglepoint 2023)



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THE WINNING SAM BLUEPRINT



EXECUTIVE BUY-IN

Selling the vision
with a compelling
business case



BUILD

Structuring a
strong SAM team
and choosing the
right technology



LEAD

Shifting SAM from
Compliance
Ownership to
Governance &
Enablement



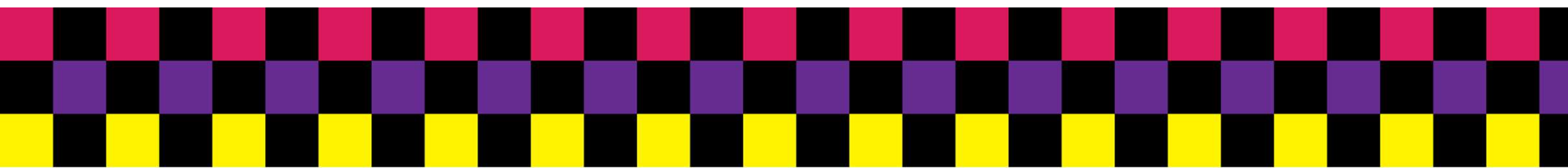
WIN

Delivering
measurable ROI
and securing long-
term leadership
support



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EXECUTIVE BUY-IN



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IS SAM A BUSINESS

The Risk of Doing Nothing	PRIORITY?	The Payoff of a Mature SAM Program
Companies overspend by 30% on software without SAM oversight (Flexera 2024)		First-year ROI of a SAM program = 3-5X in cost savings
Audit penalties average \$2M per incident (Gartner ITAM Report)		Companies with proactive SAM strategies reduce software costs by 25-40%
IT and Procurement lack visibility into software spend		Data-driven insights help optimize licensing and purchasing



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CREATING BUSINESS VALUE WITH SAM



FINANCIAL BENEFITS

Eliminates waste,
optimizes spend,
and reduces
software costs



OPERATIONAL EFFICIENCY

Cross-collaborates with
key stakeholders
showcasing optimization
opportunities



RISK MANAGEMENT

Proactively protects
against audit
exposure



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GETTING YOUR SEAT AT THE EXECUTIVE TABLE

Stakeholder	What They Care About	How SAM Aligns
CIO	Digital transformation, IT budget efficiency	Optimizes software investments & reduces unbudgeted costs
CFO	Cost savings, financial risk	3-5X ROI on software investments & audit avoidance
CISO	Compliance & risk reduction	Strengthens IT governance, minimizes non-compliance penalties
Procurement	Vendor negotiations, contract optimization	Ensures best licensing terms & eliminates shelfware



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BUILD YOUR BUSINESS CASE

1

Define the problem – Untracked software spend, audit risk, inefficiencies

2

Align with company priorities – Cost savings, IT efficiency, compliance

3

Present measurable impact – \$X savings, reduced compliance risk, ROI %

4

Communicate your ask – Financial backing for team and technology



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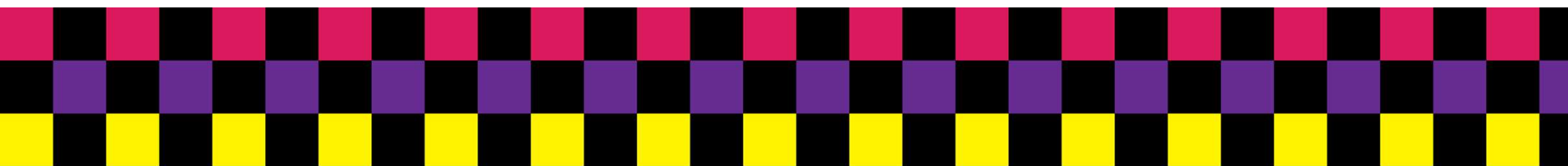
OVERCOME EXECUTIVE

Objection	How to Respond
<i>"We already have a tool; why invest in SAM?"</i>	<i>"The tool is only as good as the governance and processes behind it. Without structure, it's just data."</i>
<i>"We've never had a major audit issue."</i>	<i>"The best SAM programs don't wait for an audit disaster—they prevent them."</i>
<i>"Can't we just track this in spreadsheets?"</i>	<i>"Spreadsheets are reactive—leading companies automate and optimize their software investments."</i>



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BUILD



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BUILD A HIGH-IMPACT SAM TEAM

The most successful SAM programs take a **hybrid approach** to building their teams

Best for **strategy** & long-term **ownership**

Full-time Employees

Hybrid Approach

Cost-effective for execution

Managed Service Providers

Consultants

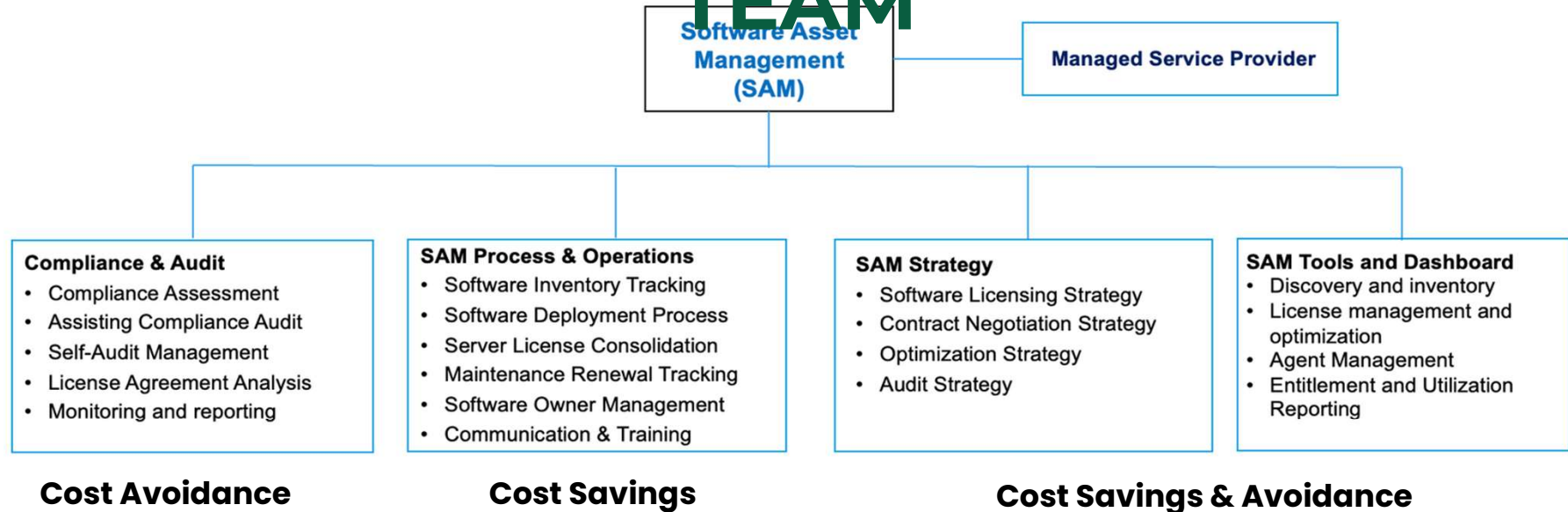
Good for short-term expertise and strategy, but **expensive**



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BUILDING A WORLD CLASS SAM TEAM



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THE MSP ADVANTAGE

License Optimization

Creating **ELPs**, unlocking **compliance** and **optimization** opportunities

Audit Response & Defense

Audit knowledge, handle all data collection, and disclose **financial exposure**

Entitlement Uploads

Analyze, consolidate, **upload**, and **manage** entitlements

SAM Tool Management

Configuring and optimizing SAM technology

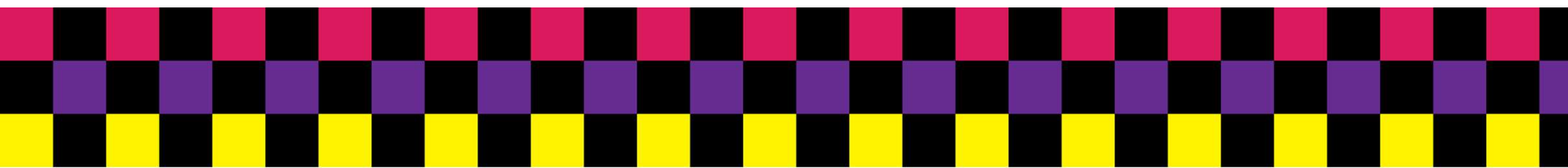
SaaS & Cloud Visibility

Tracking software usage across hybrid environments



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WHICH

MODEL WORKS BEST FOR YOU?

	Pros	Cons
In-House Only	Full Control	Expensive Resource Heavy Knowledge Gaps
Consultant Model	Specialized Knowledge	Expensive Short-Term Focus Set Deliverables
Managed Service Providers	Specialized Knowledge Cost Efficient Flexible and Scalable	Expensive Time Zone Differences Resource Turnaround



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BE STRATEGIC WITH YOUR SAM TECHNOLOGY

SAM tools aren't just databases—they drive cost savings, audit readiness, and risk reduction

Companies that get this wrong:

Fail to capture SaaS & cloud spend

20–30% overspending on software

Choose tools that don't integrate

Data silos, manual workarounds

Spend millions on an overbuilt tool

Underutilized software, sunk costs



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CHOOSING THE RIGHT SAM TECHNOLOGY



COMMON MISTAKES

Avoid the common mistake of choosing a tool before defining needs



KEY REQUIREMENTS

Single source of truth, discovery, audit defense, SaaS visibility



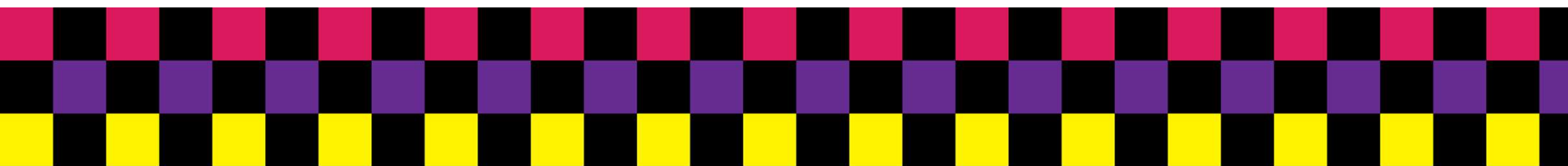
PROPER RFP

Conduct a proper RFP to avoid wasting millions on the wrong tool and push for a POC



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LEAD



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SAM SHOULD NOT OWN COMPLIANCE!

Traditional SAM teams
fail because they **own**
compliance

Application owners
should **own**
compliance, while **SAM**
provides **governance**
and **process**

This works because it
reduces risk,
empowers application
owners, & **strengthens**
SAM's role



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SHIFTING THE WAY WE LOOK AT SAM & COMPLIANCE



The Problem with Traditional SAM	The New Approach: SAM as Governance
SAM team becomes the scapegoat when compliance fails	Compliance accountability is distributed to application owners
SAM managers get fired after bad audits	SAM provides guidance, process, and support but doesn't own compliance
Compliance is reactive, leading to costly surprises	A proactive "white-glove" audit approach prevents compliance gaps



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CHANGING PERSPECTIVE IS A JOURNEY



INTERNAL AUDITS

Internal "white-glove" compliance audits to assist & educate application owners



COMMUNICATION & EDUCATION

Education campaigns to train application owners on their roles & responsibilities



EXECUTIVE ALIGNMENT

Reinforce that SAM is a governance function, we are not application owners



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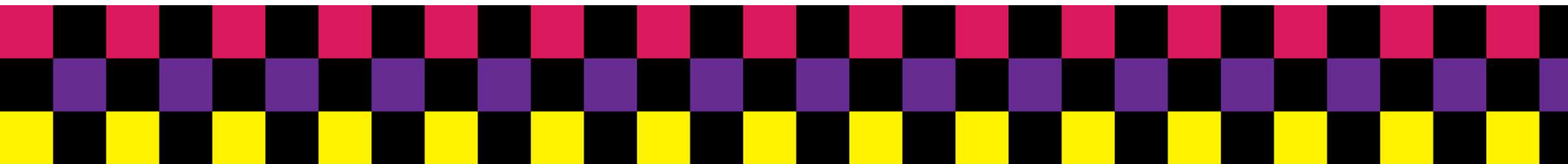
CREATING A WINNING ORGANIZATION

Scenario	What Happens Without This Model?	What Happens When Ownership is with App Owner
Audit goes south	SAM is blamed & penalized	SAM leads with best practices and audit strategy. Reviews and controls outgoing data. Mitigating audits are still good results
High Software Renewal	Overpay for unnecessary licenses, SAM is blamed	SAM provides cost-optimized solutions and product alternatives
Budget Discussions	Leadership questions SAM's value	SAM team can provide clear and documented 5X+ ROI



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WIN



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COMMUNICATE VALUE TRACK ROI

Document **cost-savings**
and **cost avoidance**
opportunities on a
quarterly basis

Winning in SAM
means **proving**
your impact in
numbers

SAM must speak
the **language** of
executives:
communicate
your value by
showcasing your
special wins



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FINAL TAKEAWAYS

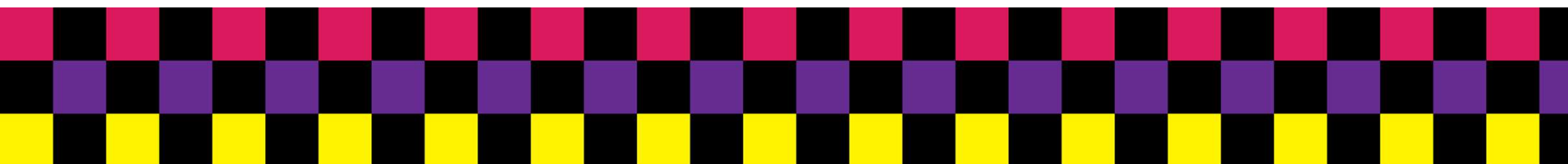
The best SAM programs
are built **with executive
buy-in, a strong team,
smart technology, and
clear ROI tracking**

If you can **prove** your
program is **saving
millions, leadership** will
always **support** it



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Q&A

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