



## Overview

**Country or Region:** United States  
**Industry:** Manufacturing—Software

### Partner Profile

Founded in 2003, Soft-Aid consists of former IT Directors, IT Asset Managers, Software Account Managers, and Licensing Specialists who all specialize in Software Asset Management. The company provides a range of a SAM consulting services.

### Business Situation

After a period of rapid expansion, a payroll services company no longer had control of its hardware and software assets. The company turned to Soft-Aid for assistance with regaining control and preparing for future business plans.

### Solution

Soft-Aid recommended that the company invest in an integrated tool to determine current IT inventories and automate license management. The company also signed a more advantageous licensing agreement and improved SAM practices.

### Benefits

- Reduced licensing costs
- Increased IT productivity
- Streamlined IT purchasing
- Locked in license prices
- Gained control of software and hardware

## Payroll Software Provider Gains Control, Reduces Licensing Costs with SAM

“As a result of the SAM Consultation, management now has peace of mind about the state of their software assets; they don’t need to worry about what would happen in the case of outside review.”

David Yashar, Managing Consultant, Soft-Aid

Software Asset Management (SAM) specialist Soft-Aid was founded by a team of professionals that are solely focused on helping customers with the intricacies of SAM. A Microsoft® Gold Certified Partner, Soft-Aid offers a full range of SAM solutions; the company’s experienced consultants bring a wealth of knowledge around licensing and SAM best practices to each engagement. One of the largest independent payroll services providers in the United States approached Soft-Aid after the company experienced significant growth from both normal expansion and a series of acquisitions. After Soft-Aid assessed its current SAM practices and provided a roadmap for improvement, the payroll software company was able to put firmer controls in place for its software and hardware assets. The payroll software company credits the SAM engagement and Soft-Aid’s expertise with helping it to save money and time and with positioning the company for future success.



## Situation

Since 2003, Software Asset Management (SAM) specialist Soft-Aid has assisted mid-market to enterprise-level companies with their SAM needs. Soft-Aid consultants design and implement SAM plans that help companies track and manage software licenses and deployments. Soft-Aid helps companies maximize the return on software investments, providing their clients with a competitive edge.

Soft-Aid was contacted by one of the largest payroll software providers in the United States. Recently, the company had grown significantly, due to both normal expansion and a series of acquisitions. The company now employs roughly 300 people and comprises two divisions: software development and a payroll service bureau.

Besides licensing payroll software to businesses that provide payroll services, the software division at the company also delivers software solutions for workers' compensation, 401(k) programs, time and attendance, and so on. Because the sister division offers the same services that the software division's licensees provide, the company is able to stay in touch with market needs. The payroll software company continues to expand both divisions by launching new software products and ancillary services.

Due to corporate acquisitions, the company owned several disparate systems that needed to be consolidated. Also, the company lacked a definitive knowledge of its licensing status and software deployment throughout the company. In addition to software acquired through corporate acquisitions, the company purchased licenses through volume licensing.

"IT management suspected that they would qualify for a more cost-effective licensing

arrangement, such as a formal volume-licensing agreement, but they needed to be able to justify that recommendation to the company's CFO. They didn't have the numbers readily available," says David Yashar, Managing Consultant at Soft-Aid. The IT department had made efforts to track license purchases manually using a spreadsheet, but the team was not confident that the data was complete. Complicating matters further, some locations purchased software independently and implemented their own tracking procedures. The IT department made some efforts to obtain purchase histories from the various software resellers with whom the company had done business, but the department quickly realized that this process was inefficient.

Additionally, IT management had concerns about the company's license compliancy. Unfortunately, the IT department had not maintained deployment records, so it was unable to reconcile license purchases with actual deployments unless the company underwent a total software inventory—a laborious task to complete manually.

## Solution

During this time, the payroll software company learned about the Microsoft® Software Asset Management (SAM) engagement program. Seeing the program as a way to gain control of the company's IT environment and help to prepare for an upcoming launch, company management quickly determined that they would benefit from a full SAM Consultation engagement. The company selected Soft-Aid to lead the company through a thorough SAM Consultation.

Soft-Aid consultants recommended that the company invest in eSMART, an automated inventory tool from Dell™. The tool deploys seamlessly and silently so that employees

are not disturbed. Once the consultants deployed the tool throughout the company's network, eSMART compiled software application data throughout the company, identifying software applications, versions, and editions.

After gathering that information, Soft-Aid worked with the IT team to review the inventory results and provide recommendations. Because the eSMART tool provides data in a customizable report, Soft-Aid was able to show the IT team only the information they required. Because the tool can track usage as well as deployment, the team could see not only where the company was out of compliance, but also where software was underutilized, allowing the company to optimize its software investments.

Additionally, IT management was pleased to learn that the tracking technology can track hardware as well, so it can help the company to locate devices such as laptops in the event they are lost or stolen. When the device in question connects to the Internet for the first time, it sends an alert that allows eSMART to track its location.

## Benefits

By participating in a full SAM Consultation, the payroll software company has realized a number of benefits, including saving money and time, gaining control of the company's IT environment, and readying the company for future growth.

### **Saved Money and Time**

After completing the SAM Consultation, IT management was convinced that continuing to use the existing licensing program was not maximizing the company's purchasing power. The company worked with Soft-Aid and Microsoft to determine the best licensing options and volume licensing program for its long-term needs. The Microsoft Enterprise

Agreement was the best fit; the company has seen substantial savings in software costs as well as in the time needed to administer Microsoft licenses as a result of signing this new Agreement.

"They have also saved employee hours that would have been spent in tracking licensing. The eSMART inventory tool is capable of handling that task automatically for them now," Yashar comments.

### **Gained Control of the IT Environment**

As a result of the Software Asset Management consultation performed by Soft-Aid, management now has peace of mind about compliance; they don't need to worry about what would happen in the case of outside review. The company is in full control of its licensing compliance, and its controller is pleased that this new arrangement provides a streamlined reconciliation process between purchased and deployed software counts.

Soft-Aid helped the company develop strong SAM processes. "We were able to tailor the policies and procedures that we recommended to accommodate their more limited resources. Automating parts of the process was particularly helpful—it freed up the IT team to focus on end users and not entering license data into an unwieldy spreadsheet," says Yashar.

### **Prepared for Strategic Growth**

The SAM Consultation and resulting process for licensing decision making provided the payroll software company's IT leadership the opportunity to work with the rest of the company's decision makers and drive integration in a tactical way. Instead of following the tradition of keeping the company's two divisions—software development and the service bureau—completely separate, IT management used this opportunity to facilitate communication across the two departments. Leaders from

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

For more information about Soft-Aid products and services, call (781) 569-0410 or visit the Web site at: [www.aid.com](http://www.aid.com)

For more information about eSMART call (866) 752-2951 or visit [DELL.COM/eSMART](http://DELL.COM/eSMART)

both divisions agreed to develop a centralized purchasing process for software as well as hardware. That process not only has allowed the company to manage its purchasing deliberately, but also will save time and money in the future.

Finally, the payroll software company is better positioned for future growth because of the Enterprise Agreement it signed. The agreement makes it possible for the company to lock in license prices for a period of three years, meaning that the IT team can acquire new licenses as they need them, rather than overpurchase now in anticipation of growth or risk paying higher prices in a few years. The Enterprise Agreement also provides for the latest upgrades and offers deployment support and training assistance. For example, the company will benefit from the home-use software licensing and online training available to Enterprise Agreement customers. Those benefits, and the flexibility they provide, will be particularly helpful to the company during periods of expansion.

## Software Asset Management

Software Asset Management often referred to as SAM, is a vital set of continuous business processes that can assist your company to control your software assets, optimize your licensing investments, and grow your business. A fully implemented SAM program plays an integral role in keeping your business agile, confident, and prepared for growth and change. This can help you to manage and reduce costs, minimize security risks, and empower your people by providing them with the tools and technology they need to be more productive.

For additional information, including complimentary tools and resources, visit: [www.microsoft.com/sam](http://www.microsoft.com/sam)

## Services

- Software Asset Management