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## The SAM Spotlight

A Publication for Software Resellers and the IT/Software Asset Management Communities



### This Issue:

**Design a Better Software Asset Management Program: Next Steps**

**September 2009,  
Issue 5, Vol. 3**

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#### Quick Links

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#### Wit & Wisdom

***"You can teach a student a lesson for a day, but if you can teach him to learn by creating curiosity, he [or she] will continue the learning process as long as he [or she] lives."***

**-Clay P. Bedford, Former Executive, Kaiser Industries, (1903-1991)**

### Industry News

"Investing in Saving While Technology is Necessary to Stay Ahead, It can Be Costly. Here, Cost-Cutting Tips that Won't Put you Behind," March 2009 [More](#)

### Welcome to Soft-Aid

In our latest e-newsletter, Greg Larsen, a Soft-Aid SAM consultant, writes about redesigning IT Asset Management processes and shares his experience doing so with some of our customers.

Done correctly and with best practices in mind, the re-engineering of business processes can have a major impact on costs, efficiencies, and the service levels that the IT department provides to the organization. For example, using the below principles, we worked with two separate companies to decrease the time to provision new IT assets by 55% and streamline asset retirement processes.

The VP of IT for a large pharmaceutical company had this to say about the help we provided in redesigning their contract management processes: "Your help redesigning our business processes has been very targeted and very beneficial ... in helping get new contract management processes rolled out. I was unsure how this was going to work out, but you exceeded our expectations. I feel very good about what has been delivered and how we really can use this. I see all kinds of applications. I am already thinking of metrics and budgets and how to tie this all together. I think this is going to be a real value-add for our organization."

Our next issue will revisit how IT Asset Management (ITAM) helps control costs. In our last issue ([Issue #4, Vol 3](#)), we focused on making intelligent use of software usage data. Our next issue continues to explore the topic of how IT Asset Mgt. helps control costs.

On a separate note, my colleague Dave Mansfield and I are presenting at the [IAITAM conference in Las Vegas](#) at the end of September on "Building Healthy Relationships with Vendors: Vendor Management Tips and Tricks." The slide deck as well as our recent presentations on the "Role of IT Asset Mgt. in Virtualized Environments" and "Understanding Microsoft Licensing for Virtualized Environments" are located at <http://www.aid.com/links>.

We will also be speaking on SAM at [Directions on Microsoft's Licensing Workshop](#) in October in Chicago. For more information, [click here](#) or [register here](#).

"Software Asset Management Makes Sense in a Recession,, MJ Fisher, FrontRange Solutions, July 2009 [More](#)

"Reining In IT Excess With Software Mgt.," 5/28/09, *E-Commerce Times* [More](#)

"Forrester: Sluggish economy prompts software pricing changes," 6/2/09, *Computerworld Magazine* [More](#)

[See more Industry News](#)

## Our Favorite Web Links

Hilarious. What is Facebook (a dry humor view). [Link](#)

Curious which videos are going viral, check this web site: [Link](#)

Shoplifting Dog!: [Link](#)

Unbelievable Motorcycle Stunt (changing the front tire while driving a motorcycle) [Link](#)

Amazing Bird Fishes Like a Human [Link](#)

If you seek discounted registration to these conferences, please e-mail [info@aid.com](mailto:info@aid.com).

Thank you for reading. I hope you find our articles informative.

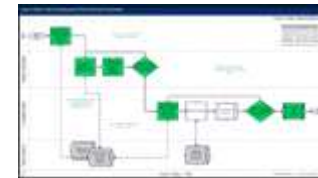
As always, our e-newsletter archive is available at [www.aid.com/enews/](http://www.aid.com/enews/)

All the best!  
David Yashar, Managing Consultant  
[info@aid.com](mailto:info@aid.com)  
(voice) 781-569-0410



## Design a Better Software Asset Management Program

### What are the Next Steps



**Author:**  
Greg Larsen, SAM Consultant, [info@aid.com](mailto:info@aid.com)

In today's economic climate, many companies are relying on Software Asset Management (SAM) practices to decrease IT costs and improve overall IT efficiencies. Soft-Aid's last e-newsletter and the upcoming one focus more on steps that yield short-term improvements ("Cost Cutting in a Down Economy"). But achieving sustainable, long-term efficiencies starts with examining how your IT department delivers SAM services. It also examines the processes that underpin those services and moves to redesign them in keeping with industry best practices. While restrictions on budgets and IT resources make undergoing this type of project appear daunting, there is a well-worn path that yields tangible results. In this article, I will elaborate on that path and how redesigning SAM processes leads to sustainable competitive advantages.

### The Tool Approach

While the IT Infrastructure Library (ITIL) best practice guide for SAM states that asset inventory tools are an "essential foundation of all SAM activity," the path to sustainable long-term efficiencies does not begin with selecting and implementing an IT Asset Management tool. There is a persistent misperception in the market that focusing on IT Asset Mgt. tools alone is the right way to approach a long-term SAM program. Gravitating to tools as the answer to drive business process improvement can appear seductive, but adopting the right SAM processes and workflows should drive tool selection not the other way around. For anyone involved in business process design or who has suffered through the implementation of an ERP system that did not

quite meet user needs, this may be self-evident but deserves repeating: understanding your current processes and then redesigning them with an eye to selecting a tool that supports them should come first. The tool should support the right policies and procedures for IT Asset Management and not vice versa.

### **Where to Start**

If examining SAM processes is of high importance where does one start? Initially, one should assess the maturity of current SAM practices which helps build a business case for change and a baseline for future improvements. Once you have established your maturity levels, you will be able to see some of the SAM process areas where you are weak and be better able to implement improvements in those areas that will yield significant gains for the organization. These processes will become your initial areas of focus.

A common approach to determining the processes on which to focus involves looking from the "bottom-up" at the current ways that software assets are managed. The bottom-up perspective assesses the actual effectiveness of operational activities (for example, the gaps you discovered between software deployments and license entitlements at your last review may yield clues as to the effectiveness or lack thereof of license reconciliation processes; interviews with employees may yield similar clues that software procurement processes do not meet user needs for timely delivery of software, etc.). One major software vendor has gone so far as to distill them into ten common processes (among the 70 primary process areas listed in the ISO standard for SAM Practices). These ten are a good starting point for what deserves focus and often redress. They include cover Organizational Management Processes and Controls for SAM, Core SAM Processes that one consistently performs, and Primary Process Interfaces around the lifecycle of managing assets.

SAM process areas that are typically examined (at a minimum) include:

- Processes to identify software assets
- Vendor/contract management and requisition/procurement practices
- Software deployment processes
- Software license management and reporting
- Processes for retiring hardware and possible reuse of any associated software

Once you establish which processes to examine, the ITIL (the IT Infrastructure Library) Best Practice Framework for SAM and the ISO SAM process standard (19770-1:2006) help frame the process areas and can guide you in what to consider in assessing maturity. Both provide solid guidance on what outcomes to achieve and when combined with common assessment frameworks provide input into what are intermediate levels of SAM process maturity.

### **Are Process and Workflows the Same?**

We are often asked by clients why process review is an important first element even before examining workflows. Why not go directly to workflows (or their more apt description as "flowcharts") which have a

time dimension and specific roles and data sources defined. The reason is twofold: first, by beginning with a higher level process review, one can begin to see the commonalities between processes and ensure that the total number of processes that the company supports is kept to a minimum. For example, the process of provisioning software assets for new employees is very similar to the process of acquiring other non-IT assets but this is not necessarily evident by looking at the workflows first. Second, the process view ensures that dependencies are actively considered upfront. A process dependency is the action that needs to take place to ensure that later processes can occur: it is the glue that holds processes together and has elements that include ensuring that the right item ("what") is available in the right place ("where") and at the right time ("when"). As this applies to procurement, for example, the approver of a software requisition request needs certain information before he/she can take the action of approving or denying the request.

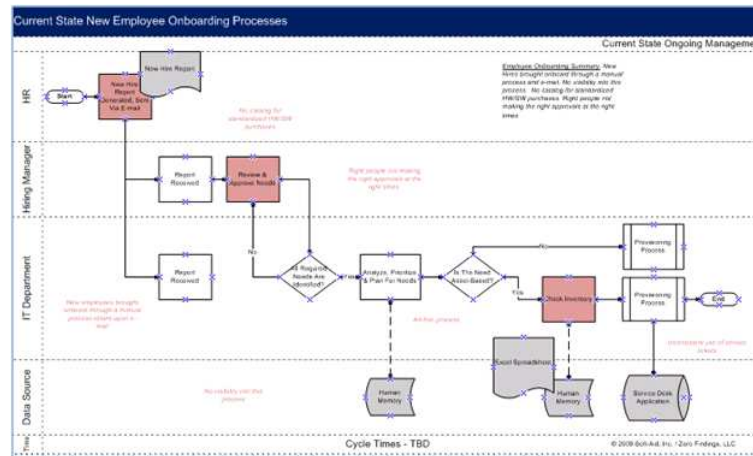
### **Creating Workflow Design - A Joint Project**

After mapping out a clients' current processes with them, we then translate that into a workflow which represents the current activities being performed on a time dimension and identifies which roles are involved in the activities. The workflow is best represented in the form of "swim lanes" with each row representing a separate role that acts on the activities being performed as the process moves from left to right. One typically supplements it with greater detail on what constitutes each activity. A workflow example is represented in the below Visio chart. Besides Visio, other tools that can help with this include:

- <http://www.processmaker.com/>
- <http://www.itillion.com/products.html>
- <http://www.pnmssoft.com/workflow-flowchart-designer.aspx>

We can also start to take a look at the capabilities and organizational commitments that are necessary to support redesigned workflows, and we can confirm the measurement mechanisms for the workflows. We can also reexamine the policies associated with the process while keeping in mind that they don't work alone for enforcement. People will break policies -- whether intentionally or inadvertently which is why any processes that support the policy must be measured, maintained, supported by senior management, and have a potential enforcement mechanism. A well designed process will have feedback and review mechanisms built in.

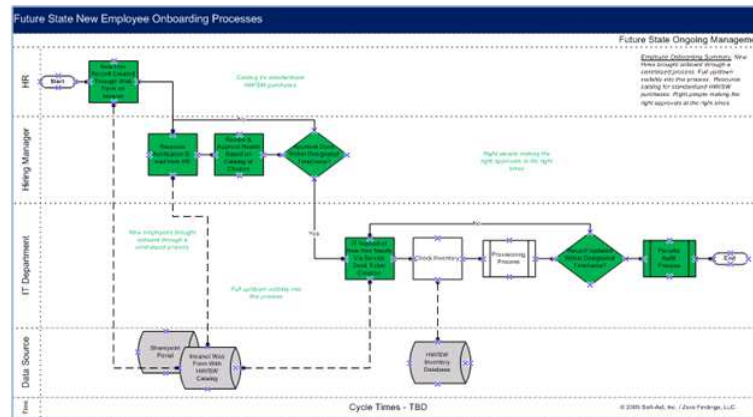
[ [Image Below-- Current State Workflow Diagram](#) ]



[ [Image Above -- Current State Workflow Diagram](#) ]

Achieving agreement on the current workflows opens up the opportunity to begin examining the "to-be" future state and the benefits that will be derived from it. This future state is the product of lengthy discussions among internal stakeholders and those people who have key roles in the process. Like the current state diagram, each row or "swim lane" represents a separate role and there is a representation of any data sources being accessed.

[ [Image Below -- Future State Workflow Diagram](#) ]



[ [Image Above -- Future State Workflow Diagram](#) ]

### The **Procedures View** and **When to Examine Tools**

Ultimately, when the future state has been agreed to by the organization, one can begin to define what tools would help automate

the workflows and/or serve as data sources (i.e. act as a data repository). In parallel, one can start to define the actual tasks to be performed for each step in the workflow (what are called "procedures"); some of those procedures may be linked to the tool used to support the workflows.

The ultimate goal is to have procedures that are easily repeatable by the individual(s) performing them, consistent with other policies and procedures, transparent to the organization, well defined and an element of broader defined workflows, reviewed on a periodic basis, and performed with the least impact to the organization. Automation through use of a tool can support these activities and should be closely considered while factoring in the financial costs and human resource dimensions of doing so.

### **Conclusion**

Implementing a holistic SAM program is comprised of many smaller SAM projects that incrementally develop your SAM program. Each of these projects included a current process state, a future process state with the aforementioned workflows. It may also include the development of forms and tools that support the processes. A periodic review or audit capability is always necessary to guard against deviation from the policies that will govern the process. When in harmony, your policies, processes, workflows, procedures and tools are complementary and supporting one another.

SAM process planning can be a daunting task and development of a proper SAM program may take years to complete, because every piece of the SAM Program must have its own established policies, procedures and process flow. This takes time and resources to come up with; precious commodities in today's fast-paced business environment, commodities that are not easily allocated to 'special projects' like SAM. The current emphasis placed on SAM throughout the global business environment and the many success stories you can find on the subject are pretty good indications of the benefits that can come through the proper implementation of a SAM program in your company.

*Greg is the founder of Zero Findings LLC, a company established to address software license management issues for both end-users and vendors. His firm is a Soft-Aid consulting partner.*

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