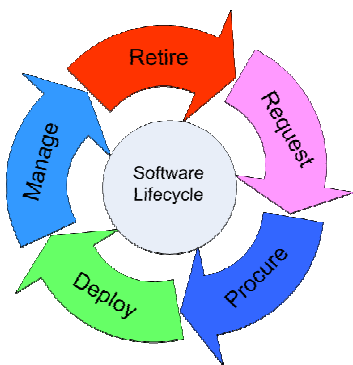




Solution Brief: Design and Implementation of SAM Policies, Processes, and Procedures

Develop and implement effective Software Asset Management policies, processes and procedures, to minimize costs, mitigate risks, improve IT efficiency and ensure good IT governance.



Soft-Aid provides design and implementation services for Policies, Processes, and Procedures that enable effective governance of software assets at each stage of their lifecycle.

The objective of this service is to help organizations adopt the right SAM practices as part of a more complete SAM program. We accomplish this by identifying those existing Software Asset Management policies and processes that can be improved and work with your personnel to redesign and implement new processes that make the most effective use of existing resources.

The Benefits of Implementing a SAM Program

A Software Asset Management (SAM) program is an integrated set of policies, processes, people, and tools that are aligned and dedicated to the active management of software assets within an organization. Software Assets have contractual, physical, and financial elements that must be separately managed. Organizations that do not effectively govern software assets face significant financial and legal risks from improper licensing.

Organizations that implement a formal program of SAM practices realize many practical benefits.

- ▶ Optimize software expenditures.
- ▶ Improve IT efficiency and enable better long-term planning and forecasting in the IT Department.
- ▶ Reduce the potentially costly risks of being improperly licensed.
- ▶ Ensure effective use and control of software assets.

Our services help ensure that your SAM program follows best practices and that you are realizing the above benefits.

Advanced SAM through Soft-Aid

Our services help organizations develop and implement SAM practices that are tailored to their specific needs. When we have not already conducted an assessment of your current Software Asset Management practices (which is more fully

described in our Software Asset Management Assessment solution brief), we often do so first. Such an assessment documents the current state of your Software Asset Management environment, from which later improvements can be measured. It also provides a business case and the justification for implementation of new practices.

Our methodology to redesign your Software Asset Management processes and develop the right SAM policies for your organization has six components.

Step 1: Conduct Interviews to Determine the Desired State for your Software Asset Management Environment

We will conduct interviews with stakeholders that can shed light on what SAM areas are of direct concern within your organization and what might be the desired state from redesigning practices. We speak not only with key personnel that perform daily Software Asset Management tasks in areas such as IT, receiving, and purchasing but also with members of senior management that have oversight for the strategy development, risk mitigation, and governance issues associated with IT. We will document and share our findings with all parties.

Our goal is to review the current state of your SAM environment and ensure, for the areas that are of direct concern to each group of stakeholders, that a global unified view of Software Asset Management in your organization exists and is understood.

Step 2: Evaluate and Implement the Right Policies

We will conduct a detailed review of current policies, whether informal or documented, that govern software assets. These might include usage, deployment, and/or procurement policies. We will work with stakeholders to identify gaps in policies and inherent constraints in your organization that would inhibit certain policies from being followed.

(Continued...)

Design and Implementation of SAM Policies, Processes, and Procedures

For More Information

Please contact us for more information about the benefits of engaging us to develop new, and redesign existing, software-related policies, processes, and procedures.

We are available by email at info@aid.com or by phone at **781-569-0410**.

You can also visit our website at:

www.aid.com

We identify and examine the desired outcomes from policies; the likelihood, urgency, and rate of achieving a certain desired outcome; the potential impact of non-conformance; the goals of the organization that are relevant to any given policy; and the measurement standards that will be used to determine whether the policy objectives have been met.

We will work with you to ensure that your SAM policies not only reflect your corporate vision but also contain the right prescriptive and descriptive components. And when they do not, we will recommend ways to close gaps in language.

By selecting and implementing the right SAM policies, organizations ensure that processes and procedures are implemented that align with them.

Step 3: Redesign Current SAM Processes

We will observe -- in detail -- current processes that impact Software Asset Management. We will compile a detailed view of the work being performed and by whom in each stage of software asset life. Process areas that we might examine, among others, include requisition, procurement, deployment, ongoing management, and retirement of software assets. We document both the "As-Is" and recommended "To-Be" processes.

Our goal is to identify the current workflows, capabilities, and dependencies between Software Asset Management tasks and work with your stakeholders to design the "to be" state of those processes. We will examine what roles and responsibilities ("people") and what systems (i.e. tools and data integrations) are necessary to support the relevant processes.

The ultimate goal is to ensure that the organization has visibility into its SAM environment and that processes are consistent, repeatable, measurable, and in accordance with both SAM and IT governance best practices as well as your own corporate strategies.

Step 4: Develop Accompanying Procedures

After redesigning your SAM processes, we can help develop the specific procedural steps used to manage software assets (the "how to" guide that personnel use on a daily basis to perform their jobs). We provide documented procedures that are easy-to-follow, tailored to your organization's unique needs, and yet based on industry-recognized best practices.

Step 5: Conduct Training and Help Ensure Adoption

To help ensure adoption, we can train employees in how to perform their SAM responsibilities. The goal is to ensure that employees adhere to new procedures so that adoption is effectively ensured

within your organization. We have developed training manuals and other tools that can be delivered via the web or on-site to support this. Soft-Aid can also develop a more customized curriculum to offer various employees with SAM roles.

Step 6: Monitor Adherence and Develop Ongoing Performance Plan

We will ensure that a performance system is put in place to monitor adherence to redesigned policies and procedures. We can also identify areas for future improvement and reassess, at your choosing, whether the goals and metrics were met for the project or for your ongoing SAM program.

The Soft-Aid Advantage

Our team consists of former IT Directors, IT Asset Managers, Software Account Managers and Licensing Specialists who have provided SAM assessments and recommendations to over one hundred clients.

We can rapidly identify processes that relate to software and provide new and/or updated process maps and procedural steps based on industry-recognized standards.

We use refined SAM tool sets, including SAM maturity models, policy templates and current licensing position analysis tools, to provide you with strategic insight into your IT environment.

We employ proven project management strategies that factor in the unique aspects of SAM engagements, to ensure projects are done on time, on budget, and correctly.

We provide up-to-date and unbiased information about software publisher licensing models and contractual terms and conditions to help you understand your licensing options.

The logo for Soft-Aid, featuring the company name in a bold, black, sans-serif font. Above the text is a stylized orange and white graphic element resembling a triangle or a roofline.

The Software Asset Management Specialists

781-569-0410 www.aid.com