SAM Now and the future ..... 
Matt Ward - Softcat SAM Director
What we do

- Security Solutions
- IT Services
- Hardware Infrastructure
- Commodity IT Sourcing

SOFTWARE LICENSING
Your SAM Maturity.

- Novice to expert

- Basic SAM (Ad Hoc): Little control over what IT assets are being used and where. Lacks policies, procedures, resources, and tools.
- Standardized SAM: SAM processes exist as well as tool/data repository. Information may not be complete and accurate and typically not used for decision making.
- Rationalized SAM (Active Management): Vision, policies, procedures, and tools are used to manage IT S/W asset lifecycle. Reliable information used to manage the assets to business targets.
- Dynamic SAM (Optimized): Near real-time alignment with changing business needs. SAM is a strategic asset to overall business objectives.
What’s stopping you?

Resources

Knowledge

Biggest block to your SAM progress?

Mindshare

Something else...
developed to enable an organization to prove that it is performing SAM to a standard sufficient to satisfy corporate governance requirements and ensure effective support for IT service management overall. The processes covered are shown in this diagram:

**Organizational Management Processes for SAM**

<table>
<thead>
<tr>
<th>4.2 Control Environment for SAM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Corporate Governance</strong></td>
</tr>
<tr>
<td>Process for SAM</td>
</tr>
<tr>
<td><strong>Roles and Responsibilities for SAM</strong></td>
</tr>
<tr>
<td>Policies, Procedures and</td>
</tr>
<tr>
<td><strong>Competence in SAM</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.3 Planning and Implementation Processes for SAM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Planning for SAM</strong></td>
</tr>
<tr>
<td>Implementation of SAM</td>
</tr>
<tr>
<td><strong>Monitoring and Review of SAM</strong></td>
</tr>
<tr>
<td><strong>Continual Improvement of SAM</strong></td>
</tr>
</tbody>
</table>

**Core SAM Processes**

<table>
<thead>
<tr>
<th>4.4 Inventory Processes for SAM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Software Asset Identification</strong></td>
</tr>
<tr>
<td><strong>Software Asset Inventory Management</strong></td>
</tr>
<tr>
<td><strong>Software Asset Control</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.5 Verification and Compliance Processes for SAM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Software Asset Record</strong></td>
</tr>
<tr>
<td><strong>Verifications (Compliance)</strong></td>
</tr>
<tr>
<td><strong>Software Asset Security Compliance</strong></td>
</tr>
<tr>
<td><strong>Conformance Verification for SAM</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>4.6 Operations Management Processes and Interfaces for SAM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Relationship and Contract Management for SAM</strong></td>
</tr>
<tr>
<td><strong>Financial Management for SAM</strong></td>
</tr>
<tr>
<td><strong>Service Level Management for SAM</strong></td>
</tr>
<tr>
<td><strong>Security Management for SAM</strong></td>
</tr>
</tbody>
</table>

**Primary Process Interfaces for SAM**

<table>
<thead>
<tr>
<th>4.7 Life Cycle Process Interfaces for SAM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Change Management Process</strong></td>
</tr>
<tr>
<td><strong>Software Development Process</strong></td>
</tr>
<tr>
<td><strong>Software Deployment Process</strong></td>
</tr>
<tr>
<td><strong>Problem Management Process</strong></td>
</tr>
</tbody>
</table>

| **Acquisition Process** |
| **Software Release Management Process** |
| **Incident Management Process** |
| **Retirement Process** |

© ISO/IEC 2006 – Permission to reproduce extracts from the BS ISO/IEC 19770-1:2006 is granted by BSI. British Standards can be obtained from BSI Customer Services, 389 Chiswick High Road, London W4 4AL. Tel: +44 (0)20 8996 9001. Email: cservices@bsi-global.com
SAM – What have you done?

- Compliance
- Biggest vendors first, mitigate the risk
- Build up the entitlements in LM tool
- Policy and Procedures
- Work with purchasing
- Training
- Reporting
- Looked at renewals ad contracts
- Analysed usage and metering
Reduce Costs

- Eliminate any unused software
- Eliminate any duplicate software
- Enhance your hand when negotiating with software vendors
- Only pay maintenance on software you still own and actually use
- Make sure insurance valuations are accurate
- Identify how efficiently your current software is being utilised
- Isolate areas of potential risk
- Implement a SAM strategy that fits your unique business needs
- Create SAM guidelines for your company’s future growth
So what makes a successful SAM engagement?

**PEOPLE**
- Software check-in/disposal
- Executive buy-in/business case
- Software usage & distribution policies
- Coordination between business & IT
- Periodic license report review
- Appropriate roles/responsibility
- Licence reconciliation
- Overall SAM coordinator
- Media/documentation retention
- Effective partners/consultants
- Executive reporting
- Monitoring ongoing program effectiveness

**TOOLS**
- Software/hardware inventory
- Software usage monitoring
- Licence reconciliation
- Centralised purchase details

**PROCESSES**
- Software check-in/disposal
- Software usage & distribution policies
- Periodic license report review
- Licence reconciliation
- Media/documentation retention
- Executive reporting
- Monitoring ongoing program effectiveness
Market forces in SAM today.

- Technology Innovation
- Consumer-led demand
- Cost Savings/risk avoidance
- Vendor audit activity
- Compliance
- The vendor has an objective
Consumer led demand – Shadow IT

Underlying Market Forces

• Broadband and Internet
• Smart phones, Tablets and consumer apps
• The IT Savvy of the average user

…has led to
• BYOD & new devices
• Internet expectations
• Non– Commercial graded Apps
Vendor tactics but turn it around

- Compliance teams:
- Revenue not Compliance
- Data to feed deals
- Unmanageable license terms, mystery there’s margin
- Too much Choice
- Do Nothing
- Vote with your feet
- Contain it / Manage it
- Negotiate terms in the agreement
- Big discounts on key strategies
- Year End
The future

The vendors are heading towards

- Cloud
- Content monitored
- Utilisation billed, pay for what you use.
- User Based Models
- “Freemium”
- Multiple devices
- More complex metrics
SAM in an enabler

Compliance is a by-product

• It underpins all aspects of the business
• It can justify it’s existence if done properly
• Smarter support, Smarter decisions
• Transparent
• As we move the process should stay the same

• More towards monitoring and metering.
• Balance the invoice.
Clear reports to the business
New Microsoft Funded SAM

- **Baseline** - The Softcat SAM team will carry out a review of your software licensing estate and will produce an ELP (Effective Licence Position), which will identify where and how assets can be used more effectively.

- **Assessment** - The Softcat SAM team will conduct a review of your policies and procedures around SAM, enabling best practice and efficiency whereby assets are maximized through the software lifecycle.

- **Deployment Planning** - The team will provide a proof of concept for 25 machines and run a workshop around the benefits of System Centre 2012. This exercise will demonstrate the benefits that a full implementation could bring to the organization. This can be particularly beneficial to customers who already have System Centre client licensing through an Enterprise level agreement.

- **Will the rest follow?**
Where are you?

Ad-hoc & Aware

Standardised & Simplified

Measured & Managed

Optimised & Orchestrated

Business Aligned & Beneficial
A Selection of Softcat Customers