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Redefining  
Software Asset  
Management

# Microsoft – Audit Options 2014

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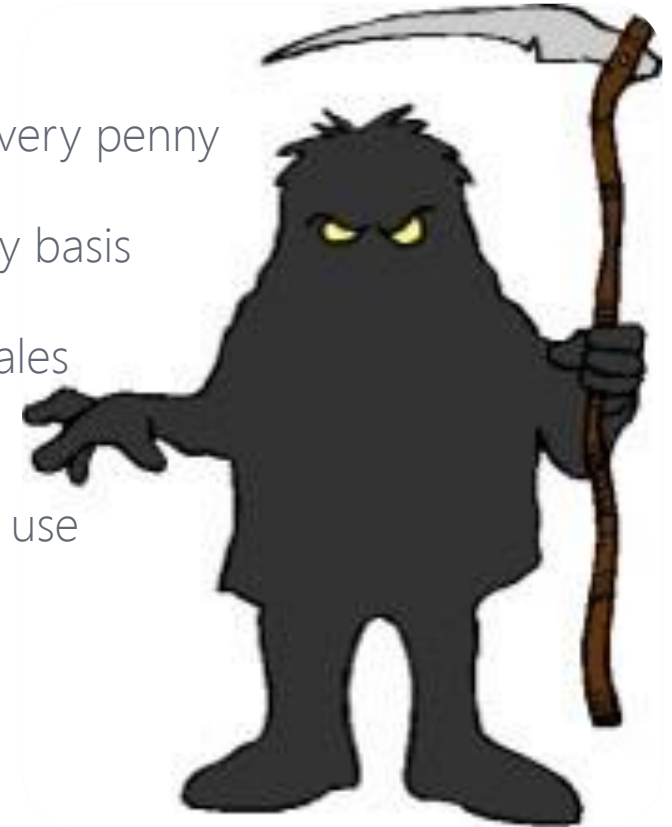


## About Me

- > Started at an IT reseller in 1996
- > Survived the millennium bug by selling licensing instead of hardware
- > Coped with the upgrade advantage bubble 1999 – 2002 by not sleeping for 3 years
- > **Realised it was all about SAM**
- > Set up SAM reseller offering to support an existing licensing team in 2006
- > Ran the SAM and licensing team from 2008 – 2011 supporting £45m+ sales
- > **Realised it was still all about SAM**
- > Moved to Livingstone to just do SAM

## About Microsoft - Perception

- > Big scary vendor that wants to screw everyone for every penny
- > Big scary vendor that changes their rules on a weekly basis
- > Big scary vendor that has no interest in continuing sales so likes upsetting everyone
- > Big scary vendor that everyone tries their hardest to use their IP without actually paying for it



## About Microsoft - Reality

- > One of the largest and most successful vendors in software history who simply would like:
  - For you to pay for what you are using
  - To offer multiple routes for you to confirm this
  - To provide support and information
  - For you to keep buying and being successful
  - To identify those who abuse the system



## Why Audit?

- > Annual payment due (e.g. EA contractual requirement)
- > Divestiture / acquisition
- > Change of infrastructure
- > New software investment
- > Agreed business process
- > Compliancy questions
- > General confusion and wanting to get sorted
- > Somebody told you too ...

## What Do You Get?

### > Effective License Position

- > A document confirming:
  - This is what licensing you own
  - This is what licensing you deployed / use
  - And this is the over / under position on each license...

... at this point in time

## An Ideal World

- > True Up submitted **on time** with supporting documentation and on an **annual** basis



## Invoking The “Audit Clause”

- > A full on-site audit:
  - Option 1:  
Using the “Big Four” – Microsoft led
  - Option 2:  
Self validation – Customer led

## Quick Quiz



What is the antonym of invoking?



## Collaborative Reviews

- > The audit clause is “not invoked”
- > Multiple options
- > Microsoft preferred approach
- > Completed within a reasonable time
- > Microsoft funded
- > Partner Led

## Collaborative Options

- > Telephone review “light touch”
  - Under 250 seats targeted
  - Customer completes deployment sheet
  - Microsoft complete licensing and ELP

## Collaborative Options

- > Microsoft Baseline Review:
  - Instigated by Microsoft or by Customer
  - Microsoft or Customer funded
  - Approved SAM Partner involvement
  - Controlled timeframe
  - Formalised process
  - ELP and baseline report of findings created
  - Clear visibility throughout the process

## Baseline Reviews

- > Takes time: 8 – 10 weeks
- > Takes resource: at least 1 main contact
- > Delivers a baseline of your licensing position
- > Gives an understanding of your estate
  
- > Resolutions are flexible (ish)
- > You WILL have AutoRoute\* installed
  
- > Your discovery tool will not tell you the answer
- > Your SAM partner is not psychic

## And Then What?

- > You have a clear, defined and agreed position
  - > You know your shortfalls
  - > You know your overages
- 
- > You have even stopped dreaming about ELPs and SQL forms!

## They Will Be Back

> So:

- Complete any agreed resolutions
- Learn from any mistakes
- Deploy unused software
- Get some ITAM process in place
- Monitor your estate regularly
- Get advice from experts
- Get value from your Microsoft investment



## Microsoft vs The Rest

- > Have an agreed process
- > Have global alignment
- > Have a proven track record
- > Have customers ASKING for reviews
- > Work with and not against you
- > Consistently provide a positive service

## And The Others Will Follow

- > So:
  - Complete any agreed resolutions
  - Learn from any mistakes
  - Deploy unused software
  - Get some ITAM process in place
  - Monitor your estate regularly
  - Get advice from experts
  - Get value from your software investment

## This Time, Next Year .... An Ideal World

- > True up submitted on time with supporting documentation and on an annual basis

Fully  
Managed  
Service

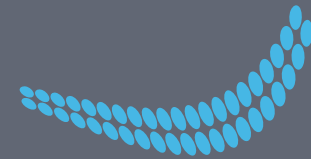
Inventory  
Data  
Cleansing

Vendor  
Audit  
Defense

Risk  
Analysis &  
Compliance

# Thank you

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