USU

Software Asset Management: Get started in 5 steps

How to avoid mistakes and successfully implement your tool

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The Goal

Acquiring a software asset management (SAM) solution is the first and critical step in building your company's customized SAM program. You have what you need and know where you want to go: The prefabricated house has been ordered.

Now it's time to build it up step by step until it's ready for occupancy and you can fill it with life. With this guide, you will succeed in preparing the individual stages well, carrying out all the stepsappropriately, and getting the maximum benefit from each phase.

You will be rewarded with an automated and functional software asset management tool:

→ oversee and control your hardware and software assets.

→ get a license overview of all important vendors

→ fully automate your inventory.

→ map your organizational structure holistically.

→ implement your customized reporting.

With your new SAM tool, you can answer software and hardware queries confidently and in no time at all. You'll also reduce your software licensing costs by up to 30 %.

So what are you waiting for?

SAM-Implementation: The phases at a glance

Phase 1

Build the team
SAM affects many different parts of the company. Therefore, the success of your project depends on different departments communicating with each other and working together as a team.
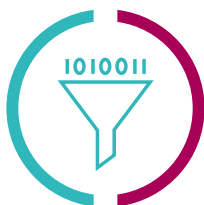
Phase 2

Kick-off
The project team plans the implementation, distributes tasks and defines milestones. A clearly defined project plan that is binding for all participants is crucial.

Phase 3

Installation and Connection
Now it's time to get serious: components are installed, systems are connected. You log into your SAM tool for the first time.

Phase 4

Gather Data
This phase determines the data quality of your SAM tool. Many processes can be automated. Keep going!

Phase 5

Training
The success of your SAM tool is dependent on its users. Take the time to get to know the individual functions and schedule training sessions so that the software optimally relieves your workload.

Goal Achieved!

Success
Your efforts will be rewarded. You have an overview of the entire software and hardware landscape. You can obtain up-to-date and reliable data on your assets every day. The implementation is successfully completed.

Build the Team

After purchasing your SAM tool, you plan the kick-off together with thevendor. Since your SAM program is designed for the long term – you want to monitor your hardware and software over the long term – it is worth getting various teams on board even before the actual start of the project. After all, as a cross-cutting function, SAM affects the entire company. Who is involved varies from company to company. However, the involvement of the following teams has proven successful in the past.

Network

To implement SAM, you need to know your infrastruc-ture inside out. Your network managers help to ensure that you fully collect asset data, consolidate it in your new tool, and inventory it if necessary. They help you with the balancing act between data security and transparency, for which firewalls and DMZs must be specifically opened. They can help you get to the right data quickly. Since SAM lives on data connections, successful implementation relies on the accessibility and availability of the network experts.

Server

Colleagues from the application team should also have their place at the table. As a rule, small software components have to be installed in the data center for SAM implementation in order to collect the on-premise data cleanly. In addition, the infrastructure and SAM tool must be continuously aligned and adapted to each other. Close collaboration and intensive information exchange are essential to bring your SAM program to life and keep it alive.

Software Deployment

Software Deployment is responsible for the distribution of software. No other department knows so precisely where which software should be installed and how it got there.

Those colleagues are usually very familiar with the various systems and environments. This helps in particular to develop a clear target state picture. In addition, the processes involved in software deploy-ment and inventory are similar. A lot of data can be ported over and normalized in the SAM solution. Take advantage of the existing expert knowledge!

Security and Privacy Policy

As with software asset management, these are cross-cutting functions that minimize to the company and ensure compliance. Ultimately, your SAM project is working towards the same goals, which you can better achieve together.

Still, security and data protection can feel like a drag: All too many rules and processes to consider when implementing a new tool. Security assessments are now a standard part of implementation projects. The sooner you get your colleagues on board, the sooner any hurdles can be overcome. When selecting a SAM tool, make sure that your data is transferred securely and processed in a trusted data center.

Work Council

If there are critical questions about whether individual applications are used and certain tools are required, colleagues from the specialist functions and depart-ments may feel like they are being challenged. Involve staff representatives from the outset to raise awareness of the costs of unused software and the risks associated with licensing.

When selecting a SAM tool, look for features that allow you to hide personal data and display only the data required for software asset management.

Purchasing

Purchasing has access to indispensable information on licenses and purchasing terms. Thus, a SAM implemen-tation should bring together software lifecycle manage-ment and procurement teams: the ongoing use of software as well as cloud services and the related costs are of interest toboth. By working together they can eliminate what no one needs , and will be able to confirm if what's being requested from purchasing may already be in place.

A look at the SAM tool will reveal the current status of licences and protect you from unnecessary cost exposures.

External Resources

To relieve your internal teams and bridge bottlenecks, it can make sense in some cases to book managed services and bring external experts on board. Many tool manufacturers have a strong partner network from which your company can benefit.

Practical Tip

Many cooks spoil the broth. However, you should ensure early on that everyone in the company gets a taste for it: Hardly any project is more dependent on being well anchored in the entire organization than a SAM project. The investment will only pay off if the tool is maintained with up-to-date data and all employees adhere to the guidelines for software and hardware acquisition and use.

Assemble your SAM team in such a way that the benefit of stratified asset management reaches the entire company!

Kick-off

How much time the kick-off meeting takes depends on various internal factors as well as the vendor. We recommend planning for half a day. If it becomes more complex, the team should possibly sit down for a whole day.

As a rule, the vendor will present you with a standard implementation concept. This will tell you what you need to prepare internally and who needs to be on site on the day of implementation.

Important accompanying aspects such as project communication and next steps can also be discussed in this context. You should agree on the following points:

- Expected result of the overall project and definition of milestones,
- Time schedule,
- Distribution of roles and responsibilities,
- Scheduling of regular coordination meetings,
- Open questions for the project participants.

Practical Tip

Use this opportunity to remind the entire team of the common project goal and highlight the benefits of the SAM program for the entire company. **If the team spirit is right, hurdles can be overcome more easily and disagreements can be resolved.**

Installation and Connection

On the day of implementation, there is little for the SAM team itself to do. Instead, the colleagues from the technology department are called upon to install the on-premise and cloud components.

Whether the implementation is successful depends on the quality of the kick-off. If you properly document and communicate the requirements identified in the meeting, chances are that all who need to be involved will be present to perform their tasks. And you know best when an extra invitation could not hurt.

If everything goes smoothly, you should be able to log into your brand new SAM tool the same day.

You can access a clear interface and numerous functions, but the crucial thing is still missing: the data that will be collected in the coming weeks.

Practical Tip

Avoid frustration and delays by making it clear to everyone that they are essential and responsible for the success of this important day.

Data Collection

You can capture the data either automatically via scanning and inventorying assets or via interfaces. Only if there is no other alternative should the data be entered manually. Most companies need about three to four weeks to gather information and fill the tool with a usable workingbaseline. Keep an eye on the progress of the inventory and pave the way for your technical colleagues.

As an multinational SAM solution provider, we know the obstacles to overcome at this stage:

- Sometimes authorizations for agentless inventory are missing.
- Time and again, network connections do not work.
- Since data is integrated from different sources, duplicates are almost unavoidable. For example, PCs may be labeled with different identifiers and the software installed on them may be mapped in different systems (licensing, security, desktop management, etc.).
- Networks are separate or even unknown from case to case.
- Source systems such as Office 365 or VMware cannot be accessed.

Workshop Data Transfer

You should now schedule a "Data Quality Master Data Acceptance Workshop". During this workshop, the project team members from the technical department hand over the data to the business department. Check the reasonableness of the data:

- Are all devices recorded?
- Is the number of users correct?
- Has a complete inventory been taken?
- Which data or interfaces are missing?

After you have clarified open questions and eliminated knowledge gaps, the technical implementation is complete.

Practical Tip

Often, the overall project loses significant momentum in this phase. Keep an eye on the progress of the inventory and support the data collection – if necessary, with targeted escalations.

Make no compromises here, because your software asset management stands and falls with the quality of the data.

Training

Now your SAM tool must prove itself in practical use. Familiarize yourself with the solution and offer training to your users. Learning is better with real data than with dry runs. Many tool vendors offer regular training and customized courses for this purpose.

When you get your key stakeholders excited about the new SAM tool, they become internal ambassadors for your SAM initiative. Give them access to the functions that are important to them and help them discover the benefits for themselves through targeted onboarding. This is how you pave the way for consolidated asset and license management.

Practical Tip

A great resource to take advantage of is vendor onboarding sessions if you have booked them. The data is in the system, the users are familiar with the solution: **just the right time to prepare compliance for selected vendors.**

Success

You have reached your goal! Now you can receive up-to-date data on your software and hardware assets on a daily basis and you have a SAM tool that helps you ensure compliance, defend yourself in the event of an audit and sustainably reduce your software costs.

With the implementation of your SAM tool, you have laid the foundation for a long-term process: monitoring and controlling your software and hardware assets for low-risk and cost-effective IT operations.

Create an "Open Points List" (OPL) during project acceptance, from which you derive the next steps. Gradually, you can expand the scope of your SAM program:

- Map additional software vendors,
- Integrate additional international locations and corporate branches,
- Connect cloud services (IaaS, PaaS, SaaS),
- Automate processes,
- Configure individual reporting for different stakeholders, and continuously adjust
- Continuously optimize data quality.

What we have compiled here for you as the sum of hundreds of SAM implementations may not correspond one-to-one to your specific path to integrated and holistic software asset management. But if we were able to provide you with a helpful orientation and a few tips, as well as warn you of some pitfalls, we have achieved our goal.

Find more tips for a successful SAM implementation in our Software Asset Management Program Guide: Read now!

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