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KICKIN' ASSETS
SINCE 2002

Build a business case for your
ITAM program using a Maturity
Assessment

Aamer Trambu

2:15 pm, May 10, 2023, Room: Cheekwood G

aamer.trambu@softwareone.com



NASHVILLE, TN
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Preview

1. About Me
2. About SoftwareOne
3. Audience Question - Experience level
4. What is a Maturity Assessment?
5. Who needs it?
6. How do you conduct it?
7. What does a Maturity Assessment Report look like?
8. How do you use it to build a business case for investing in SAM?



About Me

8+ years: Software Asset Management

1. Process optimization
2. Contract Management
3. Negotiation
4. Managed software audits
5. Advised multiple companies on SAM best practices
6. Presented at
 1. IAITAM Ace 2015, 2016
 2. SAMS USA Chicago 2018
 3. ITAM Review Wisdom Online 2021, 2022
7. Senior ITAM Consultant at SoftwareOne
 1. ITAM Maturity Assessments
 2. ITAM Process Reviews



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About Me

Optimization Tools

1. Snow License Manager
2. USU (Aspera)
3. License Dashboard

Discovery and Inventory Tools:

1. SCCM
2. CMDB
3. Casper

Publishers

1. Microsoft
2. Adobe
3. Micro Focus



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About Me

Passions:

1. Business consulting
2. LinkedIn SEO for job-seekers
3. Supporting university students

Charitable causes:

1. Orphans in Yemen
2. Kashmiri widows
3. New immigrants

Interesting facts:

1. Member - Canadian Council of Imams
2. Speak six languages
3. MBA Finance + 2 other university degrees in communication



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About SoftwareOne



About SoftwareOne



Realized **over \$500 million**
of cost avoidance in 2020



Delivering SLM Consulting and
Managed Services across the globe in
90 countries



About SoftwareOne



FinOps Certified Service Provider
since 2020



SoftwareONE named a leader in
Gartner Magic Quadrant for
SAM Managed Services in 2020





80 ITAM professionals in
North America

800 ITAM professionals
worldwide.

9,000 employees



Audience Question: Years of experience in ITAM

1. Not an ITAM professional
2. Less than 12 months - Newbie
3. 12 - 36 months - Learning
4. 3-5 years - Growing
5. 5-10 years - Expert
6. 10-20 years - Guru
7. 20+ years - Astronaut
8. 30+ years - Unreal
9. 40+ years - Grandparent



Audience Question: How closely do you work with Procurement?

1. Our paths have never crossed
2. Rarely
3. Sometimes
4. Very often
5. Joined at the hip



Audience Question: How often does IT Security reach out to you?

1. Our paths have never crossed
2. Rarely
3. Sometimes
4. Very often
5. Recurring meetings, multiple conversations each week



Audience Question: Do you participate in Change Advisory meetings?

1. Never
2. Rarely
3. Sometimes
4. Very often
5. ITAM has a seat on the Change Advisory Board. ITAM can cancel a project because of insufficient assessment of license risk

Change Advisory Board = Change Management Meetings



Audience Question: How often do you support IT Architecture?

1. What is IT Architecture? Who?
2. Rarely
3. Sometimes
4. Very often
5. They have been eating out of my lunch box



Audience Question: Are you (ITAM) consulted before a cloud migration?

1. Yes
2. No



Audience Question: Does your org see your (ITAM) value?

1. No, I am invisible to them
2. Not sure
3. Yes, my company knows the value of ITAM and wants to invest more \$ in it



FOR ALL WHO TURN ACCESS INTO OPPORTUNITY

Customers' Perception of ITAM

84% OF RESPONDENTS BELIEVE THEY LACK A TRULY EFFECTIVE ITAM INITIATIVE IN THEIR ORGANIZATIONS





What is a Maturity Assessment?



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IT Asset Management

Optimizing the use of IT Assets

Why Manage IT Assets?

1. IT Assets are IT resources that hold economic value.
2. A company owns or controls IT Assets with the expectation that they will provide a future benefit.
3. IT Assets are reported on a company's balance sheet.
4. IT Assets are bought or created to increase a firm's value or benefit its operations.



What is a Maturity Assessment

CHAOTIC

Ad-hoc

REACTIVE

Fight fires

PROACTIVE

Analyze trends

SERVICE

IT as a
service provider

VALUE

IT as a strategic
business partner

Basic SAM

Ad-hoc

**Standardized
SAM**

Tracking Assets

**Rationalized
SAM**

Active Management

Dynamic SAM

Optimized

■ Gartner Rating against SAM ISO 19770-1 framework

■ Microsoft SAM Optimization Model



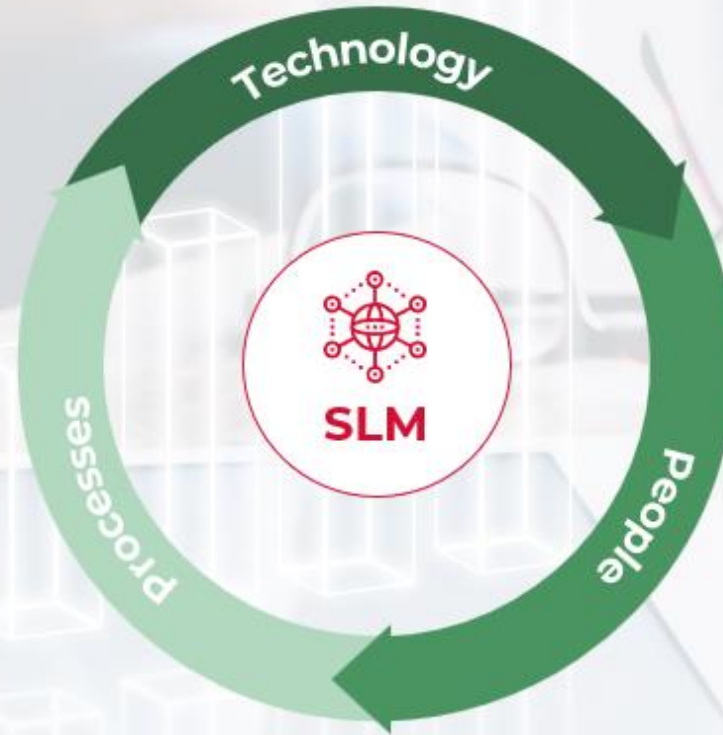


Understanding Software Lifecycle Management



What is Software Lifecycle Management (SLM)?

A business strategy
to maximize the value of software
and cloud portfolios



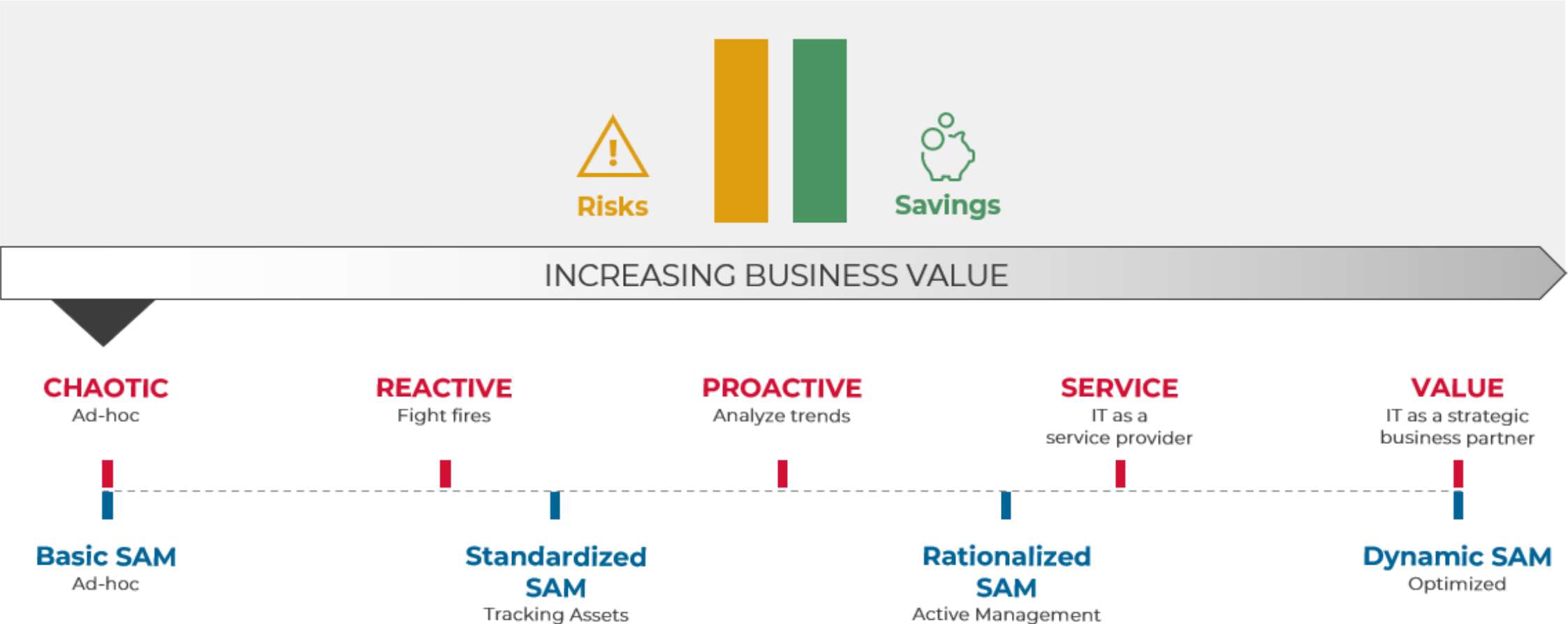
by utilizing what you have
and paying only for what you need.



Maturity Assessment within the SLM model



SLM helps turning COMPLEXITY into BUSINESS VALUE



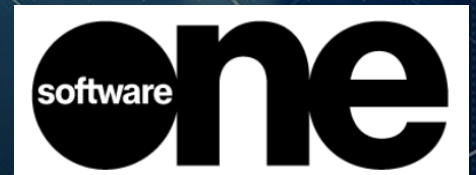
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Who needs a Maturity Assessment?



Are software assets being
managed effectively?



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If you want to know

1. How well are these processes working in relation to the other?
2. What are we doing right?
3. What can we do better?



How well are software assets
being managed?



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Facts from the Market

Only **60%** of spend is “under management” by Procurement.

Source: CPO Agenda

30% cost reductions by enterprises that implement software asset management.

Source: Gartner, Using IT Asset Management to ensure Software Compliance

For **89%** of organizations surveyed one of the main SAM initiative goals remains compliance.

Source: SAMS Europe & USA Survey Report

35% actual measured amount of wasted public cloud resources reached

Source: Right Scale, State of the Cloud Report

66% of organizations are not satisfied with their current SAM and ITAM implementation.

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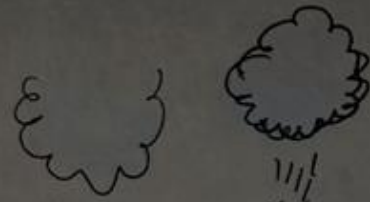


How do you conduct a Maturity Assessment?





What do you want to accomplish?



What is keeping you from getting there?



Customer Challenges

with Software Lifecycle Management



Budget

Get budget approval for cost optimization and reduction of unexpected expenditures



Empowerment

Obtaining leadership support, ensuring policies enforcement and visibility



Data & Technology

Having proper technology to have the right data at the right time and quality



Processes

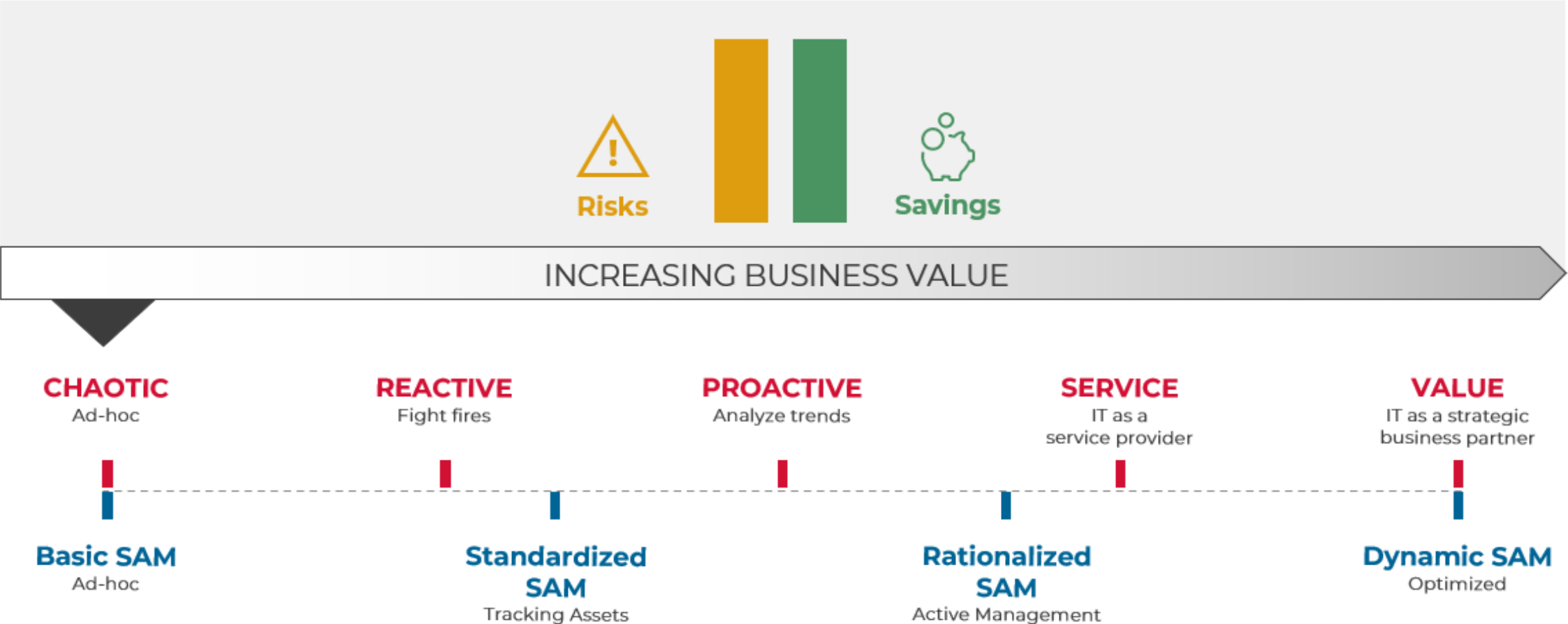
Proper collaboration with internal and external parties supported by mature Diagnostic framework



People

Having the right resources, maintaining knowledge and expertise

SLM helps turning COMPLEXITY into BUSINESS VALUE



Audience Question: Which team can give you insight into ITAM maturity?

1. Software Asset Management
2. Procurement
3. Accounting
4. Recruiting (and New Employee Onboarding)
5. Desktop management
6. Server management
7. Cloud operations
8. Legal
9. Travel Expense Reimbursement



How do I objectively measure
the maturity of processes,
technology, and people?
How do I benchmark against
similar companies in my
industry?

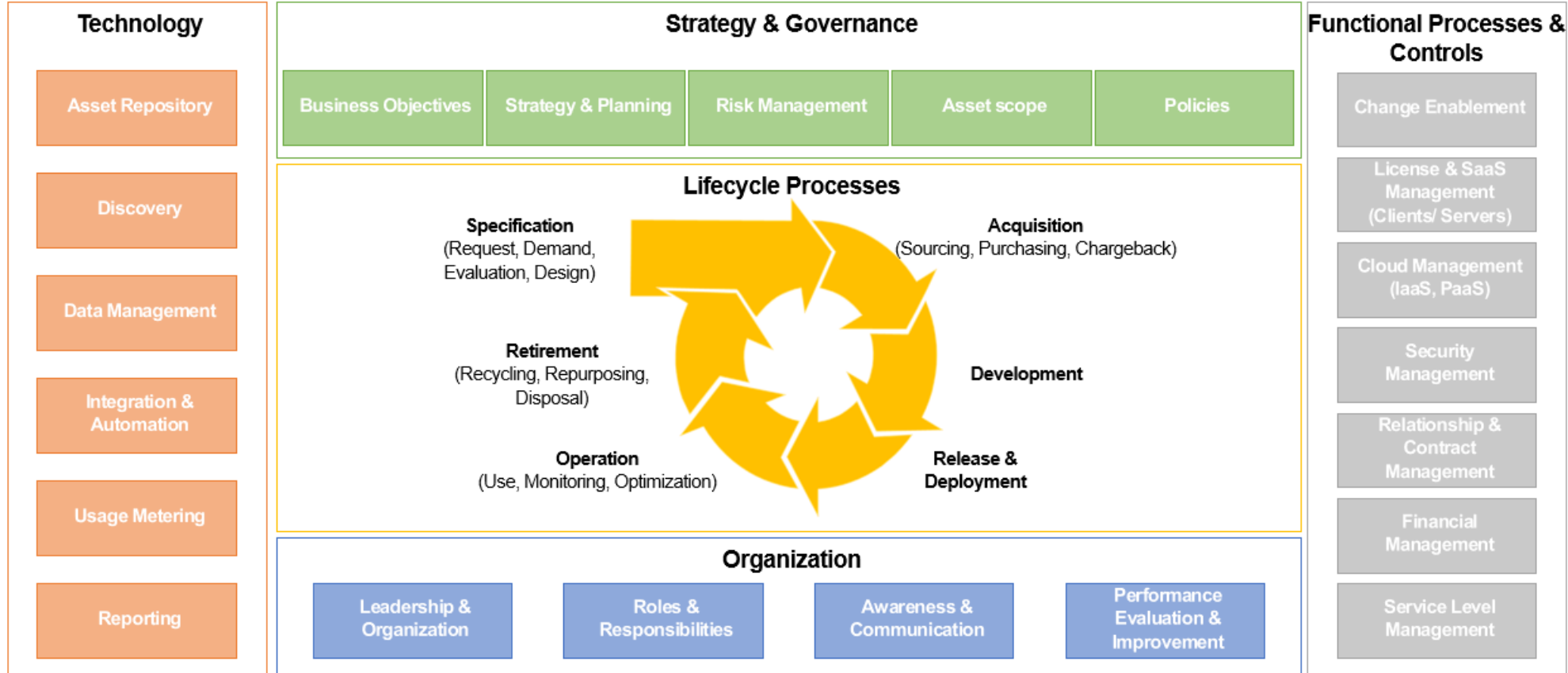


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Understand, plan & improve maturity within Software Lifecycle Management

SoftwareONE Diagnostic Framework

SoftwareONE Diagnostic platform allows for a comprehensive SLM maturity assessment consisting of 5 major domains and 28 sections.



Summary of Software Lifecycle Management (SLM) maturity levels across domains

Domain	Non-existent	Ad-hoc	Structured	Managed	Optimized
	1	2	3	4	5
Strategy & Governance	No SLM initiatives	Isolated SLM initiatives	SLM stakeholders identified	SLM strategy centralized and budgeted	End-to-end SLM program in place
Organization	SLM roles and responsibilities unclear	Reactive approach to SLM gaps	Centralized SLM team	SLM standards communicated to every employee	KPIs defined, tracked and regularly evaluated
Functional Processes & Controls	No SLM controls in place	Controls are decentralized and ineffective	Consistent controls and processes across the organization	SLM impact considered in all technology decisions	SLM goals exceed industry benchmarks and in line with organizational goals
Lifecycle Processes	No formal SLM policies	SLM policies are applied on irregular basis	SLM policies aligned with organization standards and policies	Software assets are evaluated across their lifecycle. SLM team is integral to all lifecycle processes	Continuous review and improvement of software lifecycle processes
Technology	No technology to track inventory of hardware or software	Hardware and software deployments tracked in manual and unstructured way	SLM tool tracks less than 95% of desktops and servers for software usage	SLM tool tracks 95% of desktops and servers for software usage	SLM tool tracks more than 99% of all physical and virtual hardware

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Dashboard Example | SLM Maturity Assessment

✓ **Assess your current maturity**
to understand your strengths & weaknesses and benchmark your practices against others.

✓ **Improve your maturity level**
with recommendations and actions defined by SoftwareOne experts.

✓ **Prevent unplanned expenditures & effort**
with appropriate data and 'First Line Audit Defense' mechanism for tier 1 publishers

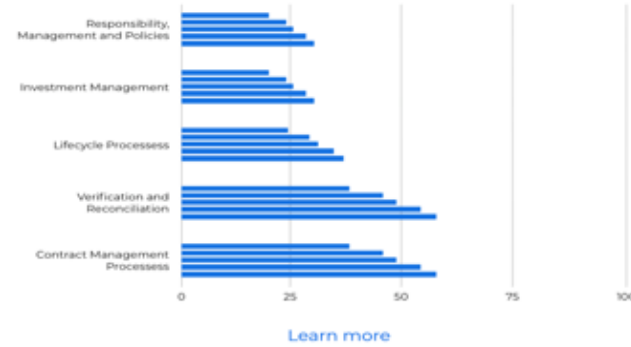
✓ **Save time & effort**
on tailored regular process assessments with easy-to-use digitized approach covering 360° view.

Best Practice Alignment

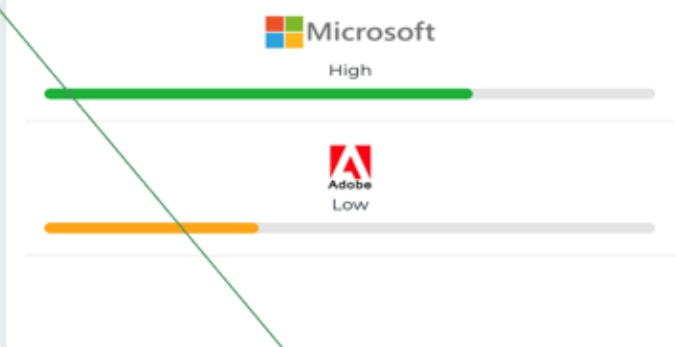
Oct 24, 19 - Jun 9, 21



Recommendation Status

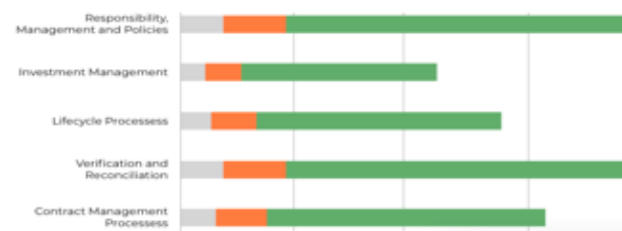


Vendor Practice Alignment



Action Status

Oct 24, 19 - Jun 9, 21



Cost Savings

Oct 24, 19 - Jun 9, 21



Forecasted Risk and Spend

In 2018 the BSA reported that an average of 37% of desktop software was unlicensed. Based on your 66% alignment with industry best practices as on 9 June 2021 an approximate percentage of unlicensed software (shown as Risk) within your environment is expected to be 16% and a potential cost saving opportunity (shown as Overspend) at 23% of total cost of desktop software.

Forecasted Overspend
952,200 USD
per annum

Forecasted Risk
62
per





Maturity Assessment

- Detailed assessment with key stakeholders
- Evaluation of data sources
- ✓ **Understanding current SLM maturity, spend & possible savings areas, benchmarking**



Selection

- Selection of preferred savings for the execution phase
- ✓ **Identification of saving initiatives and execution plan creation**



Execution

- Implementation of selected savings according to the execution plan
- ✓ **Definition & tracking of achieved savings & KPIs**



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Appendix

1. Additional facts
2. Other Maturity Models



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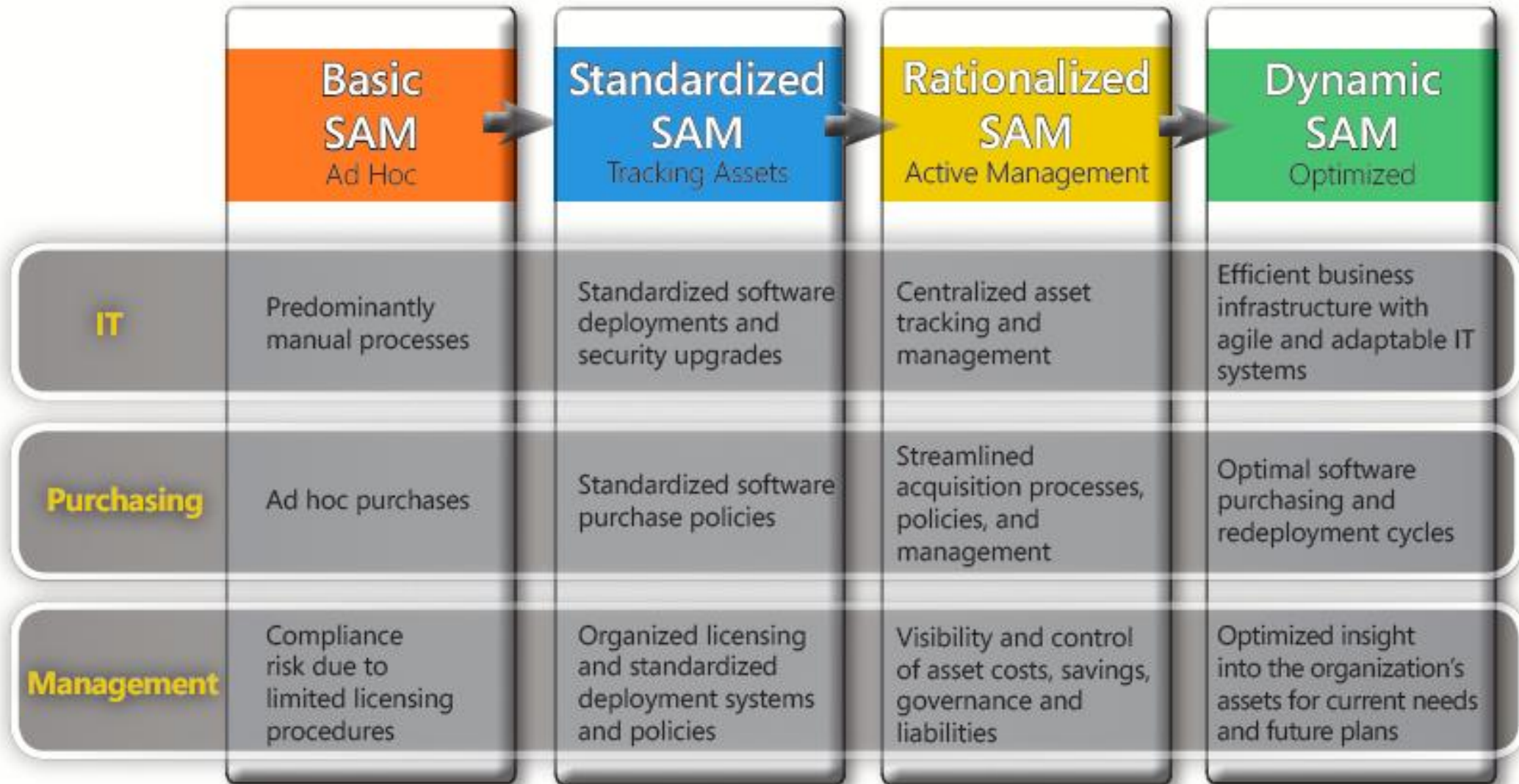
Source: SAMS Europe & USA Survey Report

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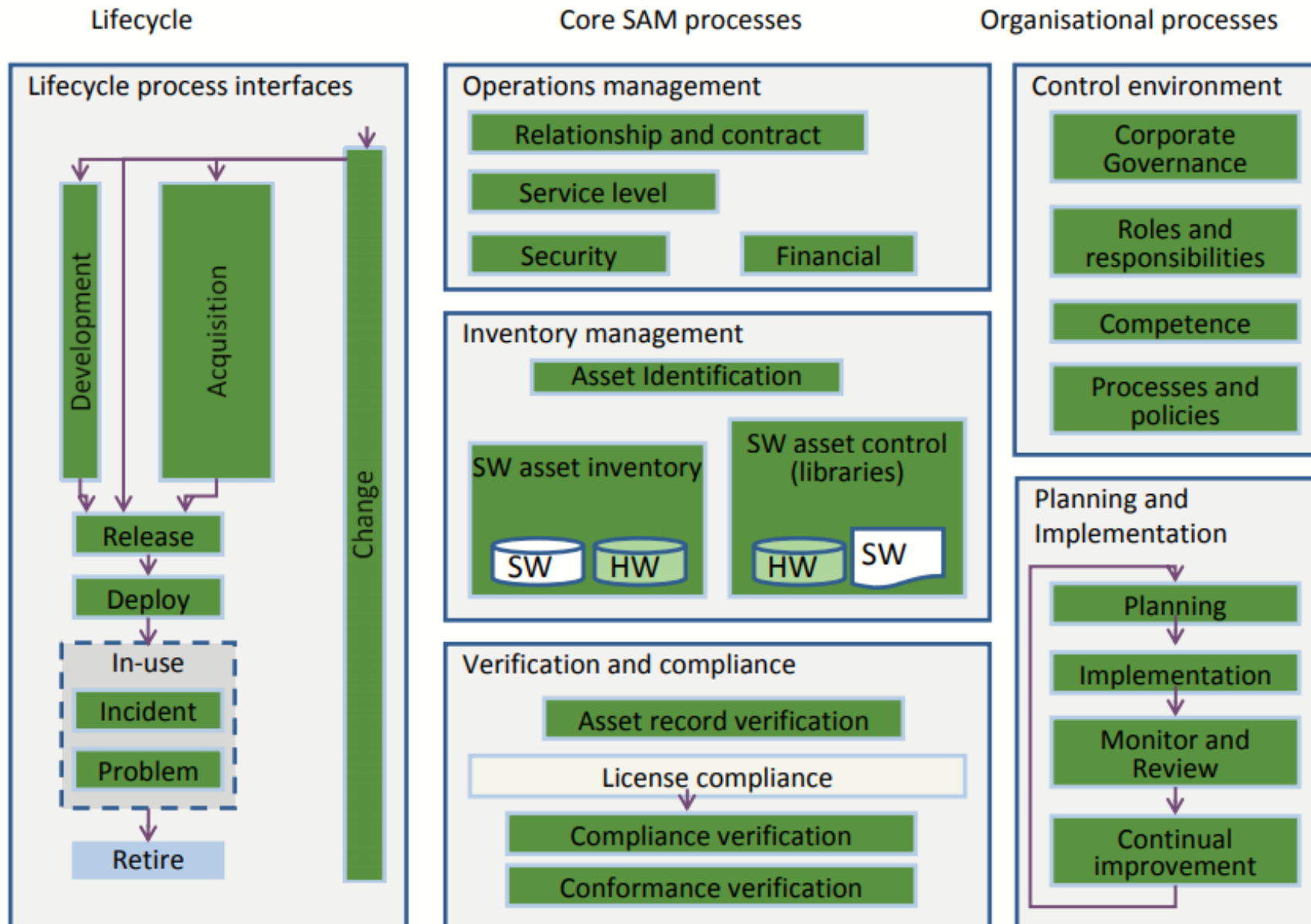
Microsoft SAM Optimization Model - 10 key competencies

Key Competency	Basic	Standardized	Rationalized	Dynamic
SAM Throughout Organization	Project Manager assigned but SAM roles & responsibilities not defined.	Direct SAM responsibility is identified throughout organization.	Each functional group actively manages SAM.	SAM responsibilities defined in job descriptions across organization.
SAM Improvement Plan	No SAM development or communication plan.	SAM plan is defined and approved.	SAM improvement is demonstrated.	SAM goals part of executive scorecard; reviewed regularly.
Hardware and Software Inventory	No centralized inventory or < 68% assets in central inventory.	Between 68% and 95% of assets in inventory.	Between 96% and 99% of assets in inventory.	> 99% of assets in inventory.
Accuracy of Inventory	Manual inventory; no discovery tools.	Inventory sources reconciled annually.	Inventory sources reconciled quarterly.	Dynamic discovery tools provide near real-time deployment details.
License Entitlement Records	Procurement manages contracts; not accessed by IT managers.	Complete entitlement records exist across organization.	Entitlement records reconciled with vendor records.	SAM entitlement system interfaces with vendor entitlement to track usage.

Image source: Microsoft SAM Optimization Brochure Direct to Customer US



ISO 19770-1 framework and processes





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