

# IAITAM ACE

**KICKIN'** ASSETS  
SINCE 2002

## SaaS Management

How to  
Maximize Your Budget &  
Tackle SaaS



NASHVILLE, TN  
MAY 9TH - 11TH



# SaaS

Are you trying to control the uncontrollable?



**Unmanaged Risk  
& Spend**



**Managed Risk  
& Spend**



# Welcome



## Preston Davis

---

ITAM Lead & Sr. Consultant, SHI



# What are we discussing today?

**Why managing SaaS  
is important**

**How to tackle  
your SaaS**

**How to maximize  
your budget?**



# What are we discussing today?

**Why managing SaaS  
is important**

**How to tackle  
your SaaS**

**How to maximize  
your budget**



# Customer XYZ SaaS Estate

229



# Customer XYZ SaaS Estate

204



# Customer XYZ SaaS Estate

\$10,463,789





# Ask the Audience



**Little or no risks associated  
with SaaS applications**

**True or False? – and Why?**



# Risks with SaaS

Terms & Conditions  
(Example: Personal  
Use Only)

Regulatory  
Compliance  
(Example: FedRAMP)

Misconfiguration

Data Retention

Privacy & Data  
(Example: HIPAA)

Access Management

Shadow  
I/T

Data  
Storage

Disaster  
Recovery



# What are we discussing today?

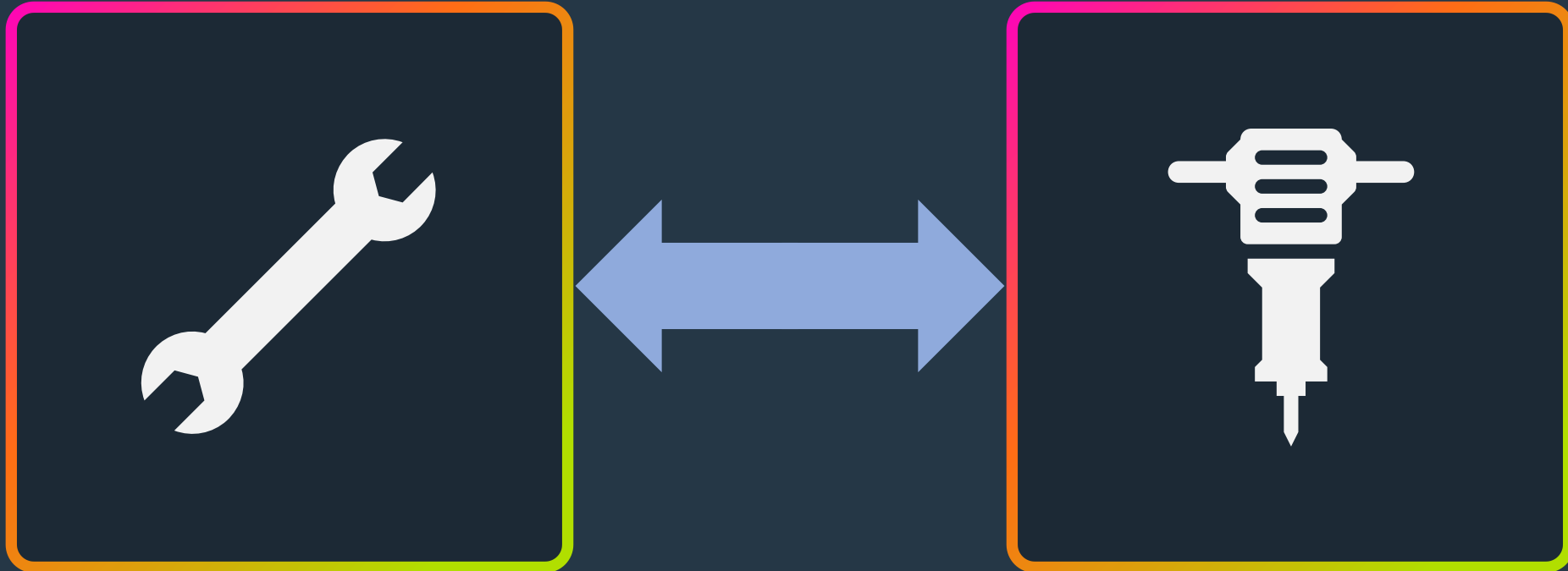
Why managing SaaS  
is important

How to tackle  
your SaaS

How to maximize  
your budget

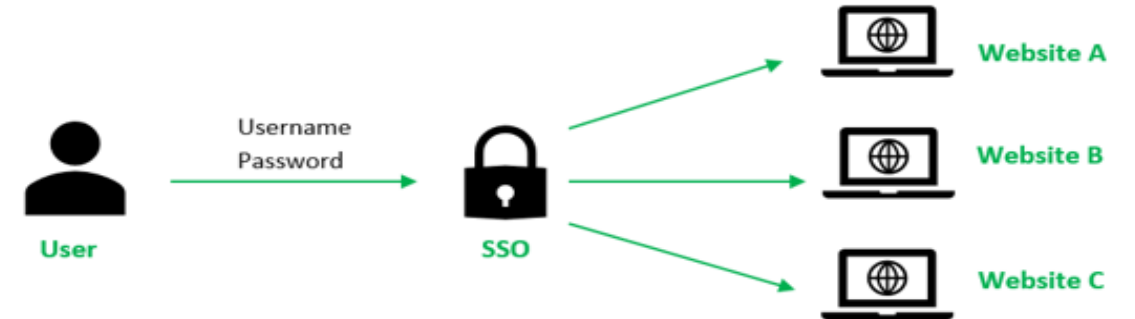


# How do you tackle your SaaS?





# Basics of SaaS Tooling



# How do we start tackling SaaS?

1

**Gather purchase orders  
& invoices**

2

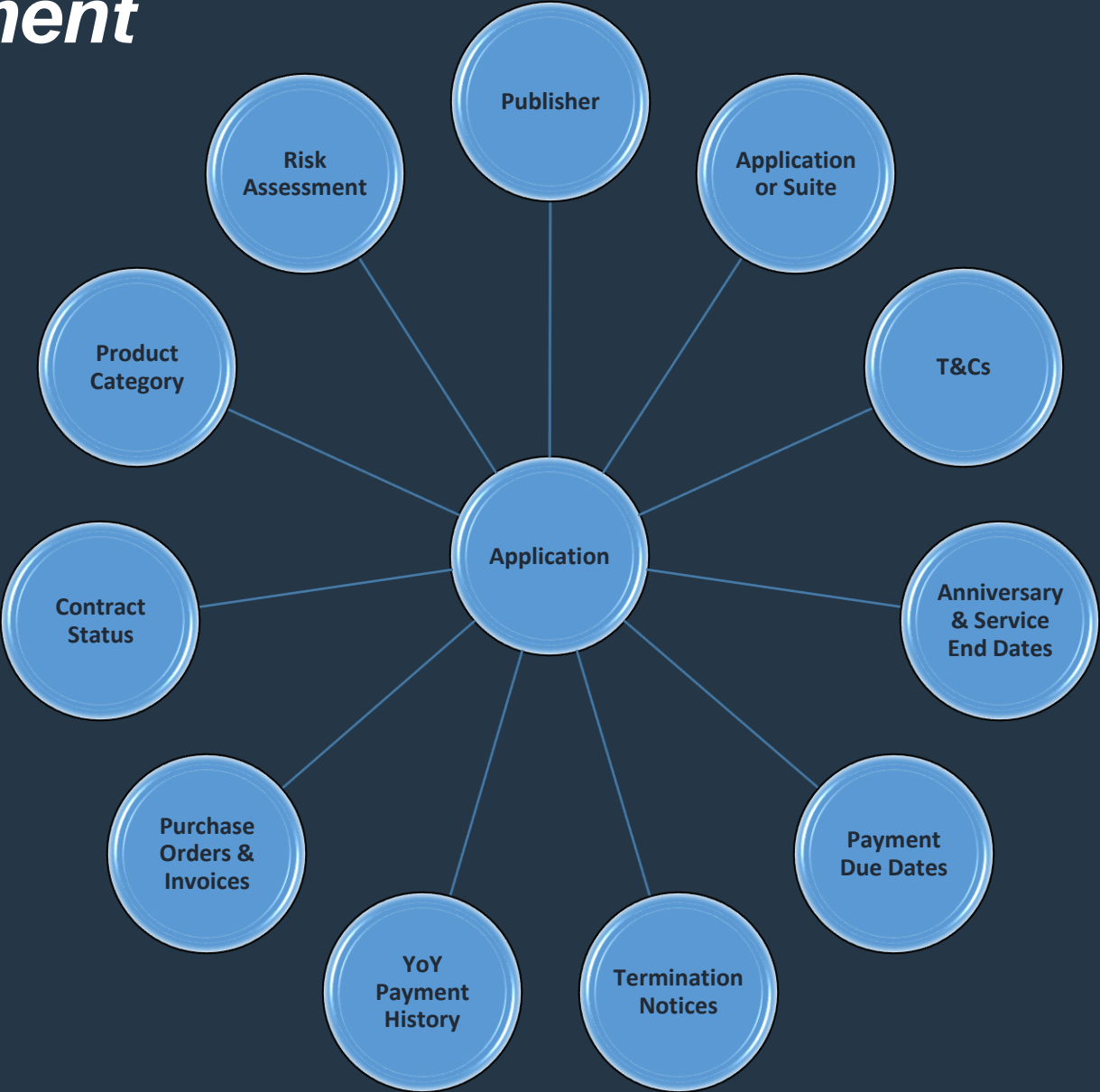
**Build the Entitlement  
Report**

3

**Create an Asset  
Portfolio**



# Asset Management Example



# How do we start tackling SaaS?

4

Create an Approved  
Standards List

5

Build a SaaS  
Road Map

6

Execute on  
Strategy





# What is a Road Map?

# Assess

Office  
111

DEV  
55

Supply  
Chain  
10

E-Com

Marketing  
52

Analytics  
37

Sales  
13

Re  
Est  
1

Unknown  
3

Entertain  
9

Industry  
6

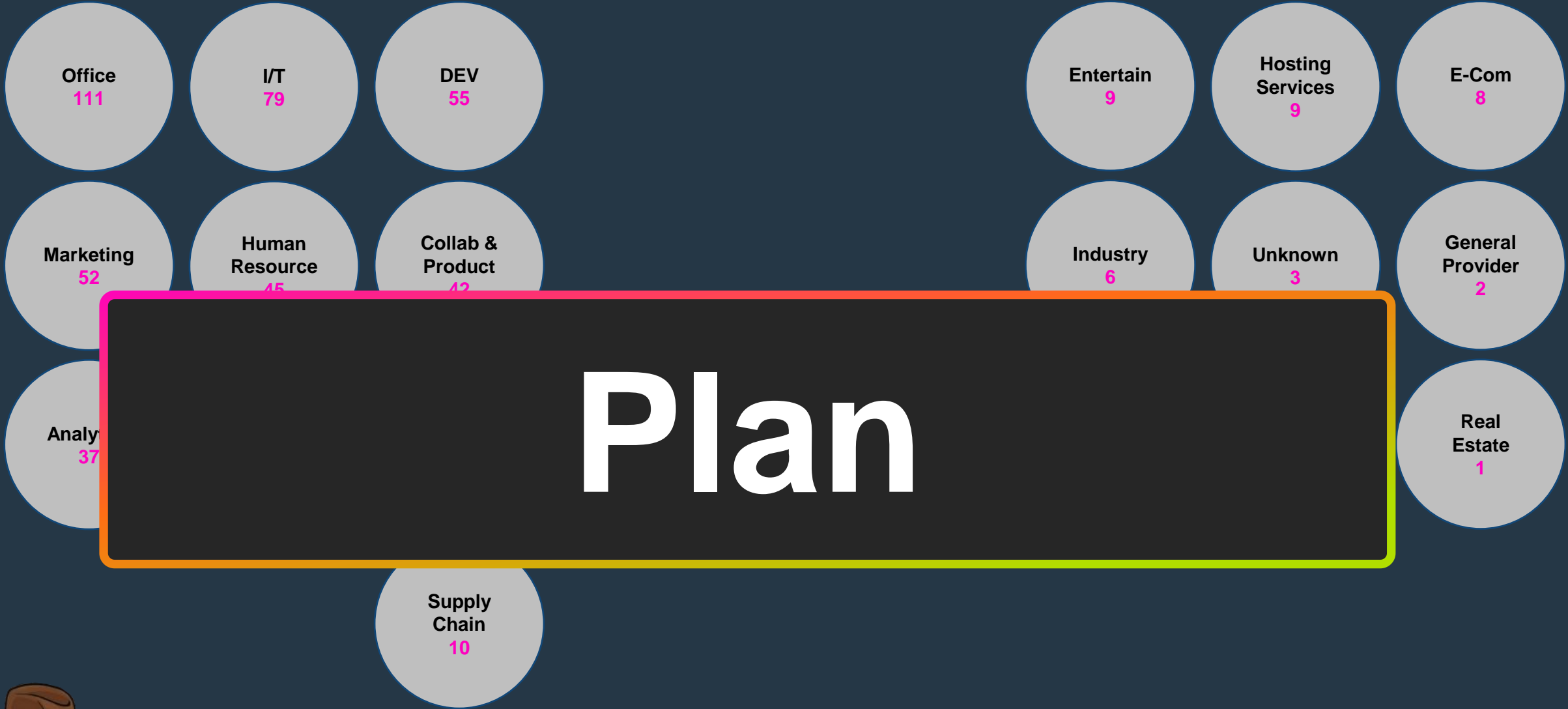
Health &  
Life  
2

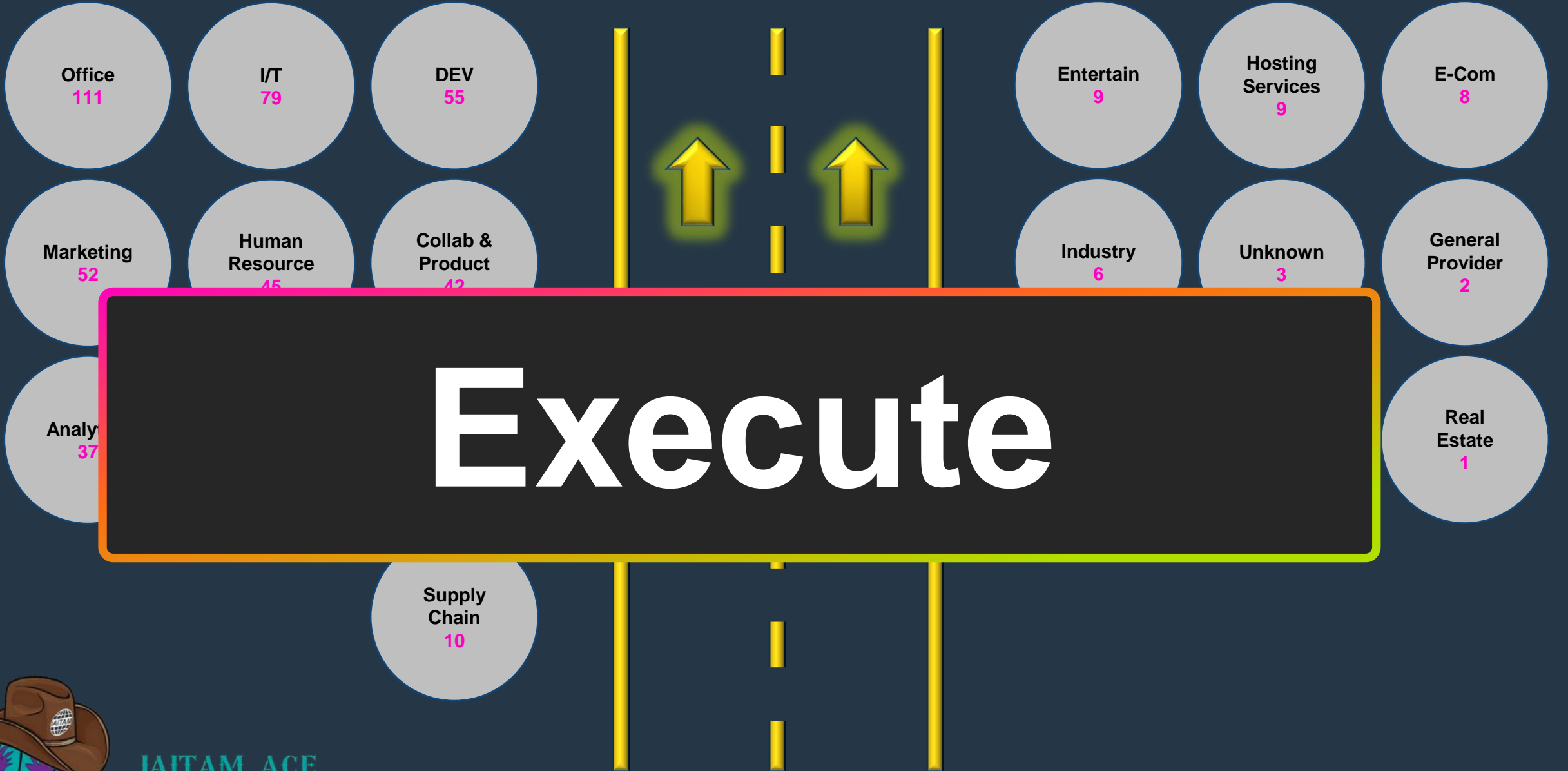
Human  
Resource  
45

Gov &  
Education  
1



IAITAM ACE  
KICKIN' ASSETS  
SINCE 2002





# Tips for Effective Strategy



**Create a Goal**



**Plan for Success**



**Track & Report on  
Progress**





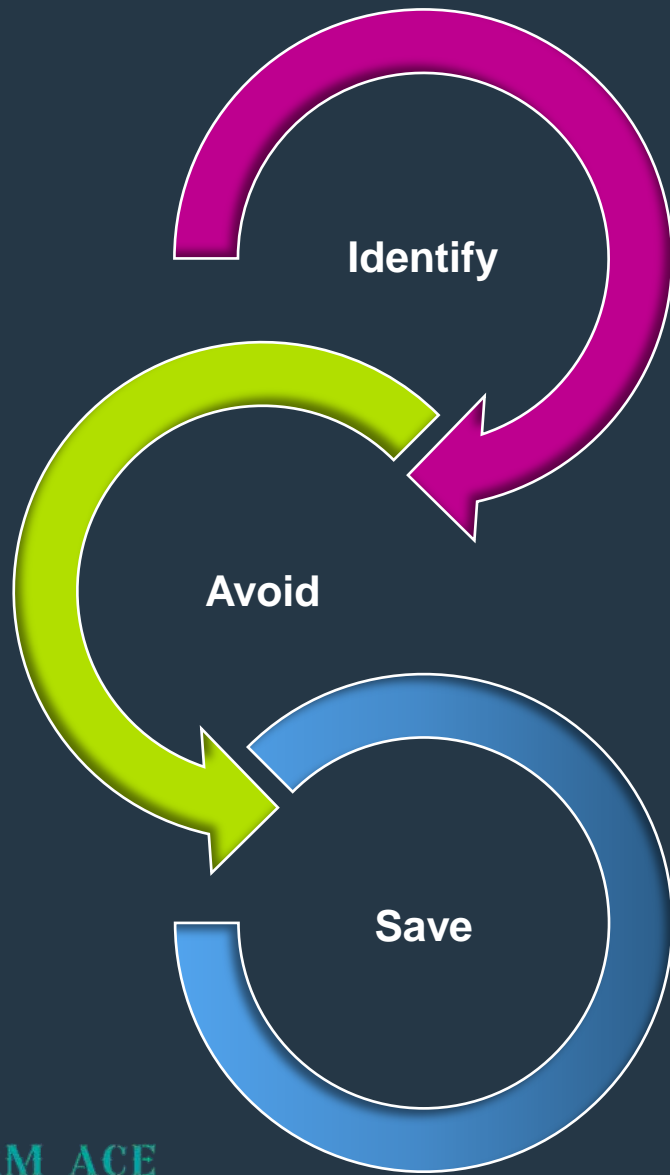
# What are we discussing today?

Why managing SaaS  
is important

How to tackle  
your SaaS

How to maximize  
your budget





**“Sound Economics in Everything  
we do”** CFO – San Antonio based Company



# Tips for Maximizing Your Budget



**Eliminate & Reduce  
Redundant Applications**



**Increase Consumption  
& Optimization %'s**



**Right-size Your Contracts  
& Spend**



# Tips for Maximizing Your Budget



**Eliminate & Reduce  
Shadow I/T**



**Manage Renewing  
Contracts**



**Look for Creative  
Opportunities**





# Creative Opportunity Example

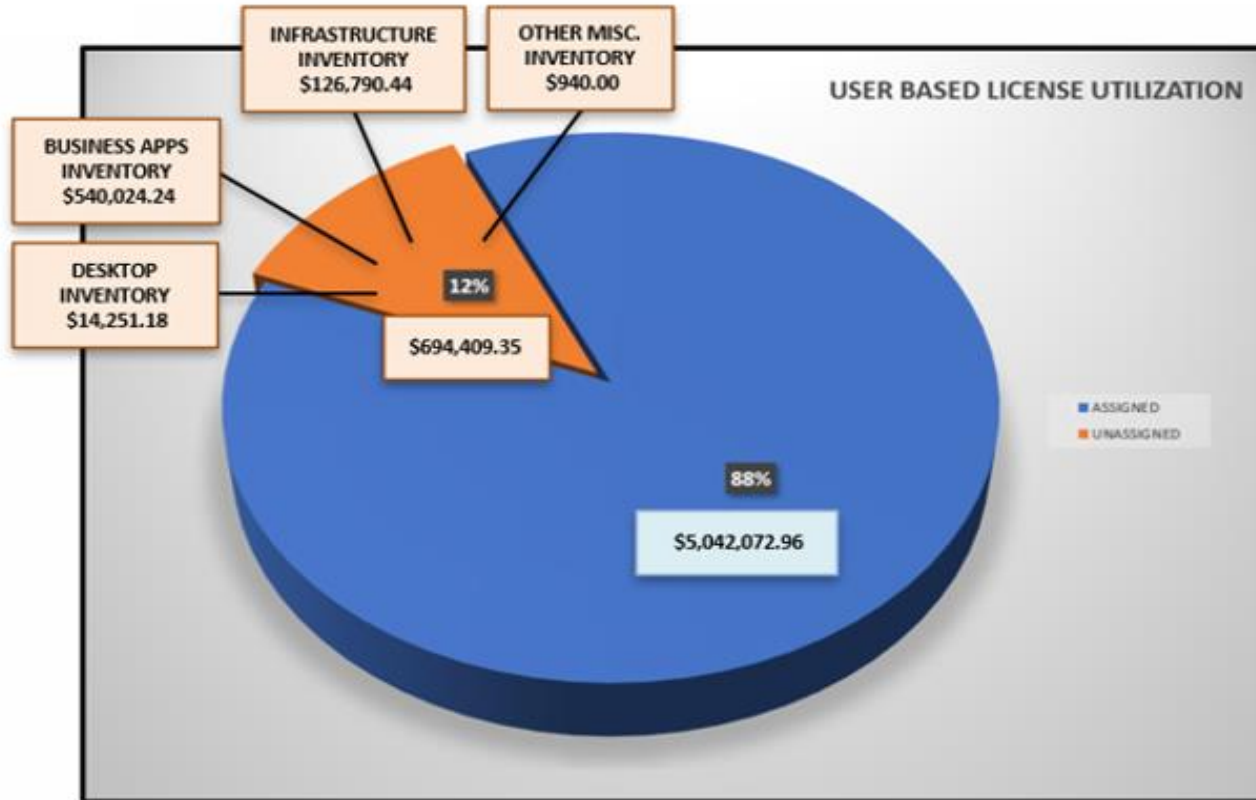


**Service Uptime Guarantee**

**Why is Uptime Guarantee important?**



# Tips for Turning Data into Reports



UNDERUTILIZED/INVENTORY SUBSCRIPTIONS BY \$ VALUE		
PRODUCT	UTILIZATION %	UNASSIGNED \$
SALESFORCE	86%	\$253,344.00
CALLIDUS COMMISSIONS	26%	\$179,779.20
THYCOTIC PRIVELEGE MANAGER	10%	\$36,449.28
FINANCIAL FORCE – FULL	97%	\$29,079.00
CALLIDUS CLM	49%	\$28,382.40
AXOSOFT	93%	\$20,085.75
CYLANCE ENDPOINT	75%	\$17,602.20
CYLANCE OPTICS	67%	\$16,001.55
CISCO WEBEX	86%	\$15,378.00
VENA CASUAL	0%	\$13,026.00
MIMECAST	43%	\$12,796.80



# Tips for Turning Data into Reports

Company	Renewal BU	Software Publisher	Software Application	Service End Date	Renew Again	Payment Due Date	Renewal End Date	FY2019 Amount
x	9040	Callidus	Callidus Subscription	TBD	Yes	Mar-20	Mar-20	\$ 235,419.00
x	9040	MobaXTerm	MobaXTerm	TBD	TBD	Mar-20	Mar-20	\$ 775.00
x	9040	Microsoft	Microsoft Enterprise Agreement	TBD	Yes	Mar-20	Mar-21	\$ 1,270,000.00
x	9040	Adobe	Adobe VIP Agreement	TBD	Yes	Mar-20	Mar-22	\$ 88,198.00
x	9040	GoDaddy	GoDaddy Domains	TBD	Yes	Apr-20	Apr-20	\$ 1,100.00
x	9040	Docusign	Docusign Electronic Envelopes	TBD	Yes	Apr-20	Apr-20	\$ 54,000.00
x	9040	Techsmith	Snagit / Camtasia Support	TBD	Yes	Apr-20	Apr-20	\$ 5,300.00
x	9040	Avalara	Avalara	TBD	Yes	May-20	May-20	\$ 145,165.00
x	9040	Thycotic	Thycotic Product Suite	TBD	Yes	May-20	May-20	\$ 7,260.00
x	9040	Essent	Essent Support (MVP Punchouts)	TBD	TBD	May-20	May-20	\$ 72,000.00
x	9040	Tervela	CloudFASTPATH	TBD	TBD	May-20	May-20	\$ 11,100.00

1-YR Renewal, Signed new contract with Xactly

Annual Payments: MSFT-3<sup>rd</sup> payment , Adobe-2<sup>nd</sup> payment

TIP

**Conduct monthly renewal meetings with Application Owners & Stakeholders**



IAITAM ACE  
KICKIN' ASSETS  
SINCE 2002

# Additional Reporting Ideas

- ✓ **Right-sizing & Optimization Report & Savings**
- ✓ **Terminated Applications Report & Savings**
- ✓ **Redundant Application Report & Savings**
- ✓ **SaaS Adoption & Consumption Reports**
- ✓ **Business Lead & Employee Lead (Shadow IT)**



# ***Thank you!***



IAITAM.org | ACE 2023 | Nashville TN

