

# IAITAM ACE

**KICKIN'** ASSETS  
SINCE 2002

## ITAM IN THE FIELD

Completing your ITAM program with an effective  
mobile solution



NASHVILLE, TN  
MAY 9TH - 11TH



# NASRIN INTRODUCTION

## ➤ 30 years Work Experience

- IBM, Sony-Ericsson, Mobile Reach, Floodlight Software
- Software Development
- Mobile Computing
- Mobile Solutions

## ➤ 20 years ITAM

- Process improvement with Mobile solutions

## ➤ MS Computer Science – mobile computing

## ➤ MBA

*“I like to help companies implement technology in order to improve their business operations”*



# AGENDA

- The Basics of ITAM in the Field
- Definition of Success
- How to meet Business Objectives
- How to achieve User Adoption
- Expected Results



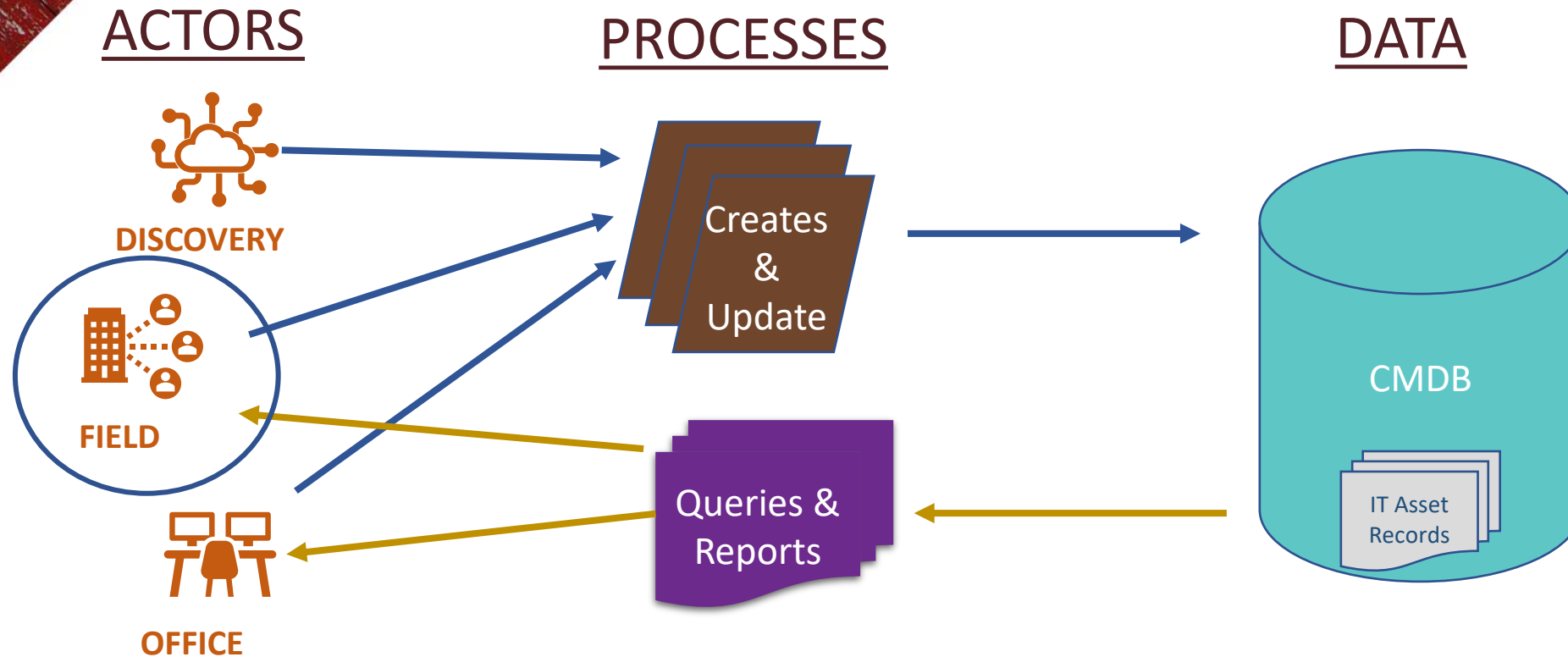


# THE BASICS

- “ITAM in the Field” includes two things:
  - The **processes** that your field personnel follow to do their work
  - The **tools** that your field personnel use to update your CMDB
- A critical goal of your ITAM in the Field solution is to keep your CMDB Complete and UP-TO-DATE



# ITAM IN THE FIELD : BIG PICTURE



# The biggest challenge ITAM orgs have...

**Ensuring that all asset activity that occurs “in the field” gets recorded (correctly) in their CMDB.**





# THINGS THAT GET IN THE WAY

- Processes don't exist to facilitate the update
- Processes are confusing for end users
- Processes are inconsistent
- Processes are not followed
- Processes are incorrect
- Processes are too slow, tedious, or time-consuming

## Process Errors!!



# ASSET ACTIVITY IN THE FIELD

## Asset Activity

- Receive
- Store in inventory
- Deploy
- Move
- Update
- Replace / Swap
- Decommission
- Disposal
- Etc.

## Required changes to Asset Record

Create or Update Asset record, status = RECEIVED

Update asset's inventory location, status = IN INVENTORY

Update "assigned to" value, location, status = DEPLOYED

Update location and possibly assigned to & status

Update critical information: software details, warranty, etc.

Update location, "assigned to", and status of each asset

Update location, clear out "assigned" value, status = DECOMMISSION

Clear out location, set status = DISPOSED and indicate how disposed

Other important use cases that affect data in your asset records





# WHAT IS THE ANSWER?

Provide a mobile solution that:

- a) Fixes ALL process errors
- b) Runs on your preferred device(s)
- c) Is Easy for your End-Users to Understand and Use
- d) Is Directly connected to your CMDB



# WHAT SUCCESS LOOKS LIKE...



## Business objectives met

- CMDB accuracy meets tolerances
- Desired reports and information easily accessible
- Productivity goals met



## Users are happy

- Mobile solution is easy to use
- Processes are more efficient
- Able to see value in the work they are doing



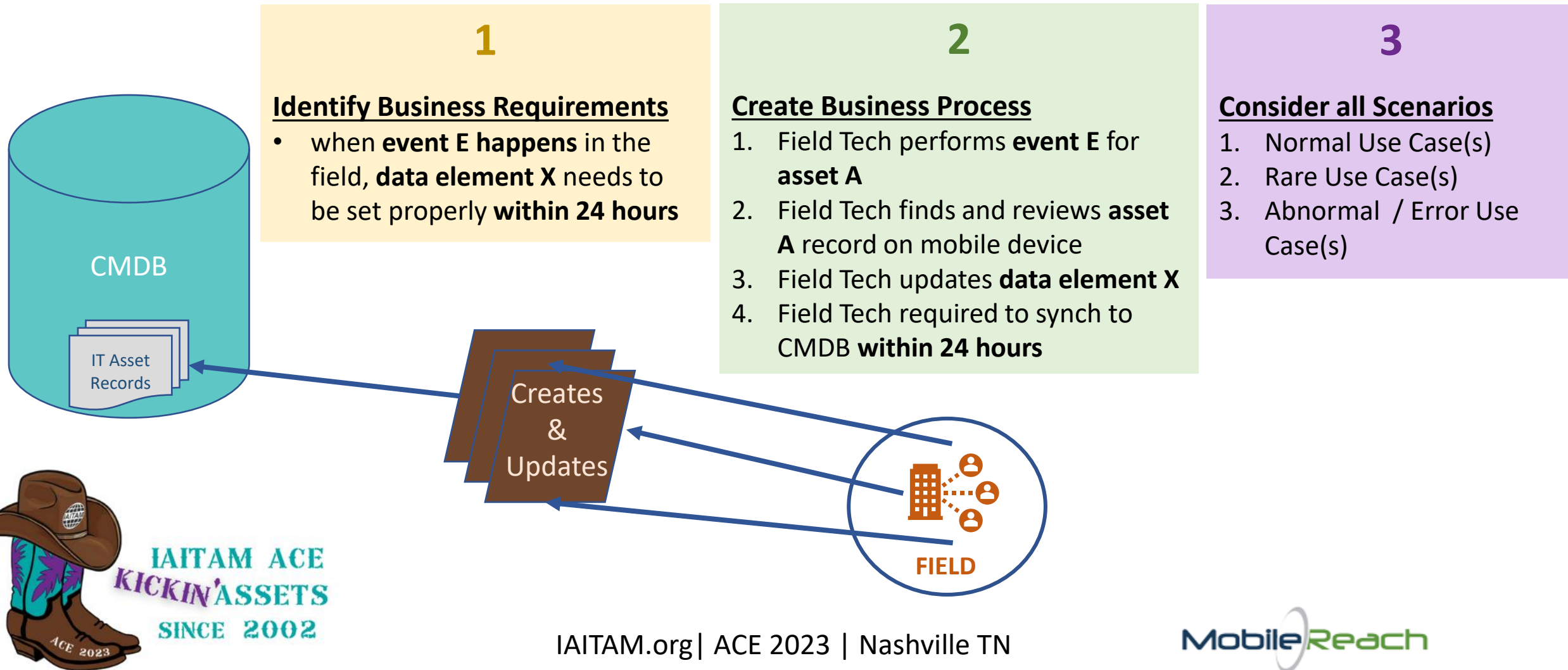


# 5 STEPS TO BUILDING EFFECTIVE ITAM IN THE FIELD

1. Design your set of processes that meets **all** business requirements
2. Build a **mobile app** for your field team that mimics your process(es)
3. Focus on **ease of use** and **efficiency** to ensure user adoption
4. **Train** end-users
5. Deploy your new solution and **require** that it be used/followed!



# DESIGN A PROCESS TO MEET BUSINESS REQUIREMENTS





# BUILD A MOBILE APP FOR YOUR FIELD TEAM THAT MIMICS YOUR PROCESS(ES)

## 1. Processes become app requirements

### App Requirement 1

1. Field Tech performs **event E** for **asset A**
2. Field Tech reviews **asset A** record on mobile device
3. Field Tech updates **data element X**
4. Field Tech ensures synchronization within 24 hours



## 2. Other factors:

- a) Network connectivity?
- b) Knowledge & skills of field tech
- c) Capabilities of chosen mobile devices
- d) Data security / protection



# ENSURING USER ADOPTION – APP CONSIDERATIONS

## Easy to Use / Good UI

- Clear instructions
- Consistent user interface
- Single purpose apps
- Graceful error handling
- Uncluttered screens
- Simple and Intuitive

## Efficient

- Automate actions where possible
- Direct integration to CMDB
- Use shortcuts for common actions
- Use barcode scanning & RFID
- Use droplists, checkboxes
- Anticipate Next steps





# ENSURING USER ADOPTION – PEOPLE FACTORS

- Communicate the “why” : the benefits to the business
- Communicate the process you went through and your goals
- Recognize it’s a process change and change is hard
- Test your solution with a small group
- Tweak the solution until the small group is happy
- Encourage feedback and be responsive
- Create ambassadors within the end-user community



# SUCCESSFUL END-USER TRAINING

- Build out a lengthy (more than sufficient) transition period
- Provide a combination of training materials:
  - ✓ Written user's guide
  - ✓ App Screenshots
  - ✓ Short "how-to" videos
  - ✓ Opportunities to test out the app in a low-risk environment
- Be responsive to feedback





# DEPLOYING YOUR MOBILE SOLUTION

- Make it a Big Deal – communicate down to the smallest detail
- Make it **required!!** People will revert to the familiar even if change is better.
- Share progress and milestones publicly, even if behind schedule
- Celebrate (even small) successes
- Continue to make improvements over time



# EXPECTED RESULTS

- Significantly increased CMDB / Asset Repository accuracy
- Ability to pull reports for auditing or analyzing purposes immediately
- Higher employee satisfaction
- More productive / effective ITAM program
- Acting Proactive versus Reactive
- Less waste, less down/unproductive time





# THANK YOU!!

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