



# CSAM Course Syllabus

**Course Title:** Certified Software Asset Manager

**Contact Information:** [Email: [info@iaitam.org](mailto:info@iaitam.org) , Phone Number: 330.638.3012, Office Hours: 9am – 5pm ET]

**Class Schedule:** 9am – 4pm, conducted online via Zoom. The time zone will be determined based on the participant's purchase choices.

---

## Course Description

The IAITAM **Certified Software Asset Manager (“CSAM”)** Course establishes a fundamental understanding of software asset management while addressing the fluid dynamics within the field. From issues concerning software piracy and compliance to legislative changes and internal organizational complexities, a holistic evaluation is required to comprehend the array of external and internal factors reshaping IT asset management practices. A proficient Software Asset Manager must align organizational objectives with the strategic potential of Software Asset Management to effectively accomplish those objectives.

Software Asset Management (“SAM”) encompasses the business methodologies supporting software utilization within an organization, often prompting a reevaluation of how and why software traverses the organizational landscape. SAM has become a crucial mandate for many organizations, recognizing Software Asset Managers as pivotal contributors to overall organizational success. To excel, Software Asset Managers must not only grasp the foundational business practices of Software Asset Management but also adeptly implement them in a manner tailored to their specific organization.

Participants will grasp the significance of Software Asset Management within the dynamic ITAM sphere of today. The demand for at least one dedicated individual within an organization, equipped with focused training and expertise in software management, has never been greater. The journey commences with the CSAM course, a pivotal instructional and certification program, intended as a core foundational pillar for any ITAM initiative.

---

## Course Objectives

By completing the **Certified Software Asset Manager (“CSAM”)** course, participants will be able to:

1. **Implement Effective Software Controls:** Design and apply controls for software inventories, integrating licensing, usage, locations, and documentation for all software products.
2. **Optimize Software Asset Visibility:** Maintain visibility into software asset processes, building controls throughout the software lifecycle to uncover savings, increase value, reduce support costs, and ensure compliance.
3. **Develop Comprehensive Policies:** Create, implement, and promote policies, processes, and procedures for software acquisition, installation, usage, and disposal.
4. **Ensure Legal Compliance:** Ensure that all stakeholders understand and comply with legal requirements for software use.
5. **Optimize Application Delivery:** Provide appropriate applications to specified users at optimal intervals, maximizing value and eliminating unnecessary software products.
6. **Problem-Solving Using Resources:** Utilize available resources to solve Software Asset Management (SAM) challenges, recognizing their interconnected impact on business objectives.

7. **Implement Proactive SAM Practices:** Establish and sustain a proactive Software Asset Management program, progressively replacing reactive processes.
  8. **Combat Software Piracy:** Develop and enforce software policies and procedures to identify and prevent software piracy and theft.
  9. **Vendor Management Leadership:** Provide strategic direction for developing and maintaining an effective Vendor Management program.
  10. **Support Asset Management Teams:** Empower, train, and support all personnel assigned to Asset Management roles.
  11. **Foster Cross-Business Relationships:** Build and maintain productive relationships across business units, including IT functions and customer-facing teams.
  12. **Secure Executive Support:** Advocate for and maintain executive management support for all IT-related initiatives.
  13. **Promote SAM Awareness:** Enhance employee awareness and understanding of Software Asset Management practices.
- 

### Who Should Attend

The CSAM course is tailored for individuals with limited experience in Software Asset Management. It serves as a fundamental resource for entry-level IT Asset Managers and other IT professionals engaged in asset management, resource budgeting, finance, software licensing, contract management, and strategic planning. While no prerequisites are required, a basic understanding of contracts and software lifecycle management is recommended. Upon course completion, participants have the option to take the CSAM certification exam to achieve professional certification.

---

### Required Materials – Access to Materials provided 48 hours prior to course

- Course book: Certified Software Asset Manager
- Presentation: Certified Software Asset Manager (CSAM)
- Student guide to Preparing for Exam Success
- Software/Technology: Computer, internet connection, Zoom Access

---

**Schedule – Times are approximate depending on Course Discussion**

<b>Time</b>	<b>Topics Covered</b>	<b>Assignments/Exams Due</b>
1 hour	Welcome/Course Expectations, IAITAM Mission, Resources, and Services, What is ITAM?	Heavy note taking
1 hour	The Scope of Software, Strategic License Management, Software Harvesting, License Documentation	Heavy note taking
1 hour	The Right to Audit, Proactive vs. Reactive SAM, Developing Goals, Savings Opportunities	Heavy note taking
1 hour	Audit Letter, Examples of License Data Documentation, Compliance Enforcement, Understanding the EULA	Heavy note taking
1.5 hour	Due Diligence for Compliance, The Art of Negotiation, Ts & Cs Advice	Heavy note taking
1 hour	ITAM Automation, Selecting a Discovery Tool	Heavy note taking
1 hour	ITAM Repository, Hardware & Organizational Impacts	Heavy note taking
4 Hours	Read and Review the CSAM Manual	Read full Manual
2 Hours	Exam Prep	Review PowerPoint and Preparing for Exam Success Doc.
3 Hours	Exam	3 hour timed exam

*Note: Schedule is subject to change.*

---

**Grading and Attendance Policy**

- Certification Exams: - 3 hours to complete 100 questions. Multiple choice, Single choice, True and false
- Participation: Must participate for the duration of the course and complete attendance link to gain access to exam.
- Grading Scale:
  - Pass - 85% or higher on Exam
  - Fail - below 85% on Exam