The People, Process and Technology for Your ITAM Journey

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Guide Objective

An IT asset management (ITAM) program lifecycle encompasses a gigantic set of processes. It's no surprise that establishing a successful program takes significant effort and can seem overwhelming at first. Snow Software developed this guide to provide you with a framework for developing your ITAM practice and helping to ease your ITAM program journey.

An ITAM program is only as effective as the people, processes and technology behind it. In our experience, we have found that dedicated people and processes are as integral to the success of your ITAM practice as your tooling. Likewise, you can have excellent people and processes, but without tools that provide visibility over your entire program, you might only see a fraction of the details needed to have a positive impact on your organization.

Section I.
## Identifying Priorities and People

SELECTING PRIORITIES

To begin, your program needs to align with your organization's top objectives and the priorities of your executive leadership. Their approval and buy-in is necessary to put your ITAM program into action.

Start by answering these questions:

- What's on your CIO's list of priorities?
- What are your organization's main goals?
- What are the biggest challenges your organization are facing today?
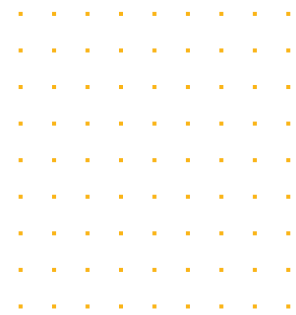
These challenges usually boil down to three big themes:

1
Reduce costs
Cost reduction is always a key to an organization's success, especially during times of global economic uncertainty. Organizations need to spend wisely so they can allocate more of their funds to innovation and be more competitive in a tough market.

2
Mitigate risk
With the rise in global cybersecurity attacks, protecting customer and company data is top of mind for most IT leaders. Their organizations also need to protect themselves from risk associated with unanticipated and unaccounted for software, cloud, SaaS or hardware spend.

3
Fuel innovation
Quickly delivering new innovations and responding to employee and customer requirements are now fundamental to surviving in today's economy. Fostering innovation starts by optimizing your current technology stack.
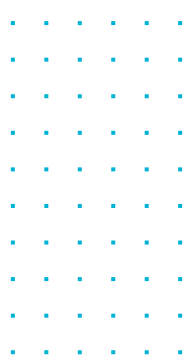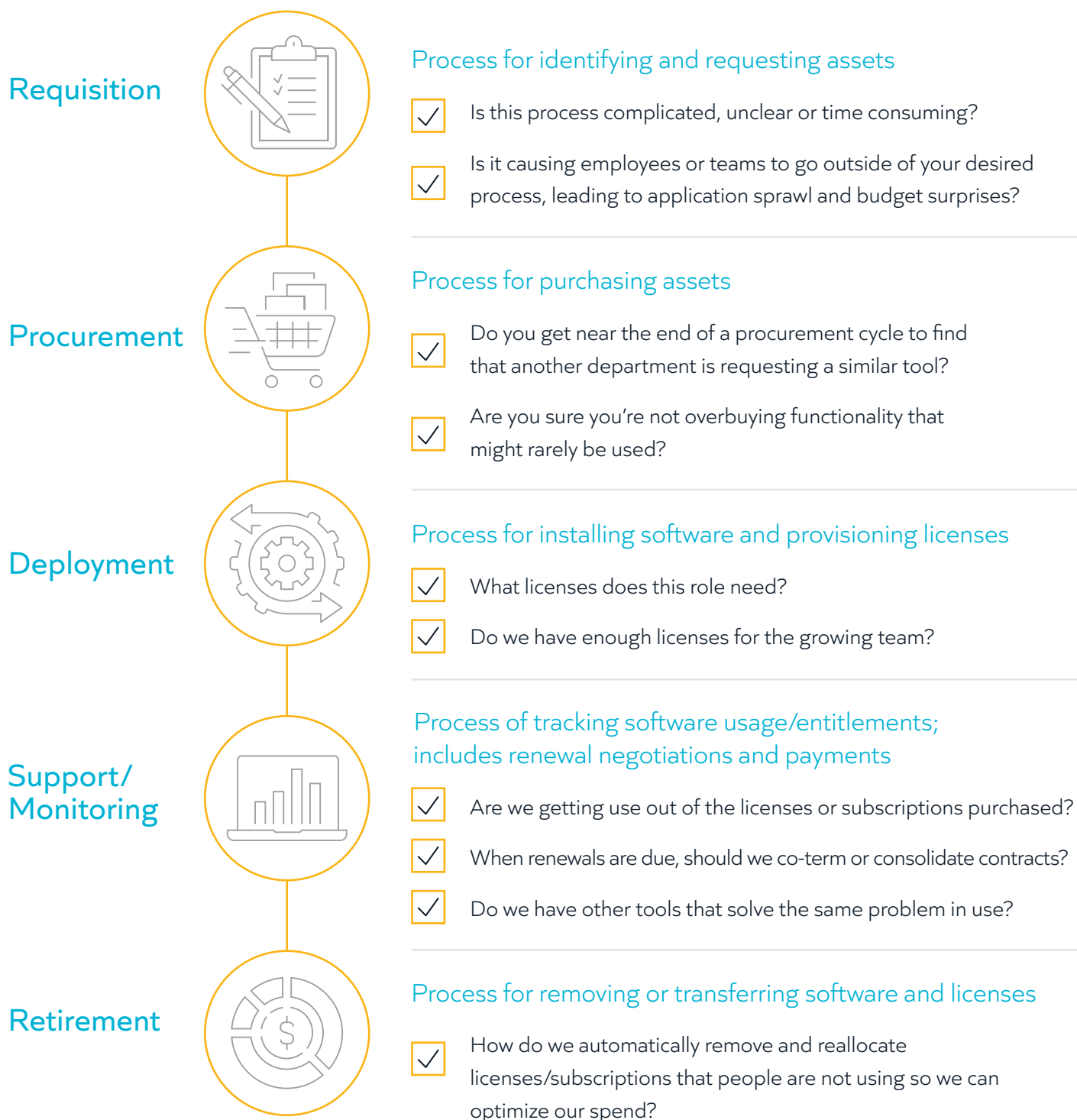
Other event-based priorities can provide justification for your planned program to move forward. Some common events and initiatives that drive ITAM programs include:

- Large merger & acquisition (M&A)
- The need to report on technology ROI to C-suite or board
- An audit or compliance event (sometimes triggered by an M&A)
- Significant cybersecurity incident
- Rising software costs (i.e., price increases)
- Digital transformation project

NARROW YOUR FOCUS

You can't solve every problem at once. To narrow your focus, identify areas within the ITAM lifecycle where you can solve some big pain points and contribute to meeting major organizational and team goals.

Identifying priorities throughout the ITAM lifecycle

Requisition

Process for identifying and requesting assets

☑ Is this process complicated, unclear or time consuming?

☑ Is it causing employees or teams to go outside of your desired process, leading to application sprawl and budget surprises?

Procurement

Process for purchasing assets

☑ Do you get near the end of a procurement cycle to find that another department is requesting a similar tool?

☑ Are you sure you're not overbuying functionality that might rarely be used?

Deployment

Process for installing software and provisioning licenses

☑ What licenses does this role need?

☑ Do we have enough licenses for the growing team?

Support/ Monitoring

Process of tracking software usage/entitlements; includes renewal negotiations and payments

☑ Are we getting use out of the licenses or subscriptions purchased?

☑ When renewals are due, should we co-term or consolidate contracts?

☑ Do we have other tools that solve the same problem in use?

Retirement

Process for removing or transferring software and licenses

☑ How do we automatically remove and reallocate licenses/subscriptions that people are not using so we can optimize our spend?

PICK YOUR PEOPLE

Internal stakeholders

Once you've selected your priorities, pick your internal program staff with the following steps:

1 Estimate the true number of resources it will take to develop and manage your ITAM tool along with your policies and processes:

- ☑ Decide if you're supporting one geography or one department at the onset, or if this will be an organization-wide operation right away.

- ☑ One of the biggest mistakes we see is when organizations unrealistically put their ITAM program on one person's shoulders. The size of your eventual organization will be dependent on the scope of services you provide and the size of the larger organization you are supporting.

2 Identify your realistic staffing costs and evaluate your current team's internal expertise to choose one of these options:

- ☑ In-house staff and software
- ☑ Extended staff with partners for specific projects/expertise
- ☑ In-house staff with partner-hosted software
- ☑ Partner-based managed services

External stakeholders

Use some of the above findings to clarify who your external stakeholders are. Focus on the short- to medium-term project scope. Within that timeframe, determine the organizational units, geographies and departments for which your team will manage hardware and software costs.

Section II.

Data and Technology

Selecting and harnessing data

Naturally, you'll need to pull data relevant to the stakeholders and goals you have identified. Prioritize your focus areas and identify exactly what you need to track for these stakeholders and your associated goals.

Consider the environments your team will be managing. You've already identified your stakeholders' departments and regions, but you need to narrow the data even further with these considerations:

- What data are you pulling from specific departments and regions?
- Are you going to track on-premises devices and software, sanctioned SaaS applications, free or unsanctioned SaaS applications, cloud infrastructure and applications?
- What about specific vendor applications and infrastructure?
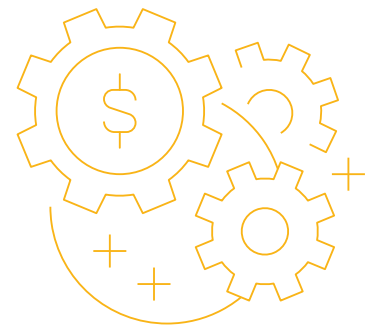
Choosing the right ITAM tool

Budgeting

It's crucial to choose and budget for an ITAM tool that will provide visibility to your entire software license usage and spend. The general rule is to estimate your tooling cost at around 20% of your desired cost savings. This amount should also account for the training and set up costs you'll need initially.
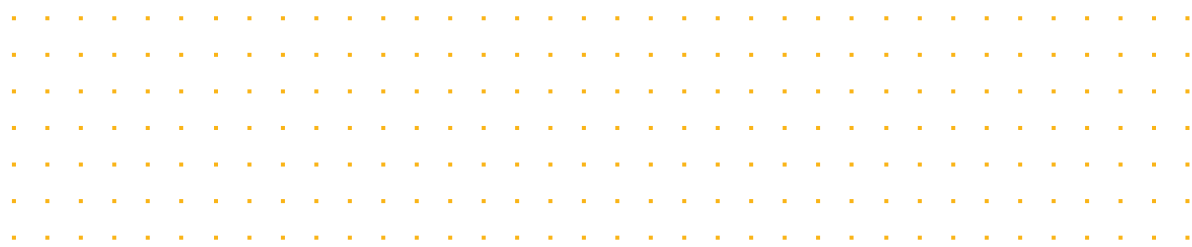
Section III.

Establishing Policies and Processes Within Governance

GOVERNANCE FRAMEWORK

Now that you know your program priorities, people and data, your next step is to build a governance framework for your practice.

Every ITAM practice should include these elements:

Mission Statement
- ☑ Should state WHAT you're doing and WHY
- ☑ Articulates why the ITAM program exists
- ☑ Represents longer-term objectives, so it shouldn't need to be changed frequently

Strategy/ Roadmap Document
- ☑ List objectives, key results and projected completion dates

Policies
- ☑ Explain who should do what and where/why they should do it in your program
- ☑ Also explain how those requirements are enforced

Processes
- ☑ Detail how your team will accomplish everything in-scope

Communication Strategy
- ☑ The plan for communicating policies, processes, updates, etc. to your team and stakeholders and to the wider organization

Reporting
- ☑ Provide evidence that your policies and processes are achieving expected results

These are all essential elements of an excellent ITAM practice, but we will focus on establishing processes here to get your program started.

Processes

Processes are steps your team takes to adhere to a policy. If we look at a software acquisition policy, for example, you'll need to create and document these processes to achieve the desired policy goal:

- Software procurement — The process to procure software assets

- License/subscription compliance — The process to document what has been purchased together with an inventory of allocated licenses or subscriptions

- Asset use verification — To ensure software assets in use have gone through the proper procurement process

Defining your process

The process definition should answer the following questions:

- What tasks need to take place to achieve the outcome?

- Who is responsible for performing each task?

- What data is needed to make decisions and perform tasks? What is the source of that data? Do we have data gaps?

Process refinement

Once you've documented your process, take a closer look at:

- How long these tasks take

- Any errors/mistakes made daily

- The impact of errors/mistakes and time it takes to fulfill tasks

Automated processes

If a process takes a long time or is riddled with errors, you may want to automate it as much as possible.

Automation can come in many forms:

- Automated data capture, normalization and reporting for license usage and allocations

- Alerts and triggers:
  - Upcoming renewal dates for key vendors, e.g., 3-6 months in advance
  - Notification when license allocations either reach entitlements or fall below a certain percentage of entitlements
  - Annual review of license entitlements, allocations and usage

- Service catalog and automated workflow for requesting/reharvesting licenses

- Automated provisioning of cloud and datacenter resources
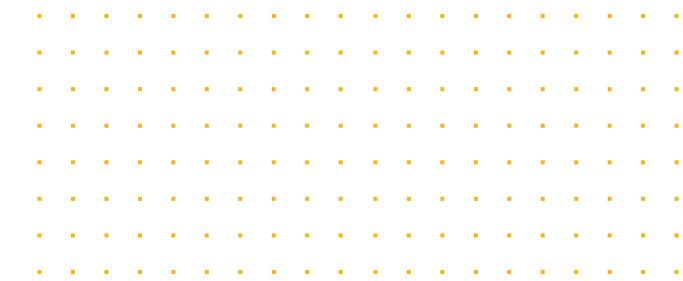
Moving Forward

We hope this guide has informed, inspired and excited you for the beginning of your ITAM program journey. We recommend deep planning and consideration for every ITAM program, and we have additional resources available as you think through your organization's ITAM needs.

If you would like to read more, please download our e-book, Building a Business Case for ITAM.

Alternatively, If you are newly responsible for software asset management (SAM) at your organization, or simply curious about SAM, then another of our e-books, The Basics of SAM, is for you.

With over 25 years in the business, Snow Software has the expertise to help you reduce risk, optimize spend and accelerate agility with a foundation of Technology Intelligence across your hybrid IT environment. Connect with us or one of our trusted partners to get help creating your ITAM/SAM strategy.

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Snow Software is changing the way organizations understand and manage their technology consumption. Our Technology Intelligence platform provides comprehensive visibility and contextual insight across software, SaaS, hardware and cloud. With Snow, IT leaders can effectively optimize resources, enhance performance and enable operational agility in a hybrid world.

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