

What Would Wally Do

Waiting on the World to Change



As we discuss in IAITAM certification classes, Asset Managers are being given increased responsibilities throughout the organization. Sometimes this responsibility is not accompanied by the authority to affect the level of change required to implement an effective ITAM program. In today's organizations, the IT Asset Manager should have responsibility for the following items:

- **Development and implementation of strategy**
- **Development and maintenance of policies**
- **Establishing and reviewing standards**
- **Developing and monitoring processes**
- **Creating and reporting on critical metrics**
- **Help keep the organization compliant**



So after we attend the IAITAM certification classes and leave with so much enthusiasm for the ITAM practice, why do programs stall out, lose focus and don't steadily progress forward? This is a tough question with many variables based on the organization and maturity level of the ITAM practice. We will address one aspect of why some IAITAM programs don't progress in this installment of **"What Would Wally Do?"**

I was listening to the radio the other day and heard a great song called "Waiting on the World to Change". Listening to the song, I realized the lyrics captured

some of the reasons our ITAM programs don't move forward. People are waiting for the world to change, but nobody is willing to step forward to make it happen. I've talked with organizations that have become disheartened because they can't obtain funding for tools they feel are needed to implement an ITAM strategy. In a previous installment of WWWD, we discussed tracking assets to the individual level. Sometimes that requires integration with our ERP and HR systems. As a rule of thumb, integration with ERP is a costly initiative. Depending on the priority placed upon a critical asset class, the cost of integration may outweigh the risk of not tracking the asset. If the asset manager does not agree with the decision, they can become discouraged because they feel their initiative is not important. Having lost the battle for funding sometimes creates a negative attitude and a perception that ITAM is not important to the organization. So we wait!

Another example of waiting is that no single individual is targeted with the responsibility of making something happen. IAITAM conducts several Initial Program Reviews (IPR) each year. A recurring theme is that managing compliance, usage, security and adherence to policy seems to always be someone else's responsibility. Many times during the IPR interview process, the manager is identified as the responsible party. The only problem is during the interview with the manager, they are not aware of the responsibility and many times indicate they don't have access to the information required to perform the function. These companies agree there is a problem, but can't agree on who owns the problem.

Instead of waiting for change, I suggest we follow the positive approach taken by the proactive IT Asset Manager. The "Do Whatever it Takes to Succeed" attitude will help your ITAM program make progress toward your critical goals and objectives. The right attitude can help you implement a program where you don't have to make excuses or provide explanations on why the ITAM program isn't progressing as planned.

A perfect example of the proactive asset management attitude is being demonstrated by one of our members based in Houston, TX. Lisa Wilson is the IT Asset Manager for Harris County Hospital

District in Houston. Lisa, faced with the same challenges that face many Health Care organizations today, took a proactive approach to introduce change into her environment. In addition to the usual software compliance, security, standards, and cost control initiatives, the Health Insurance Portability and Accountability Act (HIPAA) creates additional compliance issues. Health organizations must take additional measures to identify, locate and secure systems that contain Protected Health Information (PHI) for patients. The challenge for Lisa was how to do all of this, without negatively impacting patient care.

As we discuss in IAITAM certification class, having effective corporate policies in place that support our ITAM initiatives is critical to success. During IAITAM program reviews, we have found that many organizations have tried to move forward without first reviewing existing policy. Without a good set of foundation level IT policies that support the ITAM practice, there isn't much hope for a successful program. IAITAM offers an Employee Awareness Program that can assist organizations in developing and implementing effective policy.

Working with a limited initial budget for technology solutions, Lisa undertook a policy review and worked with other stakeholders in the organization to develop and implement policy that supports the overall IT asset management strategy of the organization. The policy changes implemented by Harris County Hospital District were accompanied by an effective communication and education plan. Lisa worked hard with the other stakeholders to make sure that new policies were properly implemented by making sure they were well documented, understood, reviewed and enforced.

The next item on Lisa's agenda was to find a method of tracking specific asset classes down to the individual level. After conducting a requirements gathering initiative, Lisa determined that integrating the ITAM processes with the current ERP system would allow assets to be assigned and tracked to the individual level. Unfortunately, the cost of the integration was accompanied by a large price tag. The cost of the integration could not be addressed within the current IT budget constraints.

Lisa was then forced to make the decision that all IT Asset Managers will face from time to time. She could either sit back and wait for budget dollars to become available (yea right!) or she could come up with an alternative method to accomplish the task of tracking critical assets to the individual level. Lisa could sit back and wait for the world to change or she could go forward doing whatever it takes to get the job done. Lisa decided to move forward. She didn't

want to make excuses or provide explanations on why critical IT Assets with potential PHI information was unable to be tracked at the appropriate level.

Lisa started with policy and implemented an "Off-Site" use policy. She then found an alternative method to the ERP integration. Lisa determined that assets assigned to an individual could be tracked using a card similar to an employee badge. The employee obtains a security form that has the information regarding the asset assigned. The information is then placed on the card that is worn along with the employee badge. When an employee leaves the organization, the employee badge and asset card can be checked to verify that all assigned assets have been returned to the organization.

The solution was implemented for pennies on the dollar compared to the price of the ERP integration. Is the solution that Lisa implemented 100% foolproof, no. Does it provide an adequate solution that is cost justified, absolutely. Lisa by not giving up and waiting, delivered a solution that met the immediate needs of the organization by providing a more secure environment and increased accountability. The combination of effective policy and a cost effective solution helps Lisa and Harris County Hospital provide the level of privacy that patients expect and deserve. At the same time the processes developed can be quickly modified to address the ERP integration once funding is approved.

Things we can do that don't always require technology:

During IAITAM certification classes we discuss that 80% of what we do in ITAM is process driven. Tools can help automate our processes significantly and will eventually need to be looked at. Unfortunately gathering requirements and gaining approval for a tool can take time. There are several things we can do that don't always require technology. As you can see from the story above, Lisa followed this approach by first evaluating her existing policies while developing a cost effective solution. Below are a few of the initiatives we discuss that don't always require tools:

Conduct a Policy Review: Review current policies and determine if they support long range asset management initiatives.

Conduct a Process Review: Review current processes to verify they have been effectively implemented. Per certification class, when evaluating the process, you should attempt to answer each of the following questions:

- Does the process have an owner?
- Is the process documented and defined clearly?
- Is it understood? (Ask people)
- Are the appropriate roles defined within the process?
- Is the process repeatable?
- Is it measured?
- Is it optimized?

Establish a “Zero Tolerance” policy for non-compliance: This policy sends a powerful message to employees, vendors and customers that our organization places a high priority on being compliant in all matters.

Define the Scope of Managed Assets: Identify the hardware and software assets that need to be managed based on need/cost to track. Remember, not all assets need to be tracked at the same level. You can refer back to your certification manuals to review criteria for tracking assets.

Conduct a Contract Review: Identify and review all strategic contracts to validate and document critical terms and conditions. Critical terms and conditions can include compliance information, critical dates and rights to audit clauses. You can refer to the contract review worksheet provided in the CITAM certification class for more information.

Based on the information above, it isn't too difficult to come up with initiatives that can move the program in a positive direction while issues such as funding and technology choices are being worked out. As Lisa proved, you can't sit around and wait for the world to change. You need to always be moving forward on an initiative. The progress made by Lisa's team has gained credibility for the ITAM program. Lisa understands that ITAM is a program not a project. She won't be done with ITAM. She is busy planning how to overcome her next challenge. Based on Lisa's attitude, I'm betting on Lisa to be equally as successful.

More on Lisa Wilson and Harris County Hospital District:

Lisa will be a featured speaker at the IAITAM Conference November 7-9 in Palm Springs, CA. Her topic is titled, “Asset Tracking and Privacy” and is scheduled for 1:30 – 2:30 on November 9th. Please come by and listen to Lisa, learn from her experience and talk with her about similar challenges in your organization.

Conclusion:

When addressing tough challenges within your organization, you should reach out to other organizations, other ITAM colleagues and IAITAM. Please remember that IAITAM exists to assist. IAITAM offers a wide range of information, programs, certifications, workshops, events and advisory services designed to help you overcome the tough challenges you face every day. If you have an ITAM program challenge and need help, you can always ask “What Would Wally Do?”



About Wally:

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