

ITAM Assessments

Jumpstarting Your ITAM Initiative

Maybe you're new to the ITAM (Information Technology Asset Management) discipline, or have had a few false starts getting a robust, global solution off the ground. You already know that a successful ITAM program requires the following:

1. Senior management support
2. Dedicated financial and people resources
3. Thorough examination of the current technology environment

Also, you have contacted one of several ITAM industry analysts who will tell you that IT Asset Management is 80% Process and 20% Tool. Finally, you have looked at the array of tools already in-house as well as sat through several of the major ITAM tool vendor demonstrations. However, in the end everyone associated with the project is unsure on the next steps.

You may be a prime candidate to engage a 3rd Party to assist you with an ITAM Assessment. Some vendors may call it a 'blueprint' or 'road map' but it should accomplish the following basic concepts:

1. Document the current environment
2. Understand the objectives of all parties involved
3. Provide a strategy to move from point 1 to 2

Having just completed an ITAM Assessment, I wanted to share those aspects, which I believe made it a successful engagement.

It all begins with understanding the vendors who are currently delivering this type of service. A few searches via the Internet will provide a laundry list of potential, viable resources. It is a good idea to see if your organization has completed any other IT projects to shorten that list. Also, utilize the various industry analysts that your company may have memberships with as a reference point.

Selecting a 3rd Party & Expectations

Ultimately, you have to make the decision on which consulting specialists best meet your organization's needs and sell that selection internally. Here are two 'key points' to consider when selecting a service provider:

1. Applied knowledge and experience
2. Tool agnostic

First of all, the organization chosen must be staffed with individuals who have 'hands on' experience in the discipline of ITAM. This should include individuals who are both knowledgeable about the business and technical issues facing such an initiative. Again, this refers back to the 80/20 rule referenced above. References should be required and time should be devoted to speaking with each one. Take the opportunity to benefit from someone who has lived the experience. Understand the scope of their engagement and what went right. Make sure this includes anything that they would do differently given a second chance.

Potential consultants should have experience with multiple tool solutions available today. Most importantly, a service provider should not be aligned with any one tool. Many times this is where a tool vendor will fall short. The risk is that the results of the assessment will be bias towards their particular tool offerings. Also, since many organizations already have numerous ITAM related tools implemented, leveraging these investments is crucial. However, if you are one of the few organizations that have an entire suite from a particular vendor this will not apply as long as their professional service team is ITAM savvy. At that point it becomes important to leverage the process and tools to meet peak performance in an already established environment.

Now that a 3rd party has been chosen what should be expected of the engagement. It is important that the deliverable be spelled out within the statement of work (SOW). This should include the method by which the service provider will perform. For example, will they use questionnaires, interviews, and/or conference calls etc? From personal

experience, guided face-to-face interviews allow consultants to gather more detail as they lead the conversation towards specific topics. It is also conducive to attention to detail. Many times if a questionnaire or survey type approach is used, the participants tend to be too concise and will rush to complete. This will not provide the detail necessary for the service provider to quickly discover the current environment. It can lead to an adversarial relationship later on as follow-up interviews are seen as redundant. More importantly, it can lengthen the time of the project. Depending on the scope of the project, 4 to 6 weeks should suffice.

The interviewees should be identified within the SOW. If not by name, at least by job function. This should also identify the general topics to be discussed, time estimate and the location of the interviews. This should provide enough high-level information to set the participants at ease in terms of expectations. It is essential that these resources understand that they don't have to have all the answers. Some information may need to be gathered after the fact as a 'takeaway' from the discussion. This may lead to additional interviews with people not identified in the initial go around. Although it is important to identify the interviewees as mentioned above, the engagement must be able to adapt based on the feed back gathered.

The deliverable should always be seen as a work in progress. There should be no surprises when the 'final' documentation is delivered for approval. In general, the current environment should be summarized and a list of inhibitors should be developed. That is, those issues that are impacting the organization and can be remedied by an ITAM program. Similarly, this will lead into a risk assessment. This should provide a rated, quantitative analysis of current risks as well as the impact of status quo. Personally, it helps to understand the maturity level of the organization within your particular industry.

The recommendations provided will ultimately address those issues and risks discovered during the assessment process. This can be illustrated in a phased approach diagram that should document a general timeline, key process and project objectives, and next steps. A service provider who is multi-product savvy should also provide an analysis of the tools currently utilized as well as those 'Best of Breed' tools available in the market. How would they rate those products? How flexible are those products in terms of integration and implementation? What internal products should stay? Finally, any good assessment should assist in providing statistics and recommendations on staffing. Roles and responsibilities need to be defined. This is extremely important, since most ITAM projects will cross departments.

What's next?

In the end an assessment is only as good as what you do next. Understanding and implementing the recommendations requires action. Lifecycle Asset Management as a discipline crosses many functions. These functions include numerous processes that need to be examined and re-engineered to take advantage of the deliverable. It is important to apply all of the recommendations to the many parts of an asset's lifecycle (e.g. request, procure, receive, IMAC and retirement). At this point it will be easier to see the 'bigger picture' and your pathway through it with the results of the successful assessment!

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Choosing a 3rd Party Service Provider Check List

	Industry recognition
	Previous relationship
	Day-to-day ITAM experience
	Technology independence
	Multiple tool implementations
	Proven methodology via reference check