

SAM on a Shoestring

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Software Asset Management is expected to accomplish a number of goals including compliance, reduction of risk and reduced costs. The impact of changing business conditions may not be immediately obvious, but SAM programs are likely to experience difficulties achieving these goals as planned. With shrinking or flat budgets, cost considerations become paramount, with the following changes developing from that savings perspective:

- Software Asset Managers must increase savings while still meeting service level commitments
- Process and automation improvements are slowed or must be re-justified
- Competition for budget is significantly increased
- Internal cooperation to existing software policies and processes lessens
- Demand for asset management increases due to changes in staffing, management structures and priorities

It is obvious from this list that the Software Asset Manager has to reassess how software is managed and potentially drop some projects while prioritizing others. The new demands may have to be met with a flawed asset management program already functioning without the addition of some essential automation or process. Since flaws are common, software asset management programs typically include a continuous

improvement plan broadening the accuracy, depth and breadth of software management. However, the specific items on the plan may not be as relevant in this new economic climate. Planned implementation may not even be practical to achieve. This realization sends us back to the planning drawing board.

An assessment of existing resources including people, process and automation is required to find the best way to function, both in the short term and building towards recovery for the longer term. The best scenario is to identify tasks that help meet immediate goals and also maintain or improve the management of software. While every situation will be different, here are some ideas to consider.

Uncovering the Inventory

The foundation for Software Asset Management is information about the inventory. Automation that provides a software inventory is invaluable, providing the best way to proactively prepare for software audits and to manage compliance. A shortcut around a delayed discovery product implementation is to take a look at the products already in the environment that provide some type of discovered data about assets. It is common to have three to four products in a large enterprise that provide this type of data about some segment of the environment. Rather than buying a new discovery tool and taking on the roll-out of a new agent, investigate the existing tools for breadth of coverage and the value of the data.

Consider centralizing the data by using the software dictionary of one of the discovery tools to normalize the software data to titles that are readable and relate to the contracted titles and versions. Software dictionaries that are frequently updated and allow updates from your organization are the best choices. It is easiest to use the data if the reporting capabilities for the software dictionary product are strong, but even excellent export capabilities provides good access to the data.

If none of the existing products has the capability to merge the data and normalize it, look for one that does and sell that project internally as the one that deserves to be on the top of the list.

Develop a New Licensing Strategy

Business is conducted in an organization based on needs, management predilections and SAM capabilities. Consider realigning the software licensing strategy to how software is actually used or purchased in your environment. Why struggle with non-compliance because the CIO insists on a “true up” approach to new purchases when there is no permission for this approach in the contract with that vendor? What if the organization does not have good information about CALs since virtualization has restructured how applications are used and servers allocated?

Upon examination of options with a tactical acceptance of the situation, there may be technology and licensing options that can narrow the compliance risk gap. While the Software Asset Manager is unlikely to be able to drive how applications are used and accessed, sitting down with the correct managers to discuss the cost implications and developing a plan together may be surprisingly effective. The licensing choice made may not be the least expensive option but the choice gathers value from meeting the internal needs, reducing risk, better vendor negotiations and the ability to focus limited resources on other problem areas.

With fluctuations in business, plans in IT as well as other departments are likely to change frequently impacting software requirements. Rather than meeting with department managers or IT managers ad hoc or yearly, the proactive Software Asset Manager schedules bimonthly meetings to review strategic direction and plans. Awareness of anticipated project delays, staffing changes or technology changes allows better allocation of resources and prevents lost budget preparing for an event that is not going to happen. Obviously, the success of these meetings will depend on a level of trust and empowerment for the Software Asset Manager.

Make the Most of Audits

Software audits from the vendors or their designated third party agencies are expected to rise since these companies have the same budget issues and will be looking for found dollars. What if the organization is unprepared for the audit

and the subsequent results aren't that great? Once the audit has begun, it is impossible to change the past. The next best step would be to make the most out of the experience. In fire drill mode, license distribution, proofs of purchase and contractual documents have been gathered for reconciliation. Instead of putting the audit behind you and moving on, consider using the results such as:

- If more copies were found than you think appropriate, look into the de-install process to insure that reported copies of the product aren't simply left-over DLLs.
- Preserve the proofs of purchase, contracts and documentation from the audit and use them to build processes to continue the collection
- Change the licensing strategy for these products based on what was learned about usage and opportunities

- Change the distribution of software internally
- Build a license bank for those licenses that had to be purchased and begin to collect information at hardware disposal or employee termination
- Use results to prepare a negotiation position for this vendor

Tip of the Iceberg

Making wise choices for resource use, purchases and allocations underlies the activities of the proactive Software Asset Manager. In times of stress, it is easy to slip back to reacting, allowing chaos to take over the software portfolio. Although you may not be able to maintain the SAM program at its current level, it is possible to do your job and make some advances. Maintenance of data as accurate as possible is valuable for planning, during mergers and reporting to external governance entities. Savings and prevention of compliance issues creates more budget dollars to be allocated elsewhere.

The ideas presented here are certainly not a complete list. Opportunistic ingenuity can yield more ways to meet the initial goals of compliance, reduction of risk and reduced costs. A few years ago, I worked with a retail company that was not able to make it through the 1990s. When the business was being dismantled, the IT Asset Manager was one of the last to be let go as her business practices for managing the lifecycle of hardware and software became invaluable during the final wrap-up months. Although I hope this scenario does not happen, it does serve as a stark example of how valuable you can become to your organization.

