Software Asset Management (SAM) Core: 70-713

Exam Preparation Module 1

SAM SOFTWARE ASSET MANAGEMENT

SAM OPTIMIZATION MODEL (SOM)

- A framework to evaluate SAM processes, policies, and tools
- Used to benchmark an organization's current state of SAM maturity
- Based on 10 key SAM competencies
- Four stages of Basic, Standardized, Rationalized and Dynamic
- A stepping stone to accomplish a complete end-to-end SAM Program

Download the full SOM guide here:
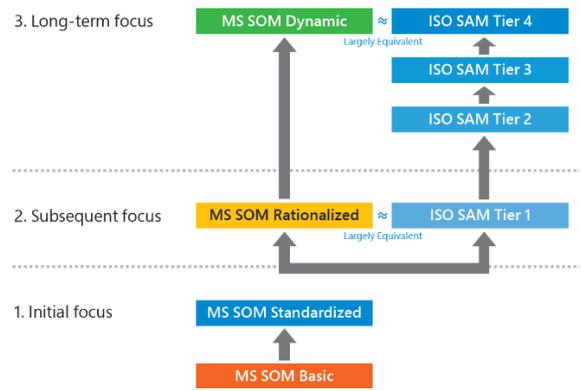http://download.microsoft.com/documents/en-us/sam/SAM_Optimization_Model_Brochure.pdf

LEVELS OF SAM OPTIMIZATION

Basic SAM	Standardized SAM	Rationalized SAM	Dynamic SAM
Ad Hoc	Tracking Assets	Active Management	Optimized
Little control over which IT assets are being used and where. Lacks policies, procedures, resources, and tools.	SAM processes exist as well as tool/data repository. Information may not be complete or accurate and typically not used for decision making.	Vision, policies, procedures, and tools are used to manage the software asset lifecycle. Reliable information used to manage the assets to business targets.	Near real-time alignment with changing business needs. Business competitive advantage through SAM.

INITIAL, SUBSEQUENT AND LONG-TERM FOCUS

SOM is based on the ISO 19770-1 SAM Processes and this diagram shows the correlation with the Tiers in the ISO 19770 model with Rationalized being similar to the ISO SAM Tier 1 and the Dynamic level generally corresponding to the ISO SAM Tiers 2, 3 and 4.

An organization should aim to move from one level to the next. The first two levels, Basic and Standardized, will be the initial focus points for an organization, and then the organization will progress to Rationalized, with the ultimate goal of arriving at a Dynamic state.

3. Long-term focus — MS SOM Dynamic ≈ ISO SAM Tier 4 (Largely Equivalent)
ISO SAM Tier 3
ISO SAM Tier 2

2. Subsequent focus — MS SOM Rationalized ≈ ISO SAM Tier 1 (Largely Equivalent)

1. Initial focus — MS SOM Standardized
MS SOM Basic

ASSESSING SAM MATURITY LEVEL

There are 10 key competencies in SOM with a question associated with each. This question is applied to the business and the answer will dictate the level they are at for that particular competency.

Example:

Competency: SAM throughout the organization

Question: "How has software asset management (with documented procedures, roles, responsibilities and executive sponsorship) been implemented in each infrastructure group?"

Example Answer: "We have someone with SAM responsibility identified for each functional area."

Key Competency	Basic	Standardized	Rationalized	Dynamic
SAM throughout the organization	Project Manager assigned, but SAM roles and responsibilities not defined.	Direct SAM responsibility is identified throughout the organization.	Each functional group actively manages SAM.	SAM responsibilities defined in job descriptions across organization.

This answer is then compared with the descriptions in the appropriate row of the SOM table (see above), and since this customer is not actively managing SAM in each group yet, but they do have the people identified, we deduce that this customer would be classified as Standardized for this competency.

RESPONSIBILITIES AND PHASES

A SAM partner helps a customer to assess their SAM maturity and then guides them in establishing people, processes and technology to move from one optimization level to another in order to increase their SAM maturity.

Phase 1: Preparation and analysis of the SAM Assessment questionnaire and licensing records. The partner communicates the process, roles and responsibilities and provides the required materials. The customer completes the SAM Assessment questionnaire across IT, purchasing, desktop management and operations teams, and assembles records of deployed and licensed software inventory. The partner completes phase 1 by analyzing the questionnaire and the software inventory

Phase 2: The partner prepares customized reports that align with the customer's priorities

Phase 3: A SAM Assessment and Executive Summary is presented highlighting the organization's SAM maturity levels and recommended next steps

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