SAM Agile

Software Asset Management For The Education Sector

LICENSE DASHBOARD™
Designed and built by SAM professionals for SAM professionals

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The only flexible Software Asset Management managed service to meet the changeable requirements of your Education institution

Achieving Greater Value and Return on Investment with Agile Software Asset Management from License Dashboard

In a world where education institutions are now adopting agile methodologies for controlling projects and software development, License Dashboard has introduced a SAM Managed service that fully complies with these new techniques, ensuring that your institution is capable of responding effectively to the unpredictability of the software industry.

For many education institutions, a SAM managed service provides a series of detailed reports on the effective licensing position (ELP) of all of the major software vendors deployed across their IT estate. The data contained within an ELP is vast and will provide insight into cost optimization opportunities and highlight areas of compliance risk where action is required.

However, even for an institution with a dedicated SAM team, interpreting the ELPs of dozens of vendors and then prioritizing areas for optimization or risk mitigation is a huge challenge. A vast amount of time can be spent on understanding the current status of an education institution's IT estate, rather than taking action which will result in cost reduction. Once an area has been prioritized for action, the process will be dependant on managers outside of the SAM team to make the required changes.

This can result in a SAM program that is generating large amounts of data and consuming hundreds of hours per month, but resulting in a low return on investment as the service consumes itself.

Applying an Agile Methodology to Your SAM Service

License Dashboard has worked with its customers to develop a revolutionary approach to Software Asset Management. SAM Agile applies the well-defined and widely adopted agile project management methodology to software asset management.

An Agile Managed Service removes the practice of creating vendor-wide ELPs on a regular basis and instead replaces them with a series of 'bite-sized' services, each designed to be completed within one month and each with a defined value and documented outcomes. Each month is defined as a **'sprint'** and each bite-sized service is termed as a **'story.'** Each story has a value associated to it in terms of points which determines the institution's spend on the SAM service each month.

This approach allows the education institution and License Dashboard to identify the work required on a sprint by sprint basis, based on the priority of each story from a cost optimization or risk mitigation viewpoint. The result is a series of actionable outcomes on a monthly basis, all of which have a business value pin-pointed against them. This allows the service owner to accurately track the cost optimization or risk mitigation opportunities identified against every piece of work completed.

What is Agile?

Agile project management is an iterative approach to planning and executing project processes.

An agile project is completed in small sections, with flexibility and collaboration key to the effectiveness of the methodology.

Agile Benefits

Deliver business value where you need it most

Focus on targeted SAM priorities in a monthly sprint cycle

Only work on activities that deliver quantifiable value to your business

Eliminate wasted effort by focussing on priority actions

Accurately measure service value

Allows for inhibitors such as data unavailability

Increase and decrease activity to suit the cadence of the business

React to unexpected demands

Pre-plan activities to be delivered as and when they are required

Engage internal stakeholders by giving them access to SAM services

Service based on leading SAM technology

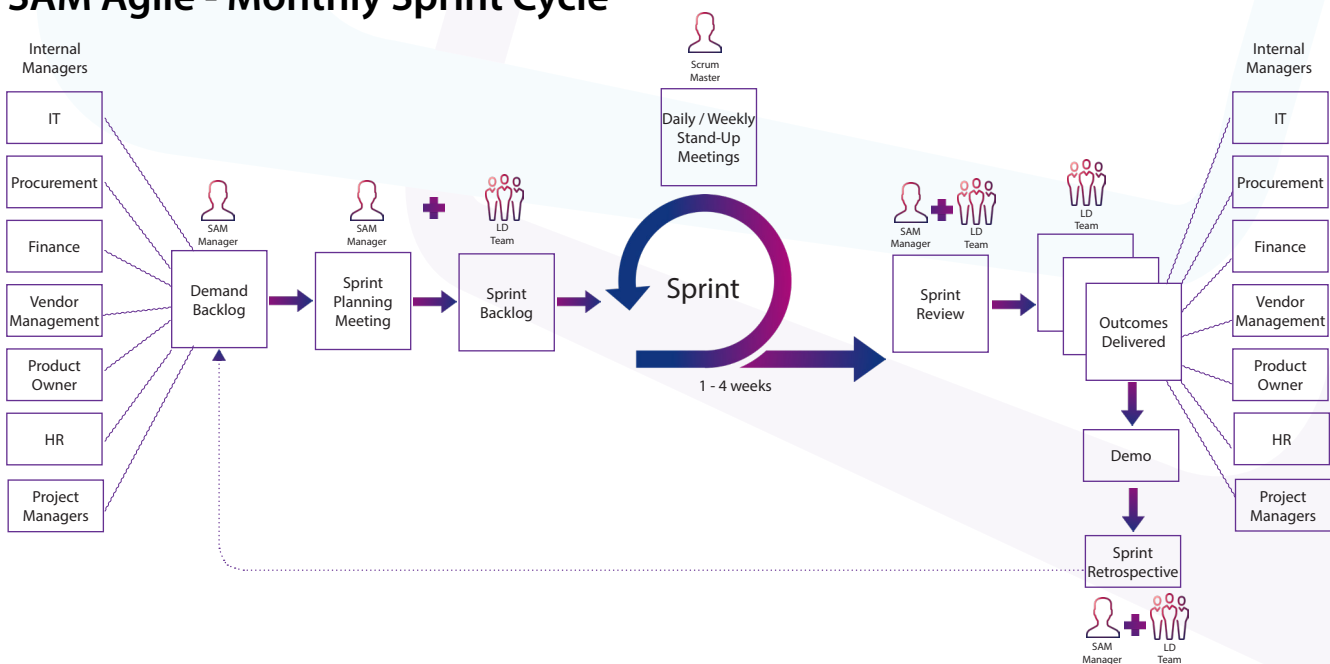# Planning Your Agile Software Asset Management Program

SAM Agile is based on a core service which includes cleansing data, managing proof of entitlement and license reconciliation to ensure that all required data is up-to-date and available to power the Managed Service. Building upon this foundation, License Dashboard then work with the insitution to produce a list of priorities that will form the Demand Backlog of the Agile program. The backlog contains a list of activities that have been identified that will provide cost optimization or risk mitigation opportunities.

Sprint Planning and Generating a Demand Backlog

License Dashboard work closely with the institution to generate this Demand Backlog by providing a risk assessment on each major vendor. This identifies considerations such as how the vendor may have changed in the market, whether the vendor is introducing new license models, whether the institution has license renewal anniversaries coming up and where the institution is within various product lifecycles.

These aspects determine which vendors or products to work on during the sprint, with a number of micro-services available depending upon the requirements of the institution. The Backlog items are prioritized based on value and added to the next sprint in the form of a story. The sprint is then conducted over the period of one month, with the subsequent sprint review providing a 'demo' of each story which highlights the findings, identifies required action, and applies a monetary value to cost optimization or risk mitigation.

In addition to the Backlog items generated by the institution SAM team, other internal managers within the institution can now request services to assist in their own job roles, as and when they need them. This is a reverse of the traditional approach to SAM in many institutions.

Rather than the SAM team approaching a department with recommended changes or demands for data, job roles such as Infrastructure Managers or Product Owners can now order an in-depth review of a product should they require the information for their own projects or activities. The current status of an institution's IT estate is made available to managers via License Dashboard's reporting application - **License Dashboard Portal.**

Flexibility and Agility in Your SAM Service

SAM Agile allows an institution to plan their SAM program based upon the varying requirements of their IT needs. In simple terms, if an institution undergoes a summer shutdown throughout August, there is no need for the SAM service to continue producing work, and therefore consume points, over and above the core service. SAM Agile can be tailored to match the cadence of any institution.

The flexibility of SAM Agile also makes it easy to switch focus to new priorities that may arise at short notice. For example, an institution may receive notice of an audit from a major vendor. Due to the agile nature of the sprint methodology, an Enhanced ELP or Consultancy for this vendor can be added to the current sprint in real-time, with an outcome delivered within the month.

Achieving the Buy-In of Internal Managers

SAM Agile - Monthly Sprint Cycle

Planning for the next sprint occurs at the mid-way point of the current sprint, meaning there is no break in service and each subsequent sprint begins the next day after the current sprint review. All stories within the sprint are reviewed, the value is established and actions planned. Any further work that is required is re-entered into the demand backlog to be prioritized for future sprints. During the following sprint, License Dashboard and the institution also evaluate whether the recommended actions from the previous sprint have been acted upon, ensuring no optimization or risk mitigation opportunities are wasted.

SAM Agile Services - Associating Points to Every Sprint

SAM Agile revolutionizes the way in which a Software Asset Management service is traditionally consumed. Rather than an 'all-you-can-eat' approach with one fixed annual cost and a vague overall value for the return on investment, SAM Agile is flexible and only charges an institution for the activities undertaken within a sprint on a monthly basis on top of the foundational core service.

The monthly nature of each sprint fits with the financial cycle of most institutions. Each sprint planning session will identify which stories are to be included in the following month. It is known in advance the cost in terms of points for each story, so an institution has control on a monthly basis of how many points are consumed. As each story has a measured outcome in terms of cost optimization or risk mitigation, it is simple to calculate a return on investment for every point spent.

How to Calculate the Points You Require

By allocating value points to each activity, and operating on a

tiered software publisher basis, institutions can work with License Dashboard to quickly scope a full year of SAM activity, with specific effort focussed on targeted activities throughout the year.

This planning session will indicate the amount of points your institution is likely to consume in a year, enabling you to purchase the points at the beginning of the year, consuming them throughout each sprint.
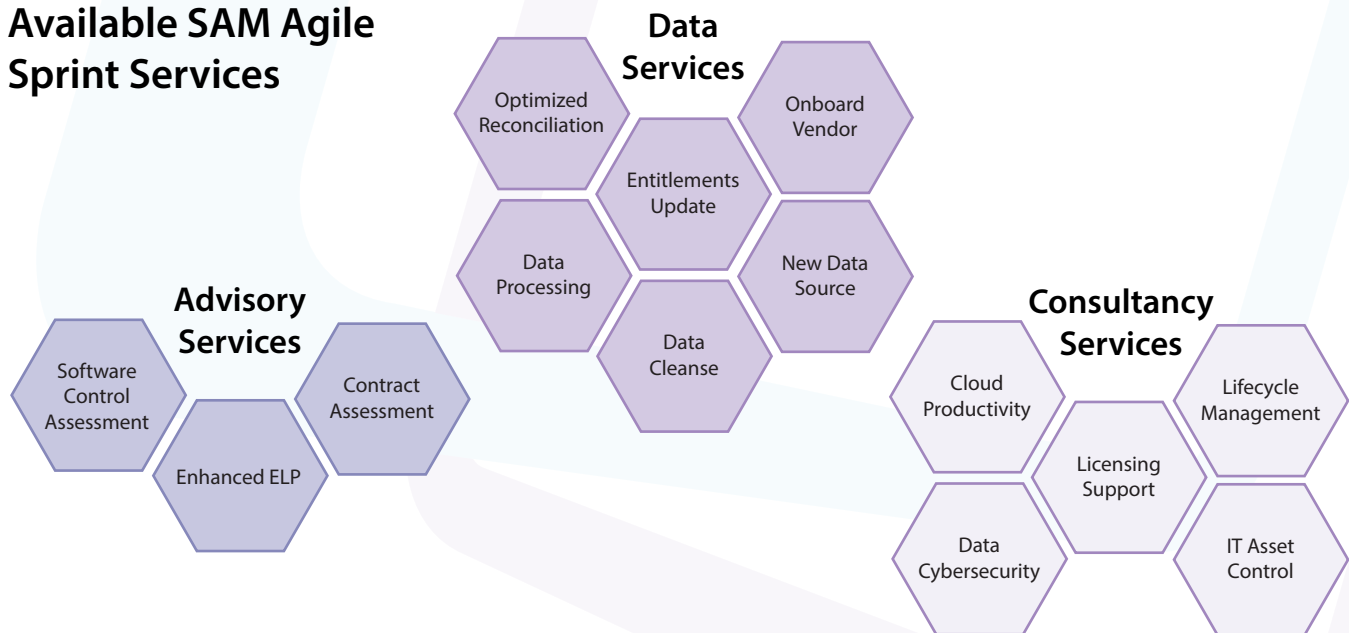
Points are allocated to an activity based on the time License Dashboard consultants will be required to spend on each task. As some larger vendors will require much more time to complete activities than others, License Dashboard will categorize your software estate into tier 1 and tier 2 vendors.

Points allocated for Tier 2 software publishers - Autodesk, Quest, Veritas etc - have less value than Tier 1 vendors and so can be included more frequently at less investment.

Example Tier 1 Vendors

Microsoft   IBM   ORACLE

Available SAM Agile Sprint Services

Data Services

Optimized Reconciliation

Onboard Vendor

Entitlements Update

Data Processing

New Data Source

Data Cleanse

Advisory Services

Software Control Assessment

Contract Assessment

Enhanced ELP

Consultancy Services

Cloud Productivity

Lifecycle Management

Licensing Support

Data Cybersecurity

IT Asset Control

Service Definitions & Business Value - Data Services

Data Processing

Provides a single view of merged data feeds and applied attributes allows the institution total visibility of complete hardware and software details.

Data Cleanse

The objective of the Data Cleanse Service is to augment automatic signature matching with a manual approach to permanently and correctly match these unique signature

combinations to the License Dashboard Dictionary so that they are displayed in a normalized and consistent manner and key attributes about the product can be inherited.

Entitlements Update

The purpose of the Entitlements Update Service is to establish the institution's deployment rights based upon available contract details and procurement data provided. These deployment rights are organic and vary from day to day.

Service Definitions & Business Value - Data Services Continued

New Data Source

The purpose of the New Data Source Service is to ensure data from new or unsupported sources can be used, ensuring continuity and evolution of the service where data sources change.

Onboard Vendor

The Onboard Vendor Service is a vendor specific report written for the institution SAM Manager and Product Owner typically in advance of a true up or renewal for vendors which are new or dormant.

Optimized Reconciliation

The Optimized Reconciliation Service delivers a non-compliance position based upon existing entitlement and current deployments. The optimization ensures that current entitlements are utilized in the best manner to offer the best possible cost avoidance or saving.

Service Definitions & Business Value - Advisory Services

Enhanced ELP

The Enhanced ELP is a vendor or product specific report written for the institution SAM Manager and Product Owner to identify and reduce risk.

The commentary and observations are intended to enhance the institution's ability to more effectively manage their licence footprint, providing fully documented analysis of license shortfalls or surplus.

Software Control Assessment

The Software Control Assessment, reviews and improves internal processes, routines and data used in the management of software installations and licensing.

The institution is given assurances as to their audit readiness in respect of a vendor or product set and also recommendations for areas requiring improvement.

Contract Assessment

Contract Assessment is an advanced service that combines Optimized Reconciliation output and known future changes to add context to current and previous contract reviews.

Service Definitions & Business Value - Consultancy Services

IT Asset Control

The IT Asset Control module aims to help institutions to gain better control over the applications and hardware entering their IT environment.

By integrating the SAM function with the Change management and Service desk functions it is possible not only to identify and manage the introduction of new applications entering an IT environment, but to streamline the process of introducing these applications and maximize the value extracted from existing software licenses.

Lifecycle Management

The Lifecycle Management module aims to help the institution to identify the key stages in the lifecycle of hardware and software assets. Introducing the controls at key stages that will help to identify, minimize and mitigate the potential risks that can be generated when assets move from one life cycle stage to the next.

Cloud Productivity

The SAM Cloud Productivity engagement provides the institution with an end-to-end analysis of their IT infrastructure, taking into consideration their current deployment, usage, processes and licensing data. The analysis will provide recommendations of the institution's overall Cloud-ready capabilities in relation to their desktop Cloud migration strategy and end-user productivity solutions, providing insights on business processes and technology barriers.

Cybersecurity

The SAM Cybersecurity engagement provides the institution with a foundational analysis of their cybersecurity infrastructure taking into consideration current software deployment, usage, and licensing data.

The analysis will be the basis for the evaluation of the institution's basic cybersecurity state, providing insights into what software is deployed and areas of potential risk. The analysis will also provide guidance on cybersecurity programs and policies to help enable strong software asset management and improved cybersecurity.

Licensing Support

The Licensing Support Service will provide the institution with proactive management and procurement advice for Microsoft licensing. The service is designed to allow the customer to request detailed advice and reports based on modelling and 'what if' scenarios. The Licensing Support Service will allow the institution to forecast cost and change across the estate.

The Technology that Powers SAM Agile - License Manager & LD Portal

License Dashboard has been developing Software Asset Management technology in line with its customers' requirements for over 15 years. As well as providing a suite of SAM tools for end-user organizations, License Dashboard also utilizes its own technology to provide Managed Services to both large and fast-growing organizations around the world.

Each License Dashboard SAM consultant utilizes License Dashboard's flagship application - License Manager - to ensure a customer's IT estate is correctly licensed, fully cost optimized and compliant. By using the technology, License Dashboard consultants are able to complete license management and data processing tasks that would take a manual users weeks or months, in a matter of hours.

All License Dashboard SAM Agile customers also have access to the License Dashboard Portal, an intuitive Business Intelligence application designed to give access to IT Asset Management data in an easy-to-understand format.

LD Portal is web-based and can be issued to any stakeholder either inside or outside of the customer organization's SAM team. LD Portal is fully customizable per user, enabling each department or member of staff to be presented with only the information relevant to them, giving each digital stakeholder real-time software and hardware information.

Importantly, LD Portal is also fully secure and can be locked down so each member of staff is only presented with the information they are authorized to view. License Dashboard can partition IT network information on a Business Unit basis, ensuring relevant, location based information is presented to those who require the data.

License Manager

License Manager is a powerful yet easy-to-use platform which allows organizations to accurately manage software licenses.

The tool provides advanced licensing automation, speeding up day-to-day tasks for software asset managers and ensuring that complicated license metrics are correctly calculated. License Manager ensures an organization is receiving the maximum ROI on their software purchases, often saving businesses up to 30% of their software spend.

License Manager integrates with your existing IT infrastructure, seamlessly working with systems such as SCCM, Lansweeper, LANDesk, vCenter and ILMT. This speeds up implementation and means your organization may have no need to deploy another expensive discovery tool.

Importing inventory and entitlement data into License Manager is also quick and easy. A Microsoft Licensing Statement (MLS) can be automatically imported into the tool in seconds, with no need for work in external spreadsheets.

LD Portal

License Dashboard Portal helps organizations share Software Asset Management and software usage monitoring information with key stakeholders outside of the SAM team.
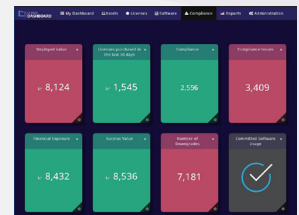
By using intuitive dashboards, charts and reports, License Dashboard Portal presents complex SAM data in an easy-to-understand BI format, suitable for the wider IT team, senior management and the C-Suite.

License Dashboard Portal is web-based and fully customizable, ensuring users only view the information relevant to their role.
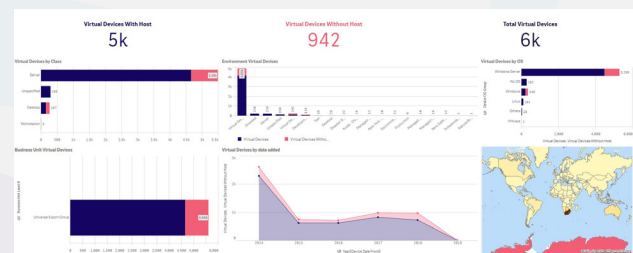
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