About ME

Jary Busato
Head of SAM Department,
NETCOM

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– Profile –

Since 2006, Jary supports enterprises in IT projects, improving the technical performance and reducing operating costs. In the last seven years he focused on SAM area, working on Software License Compliance and Optimization projects especially related to Microsoft, SAP,, Oracle and engineering technologies.

A process-driven approach mixed with a deep technical background that enable filling the gap between people, needs and technology.

– Education –

- Master degree in Computer Science, University of Padua
- MBA Candidate, CUOA Business School
- ITIL Expert – PRINCE2 Practitioner

– Experience –

More than 10 years of experience in enterprises IT projects, focusing on inventory and asset management through different framework and tools.

Project leader for more than 100 baseline and license optimization projects, aiding various organization worldwide with the ever-present challenges of Software Asset Management.

Deep understanding of Vendor license programs, metrics, and terms and conditions.

License Benchmarking: compare alternative licensing models against licensing arrangements proposed by the Vendors and/or their Business Partners.

Reviewing and benchmarking of license contracts, entitlements and based on industry common practices, global best practices and international experience.

Coaching and support in preparing for contract negotiation and alignment with future trends.

Assessment, design and implementation of Software Asset Management process based on ISO/IEC 19770:2012 and outline activities and initiatives necessary to achieve the SAM vision and goals

As head of NETCOM SAM Department, he coordinates the SAM consultancy team.

AGENDA

- About me
- Software Asset Management introduction
- Challenges in SAM
- ISO/IEC 19770
- Q&A

SOFTWARE ASSET MANAGEMENT

#StayInTouch

Software Asset Management

"all of the infrastructure and processes necessary for the effective management, control and protection of the software assets throughout all stages of their lifecycle"

ITIL's Guide to SAM

WHERE SHOULD WE START FROM?

PRACTICE

TECHNOLOGY (PRODUCTS)

PARTNERS

COMPETENCE (PEOPLE)

SAM: ONCE UPON A TIME

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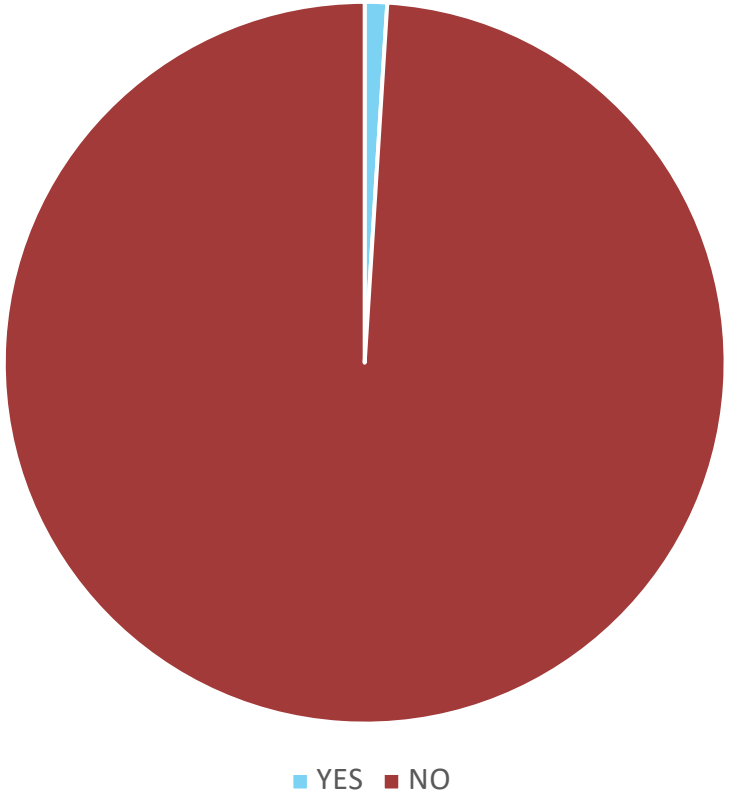
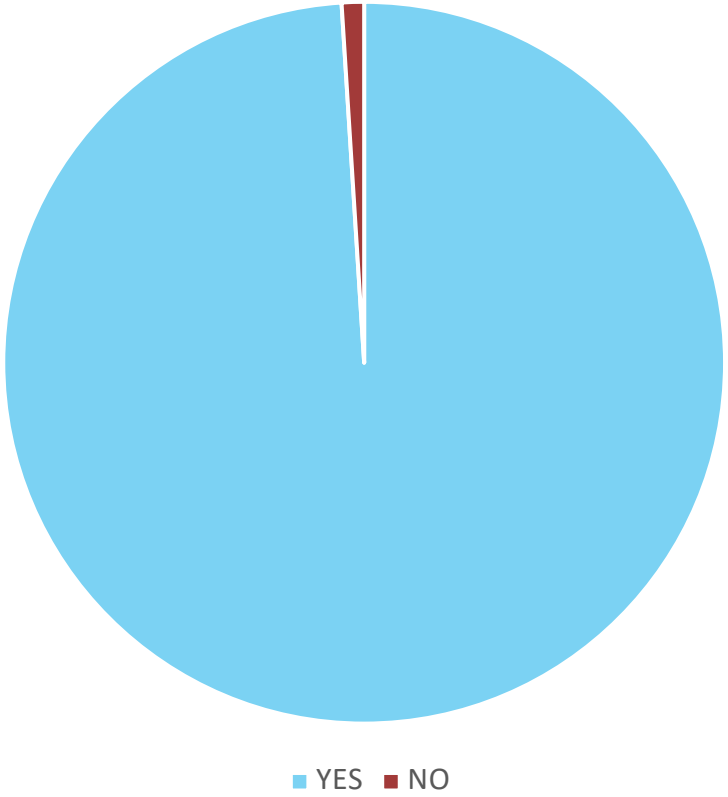
SAM Challenges (1)

Didi you **read**
the terms and conditions?



Did you **agree**
the terms and conditions?



SAM Challenges (2)

SAM Challenges(3)

1. Determine Effective Deployment Position

2. Determine Effective License Position

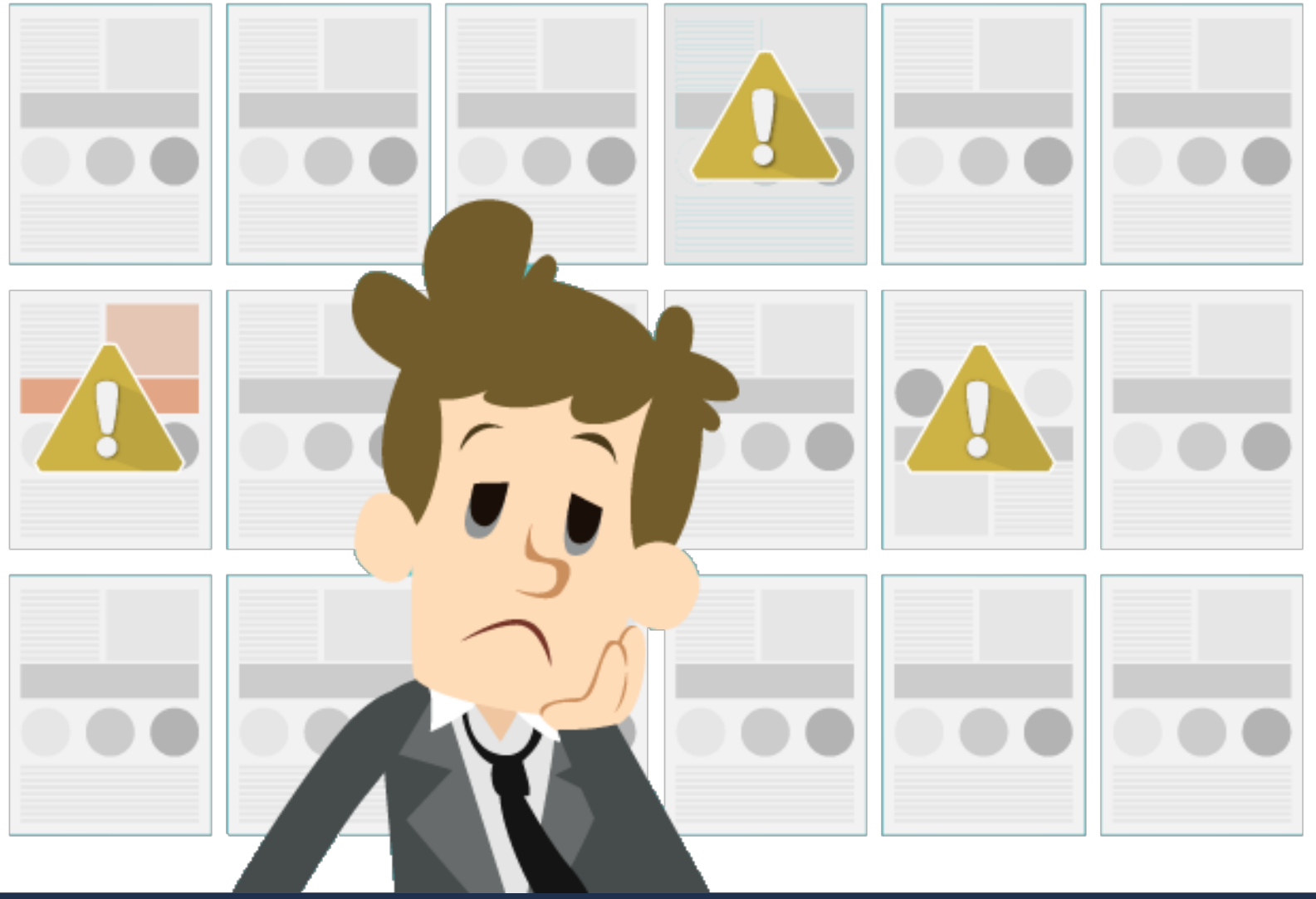
3. Translate licenses in usage rights

RIGHTS OF USE, NOT PROPERTY (1)

RIGHTS OF USE, NOT PROPERTY (2)

Really?

More difficult!



THAT'S WHY I NEED

"all of the infrastructure and processes necessary for the effective management, control and protection of the software assets throughout all stages of their lifecycle"

ITIL's Guide to SAM

WHY?

LEGAL AND REGULATORY RISKS

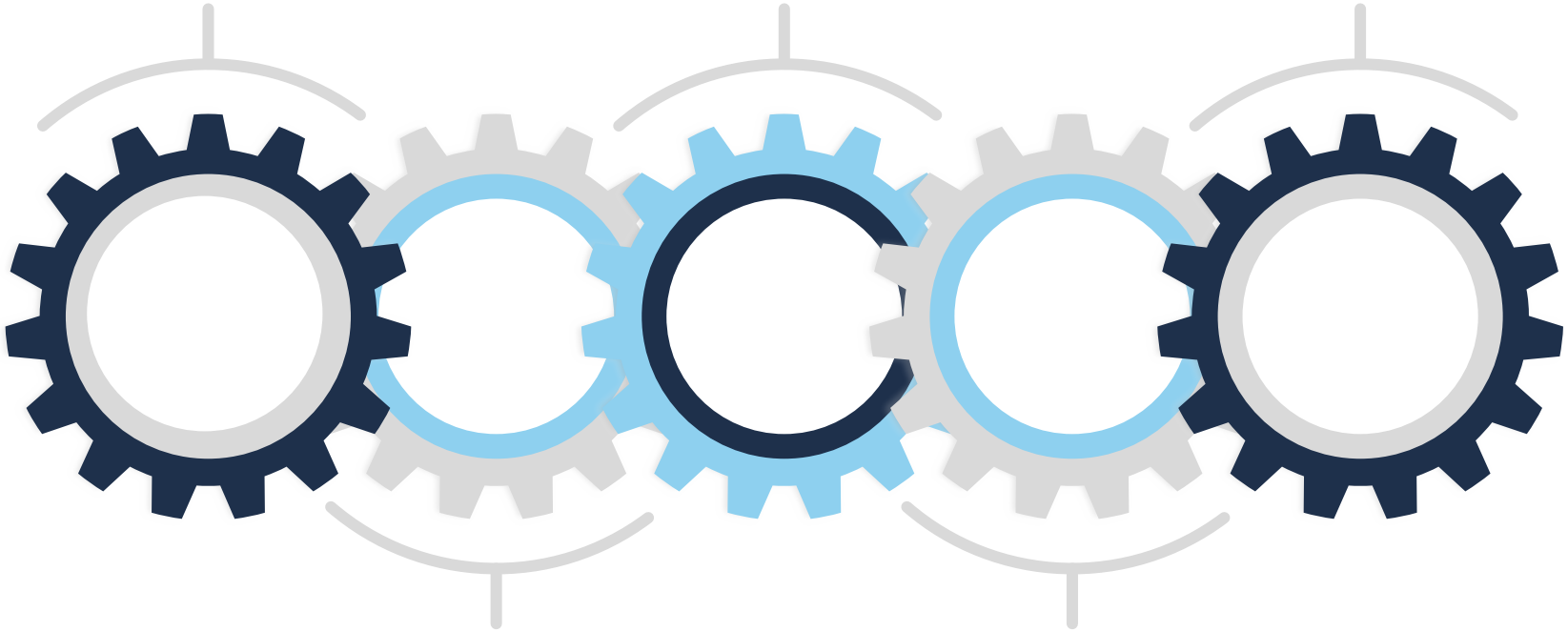
Law protects copyright *Italy: Legge sul Diritto d'Autore 248/2000, D. Lgs. 231/2001 ex legge 99/2009*

COST REDUCTION

A fully operational mature SAM program can allow savings on annual software maintenance of up to 30%

ASSET GOVERNANCE

Evolution of the software asset management and control model along the full life cycle



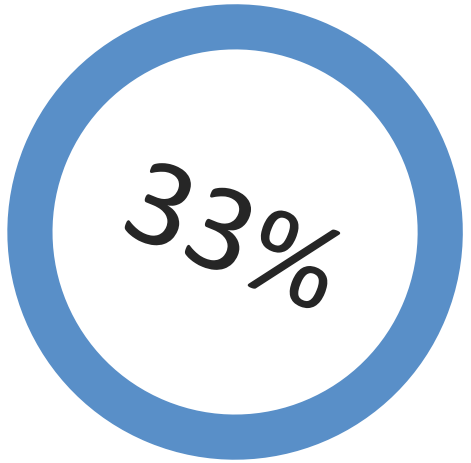
SOFTWARE AUDIT COMPLIANCE

Analysts observe an increasing trend in license audits required by SW vendors

COST CONTROL

Better strategic investment planning, budget definition, TCO measurement, charge-back

SAM NUMBERS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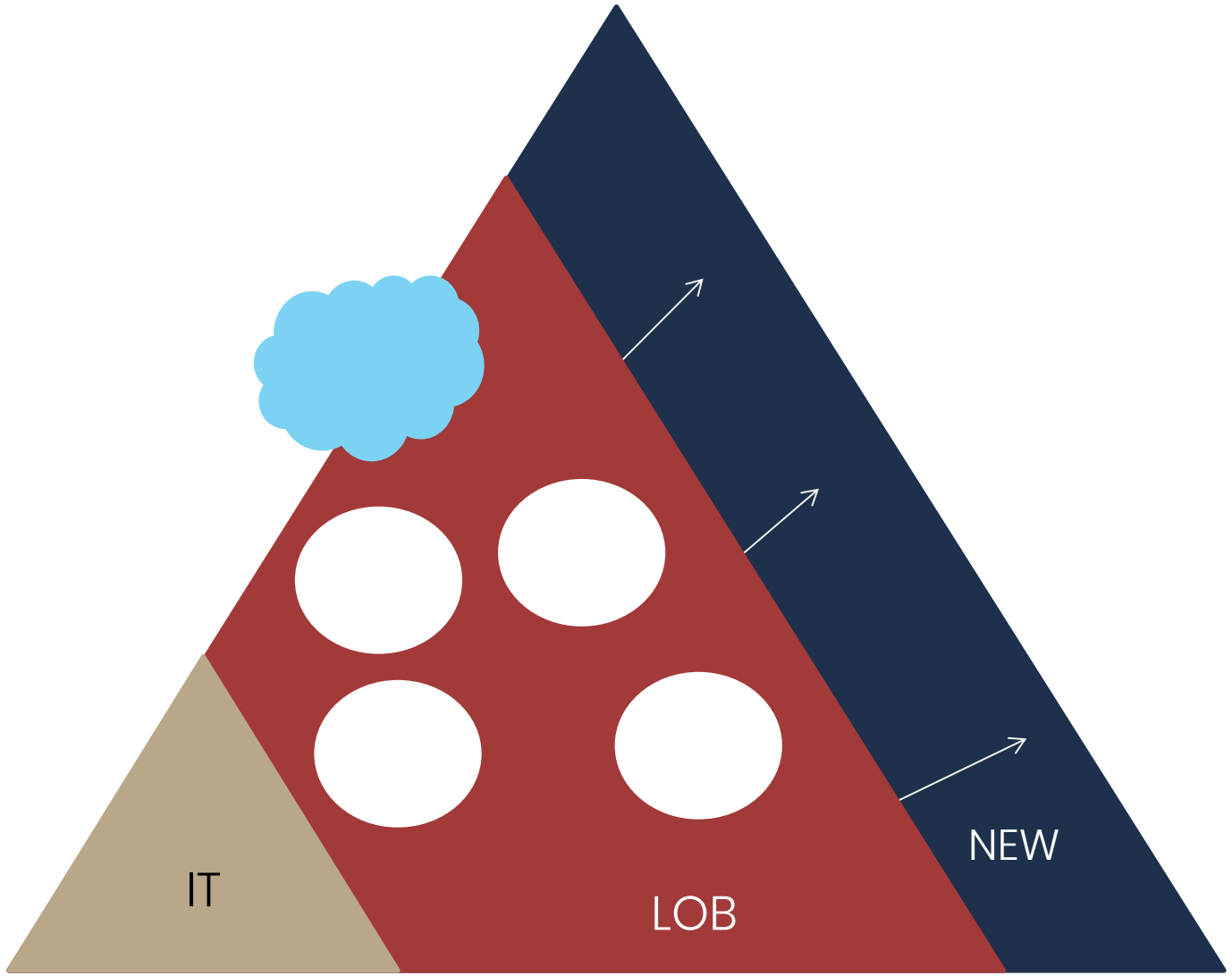
New challanges



ISO/IEC 19770

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ISO/IEC 19770

IT Asset Management standard (mostly focused on software)

- ISO/IEC 19770-1 process framework
- ISO/IEC 19770-2 standard for software identification tags ("SWID").
- ISO/IEC 19770-3 standard for software entitlements, including usage rights, limitations and metrics ("ENT").
- ISO/IEC 19770-4 standard for Resource Utilization Measurement ("RUM")
- ISO/IEC 19770-5 overview and vocabulary.

Scope

- Applicable to all software
  - Executable software (applications, OS)
  - Non-executable software (fonts, audio, video, documents)
- Regardless of the technology
  - Classic, virtualized software
  - On Premise, SaaS
- Regardless of the form
  - Software, rights of use, media

Scope

- Software and *related* IT assets

Types	Scope	Example
Hardware	Applicable: characteristics necessary for use or management	Devices on which it can be installed, Hardware requirements
	Not Applicable: features not necessary for use or management	Devices cost and devices depreciation, maintenance
Other types	Applicable: characteristics necessary for use or management	List of licensed users, IT architecture
	Not Applicable: features not necessary for use or management	Human resources costs

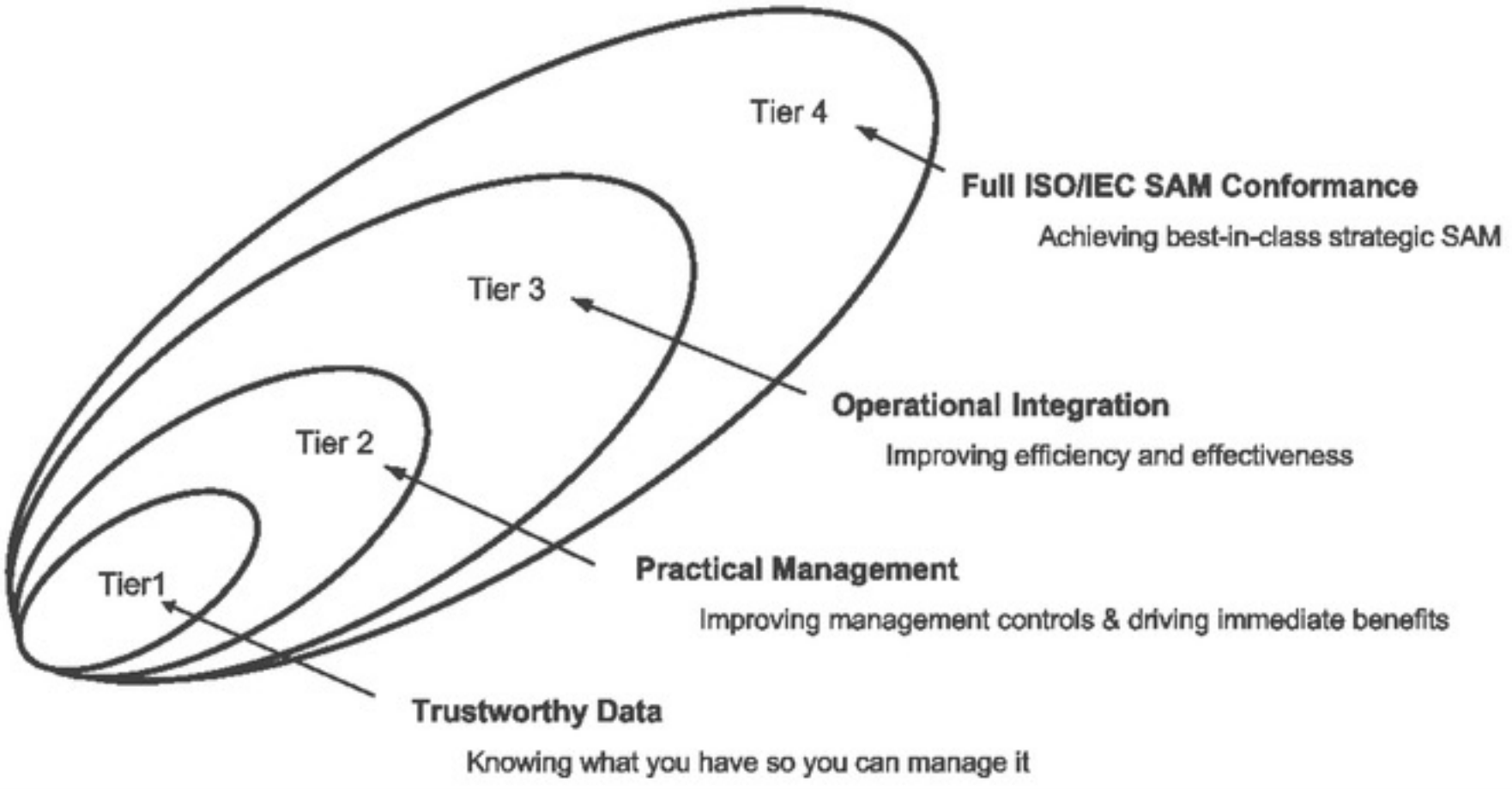
ISO/IEC 19770-1

- First release => 2006
- ISO/IEC 19770-1:2012
  - Market-driven
- Simple, adaptable, fast (in return)
  - Any company, even outsourcers
  - Tiered structure
  - Scope determination
    - Which assets?
    - What business parts?

Tiered structure

- Each tier
  - It represents a small improvement
  - It defines SAM integration within the organization
  - It builds on the benefits and performance of the previous tiers
  - It can be certified
- It's not a Maturity Model
  - Measurement not included
  - ISO 15504 - SPICE

SAM Tiers


Tier 4
Full ISO/IEC SAM Conformance
Achieving best-in-class strategic SAM
Tier 3
Operational Integration
Improving efficiency and effectiveness
Tier 2
Practical Management
Improving management controls & driving immediate benefits
Tier1
Trustworthy Data
Knowing what you have so you can manage it

Framework


Corporate Organization
Organizational Management Processes for SAM
Core SAM Processes
Primary Process Interfaces for SAM
Service Management

Framework

Organizational Management Processes for SAM

Control Environment for SAM

Corporate Governance Process for SAM	Roles and Responsabilities for SAM	Policies, Processes and Procedures for SAM	Competence in SAM

Planning and Implementation Processes for SAM

Planning for SAM	Implementation of SAM	Monitoring and Review of SAM	Continual Improvement of SAM

Core SAM Processes

Inventory Processes for SAM

Software Asset Identification	Software Asset Inventory Management	Software Asset Control	

Verification and Compliance for SAM

Software Asset Record Verification	Software License Compliance	Software Asset Security Compliance	Conformance Verification for SAM

Operation Management Processes and Interfaces for SAM

Relationship and Contract Man. for SAM	Financial Management for SAM	Service Level Management for SAM	Security Management for SAM

Primary Process Interfaces for SAM

Lifecycle Processes Interfaces for SAM

Change Management Process	Software Development Process	Software Deployment Process	Problem Management Process
Acquisition Process	Software Release Management Process	Incident Management Process	Retirement Process

Control Environment

The *Control environment for SAM* establishes and maintains the management system within which the other SAM processes are implemented.

Supervision

FRAMEWORK

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Planning and Implementation processes

The *Planning and implementation processes for SAM* ensure the effective and efficient accomplishment of SAM management objectives.

Quality (PDCA)

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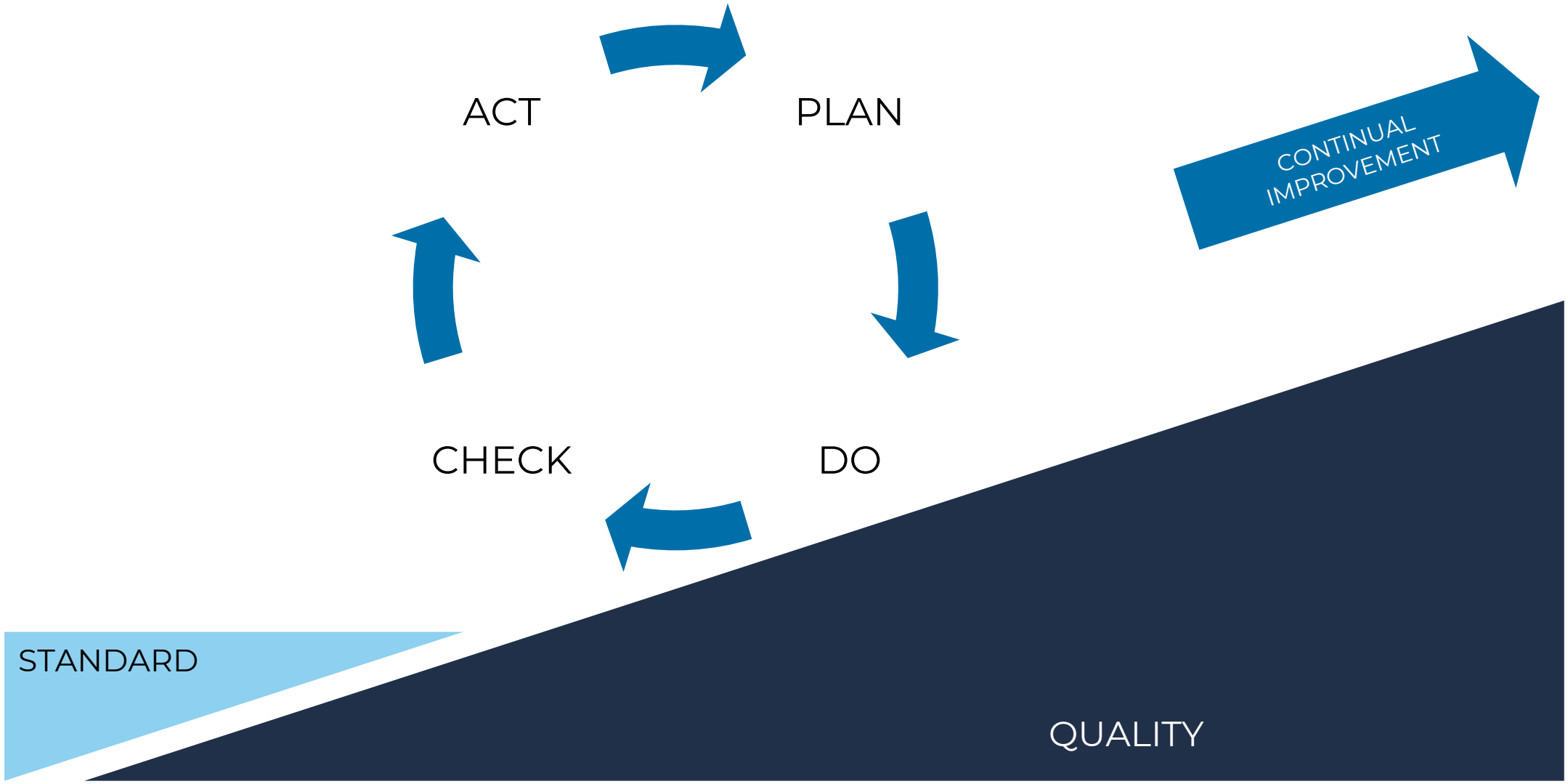
DEMING CYCLE



Inventory Processes

Inventory processes for SAM create and maintain all stores and records for software and related assets, and provide the data management functionality which ensures the integrity of control of software and related assets in the other SAM processes

Input

FRAMEWORK

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Verification and Compliance processes

Verification and Compliance processes for SAM detect and manage all exceptions to SAM policies, processes, and procedures (including license use rights)

It is not the vendor audit

FRAMEWORK

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Operation management processes and interfaces

Operations management processes and interfaces for SAM execute operational management functions which are essential to achieving overall SAM objectives and benefits.

Non-technical management

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Primary Process Interfaces

The Life cycle process interfaces for SAM are largely aligned to the primary life cycle processes of ISO/IEC 12207 in the context of SAM as well as to ISO/IEC 20000

12207 => Software Life Cycle Processes
20000 => IT Service Management (ITIL)

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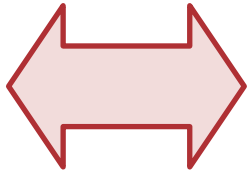
Relationship between processes and the 4 levels of ISO

4 — **Full ISO / IEC SAM Conformance**
SAM as a strategic element that permeates the company
Implementation of all processes

3 — **Operational Integration**
The company wants to increase the efficiency and effectiveness
SAM
Integration of operational processes (Procurement, IMACD)

2 — **Practical Management**
The company recognizes the problem (risks, opportunities)
Policies, roles, responsibilities and ... Quickwin !

1 — **Trustworty data**
"Clean water does not come out of dirty pipes"
Prerequisite and primary objective



Organizational Management Processes for SAM

Core SAM Processes

Primary Process Interfaces for SAM

TIER-0

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Fully covered by the current tier

Fully covered by the previous tiers

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TRUSTWORTHY DATA

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TRUSTWORTHY DATA

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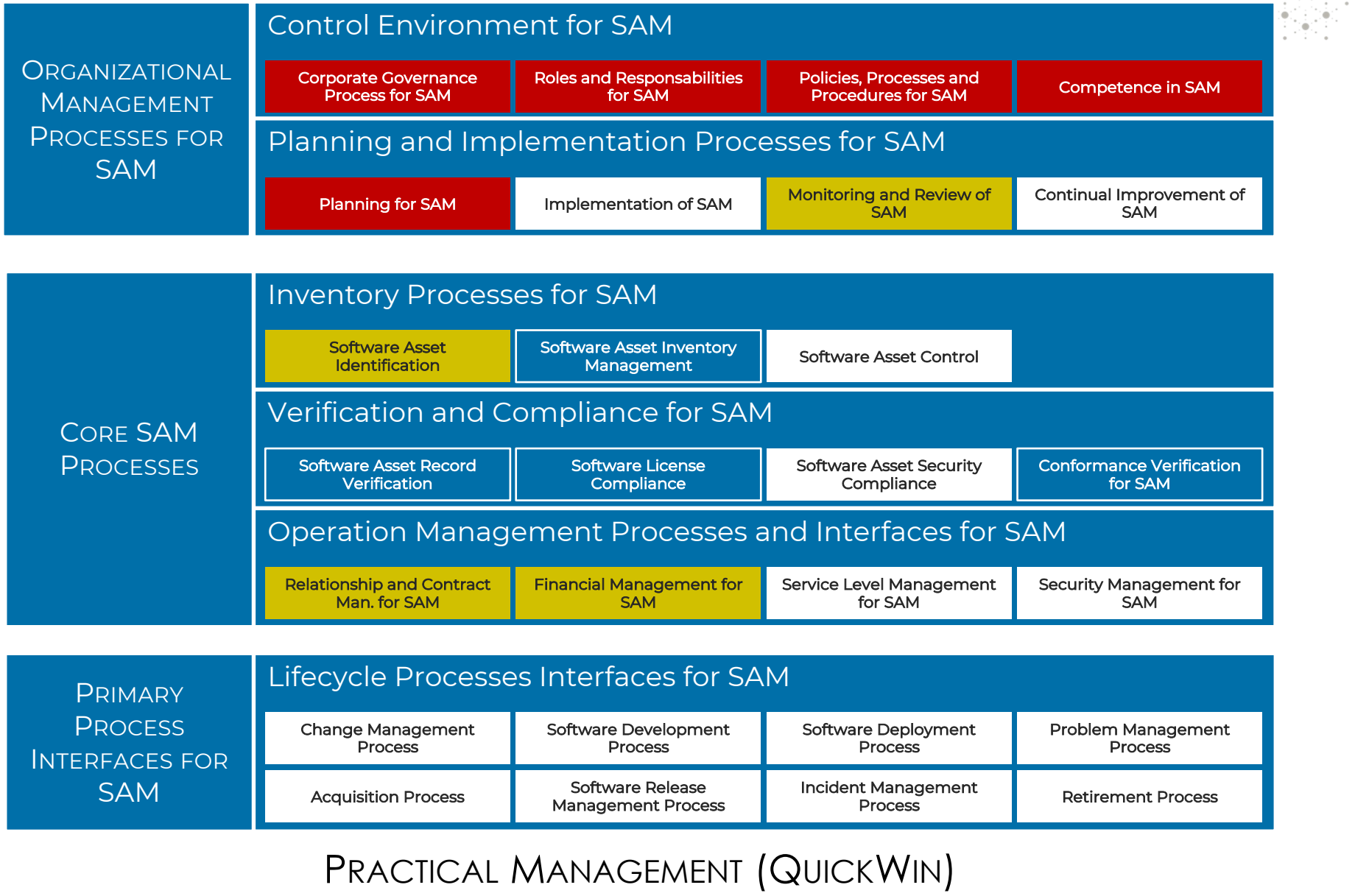
Practical Management (QuickWin)

TIER-2



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PRACTICAL MANAGEMENT (QUICKWIN)

TIER-3

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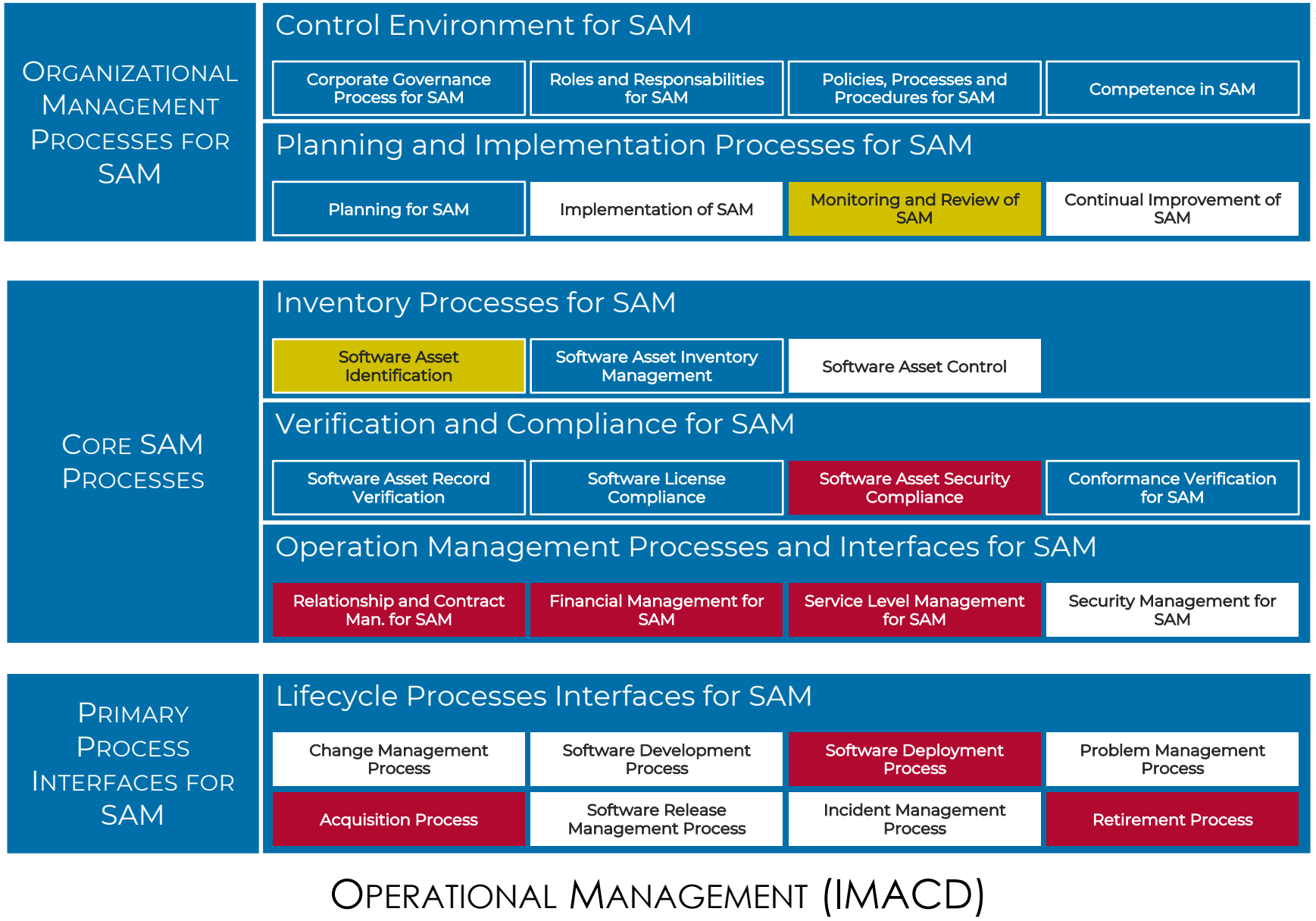
Operational Management

TIER-3



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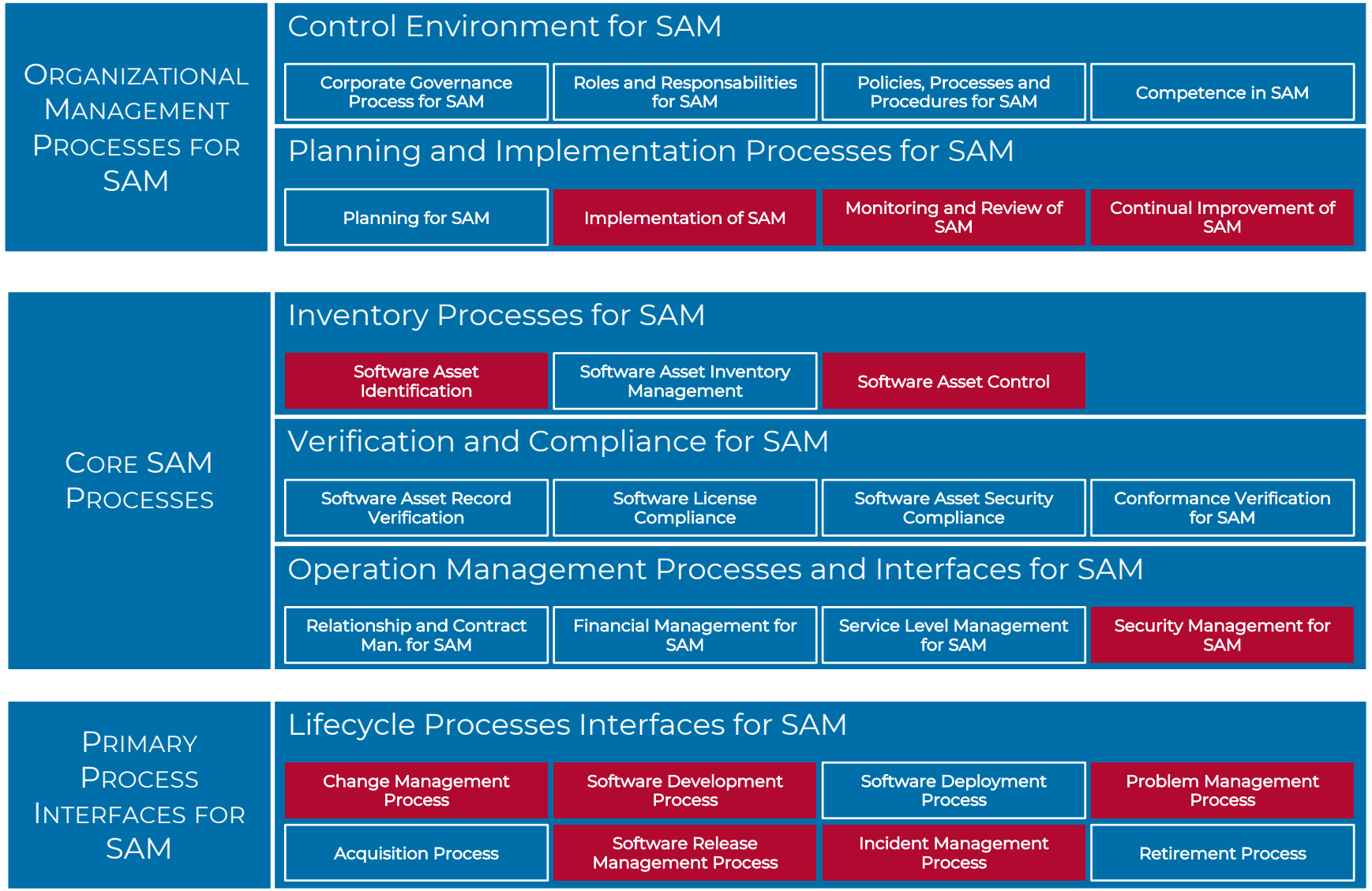
Operational Management (IMACD)

TIER-4



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FULL COMPLIANCE

Key Takeaways (1)

- SAM is not (at least in this case)
  - a person name
  - the personification of US Federal Government
  - the vendor audit
  - a software
- SAM is all of the infrastructure and processes necessary for the effective management, control and protection of the software assets throughout all stages of their lifecycle

Key Takeaways (2)

- SAM challenges are
  - Nobody reads what they sign
  - Need for specific and continuously updated knowledge
  - Poor data quality (inventory and purchases)
  - License complexity (software license vs usage rights)
- SAM benefits are
  - Risk avoidance
  - Cost Optimization
  - Asset Control

Key Takeaways (3)

- ISO/IEC 19770 defines standard for ITAM and SAM
  - 19 processes, 8 interfaces
  - Process Framework
    - Organizational processes: Governance, Roles, Responsibility, Competence and PDCA
    - Core Processes: Inventory, Verification and Operational Management
    - Interfaces: ISO/IEC 12207 (Software Lifecycle), ISO/IEC 20000 (IT Service Management)
  - 4 Tiers
    - Trustworthy data
    - Practical Management
    - Operational Management
    - Full Compliance

Questions?

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