

control. optimise. grow.



## The Microsoft SAM Programme (UK) – Customer Guide

### What is Software Asset Management?

Software Asset Management (SAM) is the development and implementation of a set of procedures and policies, enabling you to manage and optimise your software assets effectively. Your software licences are valuable assets, it's important to know what you have and how they're used.

SAM helps determine what software licences you own, where they are deployed, when to retire and when you are eligible for new upgrades. SAM also helps you accurately recapture the costs and benefits associated with the investment in the software you use.

### The Microsoft SAM Programme – here to help you make the most of your software investment

Embarking on a SAM plan can seem overwhelming. We have developed The Microsoft SAM Programme (UK) to help you manage software assets more easily. Working with one of our SAM Certified Partners, you gain access to a clear, structured framework to get you started.

Once you join the programme, you work with your partner to review your software licences. This creates your Effective Licence Position (ELP), giving you greater visibility across your IT estate and providing you with a great baseline to begin your SAM Programme.

Then you complete a SAM Optimisation Model assessment, which analyses your maturity in your SAM processes. This invaluable tool helps you identify focus areas for the ongoing development of your SAM plan.

Upon successful completion of these steps, you receive a Microsoft certificate validating your software licences for 12 months.

Microsoft's SAM Programme also provides you with a number of other valuable benefits:

- Licence reports – giving you a full view of your Microsoft Licence estate
- Access to Microsoft SAM Certified Partners who can help you develop your SAM Plan
- Complimentary attendance on a Microsoft SAM Basics training course (1 day, various locations across the UK)
- Free SAM consultation session with a specialist SAM Partner\* to help you embark on your SAM Programme and ensure you optimise the results from your licence review and assessment
- Access to numerous free tools, resources and online training at [www.microsoft.com/uk/sam](http://www.microsoft.com/uk/sam)
  - Microsoft Software Inventory Analyzer
  - SAM Optimisation Kit
  - Case Studies
- Access to Microsoft Financing to help fund your SAM Plan

\*The partner is not obliged to provide this session face-to-face, it can be conducted over the telephone or via Live Meeting

### The true benefits of SAM

We believe that if you adopt a SAM strategy you will see clear, tangible benefits:

- Save money (typically between 20-30% in the first year)
- Be in control of your software assets
- Remain compliant and avoid the risk of counterfeit software
- Build on your SAM maturity

“ Thanks to our SAM process, we can now look at our software compliancy in an instant”

Carl Stirland,  
Director of IT, Bowmer & Kirkland

Microsoft Financing can help

## How to join Microsoft's SAM Programme

Joining and completing Microsoft's programme involves sharing information with us and your chosen SAM Partner. This is critical so we can work with you in an open and transparent way.

To enrol on the programme, please complete the 'permission to proceed' form and send to [uksam@microsoft.com](mailto:uksam@microsoft.com).

You can download the form from: [www.microsoft.com/uk/sam](http://www.microsoft.com/uk/sam) request from: [uksam@microsoft.com](mailto:uksam@microsoft.com) or request from your chosen Microsoft SAM Partner.

## Frequently Asked Questions about the Microsoft SAM Programme

### **Q. Does my organisation have to pay a registration fee to join Microsoft's SAM Programme?**

A. Currently there is no registration charge to join the programme.

### **Q. Who pays the partner to conduct The Microsoft SAM Programme?**

A. The customer pays for all costs quoted by the partner to conduct Microsoft's SAM Programme. However, the customer does not have to pay to join the SAM Programme, attendance on a SAM Basics Course, the free SAM Consultancy Session, or the free tools on [www.microsoft.com/uk/sam](http://www.microsoft.com/uk/sam)

### **Q. What will the partner present in the complimentary SAM session?**

A. The partner will provide a brief introduction to SAM, gather customer requirements, discuss relevant service offerings, explain the Microsoft SAM Programme, the benefits of SAM and the Optimisation Model. Note this session does not have to be conducted face to face.

### **Q. Will Microsoft visit me during the SAM Programme?**

A. No. However we are here to help if you need us.  
Contact us via [uksam@microsoft.com](mailto:uksam@microsoft.com)

### **Q. How do I enrol in The Microsoft SAM Programme?**

A. Please refer to the key steps to SAM in this guide for full details.

### **Q. What are the benefits to me for completing The Microsoft SAM Programme?**

A. Licence review and ELP, SAM Optimisation Assessment and results, free training on SAM Basics, free consultancy session, access to free SAM tools to support your SAM plan and a valid 12-month certificate from Microsoft.

### **Q. How can I register for the Microsoft SAM Basics Course?**

A. The customer will be sent an email to register for the course once the permissions form has been received. Queries about registration can be sent to [uksam@microsoft.com](mailto:uksam@microsoft.com).

### **Q. If I have to buy more licences, what is the timeframe for making purchases?**

A. The customer must buy additional licences from an authorised reseller within 30 days of Microsoft validating their ELP.

**Q. What is the SAM Optimisation Model?**

A. The SAM Optimisation Model helps our customers evaluate their SAM practice effectively and objectively. It provides a consistent framework that our partners use to assess a customer's SAM maturity. The model illustrates the benefits and savings at each stage of SAM Optimisation.

**Q. Is the SAM Optimisation Model a requirement of the programme?**

A. When you sign the 'permission to proceed' form, you are automatically opted into complete the SAM Optimisation Model. This assessment is of immense value to you as it can help guide you in the management of your SAM Plan. You are not required to release the full assessment to Microsoft, only a short summary of key results which will be completed by the partner. If you wish to opt out, please tick the appropriate box on the 'permission to proceed' form. This also applies to re-enrolling customers.

**Re-enrolling in the Microsoft SAM Programme**

**Q. Do I have to re-sign the 'permission to proceed' form?**

A. If the individual responsible for signing the original form is still in role, an email to [uksam@microsoft.com](mailto:uksam@microsoft.com) stating "I authorise re-enrolment of X company in the Microsoft SAM Programme effective X date, and will complete the SAM Programme with X partner" is satisfactory.

If a new individual is assigned to the SAM Programme, a new permission to proceed form must be completed and submitted to [uksam@microsoft.com](mailto:uksam@microsoft.com). Download the form from [www.microsoft.com/uk/sam](http://www.microsoft.com/uk/sam)

**Q. Does the partner need to complete a Proof of Licence (PoL) on-site visit again?**

A. Providing we have evidence the PoL was completed originally, the partner can create a refreshed PoL. If the customer has kept track of OEM and retail purchases they have made since the last review, there may not be a need for an on-site visit.

**Q. Can I utilise my ELP from year to year to minimise licence compliance issues?**

A. Microsoft encourages the use of the ELP to maintain your licence entitlement position. Your SAM partner can work with you to decide the best process for maintenance.

Learn more about  
The Microsoft  
SAM Programme

Visit

[www.microsoft.com/uk/sam](http://www.microsoft.com/uk/sam)

The site is full of useful resources like these:

- Free Microsoft software inventory and ROI tool
- SAM Case Studies
- Where to go for more detailed SAM guides
- More about SAM Partners

# Key steps in The Microsoft SAM Programme

**Legend:** **ELP:** Effective Licence Position; **OEM:** Original Equipment Manufacturer; **FPP:** Full Packaged Product; **PoL:** Proof of Licence; **SAM:** Software Asset Management; **SOM:** SAM Optimisation Model.  
 Blue boxes relate to enrolment and re-enrolment, orange boxes just relate to Yr 1 enrolment



\*Partner costs to be met by customer