



The Microsoft SAM Engagement

What is SAM?

Software Asset Management (SAM) is a vital business process that provides a system for the effective management, control, and protection of the software assets within an organization. SAM is a critical function of any mid-to-large sized organization, however, it is one that is often overlooked. The international standard for Software Asset Management is a vendor-independent standard that is supported by much of the IT industry, including Microsoft.

Benefits of SAM

Software licenses are a business asset like any other, so it is important to know what software assets you have and how they are being utilized. Proper management of software assets can provide great business value and can save a company both time and money.

Companies that successfully implement SAM practices see many benefits, including:

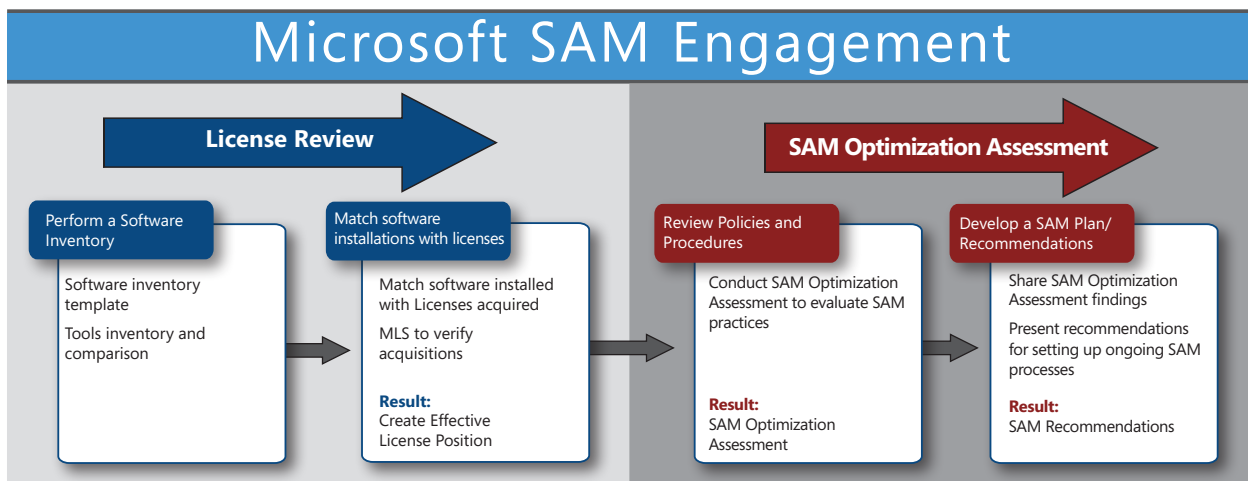
- Better intelligence and control over their IT infrastructure
- Reduced costs through license consolidation
- Assurance of license compliance
- Increased security through complete knowledge of software in use
- Streamlined license acquisition processes
- Improved user productivity, simplified IT management, and faster help desk processes through standardization of applications and platforms

For more information on the benefits of SAM, please visit www.microsoft.com/sam

What is the Microsoft SAM Engagement?

The mission of the Microsoft SAM Engagement Program is to help customers understand and implement SAM within their organizations. While the initial valuation of software assets generally begins with a License Review, the Microsoft SAM Engagement gives customers a head start on building best practices for software asset management and gaining control over their software environment.

The Microsoft SAM Engagement consists of two parts: 1) License Review 2) SAM Optimization Assessment. The License Review consists of reviewing Microsoft software installed and comparing that with licenses purchased. The SAM Optimization Assessment includes a review of policies and procedures with suggestions for improvement. Please see the diagram below that shows an overview of the Microsoft SAM Engagement process.



The SAM Partner

Microsoft engages SAM Partner experts to perform the SAM Engagement. These SAM Partners are highly trained in SAM, know the intricacies of Microsoft licensing, and have performed many prior SAM Engagements. They will make every effort to minimize disruption to your organization as they work on your behalf to identify and record all your licenses and their respective entitlements and help you assess your SAM practices effectively. The partner will act in a highly professional, ethical, impartial and timely manner to create a positive experience that provides value to you.

What is involved in the SAM Engagement?

The SAM Partner will perform a number of steps throughout the SAM Engagement. These steps are summarized as follows:

Step 1:	Step 2:	Step 3:	Step 4:
Setting Expectations The SAM Partner will provide an overview of the goals of the SAM Engagement, set expectations with regard to timelines, personnel involvement, data sources and collection protocols, and review the final deliverables that will be provided at the completion of the SAM Engagement.	Generate the Effective License Position (ELP) During this step the SAM Partner will verify licensing data, perform an analysis of software purchased and deployed, and produce the ELP which is a report that summarizes any licensing deficiencies or overages.	Perform the SAM Optimization Assessment The SAM Optimization Assessment involves completing partner-supplied questionnaires, answering open-ended questions, and holding discussions around SAM policies and procedures. The goal of this Assessment is to evaluate SAM practices and form recommendations for implementing ongoing SAM process improvements.	Present Findings During this step the SAM Partner will present a summary of their SAM Engagement discoveries. This will include the ELP, the SAM Optimization Assessment, and any SAM process improvement opportunities.

Frequently Asked Questions:

Q. How long does a SAM Engagement take?

A. We realize that you are very busy and know how short-handed IT staff can be. The SAM partner will do most of the work on your behalf. While timing is dependent on the level of complexity of your organization, the onsite time of most engagements is generally between one to two weeks. Our goal is to minimize the impact on your business.

Q. Is this an audit?

A. No – a SAM Engagement is a process whereby Microsoft works with you, through a SAM Partner expert, to help you understand and implement SAM within your organization. Part of that process includes analyzing the accuracy of your current licensing position. The SAM Engagement is Microsoft-funded and is a collaborative effort to help ensure you are getting the most from your software assets. It includes a SAM Optimization Assessment which will help you advance with SAM which can provide very tangible and realizable benefits such as cost savings.

Q. What is the SAM Optimization Assessment?

A. The SAM Optimization Model is aligned with the Infrastructure Optimization (IO) Model and provides a framework for partners to accurately evaluate SAM processes, policies, and tools. Using the IO stages of Basic, Standardized, Rationalized, and Dynamic, the SAM Partner conducts a SAM Optimization assessment based on 10 SAM key competencies. The end goal of the assessment is to evaluate your SAM Optimization level based on a set of established and objective criteria. Once customers know their optimization level, they can work to advance from one optimization level to another, based on guidance from the partner.

Q. What are the qualifications of the SAM Partner?

A. All Microsoft partners assisting with Microsoft-funded SAM Engagements must have proven proficiency in planning, implementing, and/or maintaining SAM programs. This proficiency is achieved by completing the SAM Specialization in the Microsoft Partner Program.

Q. How can we be confident that the results will be accurate and what happens next?

A. A substantial part of the data the SAM Partner will be analyzing will be provided by you, therefore if you are confident that this data is accurate then you should have confidence in the results. At the end of the review the findings will be presented and explained to you in detail at which time you will have the chance to comment and then agree on the results. Microsoft will then work with you from that point forward.

Q. What happens after the SAM Engagement?

A. After the engagement many customers elect to commission their own initiatives to ensure an accurate license position is sustained. There is however no formal precedent for this and it is up to each organization to decide what is an appropriate way forward.