



SAM Baseline Review

Software Asset Management (SAM) is a set of proven IT practices that unite people, processes, and technology to control and optimize the use of IT assets across an organization. SAM can help you control costs as well as manage business and legal risks, optimize software licensing investments, and grow IT systems to accommodate your organization's expanding needs.

Choosing the right inventory tool is important for obtaining a complete, detailed inventory of IT assets.



SAM Baseline Review

The SAM Baseline Review provides you with a complete view of your current Microsoft product deployments and licensing position. You will also receive a SAM Optimization Model (SOM) Assessment that serves as the foundation and guidance for implementing an effective SAM program that aligns with ISO standards. Here are some challenges you may be facing in your IT infrastructure today and some of the benefits you can gain by working with a Microsoft SAM Partner on a SAM Baseline Review.

Challenges

Lacking a complete picture of your IT environment can make it difficult to:

- Identify assets deployed in your environment that are unknown or unmanaged.
- Meet internal business users' needs from an IT perspective.
- Make decisions such as whether to scale on-premises solutions or move to the cloud.
- Identify idle systems that are wasting operational resources.
- Meet government and industry compliance standards.





Opportunities

Implementing SAM best practices will help you:

- Monitor and optimize costs associated with purchasing and maintaining your software.
- Control business and legal risks related to improper software deployment.
- Optimize your hardware and software investments based on accurate and detailed inventory and user data.
- Align IT with organizational goals.
- Create ongoing processes for monitoring and provisioning current and future assets.
- Highlight migration and consolidation opportunities.

What to expect from a SAM Engagement

Every engagement will be slightly varied depending on your infrastructure, needs, and goals. At a high level, an engagement can be broken down into four phases: Planning, Data Collection, Data Analysis, and Final Presentation.

-  **Planning** – The planning phase involves gathering information from you on your infrastructure, identifying engagement goals, securing appointments and meetings, and arranging access to begin data collection and analysis.
-  **Data Collection** – The data collection phase consists of the discovery and inventory of software assets using an inventory tool followed by the mapping of inventory data, usage, and license entitlements. This may include a questionnaire and interviews with key stakeholders to ensure all relevant data and information is collected to provide a full and accurate analysis on software deployments, licensing entitlements, and current management processes.
-  **Data Analysis** – The data analysis phase includes the review and validation of all collected data, the identification of all Microsoft license agreements, and analysis of your long-term IT strategy. During this phase, ways to optimize software investments are explored to provide final engagement considerations and recommendations.
-  **Final Presentation** – At the conclusion of the SAM engagement, your SAM Partner will present their results, recommendations, and next steps in an overview presentation along with a detailed set of reports and your SAM Optimization Assessment.

Data Collection and Analysis

A SAM Baseline Review can help you identify all product deployments, usage, and license entitlements. Your Microsoft Certified SAM Partner identifies areas for improvement and develops a set of recommendations and processes to help your company optimize its software investments and stay compliant. The data collection and analysis will include the categories defined below.



Asset Inventory

As a starting point, your partner will work with you to choose the right software inventory tools, define the scope of the machines to be inventoried, identify any extra steps needed to gather data from devices and networks that may not be easily accessible, and prepare environments for scanning and data collection. The inventory tools you use should collect a wide range of data points regarding all devices, workstations, and servers that can be used for planning consolidations, migrations, or expansion.

Data Interpretation and Technical Requirements

Analyzing the results from the inventory data collection involves identifying and documenting all product deployments, usage, and license entitlements. Your partner will combine the inventory data with other relevant information that may not be discoverable via most tools such as the identification of active and passive servers, the presence of internal versus external facing servers, and how the data moves through your servers.

Deployment Considerations

Your partner will identify any potential improvements such as: optimizing your workloads, retiring underutilized servers or workstations, and implementing IT management tools to monitor and manage software deployments. Other areas of consideration may include isolating production versus development environments to more easily manage and monitor deployments and licensing.

Licensing Considerations

To identify areas where you can optimize your software investments and ensure compliance, your partner will assess whether you are appropriately licensed for your current deployment and usage state, and recommend the best licensing options to align with your future business plans.

Policy Improvements

Your partner will analyze your current SAM processes and policies and map them against the SAM Optimization Model in order to identify areas of strength and improvement. If necessary they will provide recommendations to develop or improve policies to support ongoing optimization, management, and compliance. Your partner will share some key best practices to improve your organization's software asset management program going forward.

Engagement Deliverables

Prior to working with your partner, you will receive a letter of engagement and a full Statement of Work from your partner explaining what to expect during your SAM engagement. At the conclusion of the engagement you should receive the reports defined below.

Executive Overview Report	The executive overview report contains a high level executive summary of the engagement scope, results, recommendations, and next steps.
Established Deployment Position (EDP)	The EDP report provides details related to all software currently deployed within your IT infrastructure.
Effective License Position (ELP)	The ELP report provides details related to license entitlements which are mapped to deployments and identifies any gaps or underutilization in your organization.
SAM Optimization Model (SOM) Assessment Report	This assessment report provides an assessment rating and SAM maturity level along with recommendations on how to further your organization's SOM maturity. This report also includes an assessment of your company's current SAM policies and procedures and recommendations for improvement.
Licensing Optimization Recommendations Report	This report provides recommendations on how to optimize your Microsoft licensing program and structure for your company. The report details risks, liabilities, and opportunities associated with your current licensing practices and recommendations on how to better manage your licenses to minimize future risk.
Additional Uses of Data Report	The Additional Uses of Data Report includes recommendations on how to use the data you've collected for other purposes, such as developing a virtualization roadmap, cloud migration plan, or a security assessment.

Find more about Software Asset Management at:
<http://www.microsoft.com/en-us/sam/overview.aspx>

