

By taking a proactive role in software management you can assure you're getting the most out of your software assets. It is important to establish a strategic SAM plan as part of an organization's standard IT processes, helping you manage and optimize your IT infrastructure in all stages of the software lifecycle. SAM can be particularly helpful during key events that include, mergers and acquisitions, contract events such as true-up and renewals, and implementing new technologies like virtualization. Get started with your SAM plan now, and start building exceptional business results from the foundation up.

## You can implement SAM in your organization by following five basic steps:

### 1. Learn about licensing basics

Review the Volume Licensing Reference Guide and the Product Use Rights (PUR) documentation which contains information on software licensing. Additional information can be found on the Microsoft Licensing sites (<http://www.microsoft.com/licensing/about-licensing/how-volume-licensing-works.aspx> and <http://www.microsoft.com/licensing/about-licensing/product-licensing-overview.aspx>).

### 2. Inventory and catalog your software

You can analyze which software titles you're using on your company's servers, PCs and workstations by performing a manual inventory or by using a tool to generate software inventory reports. Implementing a SAM tool such as System Center Configuration Manager, or Microsoft Assessment and Planning (MAP) Toolkit will allow you to maintain and track your software assets throughout their lifecycle. You can find more information on these tools in the Microsoft Software Inventory and Asset Management Tools Catalog (<http://aka.ms/samtoolsoverview>).

### 3. Get organized, match licenses with software

Find the licensing documentation for each software title you have discovered during the software inventory process. Analyze your findings and document the results to establish a baseline. More information is available to help you determine what to look for (<http://aka.ms/msftsamresources>).

### 4. Create and review your policies and procedures

Does your company have existing policies outlining software use and acquisition and deployment procedures? If so, review them to assure they are still applicable and cover all departments and employees. If you have no current policies for acquiring, deploying or retiring software assets, now is a good time to write them. Contact your software provider or a SAM Partner for help developing policies and procedures (<http://aka.ms/findpartners>).

### 5. Implement and maintain a software asset management plan

Once you've worked with your software provider to obtain the appropriate number of licenses for your software, put a plan in place to keep the process moving forward. It is important that the SAM plan includes, at a minimum; software use policies, regular software inventory checks, employee training, and executive sponsorship of the SAM Plan. (<http://aka.ms/samprograms>).