Establishing a Software Asset Management Plan

Great job! You ve helped your customer inventory their software, find their license information, match licenses to software use, and helped them get in synch with their current license management needs. The final step is to help your customer establish a software license management plan to use moving forward so their records are always organized and complete.

Script - Establishing a Software Asset Management Plan

I want to thank you for working with me on your software management - we've gotten a lot accomplished and I know it will help <COMPANY NAME>.

I'd like to recommend one more important step — writing a software asset management plan. I can help you with this as well.

One thing we should think about is standardizing software titles. This can save money with volume discounts, less training costs, and increased work efficiency. By standardizing software versions among your employees you can also eliminate issues caused by sharing documents.

As we discussed earlier, we can also centralize software license purchasing to keep your documentation under control. Keeping documentation organized will really help <COMPANY NAME> maximize its software budget. You'll also know where all your license information resides at all times.

If you're not using certain workstations and software, they should be retired. This step will help establish a clean baseline moving forward.

I also recommend evaluating software usage by asking employees, either formally or informally, what software they need to do their jobs and what software they aren't using. Keeping an open line of communication will help you plan your license purchases.

Also, a specific individual should keep the software inventory document updated and current. This person could also be the owner of the policies and procedures document for <COMPANY NAME>.

I'm happy to work with you to write up plans to accomplish each of these steps. We can also work on a timeline for future software inventories to keep things current. My recommendation is to inventory your software and review licensing information at least:

- *Once a month [for business with more than 20 devices (PCs, servers, and other devices)]*
- *Once a quarter [for businesses with 20 or less devices]*

Thanks again for working with me - we've done a great job.

You may wish to bring the following items:

- **Software Asset Management Timeline**
  This list of tasks will help you schedule future software asset management services with your customer. The timeline is available at http://www.microsoft.com/resources/sam/partnerguide/sales_prt_fact.aspx
- **Software Asset Management Checklist**
  Use when this step of the process is complete

Note: this document is not intended for distribution to your customers.

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