

# Software Asset Management

## Following Up

It's important to follow up with your customer, either to make sure they have all of the information and tools they need to keep moving forward with software asset management, or to specifically follow up on a particular unfinished step or issue. These scripts will give you an idea of what to say in various situations.

### Script - Follow-up Conversations

#### Starting a Maintenance Program

*Hi, this is <YOUR NAME> with <YOUR COMPANY'S NAME>. Last <WEEK/MONTH> we did an initial assessment of your software and licensing. I noticed that you recently acquired more licenses from us. I've added that information into a spreadsheet along the information from your initial assessment. I can email that information to you or make it available online if you'd like.*

*Now might also be a good time to run a software inventory tool again. I recommend running the software inventory tools on a monthly or quarterly basis to keep you informed of any software that has been installed or uninstalled. Would you like me to help you with this?*

#### Policies and Procedures

*Hi <CUSTOMER NAME>, this is <YOUR NAME> with <YOUR COMPANY'S NAME>. I was just calling to thank you for working with me on the initial assessment of your software assets. Another step I wanted to recommend is developing some policies around software use and license purchasing. Software use policies outline what your employees can and cannot install and use on their computers — these basic policies can protect your company from hazards like computer viruses by prohibiting unauthorized software installations. Also, developing a centralized license purchasing process may help you save money and time.*

*I have some templates that can get you started on these policies - shall I send them to you via email or would you like me to stop by in person?*

#### General Follow-Up

*Hi, this is <YOUR NAME> with <YOUR COMPANY'S NAME>. Last <MONTH/QUARTER> we set up a software asset management program for your business, and I was calling to see how everything was going. Is there anything I can help you with?*

**Prior to calling your customer, review the steps you and your customer have already accomplished and make a list of which steps are not completed.**