

# Software Asset Management

## Initial Conversation

This script will help you with the first software asset management conversation you have with your customers.

### Script - Initial Conversation

*Hi my name is <YOUR NAME> with <COMPANY NAME>. Do you have a moment? I noticed here by our records that you recently acquired <NUMBER> licenses for <SOFTWARE TITLE> software. I understand that keeping track of software and licenses can be a challenge. I'd like to discuss some of the software asset management services <COMPANY NAME> provides. Are you the appropriate person to discuss this with?*

*First of all, are you familiar with software asset management or SAM? SAM includes everything from conducting an initial software inventory to creating a license tracking system. There are many benefits to implementing a software management plan within your business.*

*A lot of people don't know this, but software asset management can determine not only whether your business is under-licensed, but also over-licensed.*

*SAM can even help you determine whether there is a less costly way to acquire software licenses. Most software vendors offer volume discounts on their licensing. If you have a software asset management plan in place you may find that you qualify for a better pricing level.*

*Lastly, by knowing exactly what software and licenses you have, you can more effectively budget for future technology investments.*

*So how can I help? I can help you determine what software you currently have installed, help you track down the licenses that correspond with that software, and maybe even find a volume licensing solution that can save you money on future investments.*

*Once we have an initial assessment, we can work on an ongoing maintenance program so that you can take a snapshot of your software license assets at any time.*

*I just need to ask you a few questions to get started.*

1. Do you know how many devices (PCs, servers, and other devices) your company is currently using?
2. Do you know the type of software that is installed on those devices?
3. Do you have a software license for all the software used in your company?
4. How do you currently keep track of this information?
5. Are your company's devices networked?

### Before speaking with your customer, you may want to...

- Print a copy of the Customer Profile to fill out during your conversation. The document is available at [http://www.microsoft.com/resources/sam/partnerguide/sales\\_prt\\_other.aspx](http://www.microsoft.com/resources/sam/partnerguide/sales_prt_other.aspx)
- Gather information about this customer's software and license purchases from your own records.
- Print a Software Asset Management Checklist to use with this customer. The checklist is available at [http://www.microsoft.com/resources/sam/partnerguide/sales\\_crt\\_other.aspx](http://www.microsoft.com/resources/sam/partnerguide/sales_crt_other.aspx)

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### **Discuss each question and answer with your customer.**

*Great - this initial information will be really helpful. When would be a good time to conduct a software inventory? And while we're at it we can track down those licenses.*

[Depending on how your customer acquired its software licenses and stored them, this process can take anywhere from a few hours to a few days. Give the customer an estimated timeline of how long this may take.]

### **Schedule your visit.**

*Thanks <NAME>. I'm looking forward to working with you. I'll see you on <MEETING DATE, TIME>.*

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

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