

# Software Asset Management

## Matching Software with Licenses

After assisting your customer with the initial software inventory, you can help find the license documentation for each software title. Use this script as an example of what to talk about during this process.

### Script - Matching Software with Licenses

Hi <CUSTOMER NAME>. It's good to see you again. Now that we've determined all of the software titles on all of your company's workstations, we can look for your license information and match the licenses to your software. I have a few questions that will help us with this process:

**Question:** Who is responsible for the acquisition of new software?

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#### Potential Responses:

**If your customer answers "I don't know", you can say...**

We should meet with anyone responsible for software acquisition to review any licensing information they may have retained.

**Question:** Do you have a place where you store your license documentation?

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#### Potential Responses:

**If your customer answers "No", you can say...**

Having license information organized in one place can be beneficial. Once we find all of your license information, we can figure out a place to keep them that will work for you.

**If your customer answers "Yes", you can say...**

You're way ahead of the game. This information will be a good starting point. Let's review it together to make sure we have everything we need, plus we will have to record the Certificate of Authenticity information that is on the chassis of each PC in the company.

**Question:** Do you participate in any Microsoft Volume Licensing programs, like Open, Select, or Enterprise Agreement?

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#### Potential Responses:

**If your customer answers "Yes", you can say...**

Great! Microsoft has some online resources that contain your volume licensing documentation. You can log in to the eOpen site for Open Licenses or to the Microsoft Volume Licensing Services site for Select Licensing and Enterprise Agreements. All you need is your Microsoft Passport user name and password. Can we do that now? You'll also need your volume license agreement number.

**Include this point if you are not the reseller for the license program...**

If you don't have that number, we should be able to get it from your reseller.

### You may wish to bring the following items:

- The Business Value of Software Asset Management - This document contains information on types of Microsoft licenses and is available for download at <http://www.microsoft.com/resources/sam/partnerguidesales crt fact.aspx>

- Software and License Summary Report - You'll use this report to record the information from the software inventory and the license-gathering process to compare software installed to licenses owned. Fill out the report as you are reviewing all licensing information. A template of the report is available in this guide at <http://www.microsoft.com/resources/sam/partnerguidesales crt templates.aspx>

Note: If you used a software inventory tool, the tool may have already created a similar report where you can add license information.

- Finding License Information - This fact sheet, available at <http://www.microsoft.com/resources/sam/partnerguidesales prt fact.aspx> contains helpful hints and tips on how to locate licensing documentation.
- Software Asset Management Checklist - Check off this step when complete.

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**Question:** *Do you have any emailed invoices or documentation from online software license purchases?*

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**If your customer answers "Yes", you can say...**

Excellent — let's document those in your Software and License Summary Report. It's good to make a back-up of those files and keep the originals in a central location.

### **Preinstalled Software**

*Lastly, for most PCs and servers, you may have acquired preinstalled Microsoft software and there should be a Certificate of Authenticity (COA) that was delivered with the software and license or a Certificate of Authenticity label affixed to each workstation. Let's briefly visit your all your machines to include that detail into your report.*

### **Comparing Licenses Owned to Software Installed**

*Now that we've found the license information, let's review the Software and License Summary Report to compare the number of licenses to the number of software titles installed on all of the devices we've inventoried.*

**Fill out the report using the inventory report(s) and the license information you have just found.**

*It looks like in some instances you have either:*

- *too many licenses*
- *not enough licenses to match the software that is being used*
- *or just the right amount of licenses.*

*There are a few software titles that your company seems to use a lot — I can recommend a volume licensing program for these titles to help you save money.*

**Continue to discuss licensing options and software needs with your customers to make sure they have the appropriate number of licenses.**

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

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