

# Software Asset Management

## Reviewing Policies and Procedures

Establishing and following good policies and procedures for software use and license acquisition is an important part of the entire software asset management process. Use this script as an example of what to talk about during this process.

### Script - Reviewing Policies and Procedures

Thanks, <NAME>, for working with me on assessing your current software use and licensing status. I think we've done a great job reporting our findings.

I have a few recommendations that will help you with software asset management moving forward:

- Clearly delegate and document responsibility and accountability for acquiring new software licenses and keeping records
- Acquire software licenses only from reputable resellers Always keep the evidence of purchase documentation (original CDs, Certificate of Authenticity, End User License Agreement, original user's manual, and sales receipt) in a centralized and safe location
- Track and update the Software and Licensing Summary Report on a regular basis so you can reference accurate information at any time

**If your customer does have software acquisition and software use policies in place, you may wish to say:**

*I'm glad you already have policies for your employees. Do you mind if we review them together to make sure they cover all of the important points?*

**If your customer does not have software acquisition and software use policies in place, you may wish to say:**

*I'd like to recommend implementing some basic policies on software acquisition and use for your company. The policies will help you save money, manage your software, and provide employees with easy-to-follow guidelines.*

*For software acquisition, I recommend a centralized acquisition program. By delegating responsibility to a person or department for all new software acquisitions, you'll be able to stay organized, save money by recognizing where you can take advantage of volume license savings, and track budgets with actual spending.*

*A software use policy outlines what employees can and cannot do with company software and hardware. These guidelines should cover:*

- Reviewing terms and conditions to ensure proper usage (i.e. some software licenses only allow the software to be used for testing purposes, not a permanent solution for internal business use)
- Installing software by authorized personnel only
- Keeping terms and conditions in an easily accessible location for all employees

*I have templates we can use to write up software acquisition and use policies for your company now. Then you can review them with the appropriate people, revise them as necessary, and distribute them to all employees.*

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

- **Software Use Policy**  
This template, available at <http://www.microsoft.com/resources/sam/partnerguidesales crt templates.aspx>, will help you and your customer develop a good software use policy, which your customer can then share with their employees.
- **Software Asset Management Checklist**  
Check off this step from the list when completed.

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

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