

Software Asset Management

Software Inventory

Before you visit your customer to perform an initial software inventory, review the talking points in this script to better understand how to speak with your customer about this topic

Script - Software Inventory

Hi <CUSTOMER NAME>. Thanks for meeting with me.

As we talked about on the phone, I'm glad you're interested in implementing a software asset management plan at <COMPANY NAME>. I know it will help your business immensely.

So the first thing we need to do is obtain an initial assessment of your current software usage. Then we can work on an ongoing maintenance program so that you know what your software license assets are at any time.

Based on the questions we went over on the phone, I would recommend doing a <MANUAL or AUTOMATIC or COMBINATION> inventory.

If Customer's workstations are not networked, you may say:

Since your workstations are not on a network, we'll need to visit each PC and either manually record all of the software in a PC Inventory Report, or we can install a software inventory tool on each PC to automatically perform the inventory.

If your Customer has few PCs, you may say:

Since your company has only [NUMBER] PCs, let's use the PC Inventory Report.

If your Customer has many PCs, you may say:

Since your company has a lot of PCs, I recommend using a software inventory tool to help with the reports. Here's a list of tools I have found that will work.

Review tools together and then select the most appropriate tools for your customer.

If your Customer's workstations are on a network:

Since your workstations are networked, we can use a software inventory tool to automatically perform the inventory for us. Here is a list of tools I have found that will work.

Review tools together and then select the most appropriate tools for your customer.

In any situation, perform the inventory with your customer.

Now that we've determined what software is installed, we can go find those licenses.

Before the meeting you may wish to...

- Print the Software Inventory Report if you are going to perform a manual inventory. A template for this report is available for download at http://www.microsoft.com/resources/sam/partnerguides/sales crt_reports.aspx

Note: if you are doing a manual inventory, you may want to collect/document any licensing documentation at each workstation while you're there, such as the Certificate of Authenticity.

- In addition, review your customer's answers to the initial questions you asked on the phone. Then visit the Software Inventory and Asset Management Tools catalog at <http://www.microsoft.com/resources/sam/sit> to find tools that will automatically inventory your customer's installed software based on their requirements.

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

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