

Microsoft SAM Program Frequently Asked Questions



Quick answers to your questions about the Microsoft SAM Program

General SAM Questions

What is SAM?

A: SAM is an [ISO](#) standard that can help organizations control costs by identifying areas to optimize their IT infrastructure and manage IT systems to accommodate the organization's changing needs, all while minimizing legal, security, and financial risks.

Microsoft SAM engagements address some of the most pressing challenges that your company will face in today's fast changing, technology-driven world. Most organizations have a mix of traditional perpetual and modern subscription licensing models, as well as a hybrid of on-premises and cloud solutions. Over time, this complex matrix can negatively impact optimization efforts and increase risks. If done right, Microsoft believes that SAM can provide strategic value to customers.

What is a Microsoft SAM engagement?

A: Delivered by knowledgeable Microsoft partners, Microsoft SAM engagements include a data-driven analysis and set of recommendations that can help you get the most value from your IT assets. A SAM engagement includes a clear snapshot of your Microsoft software deployment and usage data, a software and license optimization analysis, and an assessment of your current SAM practices. Based on these deliverables and your IT and business goals, recommendations are provided to help you reduce costs, increase efficiency, and improve overall asset management.

What kinds of SAM engagements are available?

A: Every business has its unique challenges, which is why Microsoft offers a baseline review of your overall infrastructure and several SAM engagements that focus on key areas such as cloud-readiness, cybersecurity, SQL Server workloads, virtualization, mobile device management, and non-production environments. Through a SAM engagement, you can identify areas to optimize your IT infrastructure, create a stronger alignment between IT and business decisions, assess the way you have been and should be licensing your software, and develop a technology roadmap for the future. Learn more about each SAM engagement here: <https://www.microsoft.com/en-us/sam/use-cases.aspx>

What is expected during a Microsoft SAM engagement?

A: During a SAM engagement, a Microsoft partner will work with you to collect the Microsoft software and usage data necessary to provide a valuable analysis of your IT investments. The Microsoft partner will also work with you to gather additional information regarding Microsoft license entitlements, usage scenarios, and business goals, etc. This data and information is collected and analyzed to gain a complete picture of your current IT infrastructure to identify key areas for improvement and provide recommendations to help you optimize your IT infrastructure, create stronger alignment between your IT and business goals, assess the way you have been and should be licensed, and develop a robust technology roadmap for the future. Every SAM engagement is slightly varied depending on your infrastructure, needs, and goals. At a high level, an engagement can be broken down into four phases: Planning, Data Collection, Data Analysis, and Final Recommendations. For more information about Microsoft SAM engagements, please visit <https://www.microsoft.com/en-us/sam/programs.aspx>.

What is the goal of a Microsoft SAM engagement?

A: During a Microsoft SAM engagement, highly trained, qualified partners will work with you to define the goals for your engagement, such as identifying ways to eliminate underutilization and redundancy, and to optimize your infrastructure by consolidating and even migrating to the cloud to gain operational efficiencies and improved agility. Overall, our goal is to help you maximize value, minimize risk, and achieve more with your IT investments.

How do I benefit from a SAM engagement?

A: A SAM engagement can help you gain and maintain control over IT costs, risks, and complexity while providing insights and recommendations for getting the most value from your software assets. A SAM engagement is also an ideal way to better align your IT infrastructure with your business needs, a much-needed strategy in today's technology driven world. In fact, almost 50 percent of respondents in a [Gartner survey](#) said a top reason for investing in SAM was for better alignment between their software strategy and needs (current consumption and future demand) with business initiatives.¹

In many cases, a SAM engagement can help you respond quickly to technology trends that can put your company's security at risk if not monitored and managed closely, such as employees using their own devices in the workplace and downloading unauthorized applications. SAM can also help you identify legacy software that is no longer supported with security patches, and software assets that are not needed, ensuring that you are only paying for licenses that you are using.

What will a Microsoft SAM engagement cost me?

A: The cost of a single SAM engagement, or an ongoing SAM Managed Service varies depending on the agreement you have with your partner, as well as the scope, scale, and complexity of your IT environment. Because of the many benefits, you may find that after you've completed one SAM engagement, you will see the value in conducting more engagements in different or expanded areas of focus. For example, the results from a SQL Workloads SAM Engagement may highlight parts of your datacenter that could run more efficiently in the cloud. Before migrating, you may want to complete a Cloud-Ready SAM Engagement to identify all areas of your infrastructure that can benefit by migrating to the cloud. The good news is, you will have already collected much of the data you need from the initial engagement and may be able to leverage that data for your next engagement.

After your first engagement, work with your Microsoft partner on pricing, as the cost of additional SAM engagements varies depending on your needs, the complexity of your IT infrastructure, and how much data and information can be leveraged from your first engagement. Many customers choose to have a managed service agreement with their partner that enables them to conduct a SAM engagement every 6-12 months, saving them costs and increasing benefits.

In fact, in a recent [IDC study](#), organizations that were interviewed expressed a strong commitment to undergo SAM programs on a recurring basis and expand the scope of existing programs to different geographies and subsidiaries, after participating an initial SAM engagement.²

What information is shared with Microsoft?

A: A Microsoft partner will work with you to collect the Microsoft software deployment data necessary to provide a valuable analysis of your software investments. The Microsoft partner will also work with you to gather additional information regarding Microsoft license entitlements and usage scenarios. This data and information is collected and analyzed to gain a complete picture of your current license position, providing recommendations on ways to optimize and improve your IT Infrastructure, and highlight any discrepancies that should be addressed.

Microsoft is committed to customer data protection and privacy. During this phase, your Microsoft representative will work with you to ensure the process for sharing and sending this information follows Microsoft corporate policies and procedures. Find out more about the Microsoft policies for managing and protecting information here:

<https://www.microsoft.com/en-us/legal/compliance/buscond/managinginfo.aspx>.

Am I required to participate in a SAM engagement?

A: No, you are not required to participate. However, we highly recommend that you decide to participate because of the many benefits. Our goal is to ensure that you get the most value from your IT investments. To get the most out of the SAM engagement process, it is designed to be as collaborative as possible and functions best when all parties work together to inventory and analyze your environment fully.

Is a Microsoft SAM engagement an audit (compliance verification)?

A: No, a Microsoft SAM engagement is not audit. SAM engagements provide a 360-degree view of the customer's IT infrastructure and a set of recommendations on ways to improve their overall asset management, license management, and SAM policies and procedures. With this comprehensive view, you get valuable recommendations on areas that are most challenging for your business. A SAM engagement is recommended, but certainly not required. We believe that SAM can be a strategic advantage for all our customers.

Microsoft Partner

Do I need to work with a Microsoft partner?

A: If your current partner is part of the Microsoft Partner Network and has the appropriate SAM experience, we can consider them for your SAM engagement. To conduct a Microsoft SAM engagement, they must have a Microsoft Certified Professional (MCP) on staff. It is also valuable if your partner has other Microsoft competencies through the Microsoft Partner Network such as Cloud Platform & Infrastructure or Business Applications. Our partners have a deep expertise and certifications in Microsoft technologies as well as experience consulting with customers of all sizes and business models.

Let us know what partner you'd like to work with and we can see if they are already part of the program, or we can help you find a qualified Microsoft partner. There are many Microsoft partners that have the qualifications to guide you through the SAM process.

Or, visit the Microsoft Partner Center: <https://partnercenter.microsoft.com/en-us/pcv/search>. Use the keyword SAM or Software Asset Management to find partners near you.

What should I look for in a partner?

A: When you evaluate a Microsoft partner, don't hesitate to ask questions. Does the partner: Have someone on staff who is certified as a SAM Microsoft Certified Professional (MCP)? Provide valuable experience and knowledge about SAM? Have an in-depth understanding of on-premises and cloud software licensing? Have a solid IT background, enabling them to evaluate the pros and cons of different SAM tools as well as provide guidance on asset optimization?

If your current partner does not currently provide SAM services, you can find a partner who does on Microsoft Partner Center. To find a Microsoft partner, who provides SAM services, please visit Partner Center: <https://partnercenter.microsoft.com/en-us/pcv/search>. Use the keyword SAM or Software Asset Management to find partners near you.

Resources

Microsoft Software Asset Management

<https://www.microsoft.com/en-us/sam/>

Software Asset Management Use Cases (i.e., Cloud-Ready SAM Engagement)

<https://www.microsoft.com/en-us/sam/use-cases.aspx>

Software Asset Management (SAM) Customer Evidence

<https://www.microsoft.com/en-us/sam/customers.aspx>

Microsoft Partner Center

<https://partnercenter.microsoft.com/en-us/pcv/search>

ISO Standard

http://www.iso.org/iso/home/store/catalogue_tc/catalogue_detail.htm?csnumber=56000

¹Gartner, Software Asset Management Is Now a C-Level Imperative, 03 March 2016

<https://www.microsoft.com/en-us/sam/gartner-sam-research.aspx>

²IDC Solution Brief, sponsored by Microsoft, Business Value of Software Asset Management, October 2016,

<http://www.microsoft.com/en-us/sam/idc-sam-research.aspx>