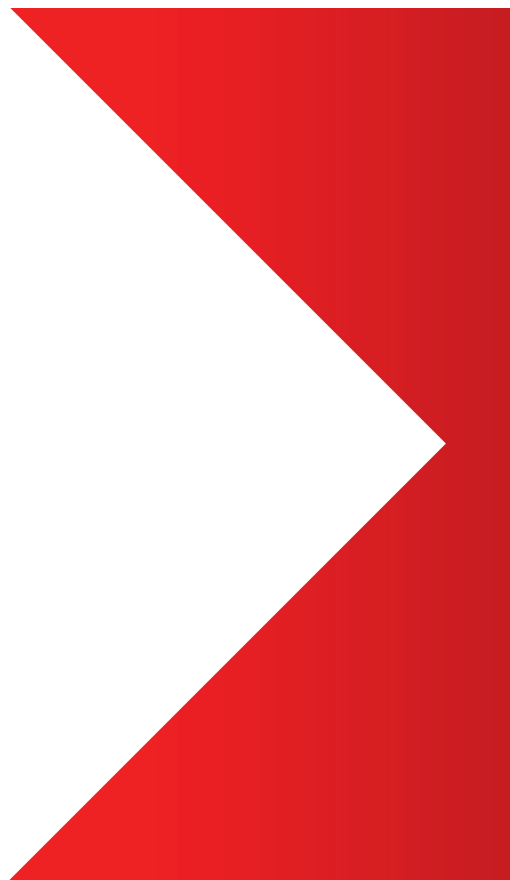


BSA SAM ADVANTAGE GUIDE FOR PARTNERS



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INTRODUCTION: THE NEED FOR BSA SAM ADVANTAGE

Most organizations recognize the problems associated with illegal software and many are playing a proactive role in implementing Software Asset Management (SAM) processes—not just to ensure compliance but also to help manage security risks and profit from the productivity and financial benefits associated with an efficient and well-managed software environment.

Though the SAM industry is still in its infancy, SAM practitioners worldwide have made great strides in recent years, and many are currently delivering professional, robust and profitable SAM services to their customers. Yet every company, vendor, and SAM practitioner has a slightly different understanding and interpretation of what SAM means and entails. This makes for a confused situation for organizations wanting to adopt SAM, who are often unclear about the best approach to SAM and whether the technology and services they have deployed mean they are “compliant.” The variety of SAM services offered also have no standardised methodology for SAM implementations, reference models or benchmarks for measuring success, or common accreditation for recognising professionalism.

Business Software Alliance (BSA), the world’s leading software industry association, recognizes the challenges that these issues create for SAM practitioners and their customers, and is launching BSA SAM Advantage.

BSA SAM ADVANTAGE IS DIFFERENT.

BSA SAM Advantage is a new and unique initiative that uses an entirely different approach to develop the SAM industry best practice and ensure truly effective SAM. BSA SAM Advantage is the only initiative worldwide sponsored by a not-for-profit association, endorsed by many of the world’s leading software companies, delivered by professional partners, resellers and practitioners and guided by the world’s standards making body, ISO. SAM Advantage is geared to provide SAM with the tools, support and credibility to help those wanting to achieve lasting SAM with an easy-to-follow, digestible, framework to achieve conformance with the ISO standard for SAM.



WHY DO ORGANIZATIONS ADOPT SAM?

SAM is the best way to drive adoption of best-in-class software management practices so that organizations of all sizes worldwide can realize the full potential of—and value from—their software investments. But what is driving organizations to investigate and adopt SAM? According to an ISO survey carried out in May 2008¹, the principle drivers are:

- Controlling licence compliance;
- Ensuring on-going software cost-efficiency; and
- Meeting IT governance requirements.

SAM has been proved to deliver major cost savings in almost every organization: industry analysts² estimate savings from SAM to be 30% in the first year alone, with ongoing 5-10% annual cost savings in subsequent years.

SAM can also help companies of all sizes become better-managed businesses, meeting IT governance requirements, obtaining the most value from the software needed to grow and compete, and assisting in avoiding security, financial, and legal risks.

Despite software having a direct impact on the performance of a business, software asset management (SAM) is still in its infancy. The structured management of software within an organization first started to emerge in the mid- to late-1980s as desktop PCs rocketed in popularity, but it is only in the past five or so years that SAM as a discipline has taken shape. Whereas companies are experienced at dealing with compliance in other areas such as health and safety or financial reporting, software asset management processes are far more diverse and usually a product of a complex history and an evolving set of practices.

Industry analysts estimate savings from SAM to be 30% in the first year alone.

Clearly, the management of a company's software estate is not a straight-forward process. Changes in the software industry and the manner in which software is deployed—such as virtualisation, multi-core computing and open source—combined with ever more diverse company structures are making controlling software assets even more challenging.

1. Source: ISO/SC7 Market Needs Study, May 2008

2. Source: "IT Asset Management: Moving to Higher Ground," Frances O'Brien, Gartner ITAM Conference 2003



Couple these factors with the fact that each company, vendor, and SAM practitioner has a slightly different understanding and interpretation of what SAM entails, those wanting to adopt

SAM aren't sure what level of SAM they need and how to manage it, and practitioners have a potentially confusing array of vendor-developed SAM guidelines and materials to follow.

WHY DO END USERS IMPLEMENT SAM?

Source: ISO/SC7 Market Needs Study, May 2008



WHAT IS WRONG WITH SAM CURRENTLY?

At present, the industry lacks a common, internationally recognized framework that adheres to global SAM standards, and there exists diverse accreditation, reference models, and benchmarks to deliver and measure the success of SAM implementations.

While many companies have embraced SAM and strive to achieve excellence in SAM processes and implementations, in many cases efforts can be focussed on periodic audits, meaning problems are often only found after they have been present for some time. A large percentage of

organizations still view SAM as a one-off project, either performed internally or by an external body. Disparate and inconsistent approaches to SAM within has meant some companies find they're often recreating the wheel, with no dedicated, recorded SAM program in place.

Often, knowledge about SAM is split across different departments: effective training programs are needed to educate employees on the requirements of the SAM program, and it can be difficult to find the qualified consultants or managers who fully understand the requirements of a SAM program.



Although the arrival of the ISO/IEC 19770-1 SAM standard means that, for the first time, businesses can work confidently toward one global standard, many end organizations are still in the dark about how best to implement SAM, and which is the correct solution from the many SAM approaches and consultants available.



WHY IS BSA SAM ADVANTAGE DIFFERENT?

While supported and recognized by many of the world's leading software vendors, the program has been developed by the Business Software Alliance. This makes it the only globally recognized available approach created by an independent, not-for-profit entity. As the world's leading industry software association, BSA's mission is to help all software end users, guided by ISO standardization, to ensure optimization of their software assets.

This makes SAM the only globally recognized available approach created by an independent, not-for-profit entity.

The BSA has worked closely with the International Organization for Standardization (ISO)—including licensing of BSA-developed intellectual property—to create a framework that helps make license compliance a long-term, strategic process. BSA SAM Advantage helps your

customers achieve better operational efficiency, improved information control and enhanced risk management through a robust, internationally acknowledged SAM implementation framework. BSA SAM Advantage recognizes that every partner and customer is different. The framework contents are therefore flexible enough to be useful in all situations and for all kinds of SAM requirements.

Because many organizations and SAM partners alike have found the ISO/IEC 19770-1 SAM standard to be too complicated for some situations, and its full implementation often unnecessary, BSA SAM Advantage has been created to ensure that the program provides a clear route toward the standard. It gives SAM partners the knowledge to advise customers on implementing the right processes for their requirement and prioritizing the implementation; which elements of the standard are applicable to their business; and to tools to make ongoing bullet-proof SAM a reality.

WHAT DOES THIS MEAN FOR SAM PARTNERS?

BSA SAM Advantage provides you with a flexible set of vendor-supported training, resource and guidance materials to help you steer your customers toward achieving software asset management excellence. BSA has always adopted global best practice in the management of software, and the BSA SAM Advantage represents the synthesis of this knowledge into the only independent, not-for-profit program.

BSA SAM Advantage will enable you to deliver the high-value support and resources that will help your customers aspire to ISO/SAM conformance and ultimately achieve their SAM goals.

BSA SAM Advantage will give you the credibility, milestones, proof points and success stories that earn you the right to act as a trusted SAM advisor. Your customers can be reassured by the fact that the knowledge and tools you deliver are fully supported by the world's leading software industry association, and the world's leading software vendors. BSA SAM Advantage will enable you to deliver the high-value support and standards that will help your customers aspire to ISO/SAM conformance and ultimately achieve their SAM goals.





HOW BSA SAM ADVANTAGE WORKS

Little beats spending time with a professional, trusted advisor to achieve a goal. SAM Advantage works by enabling and accrediting consistent, committed SAM professionals who can help and support clients as they develop successful SAM programmes.

Many partners often find it difficult to support customers through SAM projects because there are too many signposts and dead-ends, and many steps are as they strive for best-in-class SAM. Partners are asking for a consistent approach they can reference to show they are producing worthwhile results

BSA SAM Advantage resolves this by providing the *SAM Advantage Roadmap* of practical steps and recognized milestones for each of the tiers. Going deeper than the standards elements (*what* you have to do), SAM Advantage Training comprises a series of resources developed in conjunction with software vendors to guide partners in the *how best to do it*. They include:

- Scenario-based training modules with case studies and skilling on how to apply the tiers
 - help you drive results, anticipate the quick-wins and common issues
- The SAM Advantage Roadmap, steps and milestones
 - help you engage all stakeholders with a shared view of progress and ability to show leadership
- Practical resources
 - help you get started quickly using the Advantage360 interview, agendas and useful templates to speed your adoption and show how your support services can assist in achieving SAM goals
- Best practice workshops
 - help you develop the virtual team, identify opportunities, build on shared goals, understand key benefits and incentives, and communicate agreed plans and objectives
- Certification options
 - help review and appropriately recognize customer progress



The BSA SAM Advantage materials and training courses are intended to be delivered by accredited SAM partners. Our SAM partners are qualified and experienced practitioners, and will work with organizations to ensure they have the tools, knowledge, and support to achieve their SAM goals.

Organizations tend not to become best-in-class smoothly, or in one leap. Instead, they tend to move through natural evolutionary stages, each one a plateau of attainment with key practices mastered. With the tiered approach, the BSA brings you a way of benefiting from best practices in just that way: mastering first things first and moving to best practices more efficiently.

THE FOUR TIERS OF BSA SAM ADVANTAGE

TIER 1: Trustworthy data

While SAM has many benefits, organizations frequently cite the ability to achieve and show license compliance as the main reason for implementing SAM. Tier 1 focuses on creating a healthy engine-room for SAM. Processes that provide essential SAM data such as software inventories are usually imperative for organizations to master and get running smoothly, otherwise it can be difficult to set SAM in the right direction—much like a ship unable to steer. Trustworthy data flows help motivate and make a business case for further SAM. The first tier and training resources drill down on what it takes to deliver processes that can be repeated again and again and are

properly authenticated to identify exactly which software is currently installed on your network.

TIER 2: Control Environment

Having established repeatable trustworthy data processes, organizations will be in a strong position to keep control of current risks and will be able to realize benefits from their current inventory. But what about the management of these processes so they *continue to adapt to new asset requirements*, and in doing so continue to recognize new risks and causes of risk? Tier 2 is about developing processes that give management proper control and fullest visibility through SAM, while meeting the needs of the business going forward.



TIER 3: Key Operational Processes

Some organizations may continue for some time with distinct SAM operations, which remain separate from service management or service-desk initiatives, for example. And while this may suffice for some, others will want to move to the next evolutionary stage, craving greater efficiency from integrating some SAM processes with other operational processes. This is not just about systems, but about integrating the way employees think and work. Tier 3 includes contract management, procurement, deployment, and retirement so they work together

with all necessary SAM procedures and can support the SAM data processes as part of one integrated approach, and deliver real ROI.

TIER 4: Complete Systems Integration

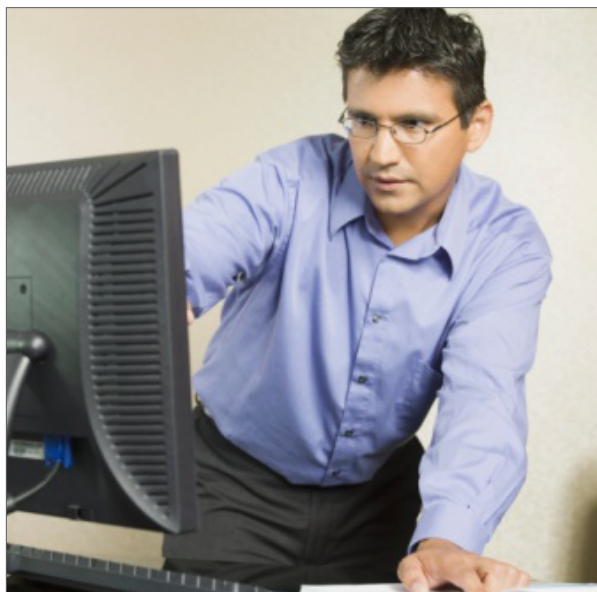
This tier groups together the remaining best practice aspects needed for full conformance, most notably the requirement for SAM to be appropriately incorporated into existing governance processes. Achieving this tier means SAM is fully comprehensive and fully backed by the business, enabling its use as a strategic tool for business transformation.

| BSA SAM ADVANTAGE TIER | ATTAINING THIS MEANS... | SAM ADVANTAGE MAKES IT EASIER FOR YOU TO... |
|---|--|---|
| Tier 1: Trustworthy Data | Knowing what you've got when needed | <ul style="list-style-type: none"> • Get started easily • Access valuable information • Set a foundation for best practices |
| Tier 2: Control Environment | Making SAM managed | <ul style="list-style-type: none"> • Make the business case for continued SAM • Set SMART objectives to achieve SAM goals • Win plan approval |
| Tier 3: Key Operational Processes | Integrating SAM so it's instinctive | <ul style="list-style-type: none"> • Deliver year-on-year value • Justify continued investment • Demonstrate continued progress |
| Tier 4: Complete Systems Integration | Full ISO Conformance, Lasting benefits | <ul style="list-style-type: none"> • Seek & retain board approval • Sustain ongoing SAM benefits • Show best practice through full certification |

HOW PARTNERS CAN GET INVOLVED

BSA SAM Advantage will be taught to enrolled SAM partners and practitioners. Those wanting to use SAM Advantage with their clients may register their interest in training and resources at www.bsa.org/SAMAdvantage. Partners can get started quickly by accessing online training resources, based around the BSA SAM Advantage Roadmap, and meeting the core program requirements. The next pilot phase is starting and partners can find out how to be referred to use the training and resources—contact details are provided at the above web address.

BSA provides easy-access, self-paced training—the completion of which will result in certification—which helps you develop an effective SAM Advantage delivery team and quickly apply SAM Advantage to grow your business. The core online training time (around 13 hours) is maximized to allow your team to quickly build its knowledge and start working together using the common language of best practice. BSA SAM Advantage training activity is strongly biased to on-the-job use of additional resources—you simply use these with your clients as part of your SAM adoption services.





SUMMARY

BSA SAM Advantage is a dramatically different approach to SAM. Supported by many of the world's leading software companies and sponsored by a not-for-profit organization committed to

It provides you with a flexible set of vendor-supported training, resource and guidance materials to help you steer your customers, easily and efficiently, toward achieving

BSA SAM Advantage is a new and unique initiative that uses an entirely different approach to develop the SAM industry best practice and ensure truly effective SAM.

software management excellence, BSA SAM Advantage represents a route toward SAM in line with the globally recognized ISO SAM standard. For the first time your customers can invest in SAM with the assurance that they are working toward a permanent, global standard —not a cent of their investment will be wasted.

software asset management excellence. BSA SAM Advantage is designed to develop and grow the SAM ecosystem. Not only will it drive uptake of SAM within organizations, it could also dramatically reduce software piracy and improve the perception of professionalism among SAM practitioners.



USEFUL LINKS

www.bsa.org

www.bsa.org/samadvantage

www.iso.org

www.19770.org



ROBERT HOLLEYMAN, President and CEO, BSA:

“BSA SAM Advantage aims to help those who make, sell and use software worldwide to make license compliance a long-term, strategic process for organizations featuring different levels of adoption for different end-user needs. It will provide organizations with a clear route toward license compliance supported by an open, independent and not-for-profit body.”

DAVID BICKET, Convener of the ISO’s Working Group for 19770-1:

“Research we conducted in 2008 revealed that businesses are looking for a staged approach to conformance with the SAM standard. In delivering this, and in providing a clear route towards the standard, I believe the BSA SAM Advantage program is firmly focussed on ensuring meeting the real SAM needs of business.”

MICHAEL BEARE, Director, License Compliance, Microsoft:

“Current SAM training structures don’t take into account the sheer diversity of SAM needs and expectations among businesses. BSA SAM Advantage provides the breadth of resource and the flexibility in their implementation, enabling us to deliver high-value support and standards to steer our customers towards achieving software asset management optimization.”

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