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## Soft-Aid E-Newsletter for End-User Businesses

**Helping Assess the Business Issues of Software Compliance, License Evaluation and Best Usage**

**May 2004**

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**Dear David,**

**Welcome to the fourth issue of Soft-Aid's E- Newsletter designed to help end-user businesses address the business issues of software license compliance, evaluation, and best usage.**

This issue focuses on the "People Approach" to streamlining software asset management (SAM).

### **The "People Approach" to streamlining software asset management (SAM)**

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### **INTRODUCTION**

The "People Approach" to software asset management (SAM)

The essence of the best practices around software procurement is to centralize and standardize software management practices. Creating clear (but overlapping) lines of responsibility is also an imperative

In this issue, we will discuss what this means in terms of managing the people groups in a company.

## **MORE ON THREE MAIN PEOPLE GROUPS**

There are three company groups that need to be considered when maintaining an effective asset management plan. They include: management, business-line employees, and what I call "SAM specialists."

Here are their purported roles:

(1) Management: Ultimate responsibility for compliance; recipient of asset reports that are used in assessing technology decisions and compliance. Imbue culture and tone for software asset management. Oversee budgeting and charge-back guidelines for software purchases.

(2) Business-line employees: Software users (the "masses")

(3) "SAM specialists": Employees who are involved in maintaining the integrity of SAM plan.

## **MORE ON THE SAM SPECIALISTS -- THE 4 E's**

The SAM Specialists subsume one of four roles in the software asset lifecycle: "Enforcers," "Educators," "Executors," and "Enablers" (the "4 E's"). Allow me to elaborate.

"Enforcers" are responsible for enforcing that software-use guidelines are adhered to in the company. They police sort of like how one envisions a "bad cop." "Enforcers" are typically members of the IT staff with knowledge of how the SAM tools work. They, however, are empowered to have make independent decisions.

If "Enforcers" are "bad cops," then "Educators" are the good ones. "Educators" are charged with making sure that all employees are aware of the company's software-use guidelines from the beginning of employment (see issue #1 of lawyer E-newsletter). They also staff the company's hotline for questions about proper usage or possible infractions. They typically are members of the company's HR staff working closely with IT and senior management.

"Executors" are responsible for both making software purchases and installing it on people's computers. These two functions are the critical choke points in software handling. The procurement of software is usually centralized in one IT person with a back-up resource. The set-up should be responsive to software purchase requests. Companies must decide whether business-line software that is specific to a particular group's business (e.g. CAD or Oracle tools) will also be directly managed by this person; if not, the "Executor" should still be coordinating the process (by setting up reseller relationships, etc.). The software should move from the reseller to the installation coordinator who will make sure that the software is installed and licenses are stored per company guidelines. To reiterate, business lines who are familiar with how to configure the software may need to be involved; in such cases, a point person for that business group should ideally be assigned to this task, working in conjunction with the "Executor."

Finally, "Enablers" are the people who manage the SAM system and produce asset management reports for senior management. They are typically members of the IT staff, but are isolated from the vagaries and daily responsibilities of maintaining these systems.

In a company with greater than 150 employees, the same party should rarely serve in more than one role. Getting the respect of fellow employees while both enforcing and educating in asset management is extremely difficult. Employees can sense the competing loyalties if one person does it. This can loosen their own commitment to the program.

If the roles seem loosely defined, that is intentional. Each company will need to make them firm, however, to fit the strengths and availability of their employee pool. Nevertheless, given the number of maintenance tasks and heightened sensitivities to the results, both overlapping responsibilities and management oversight is necessary. It helps keep these groups in- check.

This e-newsletter provides a good introduction to the human aspects of software asset management. We hope you now have a better appreciation for these issues.

**For More Information**

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Soft-Aid specializes in the creation and implementation of software asset management (SAM) plans for businesses. We would be happy to assist you with these matters.

Please take time to review our web site, [www.aid.com](http://www.aid.com)

*Please note: We are independent consultants and not formerly affiliated with any software vendor.*

**Past and Future Issues**

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Next Soft-Aid E-Newsletter on Business Issues of Software License Compliance, Evaluation & Best Usage:

The "Systems Approach" to streamlining software asset management (SAM)

**To read past issues, go to <http://www.aid.com/enewsletters/>**

**We Welcome Your Input**

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Please send along your thoughts and comments on our e-newsletters.

We welcome your input.

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**What Our Lawyers Made Us Say**

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