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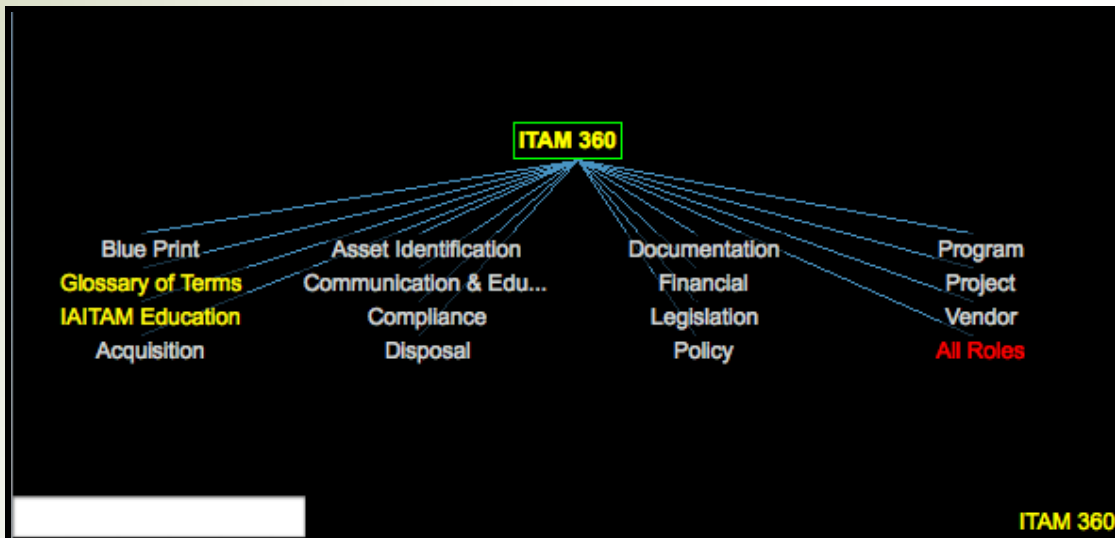
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EXECUTIVE SUMMARY

With the enormous role that Information Technology has in any organization, IT Asset Management (ITAM) programs have great potential that goes beyond achieving operational efficiencies and internal customer satisfaction. Through best practice usage and the gradual program maturation, IT Asset Management programs enable organizational goal fulfillment and deliver business advantages such as maximum value from an investment, IT as a competitive differentiator, and the reduced risk of unplanned financial events. Major barriers to ITAM program growth are the limited access to the experience and knowledge necessary to mesh IT asset processes with existing business and IT processes. Professionals are held back by the complexity of the processes and the comparative youth of the ITAM discipline. Assessments that should help identify next steps to success are limited to a particular vendor's perspective or to the narrow scope of software compliance.

The International Association of IT Asset Managers, Inc. (IAITAM) has spent most of the last ten years building a comprehensive library of best practices and educating professionals across the globe in those best practices. With extensive research and unparalleled access to practitioners and providers, the IAITAM Best Practice Library was added to the educational offerings in 2008. The library incorporated all aspects of IT Asset Management into 12 Key Process Areas spanning both the hardware and software business practices. While the library addresses the knowledge, standardization and practical implementation issues for practitioners, it remained difficult to use the underlying performance model to mature the IT Asset Management program. With the publication of ITAM 360™, access to best practices for successful IT Asset Management programs is now interactive, with a searchable knowledge base and an accessible performance model to facilitate assessing strengths as well as potential improvements. The knowledge base includes roles and responsibilities, relationships, dependencies, and projects for a broadly defined IT Asset Management program so that the information is applicable regardless of the organization's structure or specific needs. As technology, licensing and requirements change over time, the interactive knowledgebase is the perfect delivery system for fresh insights and to include the broad scope of influences to business practices.

This white paper describes the needs assessment that led to the development of ITAM 360™, relating it to specific business drivers and organizational goals. The Performance Model, developed from best practices and with a more realistic interpretation of what is required to mature processes is presented, along with the assessment process built into ITAM 360™. Navigation in the content delivery system is discussed, highlighting educational advantages as well as access to relevant expertise, and practical applications for the immediate application to an organization's IT Asset Management program.



ITAM 360

Welcome!

The ITAM 360™ provides solutions, expertise, and practical applications of the IT Asset Management profession's best practices, which enables practitioners to advance their organization's IT Asset Management Program.

Eliminating ITAM Stumbling Blocks

Managing Information Technology as a business and as an integral part of the organization are challenges that remain to be solved in many organizations. While organizations are heavily reliant on their IT infrastructures to execute and successfully achieve goals, rapid technology growth and the operational issues surrounding that growth pushed IT business management to a lower priority.

As the IT budget grew, executives struggled to relate expenditures to actual deliverables and to identify ways to increase value from that expenditure. Software budgets were particularly problematic as software portfolios both grew exponentially and introduced license compliance and audit risks. The realization of the need to manage hardware and software assets at an increased level of sophistication was the genesis of IT Asset Management.

The initial ITAM program focus was on the common business process of inventory control, although the requirements for managing software and hardware rapidly outstripped existing inventory processes and tools. New inventory processes, reflective of an in-use inventory and the opportunity for electronic surveillance led to the first data source that could be considered for business evaluation.

From this point on, the profession of IT Asset Management, with specializations in software and hardware, took off, opening an intense need for processes, roles, tools, advice and education. Both the profession and the practices of IT Asset Management had to quickly mature in order to deliver on the initial goals of accountability, savings and risk reduction. Through the development of products by software

providers and knowledge acquisition and sharing by organizations like IAITAM, IT Asset Management programs are underway in most organizations globally.

Executives expect some business management of IT, but often only at the tactical level, supporting operational efficiencies and customer satisfaction. Additional benefit from business management that is integrated with the organization's goals and used as a basis for strategic decision making is frequently not even considered. Since the discipline is new in comparison to standard business practices, history does not help the ITAM practitioner. The practitioner struggles to capture the attention of upper management to explain the ongoing business case for improving the ITAM program and to define the implementation strategies necessary to deliver these business benefits. In order to achieve maximum organizational benefit, the knowledge gap must be closed and practitioners must be supported by best practices with an accompanying road map on how to achieve the changes necessary.

Assistance from models such as ITIL® and standards such as the ISO/IEC standards for Software Asset Management is helping to close the gap at a high level. The Information Technology Infrastructure Library (ITIL) is a model advocating a service perspective, with incident, problem and configuration management for the operational aspects of using assets. IT Asset Management is strengthened by the use of this model for operations, opening up opportunities for improved data with which to conduct the business management of IT assets.

ISO/IEC standards for software provide external recognition of the best practices of software management. Increased

awareness is drawing some executive support.

The use of maturity models to plan out ongoing change and advancement of achievements has not been particularly successful. The complexities involved in multiple processes and a broad portfolio of assets is difficult to relate in a one-dimensional maturity model.

To advance the profession as well as the success of IT Asset Management programs, IAITAM has certified and educated practitioners and vendors alike in the practical application of IT Asset Management best practices. As a member-driven organization, IAITAM continually expands the educational offerings to reflect the diverse needs of the professionals as their roles change and more people join the profession. Through a close working relationship with practitioners and providers, IAITAM additionally offers webinars, conferences and networking opportunities for professionals in a vendor-neutral environment. This community of members is better able to keep up with new requirements and business opportunities.

The experiences gathered from research and from thousands of practitioners and providers worldwide led to the publication of the IAITAM Best Practice Library to fulfill the need for references that were robust and practical. This 12 volume set identifies the Key Process Areas (KPA) required to manage IT assets and includes experience-based details and alternative process paths.

With the development of the 12 Key Process Areas and detailed content on each area leading to improved value, the next natural step is to expose the interrelationships of those processes and develop a performance model to aid in the assessment. Assessments evaluate current

strengths and weaknesses and map out the actions necessary to grow the ITAM program towards goal achievement. ITAM 360 is the next generation of IT Asset Management program support, offering access to an interactive knowledge base, a practical performance model for assessment and planning and easy access to interrelationships for completeness of planning and understanding.

The ITAM 360™ Performance Model and Assessment

To align IT Asset Management programs with the goals of the organization and expand the value proposition to strategic decision making, practitioners must assess the strengths and weaknesses of the current programs and plan implementations to extend the impact and scope of responsibility. Models are typically used to provide guidance on how to implement improvements with the highest level of success.

The most common model is a maturity one, assigning a maturity rating to a specific environmental description that can include processes, automation and data sources. Relating the maturity level to specific actions that take the program to the next level is often difficult in IT Asset Management because of the complexities of managing so many processes. The organization may not even wish to follow the prescribed path as the next “step” has elements that are not relevant to the organization’s needs or goals. This lack of clarity has led to minimal use of existing models as a means of developing ITAM value. Another modeling issue presented by IT Asset Management is the complexity of capturing the scope of processes since these processes have far-reaching impact within an organization.

IAITAM has taken a different approach, focusing on delivery of specific, actionable tasks that support goal attainment, from the executive strategic vision to the overall enhancement of the business management of IT assets. The ability to take the results and choose a course of action instead of only identifying a “next level” is the essential differentiator between this performance model and other ITAM models.

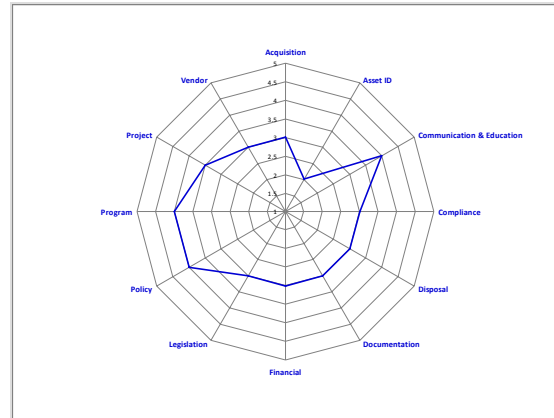
The ITAM Performance Model incorporates the complexity of ITAM into the model by utilizing 12 indicators, one for each Key Process Area (KPA). Originally published by IAITAM in 2005 as the Best Practice Blueprint and subsequently refined and expanded in the IAITAM Best Practice Library, these KPAs have been field tested for accuracy, efficiency and practicality.

IAITAM Best Practice Library
Key Process Areas

- Acquisition Management
- Asset Identification
- Communication and Education
- Compliance Management
- Disposal Management
- Documentation Management
- Financial Management
- Legislation Management
- Policy Management
- Program Management
- Project Management
- Vendor Management

With these well-defined and discreet indicators, the performance model allows each area to be evaluated and measured independently as well as providing an overall rating. The following diagram is a sample results diagram from an ITAM

program assessment based on the ITAM Performance Model.



The results of the ITAM Performance Model are produced from a weighted analysis performed by IAITAM for ITAM 360 users. IAITAM will maintain a historical record of the organization’s assessments for the entire length of their subscription so that progress and ongoing issues can be examined over time.

Summary statistics across all ITAM 360 assessments will be collected as well, building industry benchmarking statistics.

The IAITAM Assessment process consists of a series of questions for each indicator and based on the best practice KPAs. The questions are specific and measurable so that the answers to these questions collectively represent the level of sophistication achieved. For instance, the Acquisition Management KPA consists of multiple functional elements such as:

Negotiations

Purchasing

Request & Approval

Each of these functions has processes and roles, with relationships and dependencies identified within the function, the KPA and across KPAs. For example, the lack of IT

standards relates directly to the maturity that can be achieved in the request and approvals function.

The unprecedented depth and breadth of details within the ITAM Performance Model offers clarity for practitioners because the assessment questions and results relate to their daily activities. This clarity and depth offers more accurate results that ultimately lead to more successful improvements.

By examining the results of the ITAM Performance Model assessment, organizations now have a clear roadmap from which to make strategic and tactical decisions. Once decisions are made, practitioners also have specific details from which to build project plans, closing the gap between model assessments and the practical application of the assessment results.

Project planning and execution can also take advantage of the easy access to the interactive knowledgebase which delivers expert information on demand.

The ITAM 360™ Knowledgebase

ITAM 360 incorporates all the knowledge from IAITAM's Best Practice Library into an interactive and searchable knowledge database. Previous experience with the IAITAM Best Practice Library is not required for the successful use of this knowledgebase.

The power of ITAM 360 is in the representation of best practices just like a network so one user request retrieves the specific reference point, but also allows quick perusal of the relationships and roles related to that function. This capability supports the junior ITAM practitioner who is unaware of all of the implications of actions in a particular functional area.

More experienced practitioners benefit by rapid and robust access, allowing them to build additional value and linkages within their own ITAM programs without "reinventing the wheel."

By connecting the people (roles), processes, and information about choices and implications, ITAM 360 provides unparalleled context for knowledge discovery, empowering informed decision-making and actions.

Since knowledge access is no longer restricted to static content, the interactive capabilities of ITAM 360 reflects more closely the connections and relationships within the organization. For example, an inquiry about disposal practices returns additional related information from other KPAs such as Legislation Management, Documentation Management, Acquisition Management and Asset Identification.

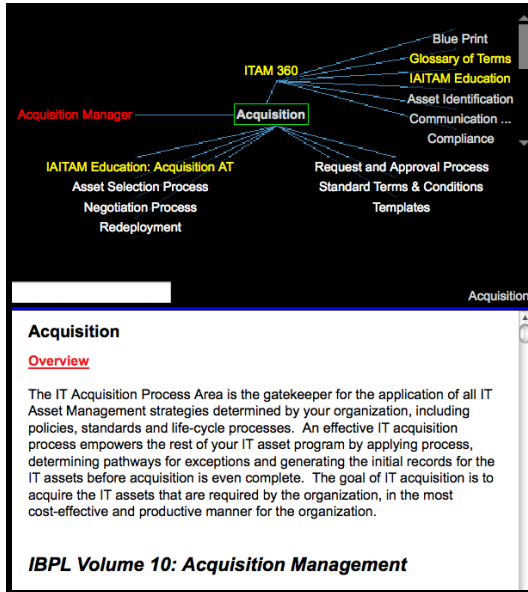
Understanding and applying the knowledge is greatly increased through this direct linkage of information to the real world of IT Asset Management.

ITAM 360™ Links

From a technical perspective, the design of ITAM 360's knowledgebase has distinct advantages over standard search techniques. The standard and predictable search engine directories normally restrict the desired information to a stringent single-path answer. This approach does not accurately reflect the multiple tiers of interconnected data and relationships that necessary to capture complex business issues.

Instead of these conventional data request vehicles, ITAM 360 utilizes a vastly expanded data request methodology that seeks connections and thereby allowing easy access to information that is not

narrowed to a single path. ITAM 360 traverses a network of logically related associations to uncover multiple facets and levels related to the requested information.



The Value Proposition for ITAM 360™

The distance between strategic vision and operational execution can be great indeed and the management of IT assets is particularly susceptible due to the number of processes and people involved. However, the size of the IT spend and the importance of IT assets to the successful execution of all aspects of the business provides almost an endless opportunity for value-laden improvements for IT Asset Management. Even simple changes or improvements have yielded enormous savings or reduced the risk of an unexpected financial event considerably.

Success of IT Asset Management programs are directly related to a complex set of processes, roles and lifecycle management of many asset types. These complexities, along with the varied implementations of IT Asset Management programs across organizations, have created roadblocks.

Lack of information about how to analyze issues, how issues relate to the web of processes and the opportunities presented by solving issues is the most common problems today.

ITAM 360 is a comprehensive support system that identifies, discerns, and guides. Reaching far beyond simple data-mining, the knowledge that ITAM 360 provides is the critical differentiator between a truly successful ITAM program and a program mired in uncertainty and lack of cooperation and understanding. The ITAM 360 approach to this knowledge is unique and powerful for the ITAM professional and the organization that benefits from the successes.

Providing the Critical Success Elements

✓ Rapid and easy access

The ITAM 360's search capability returns more than a simple list of references. The unique methodology that the search function provides assists you with identifying the various connections between the Key Process Areas. The relationships, dependencies, templates, workflows, etc. are all revealed within the easy-to-use search bar attached to the ITAM 360.

✓ Extensive and expandable library of information

The rich library of information packed into ITAM 360 is broad in coverage as well as deep in details. Best practice information is steeped in suggestions for analyzing current activities and rich in how and why information to close the performance gap. The knowledgebase will be expanded over time with additional insights and support for users so that subscribers

can keep pace with trends and new opportunities through ITAM 360.

✓ **Evaluating the impact of change**

The ITAM 360 integrated relationship capabilities help forecast the impact of a new policy or procedure by identifying the areas where the relationship to that change is the strongest or most relevant. The information allows practitioners to plan ahead for possible implications, fostering greater control and employee buy-in to that change. Real-world issues of politics and resistance to change are more easily predicted and actions planned to remove potential roadblocks.

✓ **Increasing project success**

Projects generally succeed or fail in the planning steps, although hindsight is usually required to figure that out. With the powerful information and relationship capability of ITAM 360, project initiatives start with a firmer understanding, a more robust view of the issues and consequences, and unlimited access to best practice guidance. Project Managers are able to better identify the different requirements from the various KPAs and develop detailed and practical tasks. Project Managers are also reminded of critical actions such as communicating to build buy-in, cooperation and commitment.

✓ **Mapping of roles to people**

The ITAM 360 Knowledgebase identifies roles that are tied to specific responsibilities within each KPA. Relating these roles to the real-world variety of organizational hierarchies is an easy task because of the practical and detailed descriptions for those

roles. To build job descriptions, titles and responsibilities for a particular organization's implementation of IT Asset Management, the ITAM 360 user queries that KPA and pulls the role and associated responsibilities that are expected. This information can then be added to any additional roles that the individual may have, resulting in a customized position description for the organization. With the support of the knowledgebase, job descriptions are reflective of actual needs and duties, increasing accountability and awareness of best practices as they relate to that individual's responsibilities.

✓ **Mapping to ITAM and organizational goals**

The ITAM 360 Knowledgebase helps close the gap between desired outcomes and operational activities. Whether building and implementing a project plan or attempting to align regular responsibilities to the goals, the knowledgebase has the information necessary to build a goal-oriented infrastructure that supports new directions. While the KPA for ITAM Program Management includes launching a new program, the true value of program management is in managing an infrastructure that depends on goals and is flexible enough to provide support and guidance. The ITAM 360, in the capable hands of an ITAM professional, is a powerful engine that can be used for individual as well as program success.

✓ **Ongoing education and ready reference**

ITAM 360 is an education tool that surpasses anything else available.

Specific and detailed information is easily available. The information can be extrapolated in numerous ways to illustrate the impact of actions, improving decisions that are made on a daily basis. Understanding the implications of a decision, from all angles, ultimately fosters a better decision-making process and a strong IT Asset Management Program as a whole.

✓ **Visualization of processes**

With ITAM 360, the user can research a specific function, tracing the process throughout the IT environment and lifecycle of the assets in a logical manner. Processes developed or overhauled with the support of ITAM 360 are less likely to be missing important elements or sabotaged by the absence of some element such as measurement, communication or accountability.

✓ **Actions that deliver value**

The ITAM 360 Knowledgebase delivers choices on actions and lays out the impacts so that actions can be weighed and measured. Success translates into dollars through eliminated purchases, redeployment, invoice error monitoring, compliance to standards, tactical optimization for the strategic direction and much more. Operational efficiency becomes the tip of the iceberg of value from IT Asset Management rather than the only expected deliverable.

✓ **Enhanced ROI Assessment**

ROI calculation is a valuable measurement for evaluating overall goal attainment. ITAM 360 identifies the possible sources of both hard and

soft savings from ITAM actions. Whether garnering buy-in from executives, using effective purchasing and contract negotiation techniques or ensuring policies are enforced, ITAM 360 educates on the impacts and offers the details necessary to calculate ROI and communicate success. ITAM 360 aids users in the presentation and use of measurements based on a practical and actionable assessment. Improved ROI accuracy delivers immediate value when aligning processes to financial goals.

✓ **Superior value**

The IAITAM commitment to the availability of the information that organizations need to manage IT assets is well known. No other organization is vendor neutral and yet works productively with the industry- leading vendors. No other organization has as much experience in both software and hardware asset management, especially practices that are not tied to specific product implementations. The best practices that are at the center of ITAM 360 are based on actual practitioners, consultants and vendor experiences alike. The breadth of experiences incorporated into the best practices provides the flexibility and problem-solving information necessary to overcome unique organizational issues.

The accessibility and networking of information offers faster, higher quality productivity amongst the employees who utilize ITAM 360. Ultimately, the IT Asset Management Program will deliver better results and on a wider range of goals than would have been possible without adding experienced professionals.