

# IAITAM's Certified Software Asset Manager Course Syllabus



## **Course Summary**

The IAITAM Certified Software Asset Manager (“CSAM”) course provides a foundation for managing software assets, as well as the knowledge necessary to understand the ever-changing variables that comprise the daily mandates of software asset management. From software piracy and compliance issues, to legislative matters and organizational challenges, it is necessary to evaluate both the external and internal forces that bring about changes to the manner in which organizations manage their IT assets. A successful Software Asset Manager must examine and assess the organizational goals to determine where and how Software Asset Management can be used to play a strategic role in the achievement of those goals.

In this course, students will learn best practices in Software Asset Management which include important aspects of software management such as acquisitions, documentation, matters of compliance, how to clearly identify goals and how to quantify success. All of this and much more will be covered in detail, all of which is derived from IAITAM’s Best Practice Library (IBPL).

Software Asset Management (“SAM”) is the defined set of business practices that support the use of software within an organization and frequently involves new aspects of how and why software traverses the organization. SAM is now considered mandatory by many organizations that view their Software Asset Managers as important contributors to the overall organizational goals such as reducing risk, increasing accountability, uncovering savings, as well as gaining and maintaining SAM control. To be considered truly successful, Software Asset Managers must learn not only what comprises the successful business practices of Software Asset Management, but must also learn how to groom those business practices to best meet the specific needs of their organization.

## **Real World Software Asset Management**

The Certified Software Asset Manager (CSAM) course represents the culmination of ever-changing software information including laws and regulations as promulgated in the past as well as a directed focus towards the new standards covering software applications, and the severe detriments of not adhering to those directives. It is an absolute necessity that today’s CSAM be completely aware and ready to take action on all current and proposed regulatory mandates that may directly affect not only their organization, but the ITAM industry as a whole.

Students will learn the importance of Software Asset Management in today’s dynamic ITAM environment. Never before has it been so important that there be certified individuals within an organization whose training is devoted specifically to Software Asset Management providing the needed focus to achieve the long-term value and benefits derived from that knowledge. It all begins here with the CSAM course of instruction and certification designed to be a stellar enhancement to any ITAM program.

The CSAM Program was originally developed by professional Software and Hardware Asset Managers to codify a number of existing IAITAM professional development programs. The Certification in Software Asset Management as produced by IAITAM has evolved over the years to further accommodate the changes in the profession, and will undeniably add notable credibility to any organizational IT Asset Management Program.

The CSAM course of instruction is designed to guide individuals within the profession to gain a firm understanding of the importance of adhering to existing software regulations, and how those regulations have effect on every aspect of current and future organizational endeavors. Additionally, the student will learn the importance and the steps necessary to achieve a proactive stance when dealing with software compliance.

With instruction focused on Communication and Education, Policy, Procedures, Project Management, Software Assets and Compliance Management, the CSAM instruction and related

materials will bring to light the importance of a well planned and executed Software Asset Management Program.

This interactive course of instruction will allow ITAM professionals to review existing organizational infrastructure to effectively enhance any Software Asset Management Program – one that meets global expectations.

CSAM, as with all of IAITAM's courses, convey the same primary goal of educating ITAM professionals in effective asset management, automation and centralization. When all is combined, this understanding will equate to a higher return on investment (ROI), compliance risk mitigation and increased overall productivity. Course topics include:

- Software License and Agreement Negotiations
- Software Contract Management Techniques
- Current Legislation Affecting SAM
- Advanced Software License Compliance Management
- Selecting and Implementing IT Asset Management Repositories
- Selecting and Implementing IT Configuration Discovery Tools
- Developing Strategic SAM Policies and Securing Executive Buy-In
- SAM Project Management Techniques
- Reducing Lifecycle Costs Through Effective IT Time Management
- Successful Change Management Techniques
- Achieving Senior Executive Buy-In and Support
- Current Legislation Affecting Software Compliance and Licensing

**Two methods of instruction offered:**

**Instructor led (in person) – Class room; various locations.** Conducted in 2 full day sessions

**Interactive (live) online instruction** – Conducted in either 2 full day sessions or 4 half day sessions.

**Armed with CSAM Tools of Learning**

This course exposes the student to numerous concepts for ITAM that are relevant for both a direct application and as a valuable means of discussion for those persons who will implement, manage and direct ITAM activities for their organizations. All of this is focused on Software Asset Management as the primary knowledge sought by the student. The CSAM course consists of the following components:

- CSAM Course Manual
- CSAM Course Presentation Slide Book
- CSAM Study Guide
- Interaction With Instructor student During the Instruction Period

**Who Should Attend**

The CSAM course in either mode of instruction is designed for those individuals with minimal experience in the field of Software Asset Management. This course is an essential learning tool for beginning IT Asset Managers and other IT professionals involved in asset management, resource budgeting, finance, software licensing, contract management and strategic planners. Although there are no prerequisites to this course, some knowledge of contracts and software life-cycle management is encouraged. A CSAM certification test is available upon completion of the course for those who wish to become certified.

**2 day Course Schedule (8 hours each day):**

**Day 1** – Introductions, ITAM Code of Ethics, Overview of the ITAM Program, ITAM Key Process Areas, Communication and Education, Policies and Procedures,

Compliance Management, Software Industry Member (Enforcement) Organizations, Compliance Preparations, Proactive vs Reactive SAM. Summary of Day 1 Instruction, Homework Assignment for Day 1

**Day 2** – Homework Review, Question and Answer Period. Software Licensing, Software Types, ITAM Tools, Cost Savings and Benefits, Acquisitions, Negotiations, Terms and Conditions, License Management and Documentation, License Agreements, Contract Repository, Vendor Management, Disposal Management, Project Planning and Management, Change Management. Class Summary, Question and answer Period Before end of Class.

**4 day Course Schedule:**

**Day 1** – Introductions, ITAM Code of Ethics, Overview of the ITAM Program, ITAM Key Process Areas, Communication and Education, Policies and Procedures

**Day 2** – Previous Day Review Period, Questions. Compliance Management, Software Industry Member (Enforcement) Organizations, Compliance Preparations, Proactive vs Reactive SAM, Software Licensing, Software Types, ITAM Tools, Cost Savings and Benefits

**Day 3** – Previous Day Review Period, Questions. Acquisitions, Negotiations, Terms and Conditions, License Management

**Day 4** – Previous Day Review Period, Questions. Software Documentation, License Agreements, Contract Repository, Vendor Management, Disposal Management, Project Planning and Management, Change Management. Class Summary, Final Question and answer Period Before end of Class.

**Learning Objectives:**

Through the successful completion of this course students will be able to:

- Implement and build controls for software inventories, ultimately linking licensing, usage, locations and documentation for all software products
- Maintain visibility into software asset processes and build controls for software assets throughout the lifecycle to uncover more savings and value while reducing support and rollout costs and maintain compliance
- Develop, implement and promote policies, processes and procedures for software acquisitions, installations, usage and disposition
- Ensure that all parties understand and adhere to legal requirements for using software
- Provide the correct applications to the specified users at optimal intervals to obtain the best value and to eliminate unnecessary software products
- Utilize available resources to solve problems, being aware that SAM issues interrelate and impact important business objectives
- Enact and maintain a proactive Software Asset Management program or continually work towards replacing reactive processes
- Use software policies, processes and procedures to identify and thwart software piracy and theft
- Provide strategic direction to the creation and maintenance of an effective Vendor Management program
- Empower, train and support all assigned Asset Management personnel
- Build and nurture productive relationships with all other business units, both those that have interaction with the IT business functions and those that are customers
- Encourage and maintain executive management support for all IT related endeavors
- Provide employee awareness of Software Asset Management

- Conduct responsibilities and tasks in support of the CITAM

**Learning Outcomes:**

This course reviews the primary responsibilities involved in managing an organization's software assets and analyzes the in-depth knowledge, operational knowledge, and competence required for this area. Included are methods for identifying and uncovering numerous opportunities to increase the organization's bottom line through software distribution and compliance.

- Appraise the architecture for an IT software asset management program
- Evaluate an organization's functional areas in the support of the IT software asset management program
- Analyze organizational requirements for an IT software asset management program
- Evaluate and apply the IT software asset management processes
- Demonstrate approaches to improving an IT software asset management program
- Create an IT software asset management program roadmap and policies