

Software Asset Management

A Guide for Partners

Reviewing Policies and Procedures

Establishing and following good policies and procedures for software use and license acquisition is an important part of the entire software asset management process. Use this script as an example of what to talk about during this process.

Script - Reviewing Policies and Procedures

Thanks <NAME> for working with me on assessing your current software use and licensing status. I think we've done a great job reporting our findings.

I have a few recommendations that will help you with software asset management moving forward:

- Clearly delegate and document responsibility and accountability for acquiring new software licenses and keeping records
- Acquire software licenses only from reputable resellers
- Always keep the evidence of purchase documentation (original CDs, Certificate of Authenticity, End User License Agreement, original User's Manual, and sales receipt) in a centralized and safe location
- Track and update the Software and Licensing Summary Report on a regular basis so you can reference accurate information at any time

If your customer does have software use policies in place, you may wish to say:

I'm glad you already have policies for your employees. Do you mind if we review them together to make sure they cover all of the important points?

If your customer does not have software use policies in place, you may wish to say:

I'd like to recommend implementing some basic policies on software use for your company. The policies will help you manage your software and provide employees with easy-to-follow guidelines.

The policies should cover a few items:

- Reviewing terms and conditions to ensure proper usage (i.e. some software licenses only allow the software to be used for testing purposes, not a permanent solution for internal business use)
- Installing software by authorized personnel only
- Keeping terms and conditions in an easily accessible location for all employees

Let's use this template to write up software use policies for your company now. Then you can review them with the appropriate people, revise them as necessary, and distribute them to all employees.

You may wish to bring the following items:

- Software Use Policy - This template, available at http://www.microsoft.com/resources/sam/partnerguides/03_Tools01E.asp, will help you and your customer develop a good software use policy, which your customer can then share with their employees.
- Software Asset Management Checklist - Check off this step from the list when completed.

Note: this document is not intended for distribution to your customers.

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