

Cheat Sheet – Microsoft Software Asset Management (SAM) Optimization Model



Basic SAM (Ad Hoc)

Organizations are categorized as basic if they maintain little in the way of policy and control of their software assets. These organizations tend to overspend, under license, and are constantly in a crisis mode with respect to their software assets. **Percentage of assets tracked, software purchased through central procurement, and software reuse: >68%**

Standardized SAM (Tracking Assets)

Organizations with a Standardized SAM Maturity will have some processes and controls in place but are not using the information in any meaningful way. These organizations will have implemented tracking tools and centralized data repositories, however they may not have fully reliable information. An audit takes place annually. **Percentage of assets tracked, software purchased through central procurement, and software reuse: 68-96%**

Rationalized SAM (Active Management)

Organizations with a Rationalized SAM maturity will be leveraging their data and tools, and will be actively managing their software assets. Policies and procedures are in place helping provide accurate information to support reactionary decision making. Audits take place quarterly. **Percentage of assets tracked, software purchased through central procurement, and software reuse: 96-99%**

Dynamic SAM (Optimized)

Organizations with Dynamic SAM maintain near real-time insight into their software assets. They are able to leverage this information for long term planning and proactive decision making. The audit process is ongoing. **Percentage of assets tracked, software purchased through central procurement, and software reuse: 99%+**

