



The World of IT Financial Management

June 20-24

St. Louis, MO



IT Asset Management Best Practices Seminar

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Dilbert on Cloud Decision-Making



What experience do we have in the room?

- Name
- Company / Agency
- How many years experience in IT Asset Management?
- Technical or financial
- Why are you attending this seminar?
- Do you have any specific issues or challenges?

What experience do we have in the room?

- Financial – 7
 - IT Finance Experience
 - 1-5 6
 - 5-10 1
 - 20+ 1
 - ITAM Experience
 - 0-1 7
 - 20+ 1
- Technical – 1
- Issues you wish to discuss:
- C/B Issue
 - Merger
 - Software License
 - Cost major point of ITAM
 - What are others doing?

LET'S DEFINE IT ASSET MANAGEMENT

What is it?

- Hardware
- Software
- Maintenance
- Licensing
- Procurement
- Own / Lease
- Disposal
- Replacements
- Security
- Contracts
- Help Desk
- Service Calls
- 3rd Party Relationships
- Depr / Amortizations
- Chargeback
- Warranties

What are we trying to achieve?

- Maximize the value of our assets
- Save money

What are the Critical Success Factors?

- Document the process
- Effective process flow
- Reduce incidents
- Reduce theft

ITAM – What has not worked?

- Silo solutions
- Excel spreadsheets
- Lack of a plan
- Lack of vision
- Not understanding:
 - Scope
 - Definition of ITAM
 - Asset TCO
- No SLAs

ITAM – What has worked?

- Intern tracking incoming assets
- Good ITAM definition
- Good ITAM documentation
- Workflow management
- Good processes
- Asset knowledge

ITAM Best Practices – Myth or Real?

- BETTER Practices...

Let's Build a BETTER ITAM

- What do we need?
 - Standards
 - Process Value Analysis
 - Management support

High Level Management Support

- Technical – CIO
- Financial - CFO

Must demonstrate that:

Cost Today – Cost Tomorrow = Savings!

ITAM Philosophy

- What is the Vision?
- What is the Mission?
- What are the measurable objectives – Critical Success Factors?

ITAM Software

- Configuration Management Database
- Workflow Management
- Service Management
- Discovery Tools
-
-

IT Asset Management (ITAM)

- Is a total life-cycle strategy for optimum acquisition, installation, operation, and maintenance.
- Asset management links availability, capacity, and operating and maintenance costs to business objectives.

IT Asset Management is:

- *The discipline of managing:*

Finances

Contracts

Usage of IT Assets

What it means –

- *Throughout the asset's lifecycle*
- *Maintain an optimal balance between business service requirements:*
 - ✓ *Total costs*
 - ✓ *Budget predictability*
 - ✓ *Contractual and regulatory compliance*

IT Asset Management Activities

- *The management of:*
 - Asset Inventory*
 - Software licenses*
 - Vendors*
 - Procurement*
 - Leases*
 - Warranties*
 - Cost accounting*
 - Retirement and disposal.*

What are IT Assets?

- Computer Hardware
 - Enterprise Servers (Mainframes)
 - Distributed Servers
 - Storage Devices
 - Printing Resources
 - Desktop / Portable Resources
 - Network attached devices
 - Local devices

What are IT Assets?

- Telecommunications Hardware
 - Network
 - Hubs, Routers, Bridges, Switches
 - Voice
 - PBX, VoIP Resources
 - Shared Voice/Data Resources
 - Mobile Devices
 - Smart Phones, Tablets

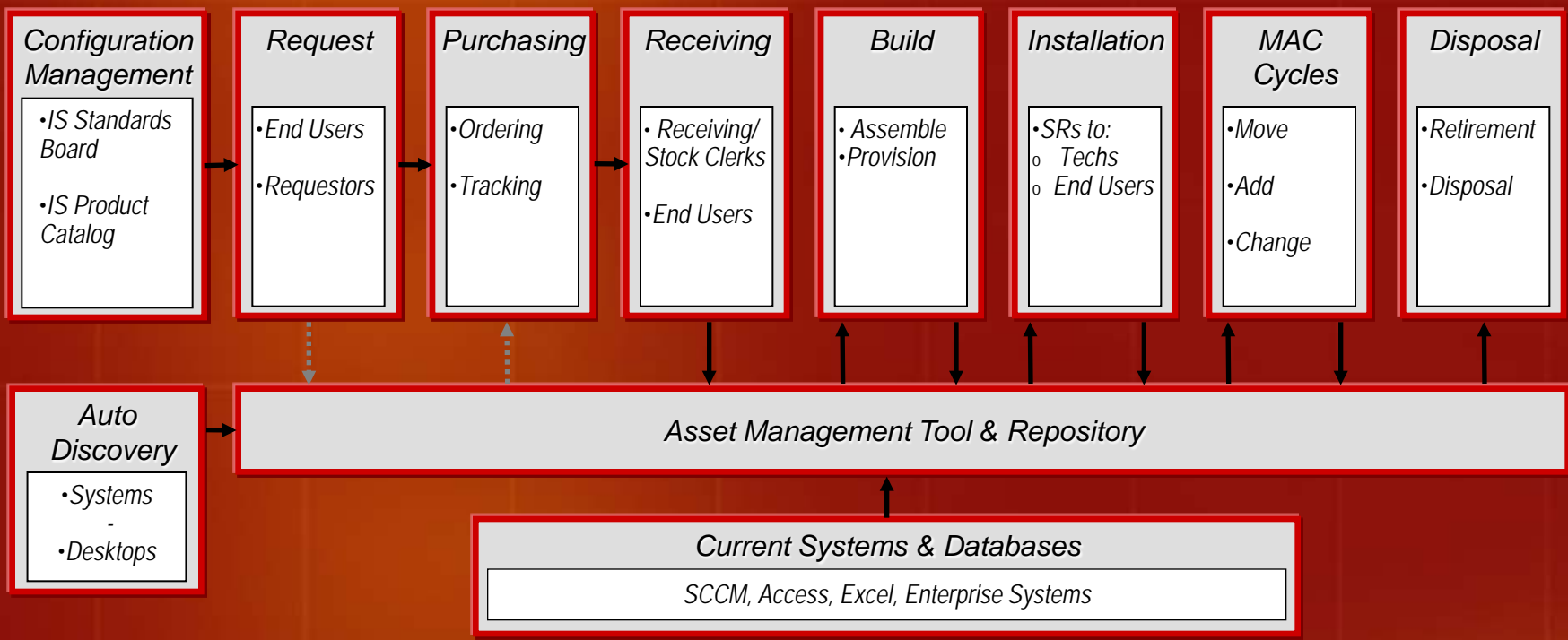
What are IT Assets?

- Software
 - Operating Systems / Sub-System
 - Application
 - Purchased
 - Developed
 - Database
 - Performance Management
 - Diagnostic
 - Utilities

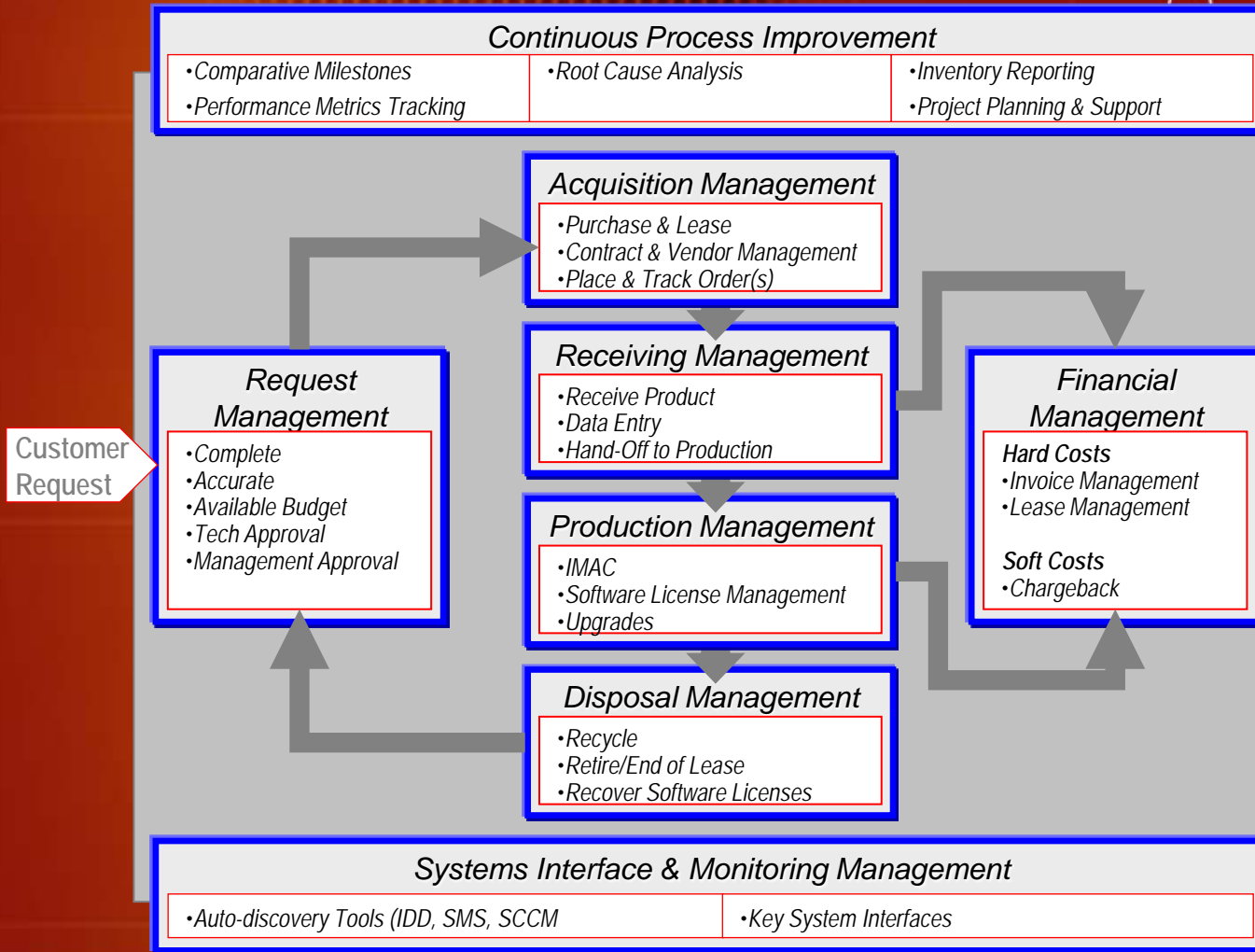
Capital / Expensed Assets

- Capitalized Assets
- Purchased Resources
- Leased Resources
- Loaned Resources (Vendors)

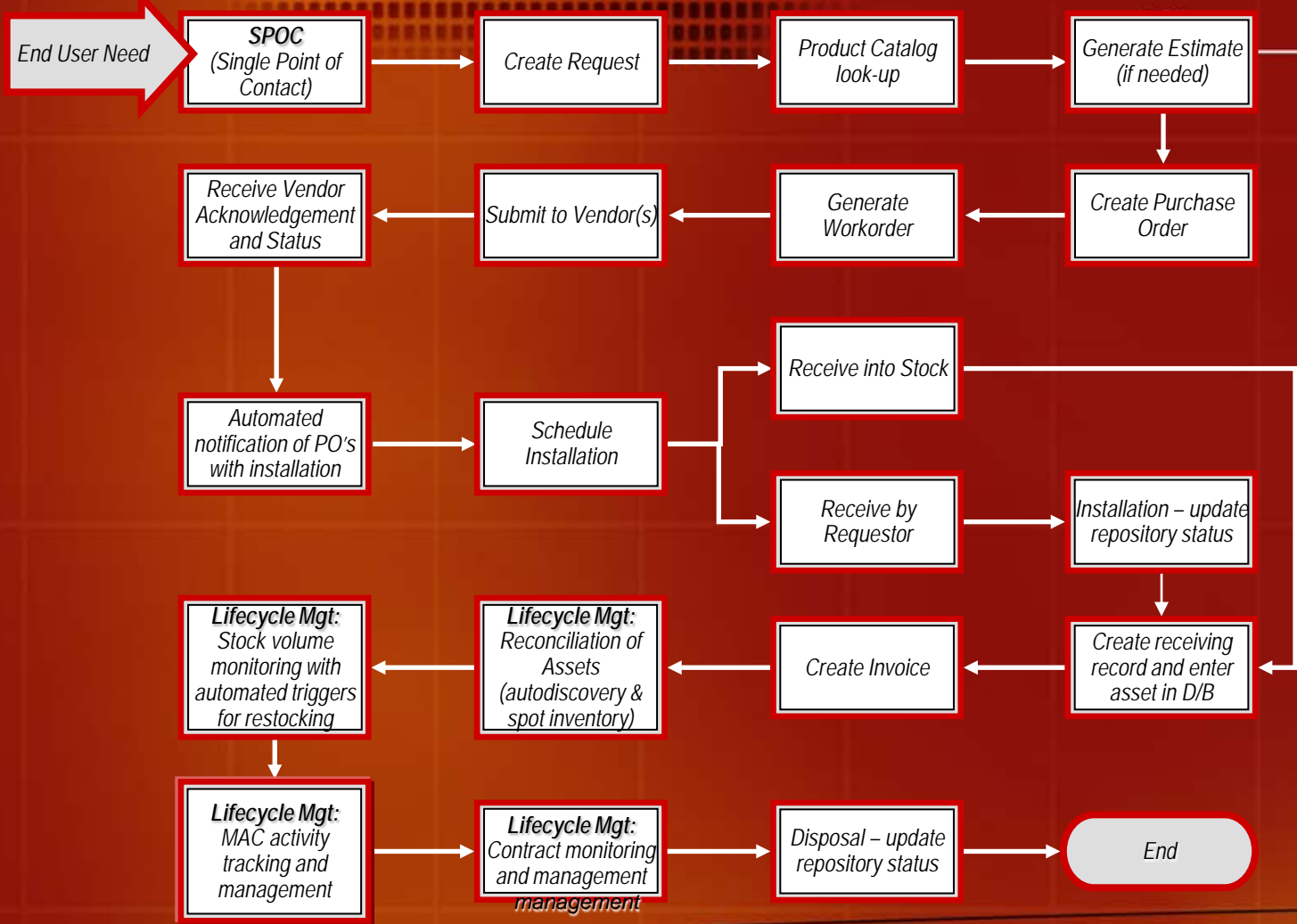
ITAM Lifecycle



Asset Management Reference Model



'Best Practice' Process Flow



Exploring the Asset Lifecycle

⇒ Call to the Customer Care Center (Help Desk)

- Trouble report
- Service request
- Request for new service

Change Management
/ Help Desk

Exploring the Asset Lifecycle

- ⇒ Customers current configuration or service profile
- Is asset under warranty?
 - What is customers service level (24x7, time & materials)

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Exploring the Asset Lifecycle

⇒ Repair

- Dispatch technician
- Create work order

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Exploring the Asset Lifecycle

⇒ Purchase replacement or new resource

- Warranty replacement?
- Disposal or retirement of old resource?
- Procurement?

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Exploring the Asset Lifecycle

⇒ Repair

- Billable time to customer

⇒ Purchase

- Capital or expense

Cost and Charge
Management

ERP System

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Exploring the Asset Lifecycle

⇒ Moves, adds, or changes to resources

- Changes in
 - Configuration
 - Location
 - Ownership

Cost and Charge Management

ERP System

Change Management / Help Desk

Procurement Management

Contract Management

Additional IT Finance Interactions

⇒ Chargeback

- Asset based
- Service based

Cost and Charge
Management

ERP System

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Additional IT Finance Interactions

⇒ Planning & Budgeting

- Capital budgeting
- Revenue budgeting
- Expense budgeting

Planning and
Budgeting

Cost and Charge
Management

ERP System

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Additional IT Finance Interactions

⇒ Expense Reporting

- Depreciation - hardware
- Amortization - software
- Hardware & software maintenance

Planning and Budgeting

Cost and Charge Management

ERP System

Change Management / Help Desk

Procurement Management

Contract Management

Additional IT Finance Interactions

⇒ Dashboard

- Management reporting - metrics

Dashboard

Planning and
Budgeting

Cost and Charge
Management

ERP System

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Additional IT Finance Interactions

⇒ Project Management

▪ IT project resources

Dashboard

Planning and
Budgeting

Cost and Charge
Management

ERP System

Change Management
/ Help Desk

Procurement
Management

Contract
Management

Project Management

Additional IT Finance Interactions

⇒ IT Portfolio

- Strategic planning for IT resources

Dashboard

Planning and
Budgeting

Cost and Charge
Management

ERP System

Change Management
/ Help Desk

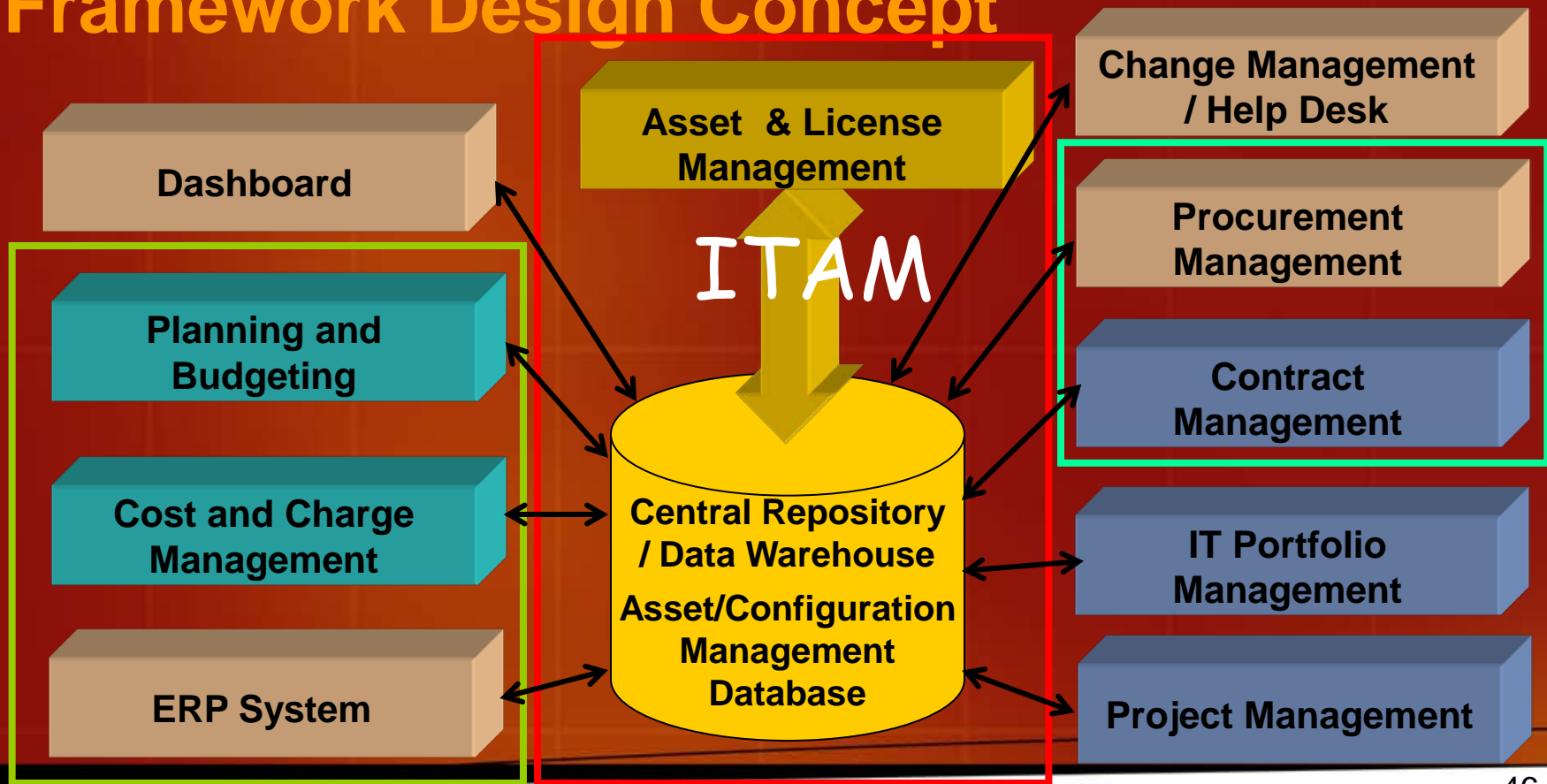
Procurement
Management

Contract
Management

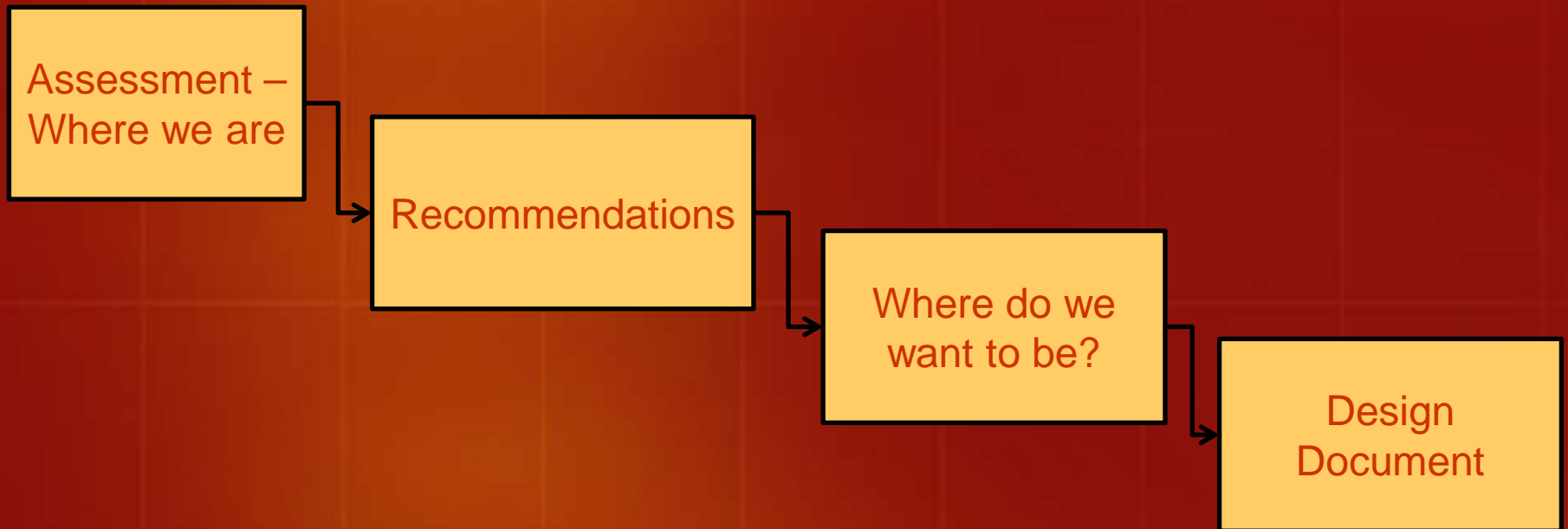
IT Portfolio
Management

Project Management

Integrated Enterprise Architecture Framework Design Concept

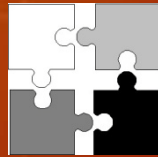


Next Steps...



Questions...





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