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Introduction

In essence, IT Asset Management encompasses a series of business practices that integrate IT assets across various business units within an organization. It seamlessly combines financial, inventory, contractual, and risk management duties to oversee the entire lifecycle of these assets, guiding both tactical and strategic decision-making processes.

**Hardware Asset Management**
- Hardware asset optimisation
- Track hardware
- Track system compliance
- Reduce cost through reuse
- Elimination of unnecessary assets

**Software Asset Management**
- Software license compliance
- Software asset optimisation
- Track software install
- Monitor software usage
- Reduce cost through reuse

SAM is inventory management of software assets. Activities within a SAM framework include the accurate discovery, tracking, and management of licenses, costs, and risks associated with software assets.

**ITAM Lifecycle**
Aligning ITAM with ISO 27001 and CIS20

Information security standard

- A6. Organisation
- A7. HR security
- A8. Asset management
- A9. Access control
- A12. Operational security
- A14. System acquisition, development, and maintenance
- A15. Supplier relationships
- A18. Compliance

ITAM Standard ISO19770-1:2017

- C1. Inventory of authorised and unauthorised devices
- C2. Inventory of authorised and unauthorised software
- C3. Secure configurations for hardware and software
- C5. Controlled use of administrative privileges

Problem Statements

CEO
What is the ROI and how do I optimise it? Is my asset procurement justified?

CFO
Is my FAR representing the right value of assets? Am I undertaking timely renewal/return/removal of hardware and software assets?

PROCUREMENT
Planning and consolidation of assets procurement: How do I track my assets, contracts, renewals?

INFRA
Track of asset allocation, location, EOL, warranties/AMCs. Visibility of rental/leased assets, license allocation, license harvesting
## ITAM framework

### ITAM Strategy and Policies

<table>
<thead>
<tr>
<th>Vision and objectives</th>
<th>Asset scope</th>
<th>Policies and procedures</th>
<th>Manage SAM third party suppliers</th>
</tr>
</thead>
</table>

### ITAM Processes

- **Procurement**
  - Plan and budget
  - Vendor management
  - Contract management
  - Procurement management
  - Receipt management

- **Deployment / Usage / Maintenance**
  - Incident / problem / change
  - Service request
  - Usage validation / compliance
  - Inventory tracking
  - Cost and value management
  - Contract management

- **Retirement**
  - Decommission management
  - Disposal management

- **Reporting**
  - Report management

### Technology

- Asset repository / CMDB
- Discovery
- Software metering and usage
- Interfaces
- Reporting

### Data

- Data sources and standards
- Data validation
- Generate SAM reports and MI

### People

<table>
<thead>
<tr>
<th>ITAM organisation</th>
<th>Governance and performance metrics</th>
<th>Communication and Awareness</th>
<th>Roles and Responsibilities</th>
<th>Skills and capabilities</th>
</tr>
</thead>
</table>

## ITAM Services

Our ITAM services can help you reduce the total cost of assets ownership while enabling compliance to ITAM module. We can help you identify savings opportunities across a range of capital and operational expenditures, making funds available for other projects instead. ITAM can also enhance service delivery, strengthen security, improve supplier relationships and reduce the overall cost of IT governance.

1. **ITAM compliance**
   - SAM governance model
   - HAM governance model
   - Regulatory compliance audit

2. **Process assessment**
   - SAM and HAM process assessments
   - SAM and HAM process implementation

3. **Tool implementation**
   - Existing ITAM tool optimisation
   - ITAM tool implementation and support

4. **ITAM value added services**
   - Entitlement repository
   - Audit readiness
   - ITAM helpdesk
   - Training and workshops

5. **Dedicated support**
   - Shadow IT application review
   - Remediation of identified gaps
   - Compliance ready
ITAM Solution Benefits

1. **Visibility and control of IT assets**
2. **Improve utilisation of assets**
3. **Reduce software and hardware costs**
4. **Compliance with audit and regulatory requirements**
5. **Support organisational change and projects**
6. **Align IT Asset costs to services**
7. **Provides finance with a bird’s eye view of an organisation’s IT balance sheet and compliance**

ITAM Desired State

- **Efficiency and effectiveness**: More efficient data management and the best, most cost-effective IT operation
- **Data consolidation**: Consolidation of all relevant information in one tool
- **Integration**: Integration of the functionalities of discovery, ITSM and enterprise resource planning systems (ERP)
- **Data into intelligence**: Data transformed into intelligence, therefore the concrete actions for compliance and cost optimisation
- **Monitoring and reporting**: Automated monitoring with Extensive reporting/dashboard capabilities
- **Compliance**: Compliance with various legal, statutory, regulatory and publisher’s requirements
- **Asset tracking**: Tracking of all software and hardware assets resulting in proper utilisation
- **Full control of asset portfolio**: Simplified way of monitoring the activities performed by various teams to manage the lifecycle of IT assets
How we help clients

ITAM Health Check
- Based on ISO 19770 & Deloitte Framework

ITAM Strategy
- Design, communication and implementation

ITAM Governance
- ITAM program vision and objectives and outline activities and initiatives

ITAM Organisation
- Develop policy, process, data, roles and KPIs

Vendor Management
- Manage key software vendors

ITAM Sourcing
- In-house/ hybrid/ outsourcing assessment

ITAM As a Service
- Deloitte managed ITAM services

License Hotline
- Deloitte ITAM as a Service SME Hotline.

ITAM Dashboard and Reporting
- Tailored for key stakeholders

ITAM Security
- An opportunity to improve cybersecurity

SAM/HAM Tool Fit-Gap
- Of existing ITAM tooling capabilities

ITAM Tool Selection
- Tool requirements and selection assessment

ITAM Tool Implementation and configuration
- Roll out of ITAM technology

Mobile Device Management
- Effective monitoring of mobile devices

Audit support
- License optimisation
- Application change
- Used software handling
- Software rationalisation
- Contract optimisation
- SPLA (Service Provider License Agreement) one time Assessment
- Cloud scan
- Software sourcing

SAM Certification
- HAM Certification
- ITAM Academy
  Extensive & independent ITAM training program
# Deloitte ITAM Case Studies

**Client profile:** **SAM** for one of the leading banks in the country with more than 1,25,000 assets

<table>
<thead>
<tr>
<th>Challenges faced</th>
<th>Summary of work</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The asset spread included over 100,000 systems, a heterogeneous network, including over 2000 applications</td>
<td>• Aligned existing policies and processes for SAM lifecycle and shared recommendations based on ISO standard 19770-1</td>
</tr>
<tr>
<td>• Multiple stakeholders with no centralised view for managing the application spread in the organisation</td>
<td>• Designed and developed a strategy for prioritising the software vendors based on business requirements and market trends</td>
</tr>
</tbody>
</table>

**Benefits to the client**

- Defined process were set up for monitoring and managing nonstandard software
- Centralised entitlement repository created to manage the entitlements and contracts effectively

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**Client profile:** **ILMT Implementation** at one of the largest Indian insurance companies

<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td>• 200+ servers with software</td>
<td>• ILMT was thoroughly deployed across Windows as well as non-Windows platform</td>
</tr>
<tr>
<td>• Incomplete stakeholder/application owner information</td>
<td>• Deloitte performed a baselining of software taking into considerations all the aspects with respect to software licensing</td>
</tr>
<tr>
<td>• Complex network architecture</td>
<td></td>
</tr>
<tr>
<td>• Identification of false positive deployments</td>
<td></td>
</tr>
<tr>
<td>• Many cross-bundling scenarios that needed to be looked into</td>
<td></td>
</tr>
</tbody>
</table>

**Benefits to the client**

- Ad-hoc issues pertaining to issues arising on ILMT were resolved using remote sessions, causing minimal damage to the regular business operations
- Bundling scenarios were taken care of by regularly monitoring the ILMT tool
**Client profile:** SAM of a leading IT – ITES Organisation having more than 1,20,000 assets and installation of **SAM Tool**

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<tr>
<td>• Management of licenses across multiple environments</td>
<td>• Current state assessment of Entitlements vs. Deployments for 40 software publishers</td>
</tr>
<tr>
<td>• Installation and configuration of the SAM tool to recognise licensing signatures for 40 software publishers</td>
<td>• Recommendations to remediate areas prone to non-compliance</td>
</tr>
<tr>
<td>• Centralised contracts, POs, and other proof of entitlements and standardising inventory tracking for software in use</td>
<td>• Fine tuning of the SAM tool</td>
</tr>
</tbody>
</table>

**Benefits to the client**

- Inventory management rationalise using the Deloitte methodology, resulting in a discovery approach to target 95-100% compliance
- Design and develop a strategy in terms of prioritising the publishers based on business requirements and market trends
- Set up a defined process for monitoring and managing nonstandard software

**Client profile:** With a worldwide network of R&D, innovation labs and delivery centres, and 149,000+ ‘Ideapreneurship’ working in 45 countries, the client serves leading enterprises across key industries, including 250 of the Fortune 500 and 650 of the Global 2000

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>• Lack of tools and technologies to provide visibility on the entire lifecycle of the IT assets</td>
<td>• Relevant tools implementation was supported with integration to smooth the ITAM process and discovery of the assets</td>
</tr>
<tr>
<td>• Absence of tracking of IT Assets which are leased to customers at their premises</td>
<td>• Providing gap-analysis report on policies, procedures, and governance structure based upon leading industry practices and recommend improvement opportunities</td>
</tr>
</tbody>
</table>

**Benefits to the client**

- Cost reduction in lease and ownership of assets by optimising usage
- Streamlined process and implement governance model for ITAM
**Client profile:** The client is a next-generation global technology company that helps enterprises reimagine their businesses for the digital age. Its technology products, services, and engineering are built on four decades of innovation.

<table>
<thead>
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<th>Challenges faced</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Tracking of assets deployed at the customer’s premises</td>
<td>• Finalisation of technological architecture and requirement specification (design phase)</td>
</tr>
<tr>
<td>• No authentic asset data source</td>
<td>• Deloitte performed a baselining of programme roadmap to achieve ITAM data flow</td>
</tr>
<tr>
<td>• Absence of management reports (MIS) and dashboards</td>
<td></td>
</tr>
</tbody>
</table>

**Benefits to the client**

- Go live and post go live stabilisation
- Master Data management and ITAM tool implementation

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**Client profile:** The client is an American cable channel, which is available in 409 million households worldwide, through its U.S. flagship channel and its various owned or licensed television channels internationally.

<table>
<thead>
<tr>
<th>Challenges faced</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Lack of tools, processes, governance and KPIs to provide visibility on the entire lifecycle of the IT assets</td>
<td>• Design/prepare ITAM processes, governance, KPIs and implementation of ITAM tool</td>
</tr>
<tr>
<td>• Absence of Target Operating Model</td>
<td>• Define Target Operating Model and provide a strategy document</td>
</tr>
</tbody>
</table>

**Benefits to the client**

- Proper visibility on lifecycle of IT assets
- Insight on over/under utilisation of assets
- ITAM governance, processes in place
Summary

**Increased accountability**
- Business justified expenditures on software licensing
- Visibility on total spend for each software publisher
- Proper KPI, KRA and roles and responsibilities defined

**Ensured efficiency**
- Accurate and updated software license details for efficient support processes and change management
- Efficient software license utilisation
- Efficient IT operations backed by robust software license management

**Managed risk**
- Compliance with all contracts and agreements
- Prevention from misuse/unauthorised use of software license
- Readiness for compliance audit with confidence

**Reduced cost**
- Visibility of TCO (total cost of ownership) for all software license
- Visibility of unnecessary software licenses
- Planned procurement resulting in optimised costing

**Lifecycle management**
- Defined processes and policies for tracking of all software license effectively
- Greater control over where software license is consumed
- Minimized risk of under and over utilisation

**Robust controls**
- Robust cyber security since all software license are properly managed and monitored
- Visibility of paid, freeware and open-source software
- Insightful analysis and recommendations for optimal contract performance
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