

A man with curly brown hair, wearing a blue and white checkered button-down shirt over a grey t-shirt, is looking down at a tablet computer he is holding. He is standing outdoors, leaning on a dark railing. The background is a blurred outdoor setting with greenery and a building.

SAM

SOFTWARE ASSET MANAGEMENT

Cloud Productivity Engagement kit





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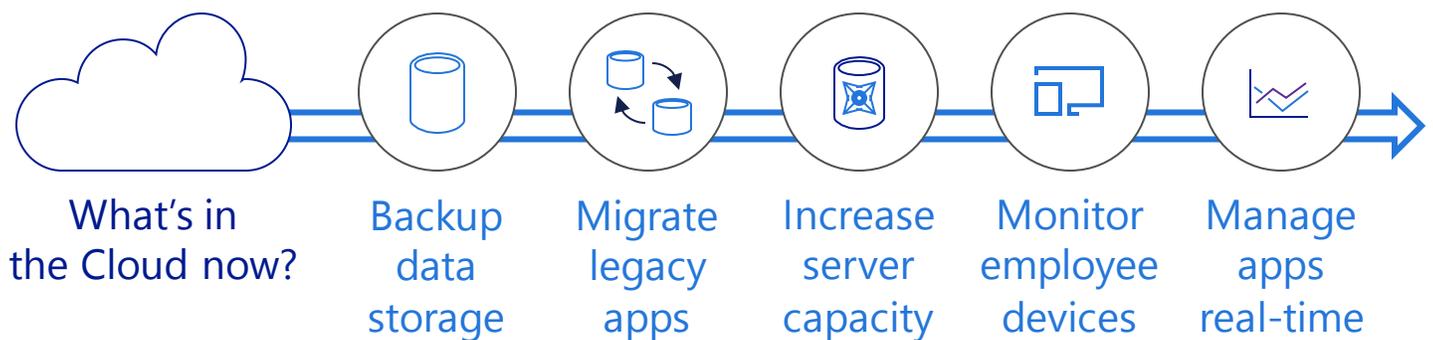
How to use this document

Getting started

The SAM Cloud Productivity Engagement Kit walks you through the complete cycle of an engagement. The kit begins with a general introduction describing what a SAM Cloud Productivity engagement is and the stages involved to complete one. The rest of the kit focuses on how to proceed with each stage. This includes which deliverables represent billable milestones at the end of each stage. At the end of the kit, within the Appendix, you will find additional information to help you with the engagement process as well as links to resources that offer useful information and details.

Prerequisites

Partners that participate in a SAM engagement must be a registered SAM Gold Partner, or must have earned the SAM Solution Expertise criteria.



Cloud Productivity Introduction



SAM

SOFTWARE ASSET MANAGEMENT

More and more businesses today are adopting the Cloud as a means of reducing costs, unlocking innovation, and improving time to market. For all of the benefits the Cloud can bring to an IT infrastructure however, it can also add complexity to Software Asset Management (SAM).

Many customers assume that moving to the Cloud makes SAM irrelevant. In fact, SAM is just as important—and in some cases even more important—in a Cloud environment because companies must address the management of services and assets. With the real-time nature of Cloud environments, SAM policies and practices need to become more agile to support ongoing changes.



Many companies are looking to **reduce costs, increase agility, and improve scalability and security** through a Cloud strategy.

SAM Cloud Productivity engagement

A SAM Cloud Productivity engagement helps you support customers in migrating to or implementing a Software as a Service (SaaS) strategy. This engagement simplifies Cloud adoption and reduces risk by offering customers a comprehensive analysis of their desktops and end user productivity tools to prepare their environment for the Cloud. Building off of a customer's Cloud strategy and overall business goals, you'll look at their current software deployment and usage and then assess their Cloud-ready state to determine the best options for migration now and later. We also provide insight on the business, cost, and technology benefits of moving workloads to the Cloud as well as recommendations about how to optimize Cloud licensing.

The engagement requires performing a full environmental (physical and virtual) discovery, gathered through third-party tools, along with customer interviews and other relevant sources. With this data, you can create a desktop Cloud Capability Assessment and recommendations for the customer on how to get the most value from their related IT investments. For customers that have currently deployed Microsoft Office 365, they'll also receive a high-level end-user security summary.

Customer benefits

- Provides a clear prioritization of what is ready to migrate today
- Identifies how Cloud-based scalability can increase organizational agility
- Enhances cost management through pay-per-use subscription models
- Provides insights on costs and technology benefits of moving to the Cloud

In addition to services, you can also help a customer adapt policies and procedures to encompass the Cloud change. SAM Cloud programs must take into account the real-time nature of the environment and speed and ease of provisioning services. Organizations end up actually relying more on SAM policies and procedures for Cloud contracting, deployment, and management than they would in a traditional environment with a longer product lifecycle.

¹<http://www.eweek.com/cloud/microsoft-cloud-first-partners-continue-to-outperform-others.html>



What to expect from a SAM engagement

Every SAM engagement focuses on four phases



PLANNING

Identify your needs & goals

Gather information on licensing, IT landscape & business organization

Discuss project and arrange access & resources

Deliverables

Letter of Engagement



DATA COLLECTION

Take inventory of hardware, software, and licenses using tools, questionnaires, and stakeholder interviews

Gather information on process & procedures

Deliverables

Established Deployment Position (EDP)



DATA ANALYSIS

Review & validate all collected data

Compare deployed assets with current utilization

Map to an optimized environment based on your goals

Deliverables

Effective License Position (ELP)



FINAL RECOMMENDATIONS

Discuss final recommendations and engage in data-driven discussions to ensure your business needs & goals are met

Deliverables

Cloud Productivity Assessment Report

SAM Services Incentive Program

SAM Cloud Productivity engagements are funded under the SAM Services Incentive Program, a worldwide offering designed to help Microsoft partners, such as you, increase customer adoption of SAM best practices. By participating in the program, you can engage with new customers or deepen existing relationships that can lead to new sales and opportunities.

It's required that you use Intelligent Asset Manager (I-AM) in this SAM Cloud Productivity engagement to receive Channel Incentives. All work completed under this Statement of Work (SOW) will be provided in accordance with the I-AM Terms of Use ("TOU"), available [here](#).

Please note that in this SAM Value engagement, the ELP deliverable is optional. You'll see components for the ELP broken out separately in each section of this kit. The choice of including the ELP belongs to the SAM engagement manager in discussions with the customer and you. Principally, the SAM Value engagement isn't an exercise to determine a licensing gap, but rather a way to identify specific opportunities to improve the customer's assets, management value, and business objectives. The ELP, as a customer-facing document, has great value to clearly articulate to the customer their current standing on entitlements compared to deployment and is often requested by the customer as the outcome of the engagement.



For Proof of Execution (PoE), you must include the following deliverables, due to Microsoft, upon the completion of the SAM engagement. These materials serve as necessary PoE in order for you to collect Channel Incentives payment.

- Letter of Engagement
- Established Deployment Position (EDP)
- Effective License Position (ELP) (optional)
- Cloud Productivity Assessment Report
- Letter of Confirmation (only required for certain countries)

How to file for a SAM Services Incentive Program

To learn how to file a SAM Services Incentive Program, visit [Software Asset Management](#).

Cloud Productivity

Step 1: Planning



SAM

SOFTWARE ASSET MANAGEMENT

A SAM engagement helps customers identify which licenses and software installations are eligible to move to the Cloud, develop a strategic plan for moving applications and services to the Cloud, and ensure the right policies and procedures are put in place to effectively manage the Cloud implementation and minimize risk.

The first stage of such an engagement focuses on planning. Within this stage, you will achieve the following:

- **Identify customer needs and goals**
- **Gather information about customer environment**
- **Discuss project and arrange access and resources**

Identify customer needs and goals

Discussing if, when, why, and what the customer wants to move to the Cloud will give you a better idea of how to deliver a SAM Cloud Productivity engagement. Goals and objectives inform how you define scope and configure your inventory tool to get the necessary information required to help identify technical readiness.

Here are some questions you can use with the customer to help discover their goals and objectives:

- **Determine if there is a value to the customer for the ELP.**
- **What are their objectives from the engagement?**
- **What is their vision for incorporating the Cloud?**
- **What Cloud delivery models are they considering?**
- **What do they hope to achieve with an engagement?**
- **What is their timeline?**

Gather information about customer environment

In your first meeting with a customer, look to scope the company, culture, and IT landscape to gain a better understanding of the customer's environment and needs.

You should collect the following inputs from the customer's premises:

- A complete background of the customer's existing IT infrastructure and environment including on-premises, Cloud, and outsourced installations for all locations and/or divisions.
- Deployment inventory data from at least one (1) automated discovery tool for each customer location where Microsoft products are installed (see [Data collection requirements](#)).
- Information on how the customer has adopted or plans on adopting Office 365, including what types of workloads are currently implemented and what future implementation plans are under consideration.
- Current IT infrastructure and organization diagrams including locations, IT group names, SAM tool(s) or supporting processes in place and stakeholder names.

Note: Before beginning your assessment, be sure to highlight the key deliverables of a SAM engagement so the customer knows what to expect.



If an Effective License Position (ELP) is required* (an ELP provides details related to license entitlements and deployments and is generated using I-AM).

An ELP requires you to collect the following inputs from the customer's premises:

- Entitlement data and licensing agreements from procurement and any applicable sources or suppliers which may include:
 - Original Equipment Manufacturer (OEM)
 - Full Packaged Product (FPP) / Retail
 - Outsourcer
 - Service provider
 - Additional reseller(s)
 - Changes to entitlements resulting from mergers, acquisitions or divestitures
 - Independent Software Vendors (ISV)
 - Any servers/environments managed by a Service Provider Licensing Agreement (SPLA)
 - Public Cloud license entitlements
- A full and confirmed list of affiliates, if they exist, and any relevant amendments to their Microsoft Volume License Agreements, including any license transfer documents, either granting or receiving licensing rights
- Location of software entitlement, deployment, and retirement records as well as the allowable level of access
- Office 365 and other Microsoft online services reservations and assignments
- Public Cloud license entitlements

**A Microsoft SAM Engagement Manager decides if an ELP is required with input from the account manager and customer.*

Discuss project and arrange access and resources

Based on the preliminary information you've gathered, you can create a full SOW. This plan will contain an outline for data collection and analysis, a detailed list of deliverables, and a timeline with deadlines. This establishes a customer's expectations and your accountability.

Deliverables

A Letter of Engagement is due to the customer and Microsoft at the beginning of the engagement. This letter will be part of the necessary Proof of Execution (PoE) in order for you to collect Channel Incentives payment. You also must notify the Microsoft SAM Engagement Manager when the Letter of Engagement is uploaded into the required system as designated by Microsoft (currently, CHIP).

The letter must include at a minimum:

- A SOW for the engagement being performed, including a list of all customer deliverables
- Scope of the engagement, including any scope limitations
- Dates and timelines
- Your project team members and their relevant Microsoft Certified Professional (MCP) credentials
- A list of key contacts that must include names, titles, phone numbers, and email addresses
- A planned disclosure of engagement deliverables to Microsoft
- A statement explaining that data collected by you from the customer's information system environment is transferred to Microsoft, and how Microsoft will use that data collected to generate reports necessary for you to effectuate the SAM services



- Consent from the customer to transfer data to Microsoft, any of its affiliates, and to the subprocessors Microsoft may employ to generate the reports necessary for the SAM services, including consent to transfer personal information to the United States and other countries where Microsoft's subprocessors are located. "Personal Information" in this instance means any information provided by Microsoft or collected by you in connection with this agreement that (a) identifies or can be used to identify, contact, or locate the person to whom such information pertains, or (b) from which identification or contact information of an individual person can be derived. Personal Information includes, but is not limited to: name, address, phone number, fax number, and email address. Additionally, to the extent any other information (such as, but not necessarily limited to, a personal profile, unique identifier, and/or IP address) is associated or combined with Personal Information, then such information also will be considered Personal Information.
- The Microsoft [SAM Engagement data usage and privacy information](#) document (i.e. Data Usage Guide).
- Reference to the Data Usage Guide, where appropriate.

The Letter of Engagement must be in writing and signed by an authorized representative of your organization and the customer.

Letter of Engagement

Provides the customer with an overview of the SAM engagement.

View sample report [here](#).

Cloud Productivity

Step 2: Data collection



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The main category of data collection is data related to the SAM Cloud Productivity Assessment, optimization, and recommendations. The objective of this phase is to develop a profile of the customer's current Microsoft software for analysis.

Within this discovery stage, you'll take inventory of the customer's IT assets and licensing as well as the use of Microsoft products, datacenters, and domains. This data will be needed for the formation of a report.

Please ensure that all data collected is complete, accurate, and stored securely and in accordance with the requirements set out in the I-AM TOUs. Any deviation or change to scope needs to be approved by Microsoft, you, and the customer.

Take inventory of IT assets and licensing

You need to prepare to take a full inventory of hardware and software deployments and licensing. This inventory includes how the technology is being used, and by whom. You can accomplish this through inventory tools, questionnaires, and stakeholder interviews. Before you can move forward, however, you must first work with the customer to establish the following parameters:

- **Data collection requirements**
- **Choosing the right tool**
- **Scope inventory**
- **Implementing the inventory tool**
- **Secondary data sources**

Data collection requirements

Data coverage means the percentage of total devices for which all required installation data has been obtained. Data coverage must reach at least 90% of all devices pertaining to this engagement. Where devices aren't joined to the directory or network, manual collection of data is acceptable (while maintaining the 90% data coverage requirement). Some specific guidance includes, but is not limited to:

- Complete extraction of user accounts from customer Active Directory (AD) domain(s) and Lightweight Directory Access Protocol (LDAP) and/or work
- Data extract must be cross-referenced against a minimum of one (1) additional data source, including but not limited to:
 - Records from existing network performance/security monitoring and management tools
 - Network management frameworks
 - Virtual machine performance monitoring
 - Customer Human Resources (HR) records
 - Security sources (anti-virus)
- All trust accounts must be extracted to ensure no domains are missed
- Extraction of user accounts by group (if applicable, e.g., for Citrix). Output includes a listing of user objects and the AD Groups they belong to
- Identification of active users in the past 90 days based upon the technique(s) employed by the customer (Output from Step 1)



- Complete extraction of data from the customer's current management and inventory tools and the calculation of current coverage levels of existing tool(s).
- Inventory of any missing device, including but not limited to devices that:
 - Do not report inventory
 - Are non-networked
 - Are unmanaged devices

Cloud Productivity Assessment

- Through data discovery, make sure to identify:
 - Operating system versions
 - Browser type and version of all machines
 - Office Suite versions
 - .Net Framework
 - CPU, Memory, Free disk
 - On-premises Exchange, SharePoint, Lync and similar system deployments to understand what functionality will be needed in Office 365
 - Identification of the current usage of Dynamics for availability for Cloud migration
- Office 365 system requirements to assist in mapping existing infrastructure to what will be needed to move to the Cloud.

If an ELP is required:

This section lists specific guidance to complete an ELP, including, but not limited to:

- Virtual environment mapping output including:
 - Clusters
 - Physical host(s) including processor and core information
 - Virtual guests and virtual guest movement across physical hosts within the past 90 days to accurately calculate licensing needs for products such as Windows Server, SQL Server, etc.
 - Virtual migration logs to accurately calculate licensing needs for products such as Windows Server, SQL Server, etc.
- Identification of workstations and servers used by Microsoft Developer Network (MSDN®) subscribers and products installed on these devices and exclusions if appropriate. To facilitate the identification of devices covered by MSDN subscriptions, you can employ various methods such as determining preferred user for devices, linking last logged-on user to devices, or soliciting feedback from customer personnel that have an MSDN subscription (email template can be provided). This step should be completed as early as possible in the Data Collection phase.
- For server products that can be licensed in multiple ways (e.g., server/CAL or per processor or per core), the licensing metric applicable to each implementation must be identified.
- SQL Server output including:
 - Version and edition
 - License type required for each SQL Server instance for customers with mixed licensing metric (server/CAL, per processor or per core)
 - Confirmation of passive SQL Servers assigned Failover Rights



- Windows Server output includes:
 - Server name
 - Physical or virtual operating system environment
 - Operating system version and edition
 - Processor and core information
- System Center Server output includes:
 - Server name
 - Physical or virtual data
 - Component (e.g. System Center Configuration Manager (SCCM), System Center Virtual Machine Manager (SCVMM) version and edition)
 - Processor and core information

Choosing the right tool

With the right inventory tool, you can collect a wide range of data points including software versions, on-premises software usage, and an analysis of applications or services already running in the Cloud. When choosing an inventory tool, keep in mind that each tool supplier has its own process framework. Tools don't all function the same way. Using multiple tools helps discover and analyze the data and provide a more robust view of a customer's environment. While in some cases the customer may already have an inventory tracking system, other tools may be able to augment the types of data that the customer's tool collects.

Some considerations to keep in mind when choosing or recommending an inventory tool:

- What inventory tools are already deployed within the organization? What scope of the environment do they cover? What data points are they capable of capturing and reporting?
- Will deploying an agent-less or agent-based tool be more effective?
- What are the strengths and weaknesses of the tools being considered? Will one or more of the tools collect all required data points—hardware, software, virtualization details across a variety of hypervisors (Hyper-V, VMware® and XenServer®, for example).
- Is it optimal to deploy and monitor a tool remotely or on-premises?
- How will the tool gather data from PCs, servers, and mobile devices that connect to the network remotely?
- If using an inventory tool that the customer already has in place, make sure it's configured correctly and can scan the full IT environment.
- Consider how the tool is licensed. The optimal tool will collect the right data and align with the customer's budget, whether the tool requires a license or subscription or is free.



Scope of inventory

For any SAM engagement, a standard best practice is to collect all relevant inventory and licensing data across all Windows-based computers in the environment. For SAM Cloud Productivity engagements, it's important to consider the minimum requirements based on customer goals. For customers looking to move some or all of their applications to a web-client delivery solution such as Office 365, the inventory tool's scope should cover all clients and a subset of servers to assess if systems are ready for the various Office 365 offerings.

You should also determine the scope of devices that contain data to be collected. For customers running Active Directory Domain Services (or Directories in the case of multiple, separate domains/forests), include in scope all machines with Active Directory activity reported in the last 30 days (time frame can be adjusted according to customer circumstances).

Implementing an inventory tool

The standard approach for deploying an inventory tool for a SAM Cloud Productivity engagement includes preparing the environment for scanning and data collection. Use either a combination of available tools or iterative scans to continually increase coverage rates.

Agent-less tools

- Understand domain, network, firewall, and other considerations that will affect a tool's ability to access various portions of a customer's environment.
- Open firewalls, make firewall exceptions, deploy Group Policy Objects, open specific ports, and take other steps to ensure that the tool can access all targeted machines.
- Agent-less tools typically need to be run multiple times, especially at different times of the day and days of the week, to catch the variety of users, shifts, time zones, and such.

Agent-based tools

- Ensure agents are communicating regularly so that data is fresh.
- Ensure agents are deployed to the scope of target machines.
- With the right refresh schedule and agent coverage, data collection from an agent-based tool should be a single snapshot extraction with no iterations necessary.
- Ensure data cleanliness. The quality of the scan coverage is top priority, beginning with Active Directory Domain Services.
- You may need to run third-party tools in addition to customer-provided tools to achieve proper cleansing.
- As a best practice, work with the customer to ensure there is a repeatable cleansing process in place going forward.



Secondary data sources for a Cloud Productivity assessment

These secondary data sources will help you profile users and conduct a client review.

Client reports	Ensure that server reports, regardless of inventory tool used, provide all necessary metrics. (Refer to page 6, Inventory Guidance for a Cloud Productivity Assessment.)
Active Directory objects	Query AD to help define the scope of active users and clients to capture in the hardware and software inventory data sets.
Exchange	Query Microsoft Exchange Server to determine the number of active Exchange users and functionality requirements to understand Office 365 subscription needs.
HR/user profiles	Consider using Human Resources (HR) employee records. They can offer a valuable secondary source for active user counts and can be used to map users to different Office 365 Plans if an organization's licensing varies across different departments or job profiles. This requires working closely with an organization to understand what HR systems, reports, etc. are available and how data can be provided to facilitate the profile mappings and right-size functionality requirements.
Anti-virus software	Consider using anti-virus software to provide a second set of data to compare license counts. The anti-virus installation count should be similar to the number of Office users.

Deliverables

At the conclusion of this stage, you'll create a set of reports that summarize your findings including the following:

EDP	Details related to all hardware and software currently deployed within the customer's IT infrastructure.
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View sample report [here](#).

The customer will have time to review and validate the preliminary reports and make final adjustments.

Cloud Productivity

Step 3: Data analysis



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The SAM Cloud Productivity engagement data must be analyzed, reviewed, and agreed upon with the customer as an accurate point-in-time reflection of the customer's current IT environment. This data, along with any additional customer inputs, will also provide a basis for the development of a solid Cloud Productivity Assessment unique to the customer. With inputs and data collection, you'll be able to complete the following analysis (these are required analyses):

- Reconciliation analysis between license entitlements and deployment data, including the application of license benefit and optimization rules (e.g. amendments, upgrades, downgrades, etc.).
- Aggregation and review of data from stakeholder interviews, noting any information that was either unavailable or challenging for the customer to gather.
- A review of the customer's current Cloud environment mapped to an optimized environment based on the customer's goals, including an assessment of workloads to move to Office 365 and Dynamics.

Data analysis comes out of the information we collected using the inventory tool such as existing infrastructure and licensing models. In addition, insight comes from taking into account deployment considerations and implementation of the right policies and procedures to help customers manage their software assets most effectively.

This third stage of a SAM engagement focuses on achieving the following:

- **Review and validate all collected data**
- **Map to an optimized environment based on customer goals**
- **Interpret inventory data**

Review and validate all collected data

A SAM engagement helps identify and document all product deployments and usage. This includes combining the inventory data with other relevant data and information that may not be discoverable with most tools such as your browser readiness for an Office 365 migration, development needs to migrate workloads to the Cloud, and relationships between on-premises systems and cloud systems.



If an ELP is required:

This section lists steps you must take to complete the ELP. This includes comparing deployed assets to entitlements.

One key benefit of a SAM engagement is that it gives you a clear picture of a customer's entire IT landscape, which you can then share with them. This includes an accurate view of all of a customer's license entitlements. By understanding these entitlements, you can help customers identify over-licensed and under-licensed software so they can purchase any necessary additions to bridge licensing gaps. The SAM Cloud Productivity engagement will also help to identify any license gaps eligible to be right-licensed while moving to the Cloud. This helps ensure that the customer is getting credit for everything they own.

In addition, the engagement helps highlight ways in which a subscription model can impact budgeting and procurement, taking into account direct, indirect, and hidden costs. Discussions around a customer's current licensing program and future needs will also help to identify the optimal Volume Licensing choices going forward.

Recommended areas of analysis for optimization include the following:

- **Assess** whether the customer's appropriately licensed for their current deployment and usage state. We can then provide recommendations for the best licensing options to align with their future business plans.
- **Analyze** the customer's SAM process and provide recommendations to develop or improve them in support of ongoing optimization, management, and compliance.
- **Determine** whether systems are ready for the Cloud in their current configurations by identifying the Windows operating system
- **Size the systems** being assessed to understand system utilization and anticipated resource needs in Virtual Machines. This requires collecting performance metrics, not simply a single scan of how a machine is running at a single point in time.
- **Look for areas of potential risk** pertaining to running older software that is out of date or past end of support. In particular, try and track the following information:
 - **Devices not running updated software**
 - **Devices running Windows XP**
 - **Devices running Windows Server 2008**

Recommended metrics include the following:

- Virtual Machine size
- Estimated monthly usage
- Network use (GB)
- Storage use (GB)
- CPU utilization (%)
- Memory utilization (MB)
- Disk I/O utilization (I/O operations per second)
- Network utilization—in/out (MB)



Interpret inventory data

- When reviewing the inventory tool output, look for anomalies such as client count results differing greatly from the number of employees. Question anything that seems unusual to ensure your analysis is an accurate representation of the customer's environment.
- Let the customer know who is managing what in order to inventory assets properly. If the organization is using a service provider, clarify what was purchased and who is managing it.

Example of inventory tool data output

The tables below illustrate examples of data output from the Microsoft Assessment and Planning (MAP) Toolkit for an Office 365 client readiness summary, an Office 365 client summary, and an Office 365 readiness assessment for Exchange Online and SharePoint Online in a customer environment running Windows-based operating systems.

Cloud Productivity Assessment summary

This worksheet provides an Office 365 readiness summary for the client machines in your environment running Windows-based operating systems, as well as a summary of which machines have an Office 365 compatible Office Suite installed.

Office 365 services	Count of desktops that are ready	Count of desktops that are not ready	Total
Ready For Office 365 Web Apps Experience	136	65	201
Ready For Office 365 Full Client access to Exchange and SharePoint services	40	161	201
Full Office 365 Web Apps & Client Support	48	153	201



Cloud Productivity Assessment

This worksheet provides a detailed summary of the compatibility of each Windows-based client in your environment with Office Web Apps. To determine the reason for reporting "Insufficient Data", refer to the Windows Management Instrumentation (WMI) Status column.

Computer name	Readiness	Reasons	Recommendations	WMI status	Web browsers installed	Operating systems	Service pack level
afaist-test123	Insufficient Data	N/A	N/A	Failed - Machine not found		Microsoft Windows 8.1 Enterprise	
Map-7-x64. map.test. CONTOSO. COM	Ready			Success	Internet Explorer 8	Microsoft Windows 7 Enterprise	
Map-81-multi. map.test. CONTOSO. COM	Not Ready	Browser Not Supported	Upgrade Browser to a supported version	Success		Microsoft Windows 8.1 Enterprise	
Map-81-x64. map.test. CONTOSO. COM	Not Ready	Browser Not Supported	Upgrade Browser to a supported version	Success		Microsoft Windows 8.1 Enterprise	
Map-8-x86. map.test. CONTOSO. COM	Ready			Success	Internet Explorer 10	Microsoft Windows 8 Enterprise	



Cloud Productivity Assessment For Exchange Online and SharePoint Online

This worksheet contains an Executive Summary, summary of project background and scope, engagement results, recommendations and next steps. To determine the reason for reporting "Insufficient Data", refer to the **WMI Status** column or other columns if WMI indicates success.

Computer name	Readiness	Reasons	Recommendations	WMI status	Office suite installed	Office products installed	Operating systems	Service pack
afaist-test123	Insufficient Data	N/A	N/A	Failed - Machine not found			Microsoft Windows 8.1 Enterprise	
Map-7-x64. map.test. CONTOSO.COM	Not Ready	Office Suite Not Found	Install Office 365 ProPlus	Success	Installed Product List Not Available	Installed Product List Not Available	Microsoft Windows 7 Enterprise	
Map-81-multi. map.test. CONTOSO.COM	Not Ready	Office Suite Not Found	Install Office 365 ProPlus	Success	Installed Product List Not Available	Installed Product List Not Available	Microsoft Windows 8.1 Enterprise	
MAP-81-x64. map.test. CONTOSO.COM	Not Ready	Office Suite Not Found	Install Office 365 ProPlus	Success	Installed Product List Not Available	Installed Product List Not Available	Microsoft Windows 8.1 Enterprise	

Deliverables

Upon completion of this stage, you can offer key best practices to improve the customer's software asset management program going forward.

Optional:

ELP	Provides details related to license entitlements and deployments.
License Optimization Report (required with an ELP)	Presents recommendations on how to optimize your infrastructure and improve licensing efficiencies.

View sample report [here](#).

Cloud Productivity

Step 4: Final recommendations



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At the conclusion of the SAM Cloud Productivity engagement, you'll sit down with the customer and go over the SAM Cloud Productivity Assessment Report and any other reports required.

Your customer may have the perception that software licensing is automatically handled by the Cloud service provider or that current pre-Cloud SAM policies are applicable for Cloud services. In fact, the Cloud environment requires that customers evaluate and revise their SAM programs to specifically manage Cloud services as well as, or in place of, managing traditional software assets.

The recommendations you offer can cover a wide variety of topics including the following:

- customer opportunities to modernize its infrastructure, with a specific focus on recommendations around a move to the Cloud
- ways for the customer to best manage its IT assets to help reduce waste, avoid unnecessary costs and business risks, and streamline the entire organization
- reviewing or writing policies and procedures to ensure ongoing proper SAM. Establishing standard practices can help reduce waste, avoid unnecessary costs and business risks, and streamline the entire organization.

Additionally, SAM must take into account the speed and ease with which new services can be provisioned, configured, and released. This ease of implementation introduces organizational risks by decentralizing IT services. Because Cloud services appeal directly to business users, the risk exists that these services may be purchased outside the traditional software procurement and SAM processes.

Deliverables

The following deliverables are **due to the customer** at the **end** of the engagement:

- **Cloud Productivity Assessment Report.** This report must contain at a minimum:
 - Executive Summary. A high-level summary of project background and scope, engagement result, recommendations and next steps.
 - An assessment of the customer's overall Cloud Productivity state, in relation to their Software as a Service (SaaS) Cloud strategy.
 - Identification of Microsoft applications/workloads to move to the Cloud (to Office 365 and Dynamics 365).
 - A Cloud roadmap to assist the customer in moving to the Cloud, including all business, licensing and technology guidance.
 - Assessment of the customer's asset management policies and procedures strengths, weaknesses and areas of opportunity for Cloud implementations, including recommendations for improvement.
 - Additional Uses of Data. In this section of the report, you provide specific Cloud Productivity-related findings. Examples of information that can be included in this report are:
 - A summary of current or upcoming end-of-life products with upgrade path recommendations
 - Familiarizing the customer with Microsoft Secure Score assessment



- **Established Deployment Position (EDP).** A document with details related to all hardware and software currently deployed within the customer's IT infrastructure.

If an ELP is required:

- **ELP:** Create the ELP spreadsheet using I-AM.
- **License Optimization Report.** This report must contain the risks, liabilities, and issues associated with the customer's current licensing practices and prioritized recommendations on how to better manage their licenses to minimize risks in the future. The report could also contain, but is not limited to:
 - Identification of all of the customer's Volume License Agreements (VLAs) with Microsoft and a recommendation on any beneficial consolidation
 - Consumption information detailing installed products that are unused or under-utilized (e.g., no use in the last six months)
 - Recommendations on repeatable, simplified inventory collection process for future True-ups (for Enterprise Agreement customers only)
 - Additional customer-specific recommendations based on captured data and insights

The ELP must be finalized in the I-AM. An encrypted ELP must be uploaded into the designated tool (currently CHIP) as proof of execution.

The following deliverables are **due to Microsoft** at the **end** of the engagement:

- **Established Deployment Position (EDP).** The EDP, a I-AM generated Excel report, provides details related to the customers' Microsoft software deployments and usage data. The software deployments are identified using discovery tools and manual inputs as outlined in the [Data Collection](#) section. You must first input all relevant data into the customer Inventory Data Contract (CIDC) template, which will then be uploaded into I-AM. The EDP will then be created by you using I-AM, which is then given to the customer and Microsoft. EDPs produced outside of I-AM will not be accepted as PoE. The EDP data must meet or exceed the minimum quality standards Microsoft will publish and may update from time to time.
- **Cloud Productivity Assessment Report.** This must be the same Cloud Productivity Assessment Report provided to the customer, as outlined above.
- **Letter of Confirmation.** (only applicable for customer countries listed below)
 - Required: China
 - Advised: India, Malaysia, Indonesia, Philippines, and Vietnam

The Letter of Confirmation should be drafted after completion of the SAM engagement and requires the customer's chop (stamp) or email from the customer's corporate domain confirming provision of the SAM engagement.

The Letter of Confirmation must include the following statement:

"This is to confirm Microsoft SAM Partner <insert Partner Name> has implemented SAM service <insert SAM Engagement Type> to customer <insert customer name>."



Due to customer

Required:

Letter of Engagement	Provides the customer with an overview of the SAM engagement.
Cloud Productivity Assessment Report	Contains an Executive Summary, a summary of project background and scope, engagement results, recommendations and next steps.
EDP	Provides details related to all hardware and software currently deployed within the customer's IT infrastructure.

Optional:

ELP	Provides details related to license entitlements and deployments.
License Optimization Report (required with an ELP)	Presents recommendations on how to optimize your infrastructure and improve licensing efficiencies.

Due to Microsoft

Required:

Letter of Engagement	Provides the customer with an overview of the SAM engagement.
Cloud Productivity Assessment Report	Contains an Executive Summary, a summary of project background and scope, engagement results, recommendations and next steps (same report as given to customer).
EDP	Provides details related to all hardware and software currently deployed within the customer's IT infrastructure.
Letter of Confirmation (required for certain countries)	Requires customer's chop (stamp) or email from the customer's corporate domain confirming provision of the SAM engagement (see the previous page for a list of countries required this letter).

Required if an ELP is included the scope of the engagement:

ELP	Provides details related to license entitlements and deployments.
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View sample report [here](#).



SAM resources

SAM Partner eligibility, program overview, and Partner incentive guides are located at <http://aka.ms/SAMIncentiveGuide>

Appendix

Appendix

Introduction



SAM

SOFTWARE ASSET MANAGEMENT

Resources

Microsoft Partner Network: SAM

<https://mspartner.microsoft.com/en/us/pages/licensing/software-asset-management.aspx>

Microsoft Partner Network: Cloud Solutions

<https://mspartner.microsoft.com/en/us/Pages/Solutions/microsoft-cloud-solutions.aspx>

Flexible Volume Licensing Program

<https://partner.microsoft.com/en-us/licensing>

SAM Partner Playbook

<https://assets.microsoft.com/en-us/SAM-Services-Partner-Playbook.zip>

Appendix

Data collection



SAM

SOFTWARE ASSET MANAGEMENT

Additional tips and tricks

- Develop and use your own technology questionnaire and report template that specifically cover cloud requirements that you can send to the customer in advance. Compare this feedback with your own findings.
- At the outset of the engagement, ensure that the customer has completed any necessary background checks and granted physical building access, and that you have scheduled all stakeholder interviews ahead of time to reduce the possibility of obstacles as the engagement moves forward.
- Because of the variety of Office 365 offerings, it can be useful to create a graphical representation of user profiles mapped to Office 365 offerings as a way to help visualize Office 365 needs in conversations with customers.
- Document any cloud services that also connect to internal services, noting any dependencies and types of data moving back and forth. This information will help improve your understanding of the customer's system architecture and provide insights about implications for any changes or future plans.
- Ensure that all administrator rights are lined up ahead of time and obtain all necessary data that can affect the engagement at the outset. Be sure to include and consider implications beyond the usual inventory data, including storage requirements, server application usage, internal and external access needs, seasonal changes to access, bring-your-own-device scenarios, mobile access, current and future plans, and warranty and end-of-life dates.
- Multiple passes with the inventory tool, or with multiple tools, may be required to ensure all data is captured correctly.
- Naming conventions are important. Ask your customer what naming conventions are in place. Look to server names to help identify their function. Recommend that, as a best practice, your customer should use specific naming conventions going forward if necessary.



Covering clients and a subset of servers to assess if systems are ready

- ✔ For Office 2013, check for:
 - Operating system version
 - Browser type and version on all machines
 - Office suite version
 - Microsoft .NET Framework
 - CPU, memory, and free disk space
- ✔ For Office 365 Web Apps, check for:
 - Operating system version
 - Browser type and version on all machine
- ✔ For Microsoft Exchange and SharePoint Online, check for:
 - Operating system version
 - Office products installed
- ✔ Identify on-premises deployments of Exchange Server, SharePoint Server, Lync Server, and similar software to understand what functionality will be needed in Office 365.

For customers looking at a cloud delivery model like Microsoft Azure, the tool's scope will need to take certain dependencies into consideration.

Resources

SAM Tools

<https://www.microsoft.com/en-us/sam/tools.aspx>

Microsoft Server Software Support for Microsoft Azure Virtual Machines

<http://support.microsoft.com/kb/2721672/en-us%20>

Enterprise Mobility Suite

<https://www.microsoft.com/en-us/server-cloud/enterprise-mobility>

Appendix

Data analysis



SAM

SOFTWARE ASSET MANAGEMENT

Data interpretation and technical requirements

Cloud solution requirements

The following are examples of requirements for Microsoft Office 365 and Microsoft Azure. Office 365 requirements can vary by offering. For a comprehensive list of requirements, please review [Office 365 Plan Options](#).

Office 365 Requirements

Before customers decide to move to Office 365, we recommend that you verify that their systems meet or exceed the minimum system requirements.

- For the best experience, Office 365 is designed to work with the following software:
 - Current or immediately previous version of Microsoft Internet Explorer or Firefox, or the latest version of Chrome or Safari.
 - All versions of Microsoft Office covered by Microsoft mainstream support.
- Office 365 does not have an operating system requirement, except that the operating system used must be supported by its manufacturer. However, there might be advanced Office 365 configuration options, features, scenarios, or tools that have explicit dependencies on an operating system or behave differently on different operating systems.
- The Microsoft Service Pack Support Life-cycle Policy requires customers to install Office service packs within 12 months of release. Office 365 requires compliance with this policy.
- Office 365 strongly recommends that customers accept automatic updates from Microsoft to help secure their environments and to have the best experience with Office 365.
- The minimum hardware requirements for Office 365 can be found [here](#).

Azure Requirements

Solutions with the following characteristics are good candidates for migration to Azure.

- **Distributed user base.** Azure data centers are located across several continents. Having users access the data centers close to their geographical location minimizes the length of a round trip, thus optimizing the user experience.
- **Need to focus on application development.** Service providers in particular want to focus their resources on development of applications and features more than on maintaining infrastructure. Use of Azure frees the customer from much of the administrative overhead required by infrastructure hosting on-premises or traditional hosted-server applications.



Data interpretation and technical requirements

Cloud solution requirements

The following are examples of requirements for Microsoft Office 365 and Microsoft Azure. Office 365 requirements can vary by offering. For a comprehensive list of requirements, please review [Office 365 Plan Options](#).

Office 365 Requirements

Before customers decide to move to Office 365, we recommend that you verify that their systems meet or exceed the minimum system requirements.

- **Variable infrastructure resource requirements.** Instances of roles and resources can be allocated as they are needed, as well as by architecting applications to take advantage of the elastic scale of Azure.
- **Virtual machine hosting.** In addition to offering traditional platform as a service advantages, Azure can host virtual machines. These virtual machines can run any Azure-supported operating system and can run applications in the same way that they would run on - premises. For a list of supported operating systems, see [Overview of Azure Virtual Machines](#).
- Variable workload needs. A company may need to accommodate high levels of use only at peak times and then return to a lower, sustained level of use. Migrating these workloads to Azure can enable a customer to scale when necessary but avoid paying for higher levels of use on a consistent basis.
- Testing environments. A customer may require higher levels of use during the testing phase for a new application. By using Azure, the customer can increase capabilities for the testing period while avoiding substantial investment in hardware and resources that will be necessary only for a limited time.



Resources

Office 365 Plan Options

<http://technet.microsoft.com/en-us/library/office-365-plan-options.aspx>

Office 365 Deployment Guide

<http://technet.microsoft.com/en-us/library/hh852466.aspx>

Overview of Azure Virtual Machines

<https://azure.microsoft.com/en-us/documentation/services/virtual-machines/>

SharePoint 2013 on Azure Infrastructure Services

<https://technet.microsoft.com/en-us/library/dn635309.aspx>

Office 365 System Requirements - Client Side

<https://products.office.com/en-US/office-system-requirements/#Office365forBEG>