



Microsoft Software Asset Management Customer Solution Case Study



Overview

Country: United States

Industry: Professional Services—
Automobile Association

Customer Profile

The Ohio Automobile Club—the largest AAA club operating solely in Ohio—has 38 stores and garages, and more than 650 employees. The company offers its members a variety of services, from travel to insurance.

Business Situation

After a period of growth, the Ohio Automobile Club wanted to regain confidence in its control of software assets, improve IT processes, and reaffirm its need for more IT support to manage licensing.

Solution

The Ohio Automobile Club worked with Project Leadership Associates to conduct a Software Asset Management consultation. The company devised a strategic plan to then monitor, optimize, and control licensing.

Benefits

- Uncovered licensing redundancies and improperly licensed software
- Streamlined the IT purchasing process
- Optimized the licensing program
- Justified a new IT position

Automobile Club Uses SAM to Gain Licencing Compliance and Justify New IT Position

“We couldn’t be happier with the results from our Software Asset Management engagement; it has improved our business and enhanced our relationship with Microsoft.”

Robert Zahn, Director of Application Services, Ohio Automobile Club

After a period of significant growth, the Ohio Automobile Club had become the largest Automobile Association of America (AAA) club operating solely in Ohio. Unfortunately, rapid growth also made it difficult for the company to maintain control over its software inventory and to determine license compliance. After deciding to implement a Software Asset Management (SAM) program, the Ohio Automobile Club chose Project Leadership Associates, a Microsoft® Gold Certified Partner for Licensing Solutions through the SAM specialization, to conduct an inventory of software assets and to review licensing policies and procedures. As a direct result of the SAM consultation, the Ohio Automobile Club identified and corrected licensing issues to become fully compliant, improved internal licensing procedures, and optimized its licensing structure.



SAM Software Asset
Management

optimize. assure. build.

“Acting on recommendations from the final Software Asset Management report, we have changed our purchasing process and further trained our IT staff on proper licensing best practices to ensure compliance.”

Robert Zahn,
Director of Application Services,
Ohio Automobile Club

Situation

The Ohio Automobile Club, part of the Automobile Association of America (AAA), is the largest AAA club operating solely in Ohio, with more than 38 stores and Car Care Plus garages throughout the state. The company has many business lines and offers its members a variety of services, from travel to insurance.

After a period of rapid growth, the Ohio Automobile Club faced significant challenges in its commitment to industry best practices in software asset management. With each new user and hardware acquisition, the Ohio Automobile Club needed to reconcile its licensing information. Because purchasing was not centralized with one vendor, however, the company found it very difficult to gather all the needed data. In addition, when vendors would supply the Ohio Automobile Club with requested licensing reports, the auto club realized that vendors were mistaking the company's name for other, similarly named auto clubs in Ohio. This confusion and combining of licensing records created a very difficult environment to reconcile.

Another issue that was likely to confound a basic license review process was that many of the company's portable computers had incorrect software images installed on them due to inadvertent use of past license keys. If a member of the IT team were to visually review the software installed on those computers, that employee would incorrectly conclude that the auto club needed to purchase more licenses.

Lastly, the Ohio Automobile Club had been a significant user of Microsoft® desktop and server software in the past. The company felt that it was time to reevaluate its licensing structure in order to prepare for strategic goals that the

organization had identified. A Software Asset Management (SAM) consultation would help the company to determine whether its current licensing program was still meeting company objectives.

Solution

The Ohio Automobile Club partnered with Project Leadership Associates (PLA) to conduct a Software Asset Management consultation. To begin, PLA deployed an inventory tool on the Ohio Automobile Club network. When users logged on to the network from an individual computer, the inventory tool tracked software on that machine. Data gained from the inventory tool was compared to license information provided by the software vendors from whom the company had acquired software. PLA provided the company with an in-depth inventory that detailed what software was owned, what was installed, and what needed to be purchased. The company could even confirm on which computers software was installed.

PLA also made recommendations to enhance the Ohio Automobile Club's efforts toward meeting industry best practices for software acquisitions and the continued maintenance of software policies and procedures. At the Ohio Auto Club, software purchasing is now centralized. One individual at the company is responsible for purchasing, and all purchases are routed through a single local Microsoft Certified Partner.

Also, the company has fine-tuned the IT team to include a newly developed position, the Enterprise Software Support Manager. This employee ensures that each computer has the appropriate software versions installed and confirms that the software's correct images appear. Creating this new position has also provided the company with opportunities to train the IT staff

on software management best practices and to further the staff's understanding of licensing agreements.

Finally, the Ohio Automobile Club realized that its current licensing plan was not the most beneficial program for its business. The information provided in the SAM engagement indicated that the company would be better served by moving to a volume licensing program, such as Microsoft Enterprise Agreement.

Benefits

After completing the inventory process, Project Leadership Associates presented the Ohio Automobile Club with a detailed review of the auto club's software assets and an analysis of the club's software processes and policies. With this information, the company was able to identify, correct, and prevent likely instances of future licensing confusion. The Software Asset Management report also provided suggestions on how to streamline some critical IT functions and improve the software acquisition process. Finally, the SAM consultation confirmed that the company qualified for a new, more beneficial, licensing structure. Robert Zahn, Director of Application Services at the Ohio Automobile Club, sums up his experience with the SAM consultation: "We couldn't be happier with the results from our Software Asset Management engagement; it has improved our business and enhanced our relationship with Microsoft."

Facilitated Compliance

The Ohio Automobile Club anticipated that the completed software inventory would identify some licensing errors to correct. After all, it was the company's commitment to licensing compliance and concerns resulting from rapid expansion that prompted it to engage in a SAM consultation.

The Ohio Automobile Club was surprised to discover therefore that in addition to some small pockets of underlicensing, which were easily corrected, the company had areas that were overlicensed. By eliminating redundant licenses, the club was able to realize substantial savings.

The Ohio Automobile Club also identified another area that could easily lead to future licensing compliance confusion: the company's unintentional use of old license keys on portable computers, which resulted in screen images that did not properly align with actual software owned. The SAM inventory revealed this discrepancy. The company had a number of portable computers that were running appropriately licensed operating systems and software. Unfortunately, incorrect screen images were displayed. These screen images wrongfully indicated that the portable computers were running the incorrect operating systems. Although this was a small problem, it was one that could easily lead to future miscalculations of the number of licenses owned.

Streamlined the IT Purchasing Process and Justified a New IT Position

After having such difficulty reconciling its licensing data, both internally and with its software vendors, the Ohio Automobile Club realized that it needed a change. "Acting on recommendations from the final Software Asset Management report, we have changed our purchasing process and further trained our IT staff on proper licensing best practices to ensure compliance," says Zahn.

In order to simplify the company's purchasing process, PLA recommended consolidating purchasing with one vendor and appointing a single individual within the company to filter all hardware and software rollouts to employees. This change has eliminated instances of multiple records and empowered one person to oversee the fulfillment process.

For More Information

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For more information about Project Leadership Associates products and services, call (312) 441-0077 or visit the Web site at: www.projectleadership.net

For more information about the Ohio Automobile Club products and services, call (614) 431-7800 or visit the Web site at: www.aaaohio.com

Now that the company has a single vendor, purchasing software is now an easily managed, streamlined process.

The Ohio Automobile Club created a new IT position, the Enterprise Software Support Manager, to facilitate those changes. The Enterprise Software Support Manager verifies that all computers provided to employees have accurately licensed software with the corresponding licenses and images. This employee also offers ongoing training to the IT staff to propagate additional information on licensing to ensure continued compliance.

Optimized Licensing

A few months after the SAM consultation, the Ohio Automobile Club decided to enter into a new licensing program. Through the Software Asset Management process, the company discovered that it had been overlicensed in some areas and underlicensed in others. The company realized that it needed a more accurate way to purchase and monitor its licensing. The company also realized that it could most effectively address its licensing needs by entering into a volume licensing program—in this case, Microsoft Enterprise Agreement. Further, the company could realize additional benefits and savings with the volume licensing program.

Enterprise Agreement offers fixed annual budgeting for the three years that the program runs. Fixed prices offer additional savings over the three-year term, as well. Another benefit of Enterprise Agreement is Software Assurance, which helps ensure that the company will always be able to take advantage of the latest versions and upgrades of Microsoft software.

In addition, the Ohio Automobile Club is finding that its employees are enjoying many of the additional benefits offered to Enterprise Agreement customers. Through the Home Use and Employee Purchase programs, the company can share the most current technology with its employees.

Software Asset Management

Software Asset Management is a best practice and process that can help save money, control risk, manage unique and standard deployments of software, provide greater security and reliability, and achieve regulatory compliance. The combination of Microsoft tools and partner services provides a solution to help you understand and implement processes to optimize your software investments, adhere to established business processes and regulatory controls, and build flexible and adaptable capabilities for the future.

For additional information, including complimentary tools and resources, visit: www.microsoft.com/sam

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Services

- Software Asset Management

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