



Software Asset Management (SAM)- Services



License
Advisory



Technology
Evangelization



SAM
Services



Agenda

1

About Silver Leaf Solutions

2

The Need | Software Asset Management (SAM)

3

SAM Deliverables | Service Outcomes

4

SAM Services | Compliance, Governance & Control

- ✓ One Time Assessment
- ✓ Audit Assistance
- ✓ Managed Services

5

One Time Assessment | Approach, Deliverables & Commercial Model

6

Audit Assistance | Approach, Deliverables & Commercial Model

7

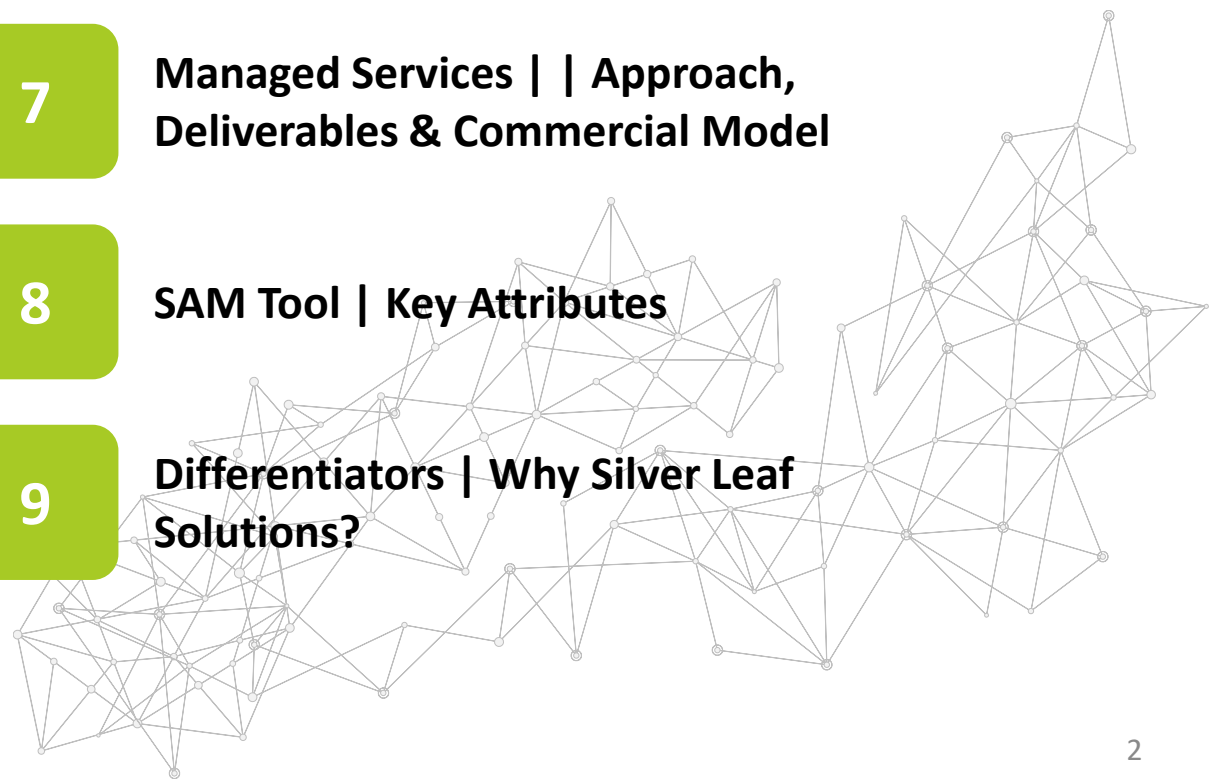
Managed Services | | Approach, Deliverables & Commercial Model

8

SAM Tool | Key Attributes

9

Differentiators | Why Silver Leaf Solutions?





About Silver Leaf Solutions



Vision

#1 Global IT Cost Optimization
Advisory & Services
Organization



Mission

Research based, Independent, Software
Licensing, Software Asset Management &
Technology Services that lead to 10-12%
savings annually



Founded

March, 2015 (Independent &
Privately owned)



Global HQ

Gurgaon, India



Employees

Diverse Team of 45+ Licensing,
Tax, Technology & Legal
consultants



Founders background

Founders from Microsoft, EY,
SAP, BCG, IBM & Oracle



Research Centre

Global Knowledge Center (GKC) –
Research & Development at
Gurgaon, India

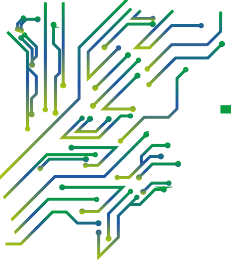


Partnerships

Strategic Partnerships – Global
SI & Big 4 Consultancy Firms

Global Presence





The Need | Software Asset Management (SAM)

Cost Optimization

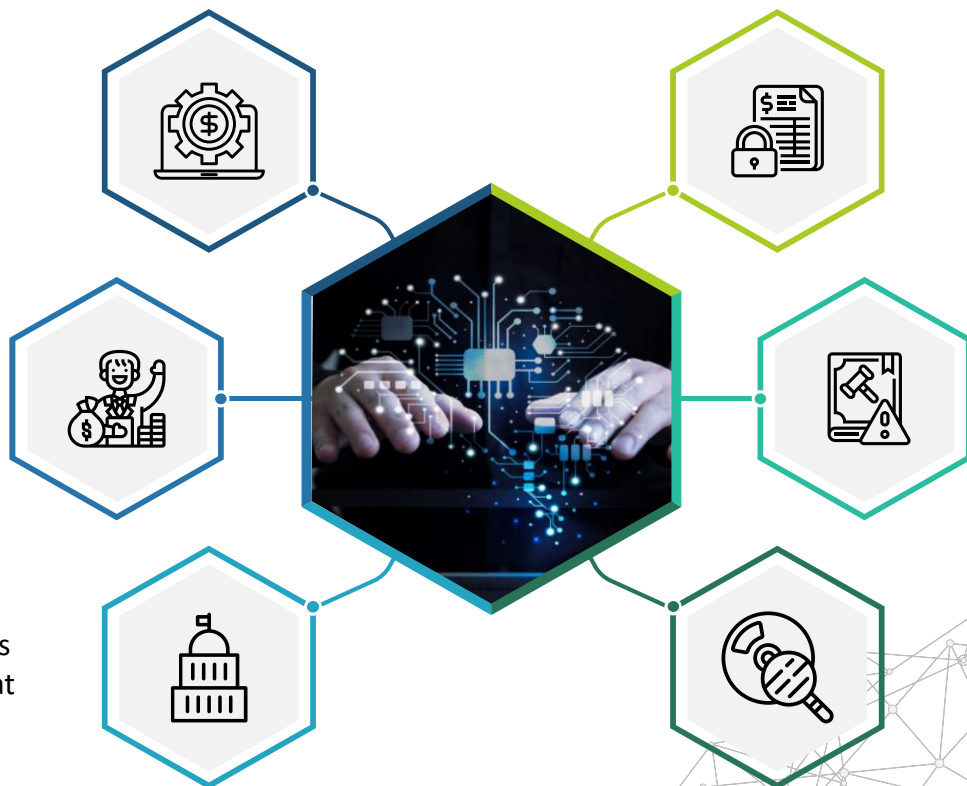
- Customer may be over-licensed and paying maintenance costs for software licenses not being used
- Software is a significant component of IT spend

Asset Management

- Monitoring & Tracking of software in use is difficult
- No “silver bullet” technology solution
- Diverse and complex software licensing models
- Reallocation of software licenses when hardware is moved or decommissioned

Organizational Governance

- Getting compliant and staying that way also helps eliminate the potential damage to reputation that could arise from a legal dispute
- Compliance with industry standards



Security

- Without the ability to inventory and control software installed and allowed to run on their hardware, organizations make their systems more vulnerable to security threats
- Inventory Open Source software to understand what is in use and what could potentially introduce security risks to the organization

Risk – Legal & Regulatory

- Properly implementing SAM limits legal and financial exposure should problems with software licenses arise
- Select industries have regulatory requirements on SAM

Risk – Software Audits

- License Compliance Audits are on the rise → Gartner continues to predict an increase in vendor audits
- Software vendors use license compliance audits to decrease squeeze on margins
- Software industry alliance “bounties”



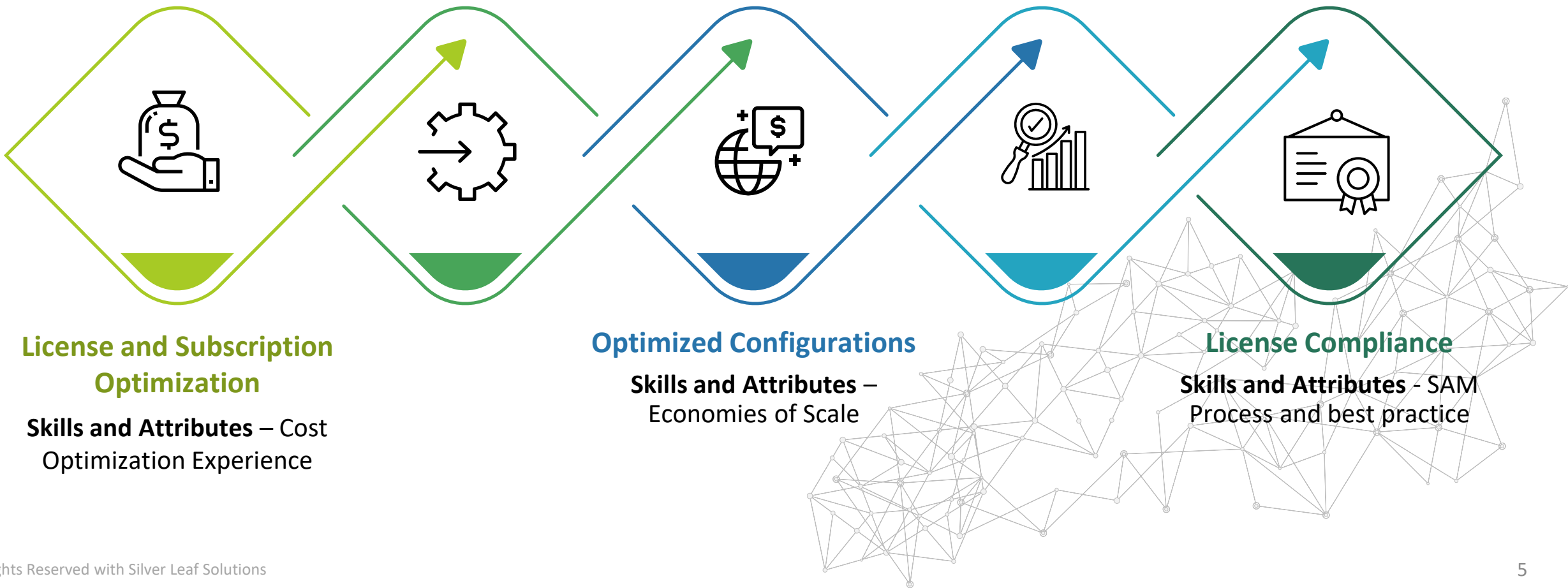
SAM Deliverables | Service Outcomes

Minimal Unnecessary Costs

Skills and Attributes – Data
Custodianship and Integration

Minimized unused Software

Skills and Attributes – Detailed
usage rights intelligence



License and Subscription Optimization

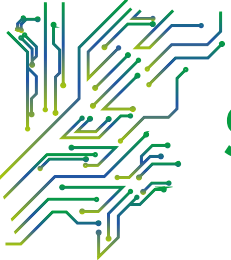
Skills and Attributes – Cost
Optimization Experience

Optimized Configurations

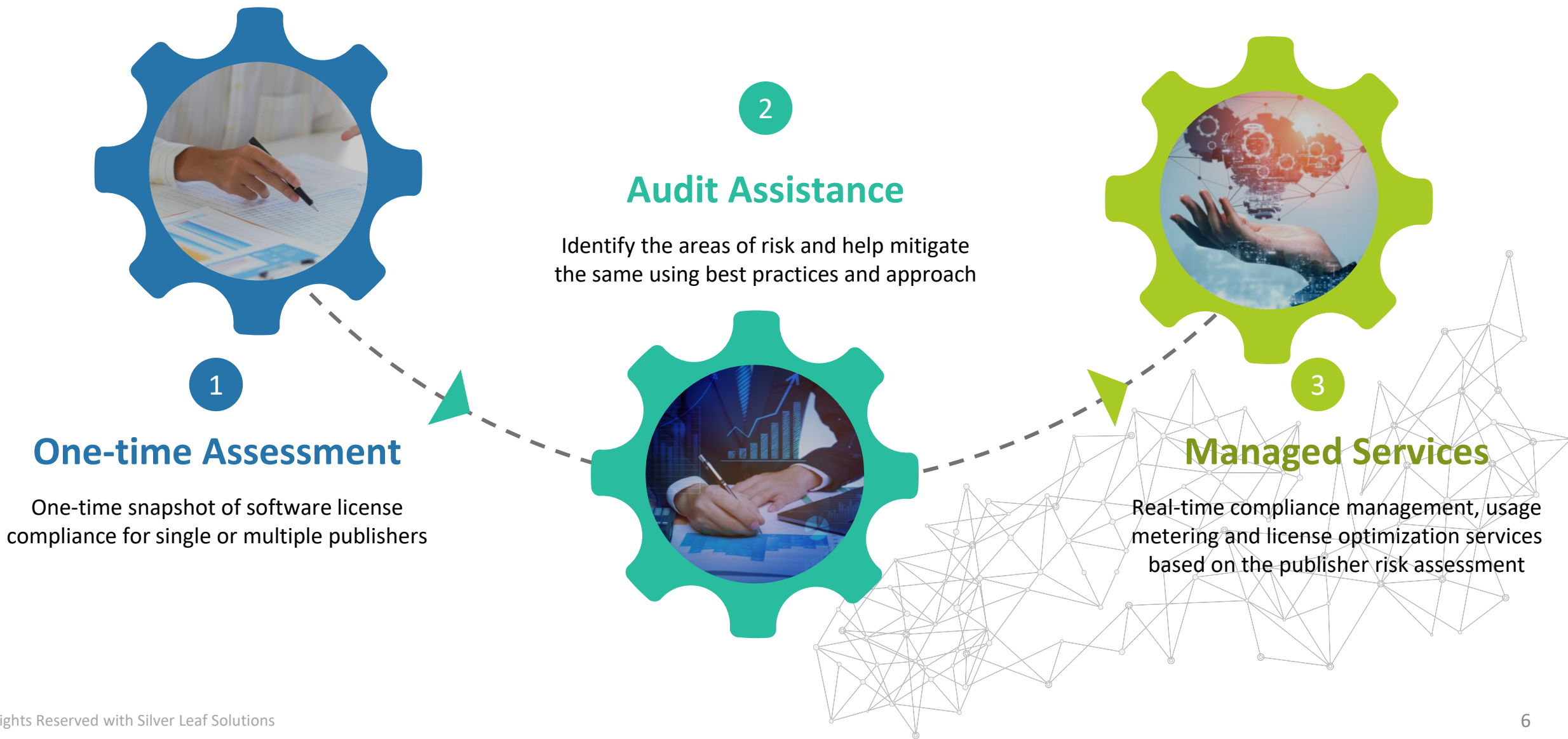
Skills and Attributes –
Economies of Scale

License Compliance

Skills and Attributes - SAM
Process and best practice



SAM Services | Compliance, Governance and Control





One-Time Assessment | Approach



Planning

The planning phase involves gathering information on your infrastructure background, identifying plans and goals for the engagement, setting up appointments, and arranging access to begin data collection and analysis.



Entitlement Analysis

The entitlement analysis will be done based on the information provided from multiple sources including but not limited to Contract/Agreement documents, license history sheets from publisher, data export from publisher portal and relevant license invoices.



Data analysis

The data analysis phase includes the review and validation of all collected data. The second level checks will be done wherever required based on the publishers in scope



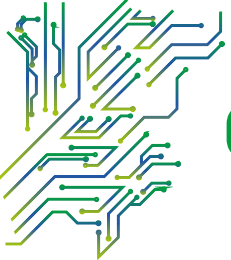
Data collection

The data collection phase includes taking inventory of your software assets using combination of multiple techniques including script based methodology, in-house inventory tools, screenshots, questionnaires etc.. This will be done centrally for all the domain assets available on network during scanning. For workgroup, standalone along with the domain machines not available on network (not reachable from central desktop), the data collection activity will be conducted manually.



Reporting

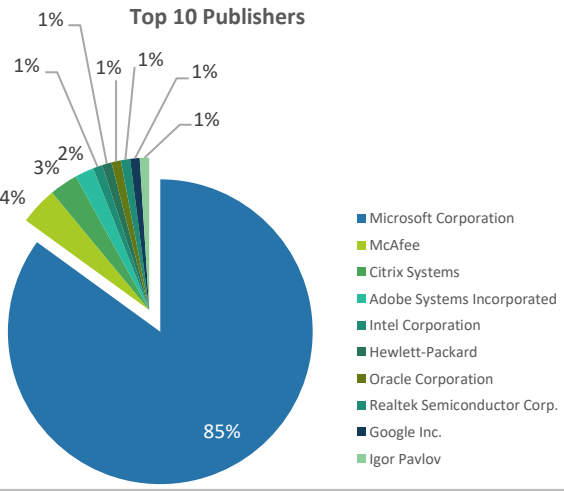
The Software License Reconciliation reports are prepared based on gap analysis conducted based on entitlement vs deployment analysis. The necessary recommendations are shared based on the licensing compliance position statement



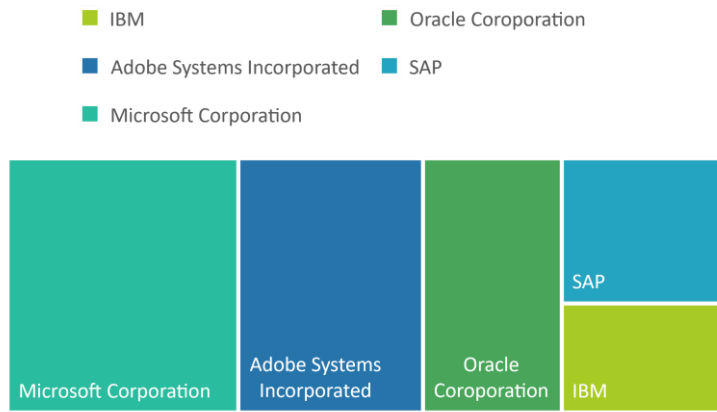
One-Time Assessment | Deliverables

SAM License Reconciliation (SLR)

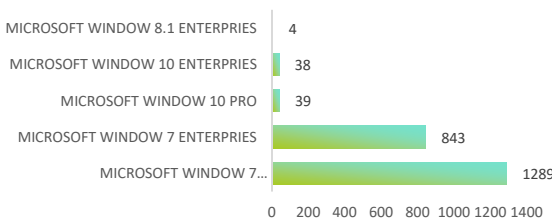
Product Fam	Version	Usage Identified			Entitlements			Interim Status		Final Status		Comments
		Tool	Semi-Auto	Total Soft	MLS	OEM	Total Lic	Software	License All	Effective L Status		
Desktop C												
Microsoft	10	0	38	38	2,849	0	2,849	2,811	-849	1,962	Green	Requires POL for OEMs
Microsoft	8.1	0	4	4	0	0	0	-4	4	0	Green	Requires POL for OEMs
Microsoft	7	0	845	845	0	0	0	-845	845	0	Green	Requires POL for OEMs
Microsoft	10	0	39	39	4	35	30	0	0	0	Green	Requires POL for OEMs
Microsoft	7	0	1,289	1,289	0	1,289	1,289	0	0	0	Green	Requires POL for OEMs
VDA	-	0	1	1	0	0	0	-1	0	-1	Red	-
Office												
Microsoft	365	181	0	181	250	0	250	69	0	69	Green	-
Microsoft	365	2483	0	2,483	2,844	0	2,844	361	0	361	Green	-
0365 Extra	365	0	0	0	1	0	1	1	0	1	Green	-
Microsoft	365	0	32	32	0	0	0	-32	32	0	Green	Covered with E3
Microsoft	2016	0	2	2	250	0	250	248	-13	235	Green	-
Microsoft	2013	0	13	13	0	0	0	-13	13	0	Green	Upgrade license used from office 2016 Pro
Microsoft	2010	0	12	12	25	0	25	13	0	13	Green	-
Microsoft	2007	0	0	0	97	0	97	97	0	97	Green	-
Microsoft	2016	0	1,211	1,211	2,844	0	2,844	1,633	-436	1,197	Green	-
Microsoft	2013	0	436	436	0	0	0	-436	436	0	Green	Upgrade license used from office 2016 Stan
Microsoft	2010	0	59	59	149	0	149	90	0	90	Green	-
Microsoft	2007	0	1	1	1,981	0	1,981	1,980	0	1,980	Green	-



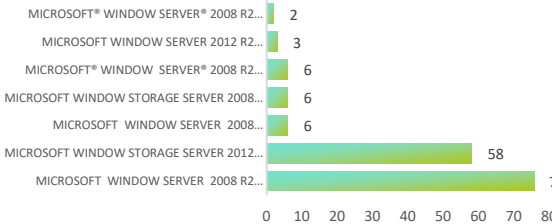
Top 5 Critical Publishers- Based on Audit Trends



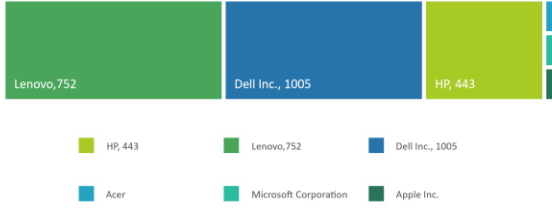
End User Infrastructure



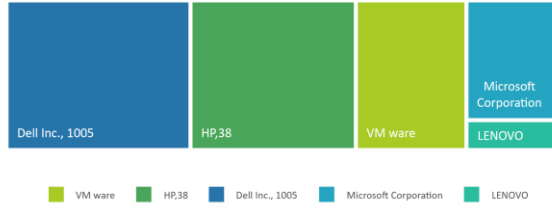
Server Infrastructure



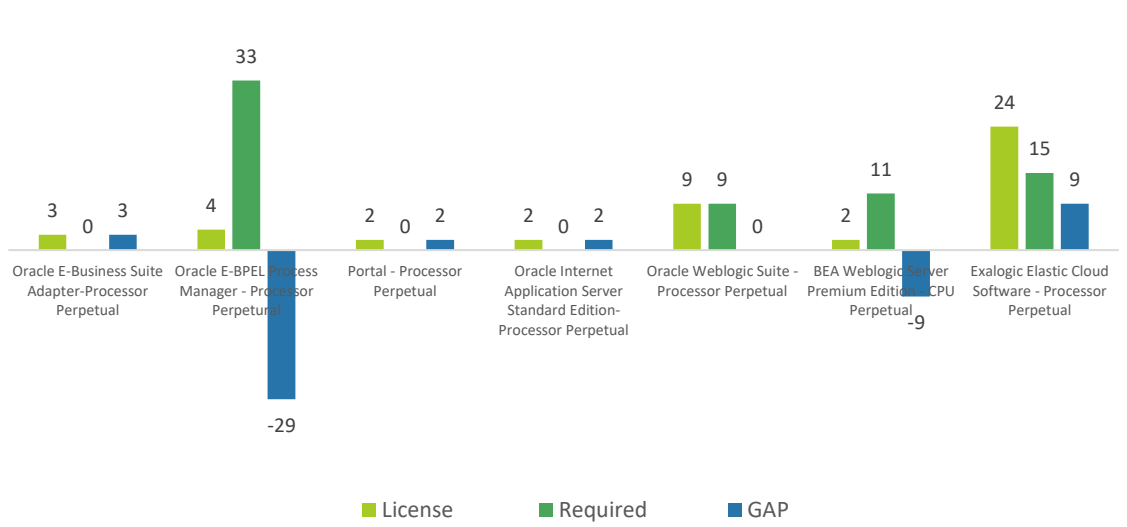
End User Manufactures

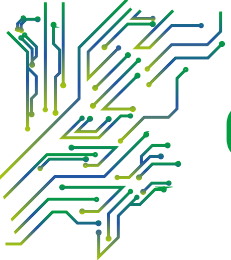


Server Infra Manufactures



SOA, Weblogic, Exalogic





One-Time Assessment | Commercial Model

Commercial Model is **Fixed Fee** and is dependent on following parameters



Total IT assets in scope



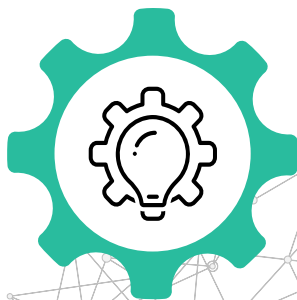
Assets on domain are available on network



Assets in standalone/ workgroup environment



Publishers in scope
(Microsoft, Oracle, IBM, Adobe etc.)



Tool/Methodology in scope (For e.g. SAP compliance may require dedicated tool to be deployed for assessment period)



Audit Assistance | Approach



Planning

The planning phase involves gathering information on your infrastructure background, identifying plans and goals for the engagement, setting up appointments, and arranging access to begin data collection and analysis.



One-time Assessment

One-time compliance assessment activity will be conducted as per the approach shared early to validate the latest compliance stage.



Additional Governance Checks

The additional governance checks will include the information related to cracks, keygens, un-installations, past product traces etc.



Mail Communication response

We recommend to involve ourselves from the time when you receive the first email/ audit letter from publisher or audit partner, so that we can help handle the response time and draft right emails to avoid any legal litigations in parallel.



Mitigation

Depending on the publisher process and guidelines, we can help mitigate the risks around non-compliance by managing the complete audit activity and understanding the audit reports. We may also get involved in the publisher negotiations, wherever required.





Audit Assistance | Deliverables



SAM License Reconciliation (SLR)

Product Family	Version	Usage Identified			Entitlements			Interim Status		Final Status		Comments
		VDI	Semi-Auto	Total Soft	AOD	Subscriptic	Total Licen	Software	License All	Effective	Status	
Acrobat												
Acrobat Professional	DC	0	3	3	0	2	2	-1	0	-1	Red	-
Acrobat Professional	X	0	6	6	0	0	0	-6	0	-6	Red	-
Acrobat Professional	9	0	3	3	0	0	0	-3	0	-3	Red	-
Acrobat Professional	9	0	4	4	0	0	0	-4	0	-4	Red	-
Acrobat Professional	8	0	3	3	0	0	0	-3	0	-3	Red	-
Acrobat Professional	7	45	278	273	0	0	0	-273	0	-273	Red	-
Acrobat Professional	6	0	15	15	0	0	0	-15	0	-15	Red	-
Creative Suite												
Adobe Master Collection	CC	0	3	1	0	0	0	-1	0	-1	Red	-
Adobe Master Collection	CS5	0	3	3	0	0	0	-3	0	-3	Red	-
Adobe Design Standard	CS3	0	2	2	0	0	0	-2	0	-2	Red	-
Adobe Design Standard	CS6	0	0	0	130	0	130	130	0	130	Green	-
Adobe Design Standard	CS 5.5	561	162	162	0	0	0	-273	0	-273	Red	-
Photoshop												
Photoshop	CC	0	7	7	0	4	4	-3	0	-3	Red	-
Photoshop	CS 6	0	0	0	50	0	50	50	0	50	Green	-
Photoshop	CS 5.5	0	24	24	1	0	1	-23	0	-23	Red	-
Photoshop	CS 3	0	6	6	17	0	17	11	0	11	Green	-
Photoshop	CS 2	0	4	4	0	0	0	-4	0	-4	Red	-
Photoshop	CS	0	21	21	0	0	0	-21	0	-21	Red	-
Photoshop	7	0	179	179	0	0	0	-179	0	-179	Red	-
In Design												
In Design	CC	0	5	5	0	0	0	-5	0	-5	Red	-
In Design	CS 6	0	0	0	500	0	500	500	0	500	Green	-
In Design	CS 5.5	0	86	86	0	0	0	-68	0	-86	Red	-
Illustrator												
Illustrator	CC	0	7	7	0	3	3	-4	0	-4	Red	-

Product Un-Installed	Count of unique Hostname
Adobe Acrobat 6.0 Professional	7
Adobe Acrobat 8 Professional	1
Adobe Acrobat DC	1
Adobe Acrobat X Pro	13
Adobe After Effects CS4	1
Adobe Creative Suite 3 Design Premium	1
Adobe Photoshop Lightroom 5.6	1
Adobe Stock Photos 1.0	3
Adobe Stock Photos CS3	1
Macromedia Dreamweaver 8	1

Product Traces	Count of Unique Hostname
Adobe Acrobat 7.0 Professional	89
Adobe Acrobat DC	2
Adobe Acrobat X Pro	16
Adobe CC	2
Adobe Photoshop CC+lightroom	1
Adobe Photoshop CS2	5
Adobe Photoshop Lightroom 5.6	1

Hostname	Crack/ Keygen Path	AD/Non-AD
a	C:\Users\admin\Desktop\adobe_acrobat_7.0_professional&keygen\adobe_acrobat_7.0_professional&keygen\Adobe Acrobat 7.0 Professional\	Non-AD
b	D:\Lakhwinder\Software\Adobe Photoshop CS6 13.0.1 Final Multilanguage (cracked dll) [ChingLiu]\Adobe CS6\payloads\Microsoft_VC90_CRT_x86\	AD
c	D:\Adobe photoshop CS3 with crack\Adobe photoshop CS3 with crack\Adobe CS3\payloads\AdobeHelpViewerAll\	AD
d	E:\adobe_acrobat_7.0_professional&keygen\Adobe Acrobat 7.0 Professional\	AD
e	C:\Documents and Settings\bhaskar\Desktop\adobe_acrobat_7.0_professional&keygen\Adobe Acrobat 7.0 Professional\	AD
f	C:\Users\dbmum2016\Desktop\adobe_acrobat_7.0_professional&keygen\Adobe Acrobat 7.0 Professional\	Non-AD
G	E:\adobe_acrobat_7.0_professional&keygen\Adobe Acrobat 7.0 Professional\	AD
h	C:\Users\city\AppData\Local\Temp\Rar\$EXa0.778\adobe_acrobat_7.0_professional&keygen\Adobe Acrobat 7.0 Professional\	AD



Audit Assistance | Commercial Model

Commercial Model is **Fixed Fee** and is dependent on following parameters



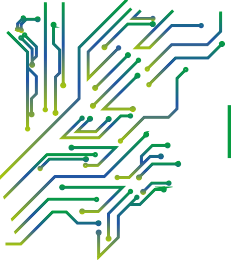
Parameters of one-time assessment



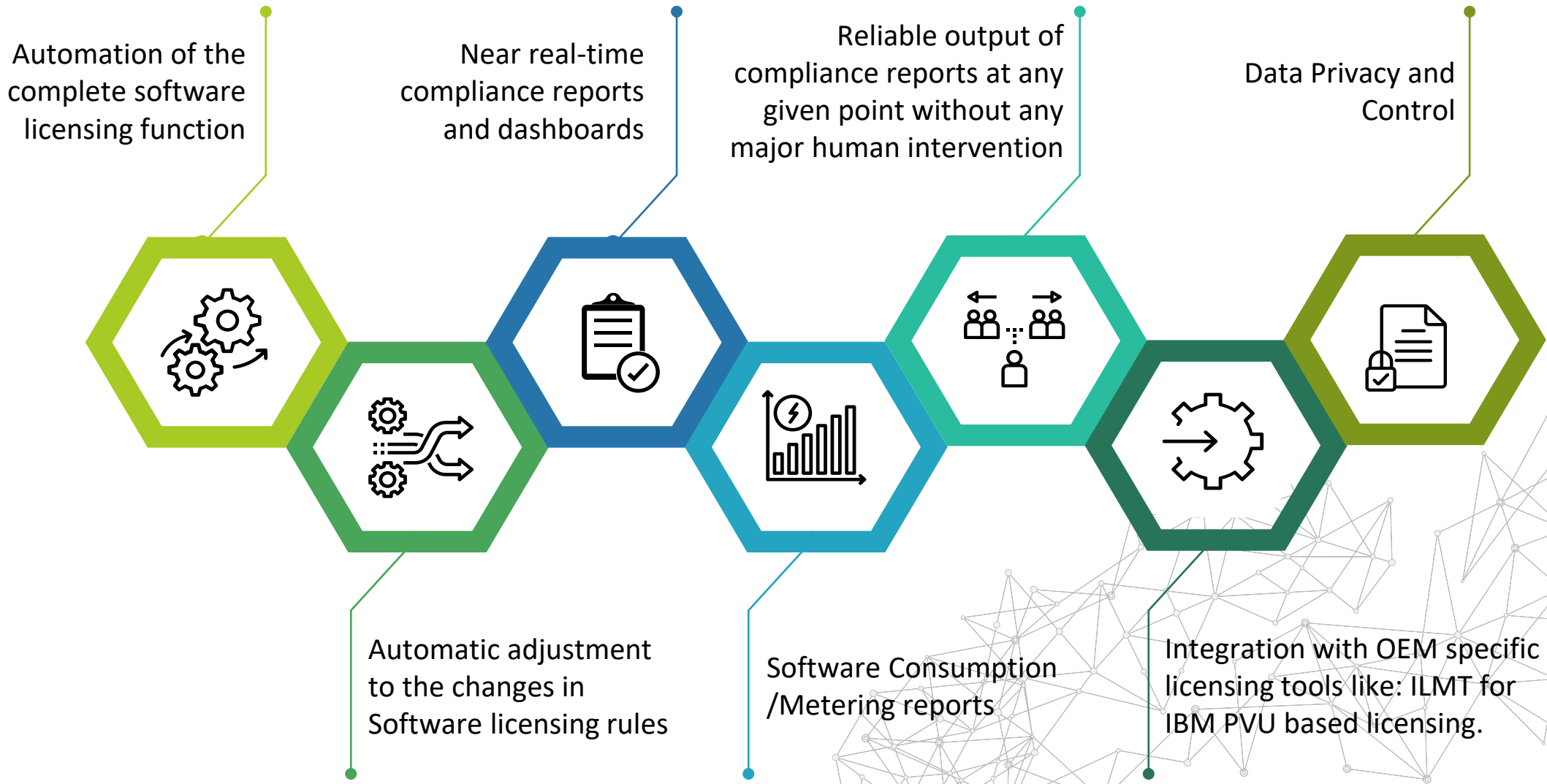
Audit stage

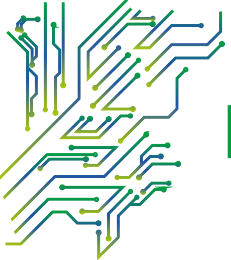


Proposal shared by Publisher, based on their internal intelligence



Managed Services | Objectives

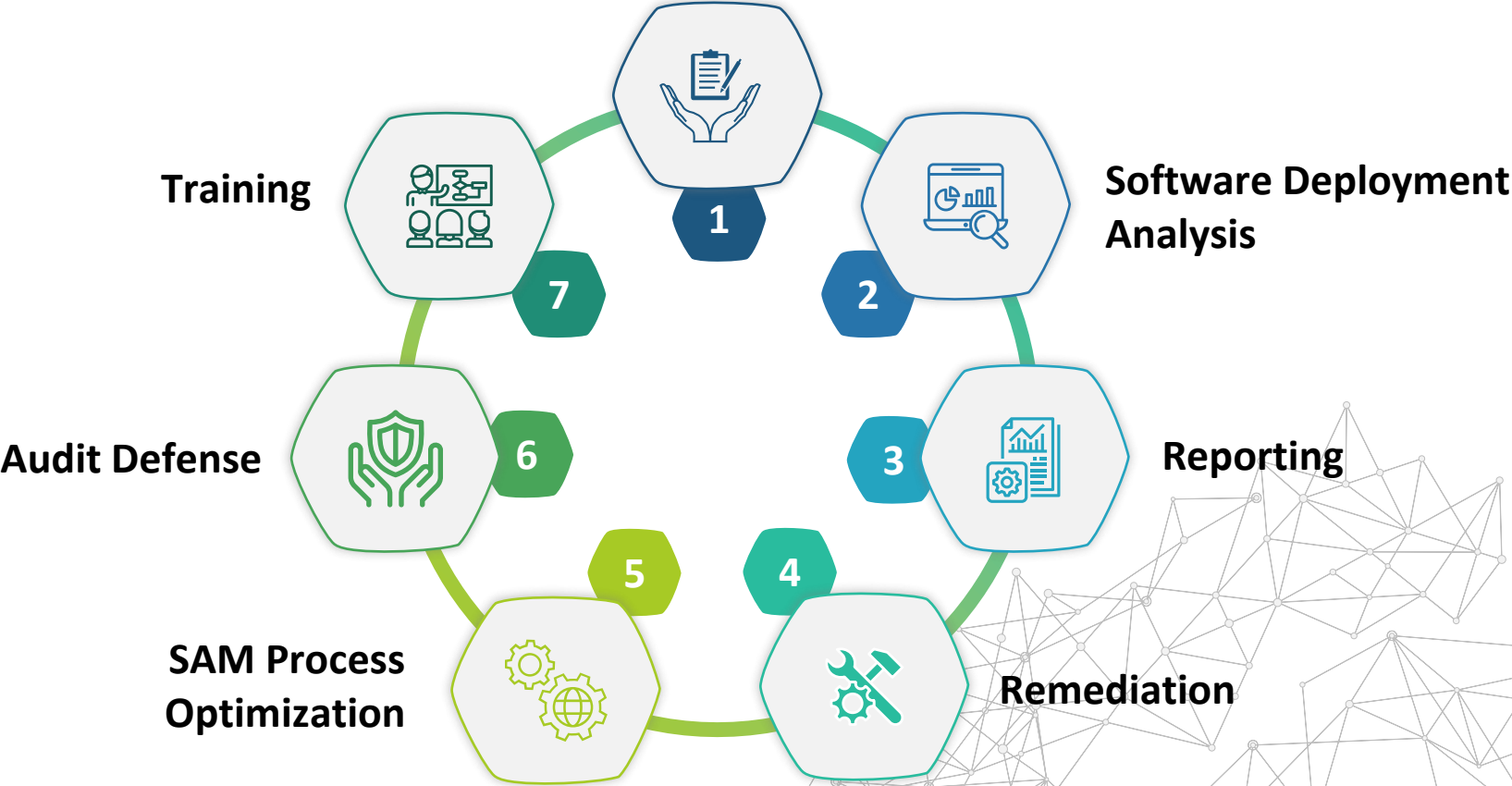


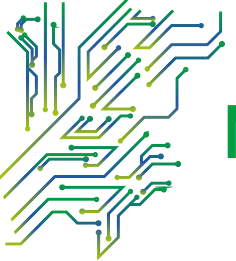


Managed Services | Tracks

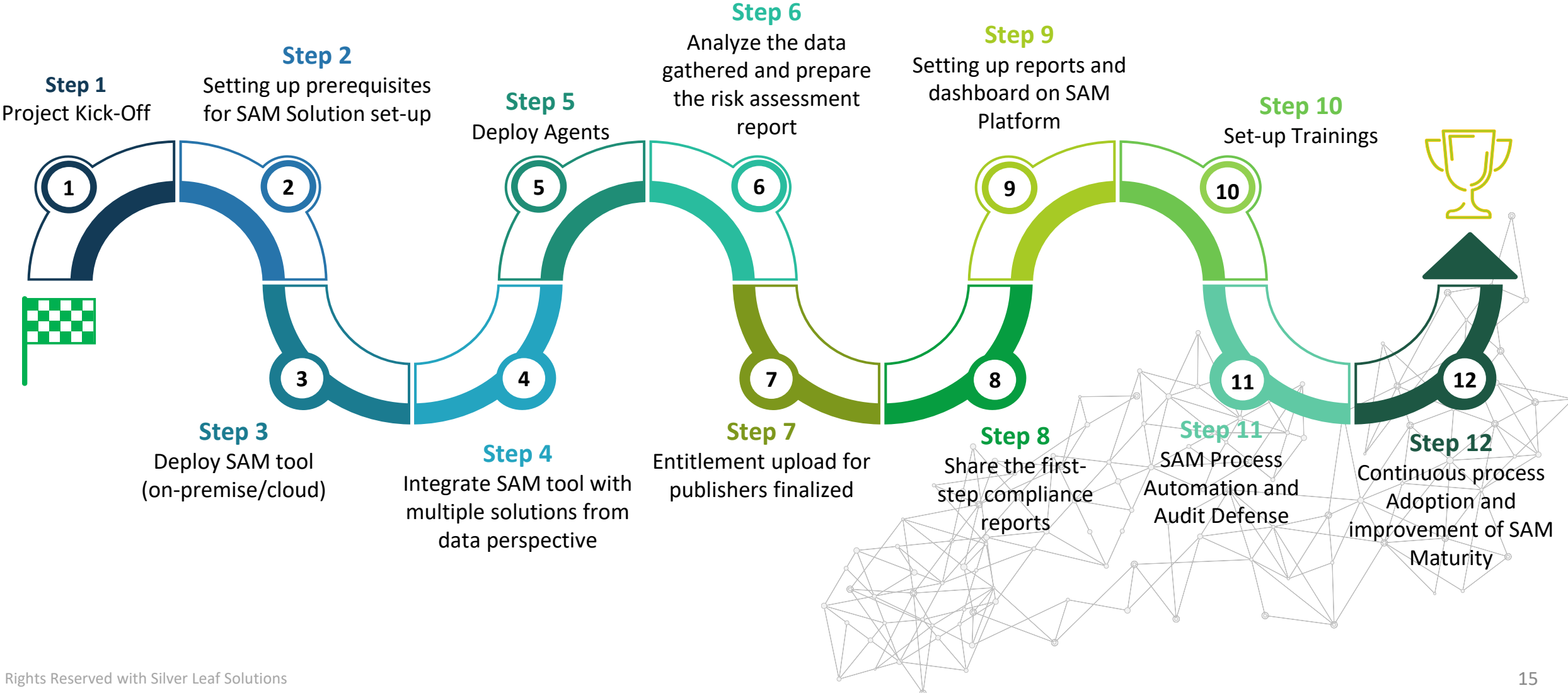
Managed Services of SAM are generally divided into following sections

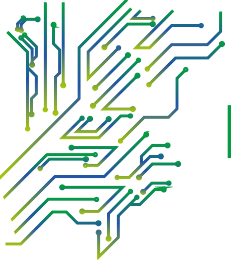
Entitlement Gathering





Managed Services | The Methodology





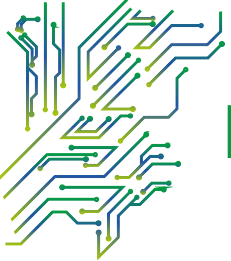
Managed Services | Key Deliverables (1/3)

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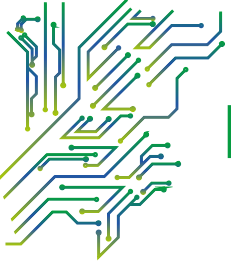
- **Coverage of 100% of in scope End user devices** (Laptops/Desktop/Thin Clients) and **100% of in scope Software/Servers on all platforms** including but not limited to Windows, Unix, Linux, ESXI, MAC for collection of software inventory and other relevant details required for license compliance. **Coverage for all software inventory for all OEM** as shared in this RFP.
- **Identification of High, Medium and Low Risk Software Publishers** from the collected software inventory based on the relevant criteria including vendor audit activity, vendor active compliance program, software spend, complexity of licensing terms/contracts, usage, etc.
- **Recommendation on AMC renewal** based on software metering and usage information.
- **Report for Unauthorized Software deployments** for any publisher on the covered assets.
- **Detailed compliance report for identified publishers** (XY High, PQ Medium and VZ Low Risk Software Publishers) containing entitlement information, deployment details, effective license position, traces of past deployment, non-compliance to EULA and any deviation from licensing terms and conditions, etc.
- **Optimization report for publishers** based on software metering and usage details using SAM Software



Managed Services | Key Deliverables (2/3)



- **The detailed methodology** for proper removal of identified unwanted software or related files along with tools and scripts to ensure their uninstallation/deletion
- **Compliance report revalidation** post remediation activity for ensuring removal of unwanted software assets.
- **Detailed preventive recommendations** along with implementation plan to avoid non-compliance
- **Implementation plan and detailed methodology** for Optimization of existing SAM Processes.
- **Time bound internal assessment** for specific publishers on request. Remediation of identified gaps and confirmation of compliance.
- **Support for negotiations** during Publisher initiated Audit Requests
- **System for real time and comprehensive automatic email alerts** of any unwanted software installation/uninstallation on the Assets under scope.



Managed Services | Key Deliverables (3/3)

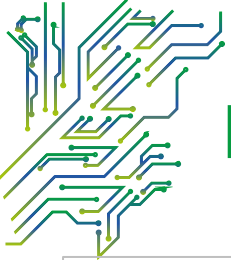
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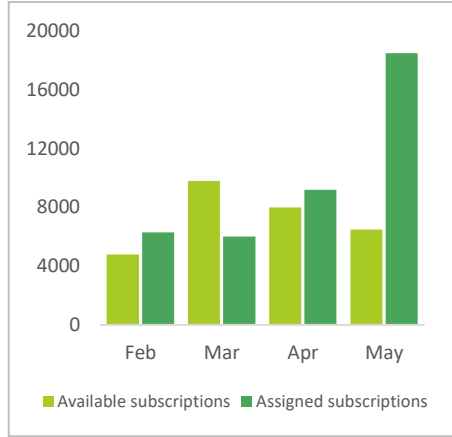
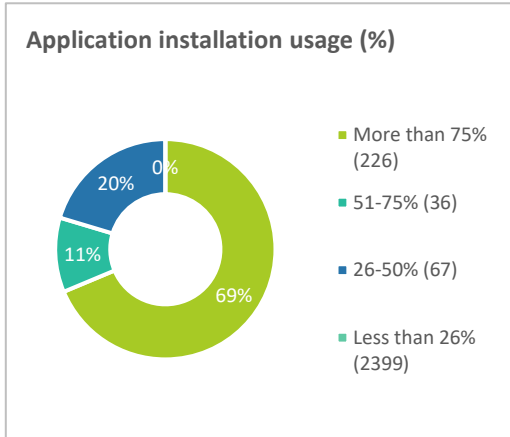
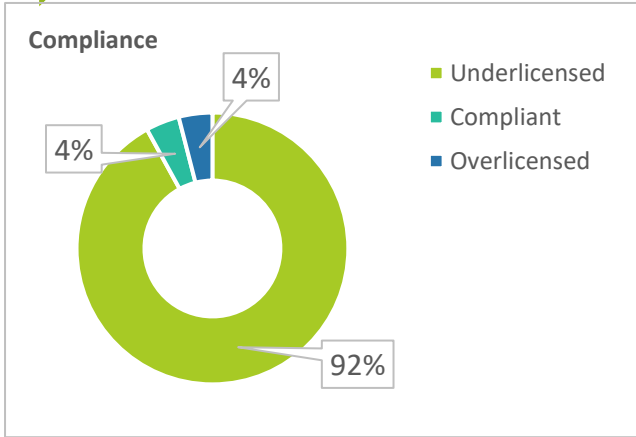
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- **System for automatic reconciliation of software deployments** against entitlements, calculation of Effective License Position for Publishers in scope . The same should be reflected in Our Tool.
- **Creation and periodic updation of Best Practices and Process for SAM** based on Industry guidelines
- **ILMT reporting** for PVU metric based IBM products
- **Developing, Managing and Maintaining software license management policy framework** with clearly defined roles and responsibilities across asset lifecycle, along with a monitoring and reporting framework to support policy compliance and accountability
- **Identify and present Cost Optimization opportunities** as applicable post License Compliance Review.
- **Perform periodic reconciliation of IT asset** to keep a track of IT assets - desktops/laptops/servers/virtual machines etc.
- **Publish Tool Dashboards** as required by Customer management on monthly, quarterly, half yearly, and yearly basis as per the proposed SLAs

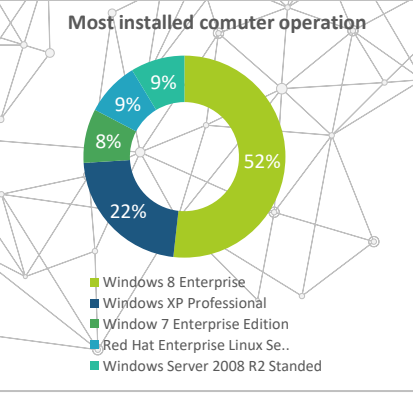
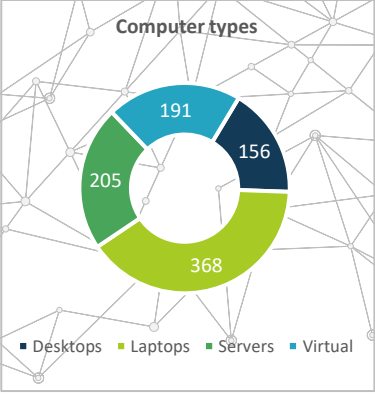
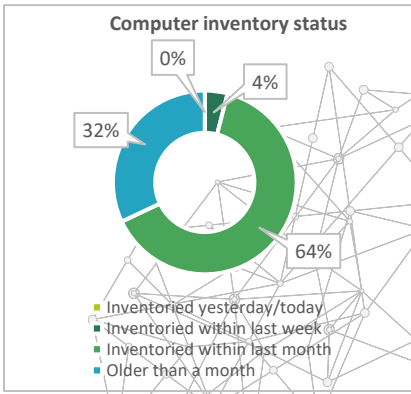
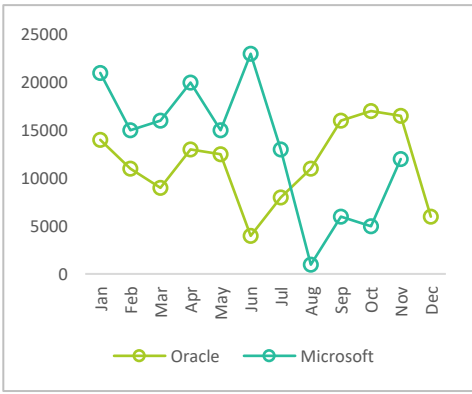
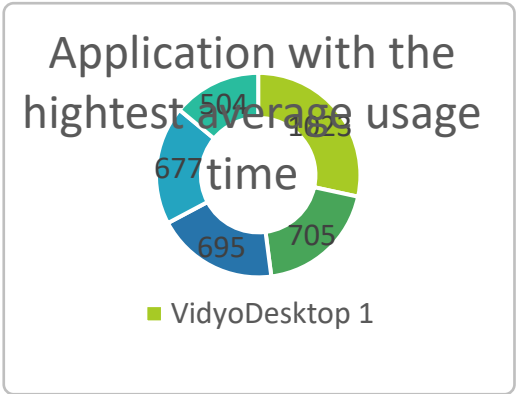
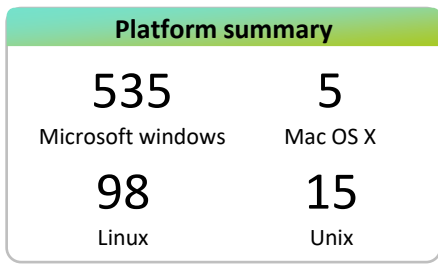
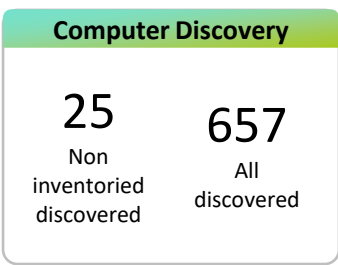
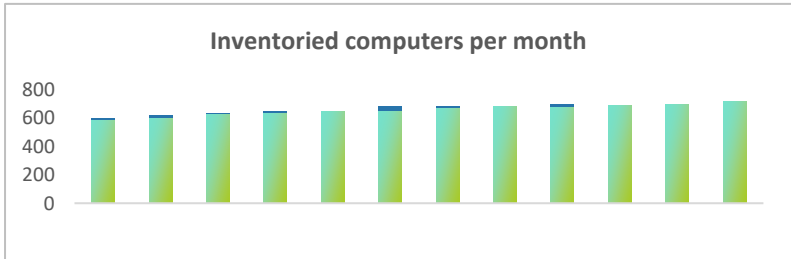
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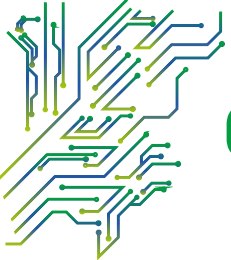


Managed Services | Deliverables as a Snapshot



Subscriptions	Subscriptions		
	Available	Assigned	Total
Microsoft Project Online Professional	50	160	210
Microsoft Project Pro For Office 365	21	318	339
Microsoft Office 365 Plan E3	2,528	12,740	15,268
Microsoft Visio Pro For Office 365	426	1,546	1,972
Microsoft Office 365 Plan E1	33	120	153
Microsoft Enterprise Mobility + Security E3	4,271	3,329	7,600
6 items	17,329	18,213	25,542





Components for commercials| Managed Services

Components



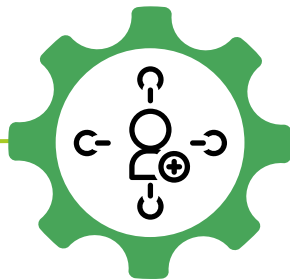
Tool Cost

This will cover all the SAM tool modules required for running SAM managed Services



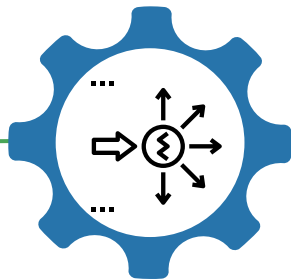
Services Cost

This includes the services fees for the deliverables executed by all allocated resources onsite as well as offsite



Add ONs

Additional Tool Requirements (If requested by customer) OR expanding the scope of services OR adding the consulting services on technology OR Advisory on Spend optimization



Variables

Increase in the number of assets/Locations /Merger acquisition etc.



SAM Tool | Key Attributes



Tool Basic Requirements



SAM Tool should be agent based and should support Windows, AIX, Linux, MAC operating systems (all versions)



Tool should be able to do software recognition (free/paid/bundling) and provide compliance reports automatically for atleast 90% of the products in our environment.



Tool should be able to do software metering (provide actual usage of products deployed across all assets in our environment)



SAM tool should have integration with VMware environment to fetch physical vs virtual mapping of assets to understand the Licensing compliance in virtual environment.



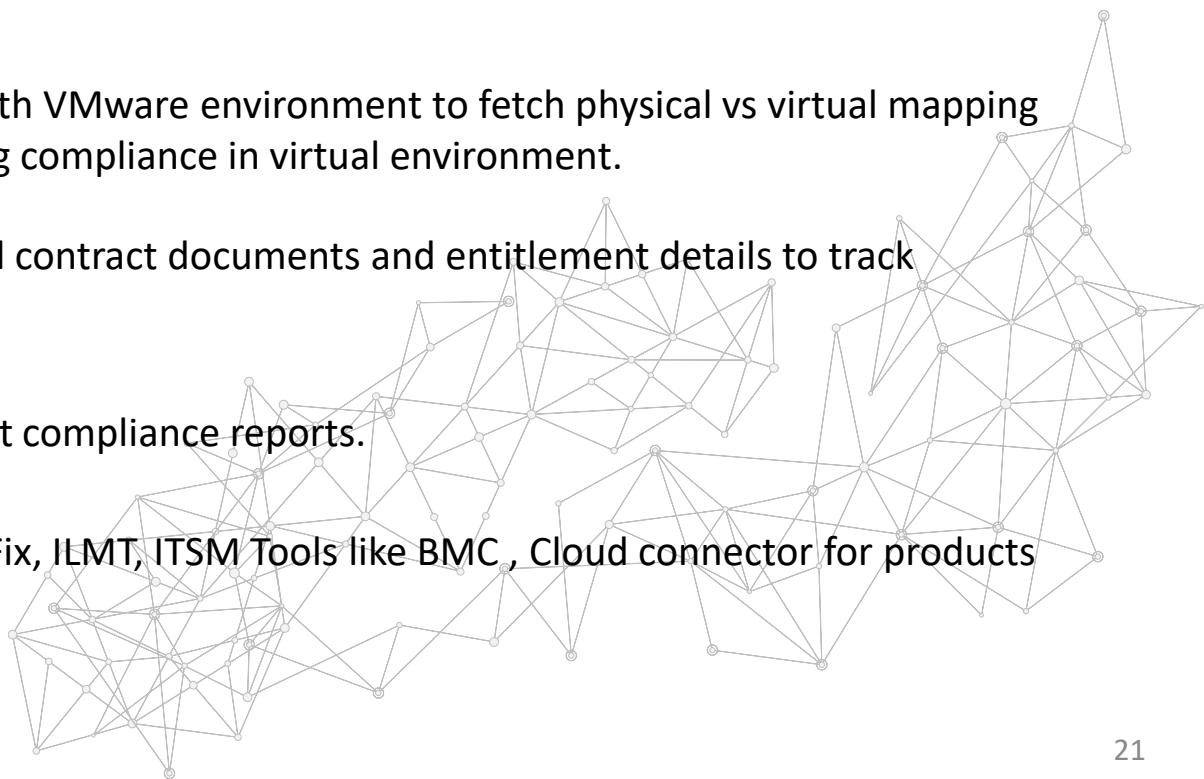
Tool should have provision to upload contract documents and entitlement details to track renewal dates.

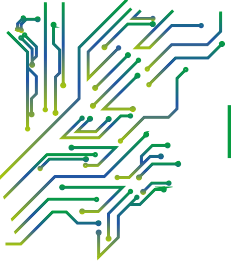


Tool should be able to provide inbuilt compliance reports.



Tool should have connectors for BigFix, ILMT, ITSM Tools like BMC , Cloud connector for products like Microsoft O365.

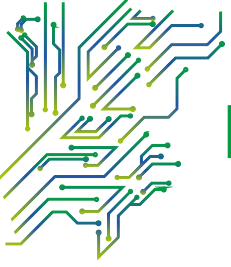




Differentiators | Why Silver Leaf Solutions?



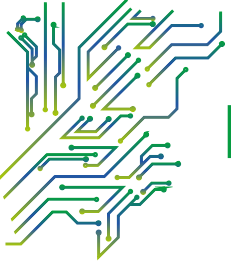
- We are **Global & Independent** because **we do not work as an auditor** for any Publisher/Software Vendor/OEM
- We are **Global & Independent** because **we do not work as a reseller** of any Publishers/Software Vendor/OEM
- **100% Data Privacy and Protection Always**
- **Real Time Updated Licensing & Pricing Information** through **Global Research & Knowledge Centre** based in Gurgaon, India
- **In-House Team of Software Licensing Advisory & Optimization experts** for all major Publishers
- **In-Depth SAM knowledge** for process, tool deployment and integration services & support
- **Delivering Multi-Year Managed SAM Services to Large Telecom Companies in Asia, Europe & Australia**
- **Expertise across all major Global SAM platforms/tools** like SNOW, Flexera, Certero, Aspera, Lansweeper etc.
- **In certain cases, we provide guaranteed Savings** on Existing/Planned Spends with an **Outcome Based Gain Share Fee Model** assuring **Risk Mitigation & 100% Compliance**



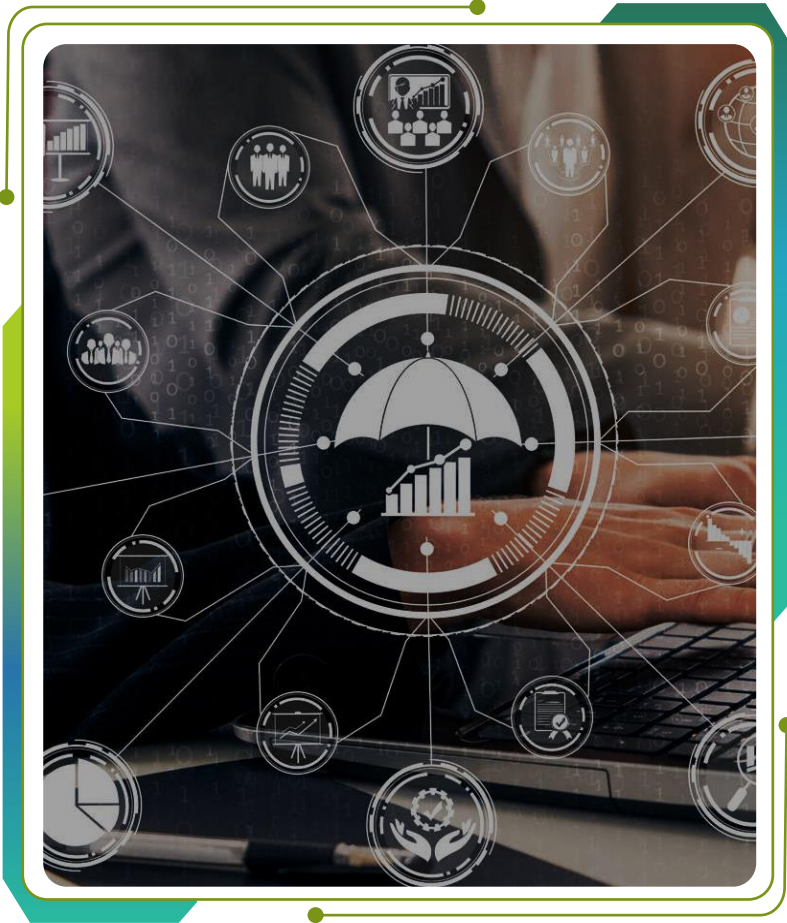
Differentiators | Why Silver Leaf Solutions?



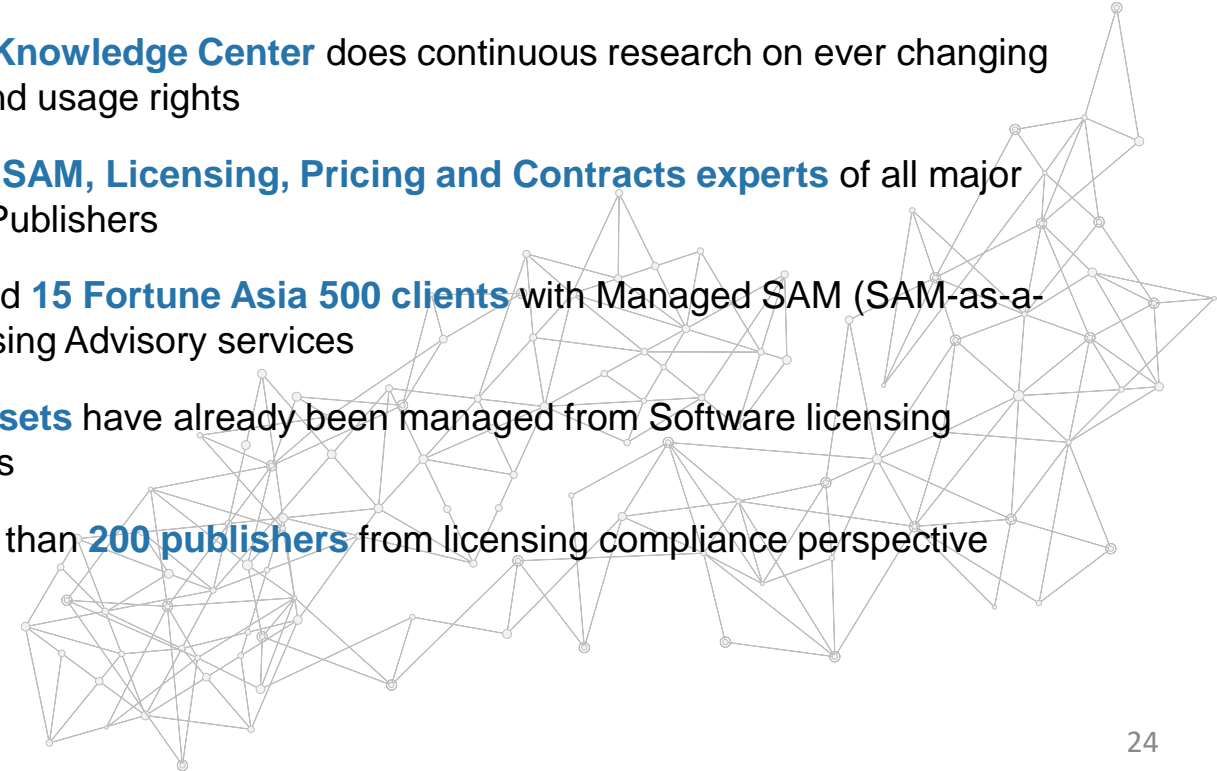
- **Audit Assistance/ Audit Defence service** is most effective as we are independent and have **NO Conflict of Interest**.
- **Always work on customer/client side** and help them achieve **transparency** in terms of product use rights, pricing, discounts, contract clauses, exceptions, grants & partner margins/incentives
- **Domain Expertise** in M&A, Divestures, Global Contracts, Price Benchmarking, Price Arbitrage, Taxation & Compliance
- **Deep Knowledge of Custom Contracts, Exceptions, Grants, Discounts & Other Contractual Amendments that** help customers to achieve more value out of their investments into multi-year contracts
- **Licensing Knowledge along with Usage Analysis (Across On-Premise and Cloud Licenses)** can help achieve cost savings in the mid-term of the contract
- ADNOC, Bharti Airtel, Tata Motors, Max Life Insurance, YBA Kanoo, Bank ABC **are some key referenceable customers in UAE & India**
- Delivery of all engagements under **Strict NDA guidelines** and without any presence or interference from any vendor at anytime
- **No Sub-Contracting done** for any kind of service (SAM or Licensing Advisory & Cost Optimization)

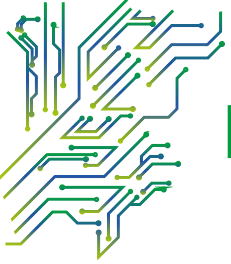


Differentiators | Why Silver Leaf Solutions?



- We are **completely Independent** because
 - Do not work as an auditor for any Software Vendors/Publishers
 - Do not work as a reseller of enterprise contracts of any Software Vendors/Publishers
 - Ensure safety, privacy and complete confidentiality customer's environment and data
- **Global Licensing Knowledge Center** does continuous research on ever changing licensing metrics and usage rights
- Team comprises of **SAM, Licensing, Pricing and Contracts experts** of all major Software Vendors/Publishers
- Have already served **15 Fortune Asia 500 clients** with Managed SAM (SAM-as-a-Service) and Licensing Advisory services
- More than **300K assets** have already been managed from Software licensing compliance services
- Worked upon more than **200 publishers** from licensing compliance perspective





Differentiators | Big 4 Audit Firms vs Silver Leaf Solutions



- **All Big 4 Audit Firms** like EY, Protiviti, KPMG, Deloitte, etc. are paid by all software publishers/vendors to conduct licensing audits at customer's locations
- **RoI measured as 20X to 30X times** (the order value to Software Vendors/Resellers) through identification of licensing gaps during the audit process
- **Risk of leakage of information** on internal IT Usage and Deployment at customer locations to other software vendors
- **No expertise on the finer nuances** of contract T&Cs, Product Use Rights, Program licensing and restructuring options especially during the mid-term of the signed contract
- **Limited knowledge** of Global Pricing Structure, Arbitrage opportunities and WHT structures
- **Limited knowledge** across all types of global SAM Tools
- **Cost Optimization** being driven only through customer paid SAM assessments by identification of unused software licenses



- Silver Leaf Solutions is **completely independent** because we do not work as an auditor/resellers for all major Software Vendors
- We help customers with **Audit Assistance and Clean-up** to make sure that the environment is fully compliant and no trace of cracks, keygens, etc. can be found out during the audit
- We use customer's internal data to help them with the optimization and keeping **compliant without risk**
- The Company has **various profiles/experts** for each kind of role such as Licensing Consultants, Contract Specialists, Taxation, Legal, and SAM Consultants
- **Domain Expertise** in M&A, Divestures, Global Contracts, Price Benchmarking, Price Arbitrage, Taxation & Compliance
- Expertise across various **global SAM Tools**
- **Cost Optimization** is achieved through various dimensions **including Consumption Analysis** and others.

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