**The Enterprise Agreement:**

***Save Money with Smart Licensing***

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# Introduction

Businesses today need to be able to adapt to change, and the successful executive is focused on building organizations and business processes that can accommodate whatever changes are required. In addition, organizations need to build technical structures that drive the business forward in both good and challenging economic times. Microsoft can help your organizations get ahead—and stay there – by getting the most from your software investments when you acquire licenses through a Microsoft® Volume Licensing program.

*“By selecting the Enterprise Agreement with the Enterprise CAL Suite Step-Up, we saved about $1.8 million compared to the Select License, based on two forecasted upgrades over three years,” says Colón. “The Enterprise Agreement gives us the freedom to upgrade as soon as the new version is available. With the Select License agreement, we might not upgrade as quickly.”*

**Charlie Colón**  
IT Director, The Gallup Organization

Read more at: <http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000001924>

**Microsoft Volume Licensing** helps organizations acquire the right Microsoft platform and IT infrastructure solutions in the most cost-effective way. We are dedicated to creating an excellent customer experience by offering licensing programs that give you choice and flexibility, improve asset management, and deliver substantial price advantages based on the volume you purchase. In other words, we can help you deploy the IT solutions you need—and still save money during economic uncertainty.

Microsoft also helps chief information officers (CIOs) and other decision makers within IT departments be proactive in implementing technology solutions that help enable clear business outcomes. As part of our services, we provide recommendations that not only help you achieve your objectives, but also help you understand and quantify business value. As part of this process, we can help you take advantage of your existing license portfolio to create the IT infrastructure necessary to support your business needs without additional expenditure.

# The Enterprise Agreement

**The Enterprise Agreement** (EA) is the optimal Microsoft Volume Licensing program for saving organizations money. The EA offers large organizations a licensing solution that can help reduce operating costs with a fixed, annual price per desktop for significant savings, increase operating efficiencies with rights to the latest versions of Microsoft licensed products, accelerate deployment with tools and resources under Software Assurance, and streamline asset management with online tools. It also helps standardize IT choices across the organization and centralizes purchasing. Its set pricing is based on purchase volume and includes Software Assurance benefits—such as deployment assistance, support, new version upgrades, and training.

The Enterprise Agreement offers a sound licensing strategy that includes partnering with a Large Account Reseller (LAR) or Enterprise Software Advisor (ESA) to determine the best software and services for your organization during a slowed economy. With the Enterprise Agreement, customers can respond to changing markets and business needs by licensing additional products with the same License & Software Assurance coverage as enterprise products, but do not require an enterprise-wide commitment. For products licensed at signing, payments can be spread throughout three years helping organizations to refocus critical IT budget.

### How Enterprise Agreements Can Save Customers Money

**The Gallup Organization** employs many of the world’s leading scientists in management, economics, psychology, and sociology. More than 2,000 professionals deliver Gallup services at client organizations, through the Web, at Gallup University’s campuses, and in 40 offices around the world.

Rapid growth and global expansion created a need for new ways for Gallup associates in 27 countries and multiple time zones to communicate, collaborate, and manage information. In addition to adding the new technologies, Gallup wanted to simplify license management and reduce acquisition costs. To address those needs, the firm upgraded to Microsoft® Exchange Server 2007 and is implementing Exchange Unified Messaging, Microsoft Office SharePoint® Server 2007, Microsoft Office Communications Server 2007 Enterprise, and Windows® Rights Management Services. Gallup expects that implementing these products will help the firm increase efficiency, enhance team building, and streamline communications. And by acquiring a Microsoft Enterprise Agreement with an Enterprise Client Access License Suite Step-Up, the company saved U.S. $1.8 million in licensing costs and simplified license management.

See the full case study at <http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000001924>.

**NuStar Energy** began operations in 2007 in San Antonio, Texas, after separating from parent company Valero Energy. Management was under pressure to rebrand operations while ensuring that customers experience continuous service. NuStar had to choose technology that would provide immediate operational efficiency with their 2,250 employees in globally dispersed, regional, and operational offices and support long-term corporate goals. NuStar Energy also needed a licensing strategy that would deliver initial cost savings and long-term benefits.

NuStar Energy decided to standardize on an integrated suite of Microsoft server and desktop technologies. NuStar Energy signed a Microsoft Enterprise Agreement, which provides them with cost-effective pricing based on the 1,500 desktops the licensing agreement covers.

NuStar Energy realized immediate costs savings by acquiring its technology through an Enterprise Agreement, as opposed to buying individual licenses for products as needed. For an organization in the midst of a major re-branding operation, the ability to stretch technology payments over three years frees up money for other launch priorities.

NuStar Energy’s IT infrastructure was operational in less than six months and now has the communication, collaboration, and IT management capabilities it needs to support a growing global organization.

See the full case study at <http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000002661>.

Learn more about the Enterprise Agreement at <http://www.microsoft.com/licensing/programs/ent/default.mspx>.

## Software Assurance

**Microsoft Software Assurance for Volume Licensing**, which is included in the Enterprise Agreement, is a comprehensive offering that helps you get the most value out of your IT investment. More than just maintenance, Software Assurance offers a broad range of benefits that help organizations deploy, manage, and migrate software. Collectively, these benefits help boost organizational performance with better budget predictability, lowered operating expenses, and support for employee productivity.

### Achieve Seamless Software Migrations

Software assurance makes it simpler to migrate to new software with the following benefits:

* **Packaged Services.** These are consulting engagements to help organizations plan and prepare for successfully deploying new software while maximizing the value of existing investments. Service areas include Desktop Deployment Planning Services (for the 2007 Microsoft Office system and/or the Windows® operating system), SharePoint® Deployment Planning Services, Exchange Deployment Planning Services, and Business Value Planning Services.
* **Training Vouchers.** Access to technical instructor-led training can help IT staff efficiently plan, build, deploy, maintain, and support new solutions on the Microsoft platform.

**Windows Fundamentals for Legacy PCs.** This program helps reduce the total cost of ownership of older PCs by improving their security and manageability. Based on Windows XP SP2, it can help ease the transition to Windows Vista.

### Minimize Downtime and Support Issues

The following benefits of Software Assurance can help reduce the costs of downtime and critical support:

* **24x7 Problem Resolution Support.** Now you can get the business-critical support your organization needs before, during, and after the deployment of new software—whenever you need it.

*“Even though Microsoft Office 2007 had been released, we weren’t in a position to roll it out until recently. Signing the Enterprise Agreement gave us the ability to start with Office 2003 and then to deploy the next version when we were ready. Similarly, we were able to upgrade all our users from Exchange Server 2003 directly into a new Exchange Server 2007 environment, without additional software license costs.*”

**Robert Amos,**

Manager, Infrastructure Systems, NuStar Energy

Read more at:

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000002661>

* **TechNet Software Assurance Subscription Services.** Your IT staff can get answers to technical questions from industry colleagues. In addition, customers with Software Assurance for qualifying products are eligible for a single license subscription to TechNet Plus Direct during the term of their Software Assurance coverage.
* **Cold Backups for Disaster Recovery.** Help your IT staff stay prepared with complimentary “cold” backup server licenses for disaster recovery.

### Gain More Control Over IT Planning and Costs

Software Assurance provides the following benefits to keep IT costs to a minimum and help reduce total cost of ownership:

* **New Version Rights.** Rights to new software versions released during the term of your Software Assurance coverage helps lower the costs of software acquisition—and simplify procurement and forecasting.
* **Spread Payments.** Get greater flexibility in managing technology expenditures with the option of making annual payments instead of one up-front payment. This benefit can help reduce initial costs and forecast annual software budget requirements up to three years in advance.
* **Windows Vista Enterprise.** The Windows Vista Enterprise operating system has exclusive features that help lower IT costs and improve IT efficiency. For instance, data protection helps safeguard lost or stolen PCs, tools for application compatibility and virtualization ensure you can keep existing technology investments, and worldwide users streamline deployment.
* **Microsoft Desktop Optimization Pack for Software Assurance (MDOP).** This added subscription—available exclusively to Software Assurance customers—helps organizations significantly reduce the total cost of ownership of the entire Windows-based desktop PC life cycle. MDOP helps reduce application deployment costs, enables the delivery of applications as services, and allows for better management and control of enterprise desktop PC environments.

### Empower Employees to be More Productive

People are the greatest asset of any organization, and Software Assurance helps them be more productive with the following:

* **Home Use Program.** Give your employees the ability to use the same Microsoft Office 2007 suites of desktop PC programs both at work and at home so that they can help build skills for deploying new software; thus helping to increase productivity and promote employee job satisfaction.

*“We want our employees to have the best technology available to continue to help them develop the best, most competitive products. And we want consistent and predictable IT costs each year. The Microsoft Enterprise Agreement enables us to do both.”*

**Tom Grahek,**   
Director of Platform Engineering, Fair Isaac

Read more at: <http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=1000003666>

* **E-Learning.** Access to self-paced, interactive training developed by Microsoft experts helps employees learn new software and build their skills.

### How Software Assurance Can Provide Customers More Value

**Fair Isaac Corporation** takes advantage of Software Assurance within the Enterprise Agreement, which offers a powerful combination of productivity benefits, support tools, and training to gain even more value from the software. With the New Version Rights benefit, the company upgrades all of its users to new versions of software as soon as they are released. Fair Isaac also uses the Training Vouchers and E-Learning courses to help prepare both its IT staff and end users for upgrades. And the Employee Purchase Program (EPP) gives Fair Isaac employees discounts from retail pricing on Microsoft productivity software for home use, so they can use the same software at home that they use at work.

Fair Isaac also gains several technical support benefits from Software Assurance. With the Enterprise Source Licensing Program, Fair Isaac developers can easily access Windows source code to make adjustments to internal systems and related applications, to improve debugging, help maintain security, and help safeguard against viruses. The 24x7 Problem Resolution Support, TechNet Software Assurance Subscription, and Cold Backups for Disaster Recovery provide added support for its IT staff.

Learn more about Software Assurance at <http://www.microsoft.com/licensing/sa/default.mspx>.

## Client Access License (CAL) Suites Consolidate Purchases with Cost Savings

The Enterprise Agreement also offers both **Microsoft Core CAL and Enterprise CAL Suites**, which provide a wide range of benefits including:

* **Flexibility to adapt to your organization’s technology demands.** With the ability to deploy multiple Microsoft server products and not have to renegotiate agreements, you can meet business needs more quickly. Extend the value of existing Windows Server® operating system investments with products and services that integrate with your IT infrastructure, while automatically getting the rights to use new Microsoft innovations in collaboration, security, compliance, and communication.
* **Simplified licensing.** Now you can eliminate the hassle of negotiating multiple agreements with multiple vendors for different technologies. Plus, a single license for the rights to use many Microsoft technologies makes tracking and managing licenses much easier.
* **More value for your money.** Suites provide substantial cost savings by packaging new Microsoft technologies together at much lower prices than individual purchases. You can also eliminate the costs of disparate product lines by adopting the Microsoft family of integrated solutions. Plus, you get additional savings when your organization standardizes on the entire platform.

### Microsoft Enterprise Client Access License Suite

TheMicrosoft Enterprise CAL Suite provides significant cost savings. It brings together 11 of the latest Microsoft products to provide your people with the newest innovations in compliance, real-time collaboration, security, communication, desktop PC management, and more. The Microsoft Enterprise CAL Suite provides an outstanding opportunity for customers to use their existing IT investments in the Microsoft core platform.

Microsoft Core CAL Suite

The Microsoft Core CAL Suite presents outstanding value and cost savings for customers who want to extend the capabilities of the Windows and Microsoft Office 2007 suites platforms. It includes four fundamental Microsoft server products for identity management, directory services, enterprise communication (e-mail, calendar functions, and scheduling), collaborative workspaces, and asset management.

## Extended Payment Terms for Enterprise Agreements

Organizations looking for additional flexibility in how they pay for their Enterprise Agreement enrollments and renewals, true-ups, and additional product orders, will find value in the new Extended Payment Terms option from Microsoft. It goes beyond the current upfront annual payment structure to provide a choice of monthly, quarterly, semi-annual or customized payment options such as deferred or ramped payments. Extended Payment Terms also simplifies decision-making because it is integrated into the Enterprise Agreement by a simple, one –time amendment covering current as well as future purchases.

Example scenarios where Extended Payment Terms adds value:

* **Company A** wants to spread its annual upfront payment more evenly over the course of the year, lessening the impact on cash flow. They may simply wish to even out their cash requirement, reduce short term borrowing to make the annual payment or match seasonal business revenue patterns. In this scenario, Microsoft offers **monthly, quarterly or semi-annual payments**. The full annual payment amount is paid within the 12 month billing period. What’s more, these payment structures can be combined with either ramped payments or skip payments to better match Company A’s budgetary needs.
* **Company B** has started an Enterprise Agreement or renewal part way into its fiscal year and wants to delay making its first payment until the new budget year. Microsoft offers **skip payments**, enabling them to defer payments for up to six months. Skip payments can be monthly or quarterly payments. In all cases, the full annual payment amount must be paid within the 12 month period.
* **Company C** wants the flexibility to spend its current budget within this fiscal year and step up the payment in the next fiscal year. Here, **ramped payments** can be offered. With quarterly payments, for example, if Company C has a $1.5M annual payment it could pay $250K in July and October, then $500K in the following January and April. In this way Company C has ramped the whole amount unevenly across its current fiscal year and the next one.

For more information on Extended Payment Terms, visit [www.microsoft.com/licensing](http://www.microsoft.com/licensing).

## Additional Resources to Improve Your Bottom Line

The Enterprise Agreement also offers additional resources—all of which are focused on saving costs.

### Microsoft Financing

Microsoft Financing provides an affordable and predictable way to acquire the IT your business needs to cut costs and increase efficiency.

Microsoft Financing offers qualified customers immediate access to funds, so that you can purchase and deploy the IT you need within an affordable and predictable payment structure. As a result, you can preserve your budgets and existing sources of capital, so that they can be applied to other priorities. Businesses of all sizes can finance their technology needs—from software to services, from partner products to software, and hardware.

It should be noted that Microsoft Financing is not a financial services company. It is a Microsoft-backed financing solution that supports the sales of Microsoft products and services to qualified customers. It is available in 15 countries and credit terms and industry standards vary by country operating terms and conditions. Read more about how Microsoft Financing is helping businesses of all sizes cut costs and increase efficiencies.

For more information, please visit <http://www.microsoft.com/licensing/financing/default.mspx>.

### Application Platform Agreement (APA)

*“And Microsoft was willing. They were willing to—in full—finance the software and the implementation. They were exceedingly responsive and very easy to deal with. Ultimately, Microsoft Financing was able to finance the whole package.”*

**Amy Sabala**  
Senior Director of Corporate Finance, Hampton Products

Read more at:

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000002252>

The Application Platform Agreement is a new offering designed to help customers consolidate vendors and reduce database total cost of ownership with unlimited deployment rights for Microsoft SQL Server and Microsoft Application Platform Products. It offers a fixed payment schedule over three years with unlimited deployment rights. Costs are negotiated up-front, with a growth rate based on good faith estimate of application platform ramp. APA offers faster time-to-value with an integrated offering and simplified purchase process since all of the eligible licensed products are included in one agreement.

Because APA is negotiated up-front, there are no incremental costs when it comes to additional deployments and you are always compliant, with rights to current and future versions during the agreement’s term.

For more information, visit <http://www.microsoft.com/applicationplatform/default.mspx>.

### Software Asset Management (SAM)

The assets your organization depends on include the software that allows productive use of laptops, desktops, and servers. Software asset management helps you maintain maximum efficiency and value for your software assets. With SAM you can manage, control, and protect your organization’s software from start to finish. And you can be confident that the software supporting your organization is cost-effective, secure, genuine, and fully supported.

For more information, please visit: <http://www.microsoft.com/SAM>.

### Infrastructure Optimization

Infrastructure Optimization is a cyclical and continuous process that can help IT meet their own unique challenges while using technology to drive business outcomes. This service helps IT drive business value through increasing technology capabilities while simultaneously helping reduce costs and increase security.

For more information, visit <http://www.microsoft.com/optimization/model/coreio.mspx>.

# Conclusion

Microsoft is committed to building trusted relationships with you. One way that we can do this is by helping your organization get the most from your software investments when you purchase from Microsoft.

*“Microsoft has been a great partner in helping us develop our vision, and our account team demonstrated the value of purchasing Microsoft products through an Enterprise Agreement. With a single, comprehensive agreement, we can achieve the unified communications, enhanced content management, and automated business process that we seek.”*

**Stephen Mulligan**

Web and Mobile Technology Manager, eircom IT

Read more at: <http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=4000002684>

One of our goals is to help our customers execute on their business initiatives with comprehensive software solutions. With Microsoft Volume Licensing, you can do this while saving money with affordable software licenses, and by taking advantage of the software license assets you have already purchased.

Microsoft supports you through the entire process—not just the sales process—to help you determine your organizational or project-specific goals, get the right infrastructure in place, deploy as quickly and efficiently as possible, and ultimately achieve those goals. At the same time, Microsoft wants to get you the best possible price and make sure you take full advantage of an Enterprise Agreement with Software Assurance tools and resources that will make your money go even further.

In the short term, use your Software Assurance benefits in all stages of the software life cycle, consolidate your vendors and agreements, and work with Microsoft to evaluate the CAL Suites and Application Platform Agreement to determine how significant the cost savings will be. In the long term, know that the Enterprise Agreement means predictable pricing and continued support from Microsoft to accommodate growth, and look to Software Asset Management (SAM) to further control costs and increase efficiency.

With the Enterprise Agreement and the above mentioned programs and tools, and with the Microsoft Volume Licensing Service Center (VLSC) to manage them, you have a partner in Microsoft that is invested in your success and ready to help you save money during any economic climate.

**Software Assurance**

Software Assurance has many financial advantages—beyond the value of future licenses—that should be considered. The cost per license covers more than 15 benefits, including Windows Vista Enterprise, 24 hours a day, seven days a week (24 x 7) support, partner services, Employee Purchase Program, and training and online learning. Benefits such as Training Vouchers, E-Learning, Home Use Program, Packaged Services, and 24 x 7 Problem Resolution Support provide training, knowledge transfer, and consulting services and support to help customers successfully deploy and use solutions based on the latest editions of our products. It represents a long-term commitment to value for our customers.

The following chart is a helpful way to understand the Software Assurance benefits and their value mapping to each phase of the software life cycle.

|  |  |  |  |
| --- | --- | --- | --- |
| **Phase in Software Life Cycle** | **Customer Challenge** | **Software Assurance Solution** | **Customer Value** |
| Plan | Gain budget predictability.  Control and manage IT costs.  Align IT investment with latest products. | New Version Rights | Rights to new software version releases help you lower the costs associated with software acquisition while simplifying procurement and forecasting. This helps protect your organization’s investment while providing upgrades to the latest software available. |
| Spread Payments | Take advantage of greater flexibility in managing technology expenditures with the option to make annual payments instead of one up-front payment. Helps reduce initial costs and forecast annual software budget requirements up to three years in advance. |
| Deploy | Maximize value by deploying all licenses.  Reduce cost and complexity of deployment.  Automate deployment across desktop PCs.  Increase productivity of IT staff. | Packaged Services | Plan and prepare for successful deployment of new software and maximize the value of your technology investment with comprehensive services delivered through pre-qualified deployment partners. |
| * Desktop Deployment Planning Services (DDPS) | Helps lower the cost and complexity of deploying the latest Microsoft Office and Windows desktop PC software. |
| * SharePoint Deployment Planning Services (SDPS) | Helps lower the cost and complexity of deploying Microsoft Office SharePoint Server 2007. |
|  |  | * Exchange Deployment Planning Services (EDPS) | Helps create a comprehensive plan for a successful Microsoft Exchange deployment. |
|  |  | * Business Value Planning Services (BVPS) | Helps identify, unlock, and capture the business value of the 2007 Microsoft Office System. |
| Use | Increase worker productivity with full-featured software.  Enhance employee skills and knowledge. | Windows Vista Enterprise | Supports lower IT costs and improved IT efficiency. The Windows  Vista Enterprise operating system is optimized for midsize and  large organizations, with exclusive features that include data protection to help safeguard lost or stolen PCs, tools for application compatibility and virtualization, and the ability to deploy a single image with different interface languages for users around the world. |
|  | Microsoft Desktop Optimization Pack (MDOP) for Software Assurance | Helps reduce the TCO of your desktop PC running Windows by accelerating operating system and application management and enhancing IT responsiveness and user uptime. Available exclusively to Software Assurance customers, the MDOP is an add-on subscription license that uses innovative technologies to help better control the desktop PC, accelerate and simplify desktop PC deployments and management, and create a dynamic IT infrastructure by turning software into centrally managed services. |
| Training Vouchers | Receive vouchers for technical training on select courses from Microsoft Certified Partners for Learning Solutions, the authorized worldwide training channel for Microsoft technology products and services. Training Vouchers provide your IT staff with direct access to in-depth, instructor-led training using Official Microsoft Courseware from the Microsoft technology experts. |
| E-Learning | Provide your employees with access to flexible and convenient self-paced learning developed by Microsoft technology experts. Available 24 hours a day, seven days a week, Official Microsoft E-Learning delivers a rich and interactive learning experience featuring audio, games, learning assessments, and hands-on exercises. |
| Employee Purchase Program | Give employees discounts on the retail pricing of some of Microsoft’s most popular productivity and entertainment products. Using the same software at home and at work provides employees with flexibility, while great consumer products offer fun and excitement. |
| Home Use Program | Supports increased employee productivity and helps maximize the value of Microsoft Office 2007 by enabling employees to work from home. Eligible software includes the most widely used Microsoft Office 2007 desktop PC programs. |
| Enterprise Source Licensing Program | Access Windows source code for internal development and support. Eligible customers with 1,500 or more licensed desktop PCs can make adjustments and improvements to systems and related applications, implement improved debugging to help maintain security, and help protect against viruses and other computer hazards. |
| Maintain | Get the support they need to keep their organization up and running.  Keep current on IT best practices for licensed products.  Have latest technology available for resolving problems quickly. | 24x7 Problem Resolution Support | Receive business-critical support with 24x7 Problem Resolution phone support and unlimited Web support during business hours for Standard and Enterprise edition servers. 24x7 allows you to select the right level of support. Customers with Premier contracts can apply support incidents earned through Software Assurance towards Premier support for higher service levels. |
| TechNet Subscription Through Software Assurance | Access TechNet Online Concierge Chat and Managed Newsgroups. A designated IT professional will also receive a single license subscription to TechNet Plus Direct, offering evaluation copies of Microsoft software as well as other technical tools and resources. |
| “Cold” Backups for Disaster Recovery | Be prepared with complimentary “cold” backup server licenses for disaster recovery. To qualify for this Software Assurance benefit, you must have a Microsoft server license and all corresponding Client Access Licenses (CALs)—if required by the software—enrolled in active Software Assurance. |
| Transition | Get support while upgrading and migrating.  Operate effectively in a mixed-version environment.  Extend support for legacy systems.  Smooth transitions among software products or versions. | Windows Fundamentals for Legacy PCs | Get the security and manageability of the Windows XP SP2 operating system and experience a smooth migration path to the latest hardware and the Windows Vista operating system. |
| Extended Hotfix Support | Enter into Extended Hotfix Support Agreements (EHSA) as hotfix issues arise. Annual fees associated with EHSA are included in the Software Assurance agreement—helping to increase peace of mind and reduce support cost. To qualify for this benefit, you must have a Premier or Essential Support Agreement. |

You can get more information about Software Assurance at: <http://www.microsoft.com/licensing/sa/default.mspx>

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