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| Overview  Country: Canada  Industry: Professional services  Customer Profile  Golder Associates Limited is the Canadian subsidiary of Golder Associates, a global group of consulting companies, specializing in ground engineering and environmental services.  Business Situation  With no standard process for auditing software licenses or procedures for procurement, Golder Associates found it difficult to manage software assets.  Solution  Golder Associates teamed up with a Microsoft Certified Partner to implement a Software Asset Management (SAM) program that produces an accurate inventory and streamlines acquisition.  Benefits   * Saves time and money * Helps ensure compliance * Improves IT perception within the company |  |  | “People were simply purchasing software, without checking to see if we already owned a license.…We had to get a handle on our software assets and design a way to track our purchases.”  Alison Ramsley, Associate, Leader Global IT Services, Golder Associates Ltd. |
|  |  | Every business knows the importance of tracking finances, but how about software licenses? As one of Canada’s 50 Best Managed companies, Golder Associates Ltd., a group of consulting companies specializing in ground engineering and environmental services, understands the importance of software management.  In the past, the company had no formal process for tracking software purchases. Software was acquired from multiple vendors and by various departments, making it difficult to accurately track. This left Golder vulnerable to license violations and mismanagement of software acquisitions.  When its parent company, Golder Associates (US) completed a global inventory of its software and licenses, the Canadian team took the lead in software asset management by developing a software tracking and purchasing system. This system ensures software compliance for all global operations while centralizing the purchasing process. |
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Situation

Golder Associates Limited is the Canadian subsidiary of Golder Associates, a group of consulting companies specializing in ground engineering and environmental services. This multinational organization’s history dates back to its founding in 1960 when it was only five employees working out of a two-bedroom Toronto apartment. Today, Golder Associates has offices located across the globe, while its Canadian arm, Golder Associates Limited, maintains over 30 offices across the country.

As one of Canada’s 50 Best Managed Companies, Golder Associates Limited understands that software management is a key component to successful business management. So when the global inventory of software assets conducted by its parent company revealed problems with acquisitions and license management, the need for a more effective software management process became clear.

Golder Associates found that software was being acquired from multiple vendors and by various departments, making it difficult to accurately track. The IT team also uncovered instances of software acquisitions charged to the IT budget without any consultation, needs assessment, or investigation of existing licenses. Such acquisitions prevented IT from taking advantage of discounts, or advising its users which applications might be most efficient for certain tasks.

“People were simply purchasing software, without checking to see if we already owned a license. Since the Canadian operation is twice as big as the other regions, it was twice the problem. We had to get a handle on our software assets and design a way to track our purchases,” says Alison Ramsley, Associate, Leader Global IT Services at Golder Associates.

The fact that there were no procedures in place to ensure that licenses were current and properly documented only added to the problem. Audits were being conducted as requested by management, but audit teams were drawing conclusions based on unreliable information. This left Golder vulnerable to license violations and continued mismanagement of software acquisitions. It also meant that the IT department was continually playing catch up with inventories.

Finally, the company could not properly allocate resources or appropriately match employee skills with software programs. Time was wasted training one employee on a new software program while another employee already had these skills.

Solution

Once Golder Associates recognized the need for improved Software Asset Management (SAM) processes, the company’s U.S. arm underwent a consultation with a SAM service provider. The consultation involved three main steps to achieving a SAM program that was beneficial to the Golder Associates IT team and the business as a whole.

First, a Microsoft Certified SAM partner met with Golder Associates to set objectives and discuss goals of the consultation. The discovery process involved two meetings, during which key Golder IT personnel were taken through an in-depth questionnaire. Based on the company’s answers, the partner tailored an effective software management program. In addition, the questionnaire referenced IT Infrastructure Library (ITIL) best practices and additional recommendations based on the partner’s own industry expertise. ITIL is a comprehensive documentation set of best practices for IT service management drawn from the public and private sectors and used widely around the world.

Next, a detailed inventory of current software assets and licenses was conducted using a commercial auditing tool. Once this was complete, the inventory and licensing reports were compared to help locate any missing licenses.

Finally, a detailed report was created for Golder Associates outlining the recommendations. The report included best practices for the company based on its situation and ITIL guidelines. Key recommendations included performing quarterly audits of software assets and centralizing software acquisition. It was also recommended that Golder Associates develop SAM skills, including licensing expertise, and promote software acquisition agreements with preferred partners to minimize costs and ensure control.

The results of this in-depth consultation empowered the Canadian team to design, develop and maintain a centralized software purchasing and tracking system for Golder’s operations worldwide.

Now, when acquiring software, employees make use of a centralized procurement facility established and maintained by the Canadian IT team at Golder Associates Limited. Software assets from all regions across the globe are now centrally tracked in Canada. This helps identify if appropriate licenses already exist within the company so the IT team can move an unused license to a user or computer that needs it - significantly reducing new license costs.

Benefits

By engaging in Software Asset Management, Golder Associates is realizing improvements within the organization through best practices and standardized procedures. By undertaking quarterly audits of software and licenses, the company has current information to determine how software is best utilized and how it should plan for future investments, rather than acquiring and distributing software on demand and potentially losing the opportunity to capitalize on existing investments.

***Saves Time and Money***

Golder Associates now runs quarterly audits of its software assets around the globe and, thanks to an initiative by the Canadian team, has centralized software acquisition and tracking for the entire global organization. This global software management approach improves planning and helps make software acquisition a smooth and efficient process. In addition, the IT team is able to view all the software in use at the company. This drastically reduces the need for IT support due to problems with unknown programs. The IT team is able to offer standardized software solutions, eliminating the temptation for employees to acquire and download potentially problematic software on their own. Proper planning ensures that IT personnel are available to work on more strategic IT needs for the organization rather than responding to help-desk requests that could be avoided.

SAM will continue to save Golder Associates money and time in a number of other ways. For example, unnecessary software can be eliminated from computers, reducing payments for unused licenses. As hardware is requested, coordinating software also can be requested and fulfilled through the IT team’s procurement centre. This reduces the need for additional IT work and staff in other offices and reduces the number of steps required in the purchasing process.

***Helps Ensure Compliance***

By implementing quarterly audits, Golder Associates helps ensure that proper licensing procedures are being followed. If they are not, discrepancies between existing software and purchased licenses can be addressed easily and quickly. The number of licenses can be confirmed with vendors each quarter to catch instances where they may be missing, or if there are surpluses. This helps Golder get the full benefits from existing licenses and take advantage of volume discounts. By keeping current with licenses, Golder Associates has improved relationships with vendors and can manage these relationships more like a partnership.

***Improves IT Perception within the Company***

With a firm understanding of software assets, the Golder IT team can help the company plan more strategically. The IT team is now more highly valued across the organization because of the valuable knowledge it manages. By centralizing software acquisition and tracking in conjunction with hardware, the IT team provides a seamless procurement system. New hardware is shipped to other offices with all the necessary software already installed. Digital photos of the unit, with all hardware serial numbers and software license numbers, are taken before shipping and then entered into the inventory database and tracked to ensure compliance.

According to Ramsley, user perception of the SAM program has been well received and has improved communication with the IT staff.

“The user response from the centralized purchasing site has been phenomenal. We are noticing a significant increase in the number of people accessing the site. And now that people actually see that we are tracking our software, they are more inclined to use the tool and rethink unnecessary software purchases.”

***Future Projects***

Golder Associates plans to explore using this same logic for employee resource allocation. If the IT team could identify employees across its global offices with expertise in specific engineering software, those employees could be matched with projects involving that software, thereby avoiding the need to train other employees on a new software program. The IT team also sees this as an opportunity to reduce training costs. By having a firm grasp on the company’s software assets, Golder Associates has taken the first step to increasing operational efficiency and can now apply these best practices to other areas of the business.

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| Software & Services   * Software Asset Management |  |

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