



Software Asset Management Course: Licence Compliance, Audit Defence and Optimisation

2 – 6 August 2027

London - Central London four-star



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Introduction:

Software asset management course on licence compliance, audit defence and optimisation, held over 5 days for staff who track software entitlements, buy licences, fund IT spend or answer vendor audits, ending with an effective licence position and optimisation plan for a case estate. Organisations often cannot show what they own against what they have deployed, so vendor audits bring unbudgeted true-up bills while unused subscriptions keep renewing. Nominees already handle licence records, purchasing or IT cost reporting at work, and each day uses case study material from contracts and inventory extracts. CoreConcept Training Center delivers this software asset management course.

Course Objectives:

- Establish SAM governance, policy and roles aligned to the ISO/IEC 19770 IT asset management system requirements
- Interpret per user, per device, per core and subscription licence metrics, including Microsoft, Oracle and SaaS models
- Build a normalised software inventory and an entitlement register from discovery data, contracts and proofs of licence
- Reconcile deployments and use rights into an effective licence position for each priority publisher
- Respond to vendor audit notices and reduce licence exposure in cloud, virtualised and SaaS environments
- Prepare an optimisation plan with harvesting actions, SAM tooling needs and SAM KPIs for leadership reporting

Target Audience:

- Staff responsible for software asset registers, licence records and publisher reconciliations
 - Staff responsible for buying software, renewing subscriptions and handling true-ups
 - Staff responsible for IT cost reporting and the funding of licence and subscription spend
 - Staff responsible for licence compliance checks, internal control testing and responses to vendor audits
 - Staff responsible for configuring desktop, server, virtualised and cloud platforms that consume licences
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Course Outline:

Day 1: SAM Objectives, Governance and Estate Baseline

- SAM Objectives Balancing Licence Risk, Cost and Security
- SAM Governance Roles, Policy and Decision Rights Charter
- Software Lifecycle from Request and Acquisition to Retirement
- Licence Risk Heat Map Across Publishers and Business Units
- SAM Maturity Self-Assessment and Current-State Estate Baseline

Day 2: ISO/IEC 19770 Framework, Data Standards and Licensing Metrics

- ISO/IEC 19770 IT Asset Management System Requirements Overview
- SWID Tags and Entitlement Schema for Software Identification
- Per User, Per Device and Named User Licence Metrics
- Per Core Processor Licensing and Core Factor Calculations
- Subscription, Enterprise Agreement and Concurrent Use Licence Models

Day 3: Discovery, Entitlement Records and Licence Reconciliation

- Discovery Agents and Inventory Scans Across Endpoints and Servers
- Software Normalisation Using Product Catalogue and Publisher Naming
- Entitlement Register Built from Contracts, Invoices and Proofs of Licence
- Licence Reconciliation Matching Installs to Entitlements and Use Rights
- Effective Licence Position Statement per Publisher and Product

Day 4: Cloud, Virtualisation, Vendor Audits and Licence Optimisation

- Microsoft Cloud Subscriptions and Bring-Your-Own-Licence Use Rights
- Oracle Database Licensing on Virtualised and Clustered Hosts
- SaaS Usage Metering, Shadow IT and Subscription Rightsizing
- Vendor Audit Notice Response, Data Scoping and Settlement Negotiation
- Licence Harvesting, Reallocation and Shelfware Elimination Rules

Day 5: Case Study Building the Licence Position and Optimisation Plan

- Case Estate Briefing with Inventory, Contracts and Usage Data
 - Case Study Reconciliation of Desktop, Server and SaaS Titles
 - Mock Vendor Audit Defence Using Reconciled Licence Evidence
 - SAM Tooling Requirements and KPI Dashboard for Leadership
 - Effective Licence Position and Optimisation Plan Completion
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Skills You Will Gain:

- Software Inventory Normalisation
- Entitlement Record Management
- Licence Metric Interpretation
- Effective Licence Position Analysis
- Virtualisation Licence Impact Assessment
- Vendor Audit Response
- Licence Harvesting
- SAM KPI Reporting

Why Attend This Course:

- Hand the IT asset owner and procurement lead an effective licence position and optimisation plan built on a case estate, ready to adapt to the organisation's own publishers
- Decide whether to renew, reduce, reallocate or retire a licence or subscription using reconciled usage evidence
- Avoid unbudgeted audit settlements, double-paid subscriptions and virtualisation licensing gaps that surface only at true-up
- Share the reconciliation workbook, audit response checklist and SAM KPI set with colleagues in IT, procurement and finance

Conclusion:

Back at work, the participant gives the IT asset owner, procurement lead and finance business partner an effective licence position and optimisation plan that shows, publisher by publisher, where the organisation is under-licensed, over-licensed or exposed to audit. These owners use it to decide renewals, true-up budgets, harvesting actions and which SAM tooling to fund. After the first renewal cycle or vendor audit handled this way, the unit should review reconciliation accuracy, savings realised from harvested licences, audit findings and the KPI trend reported to leadership.

Frequently Asked Questions FAQ:

What should participants know before the software asset management course?

Participants should already work with software purchases, licence records, IT cost reports or compliance checks. No SAM tool experience is needed; a laptop with a spreadsheet application is used to build the reconciliation and effective licence position during the case study work.

How does the software asset management course differ from IT financial management or IT service management courses?

It concentrates on licences: entitlements, metrics, reconciliation, audits and harvesting. IT financial management courses cost and allocate the whole technology budget, and IT service management courses cover incidents, changes and service levels, touching licences only in passing.

Why does software asset management matter for licence compliance and cost?

Software asset management shows what the organisation owns against what it runs. Without that comparison, under-licensing leads to audit settlements and over-licensing wastes money on shelfware and idle subscriptions; an effective licence position exposes both and guides renewal and harvesting decisions.

What do participants take back from the software asset management course?

Participants take back an effective licence position and optimisation plan for a case estate, a reconciliation workbook template, an audit response checklist and a set of SAM KPIs that can be applied to their own publishers and contracts.
