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Transforming the Way People Work

Starting and Maturing Your ITAM Program

How do you do ITAM and how to get started

Christine Morris & Teri Bobst | March 12, 2025

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Agenda

Welcome & Introduction

1. What is ITAM? Common Misconceptions

2. How do you do ITAM?

3. Q&A

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Cask NX is with clients for what comes next – on the platform and in their business.

4.6 Customer Satisfaction Rating

5.4K+ Certifications & Accreditations

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Consulting & Implementation

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ADVANCED PLATFORM
Partner

Build

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ELITE
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Customer Service Mgmt
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Hardware Asset Mgmt
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Software Asset Mgmt
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ITOM Visibility
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Validated Practice ✓
Vulnerability Response
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Integrated Risk Management
AMS

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Validated Practice ✓
Hybrid Project Mgmt
AMS

ServiceNow
Product Line Achievement
Application Portfolio Management
AMS

ServiceNow
Product Line Achievement
App Engine
AMS

ServiceNow
Product Line Achievement
Human Resources
AMS

8 VALIDATED PRACTICES (Most of any Pure-Play Partner in AMS)

+3 PRODUCT LINE ACHIEVEMENTS
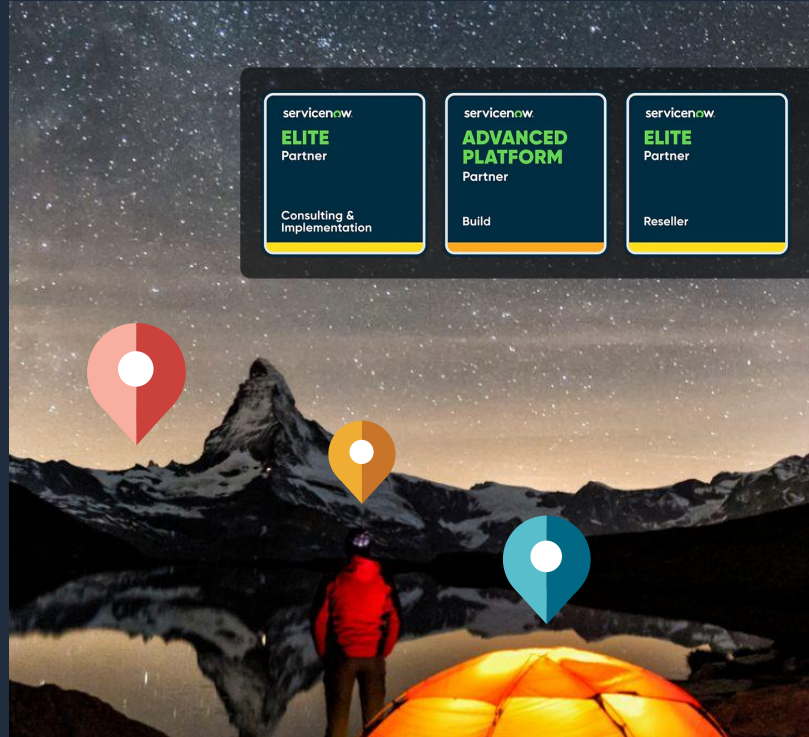
Cask NX is the only pure play ServiceNow partner with dedicated, fully certified practices across the platform.
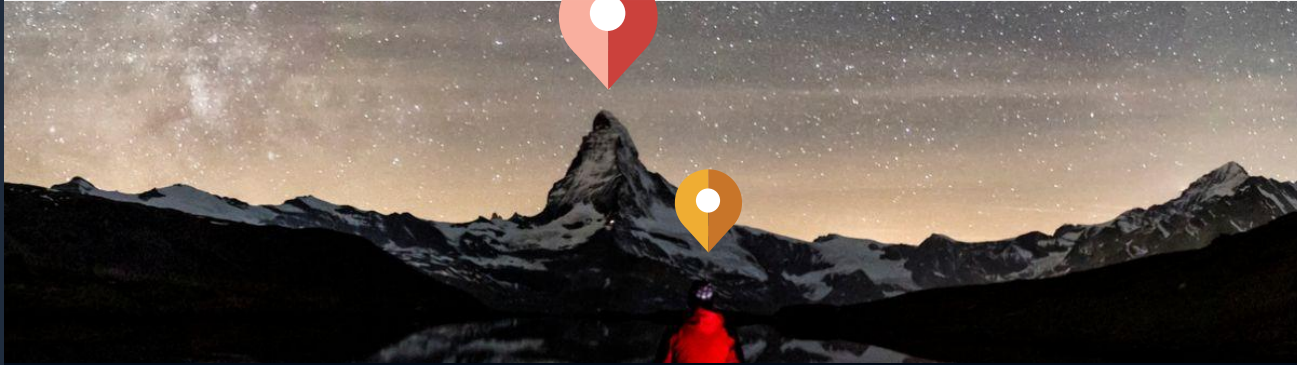
IT SERVICE MANAGEMENT

IT OPERATIONS MANAGEMENT

IT ASSET MANAGEMENT

STRATEGIC PORTFOLIO MANAGEMENT

EMPLOYEE WORKFLOW

CUSTOMER WORKFLOW

SECURITY & RISK

APP ENGINE

STRATEGY

Strategic Roadmapping

Advisory Consulting

Platform Strategy & Governance

Demand Management

TRANSFORMATION

App Modernization

UX & UI Design

Product Management

Org Change Management

Testing & Quality Engineering

Program & Project Management

Agile Transformation w/SAFe

IMPLEMENTATION & APP DEVELOPMENT

Product Implementation

Platform Engineering

Data Management & Integrations

App Development

OPERATIONS & ENHANCEMENT

Continuous Cloud Innovation

Platform Architecture & Engineering

Functional Process Execution

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Introductions

Teri Bobst
Sr. Director,
ITAM | ITOM | Security & Risk
Cask NX

Christine Morris
Sr. Director, Service Innovation
ITSM | Platform | UI/UX
Cask NX
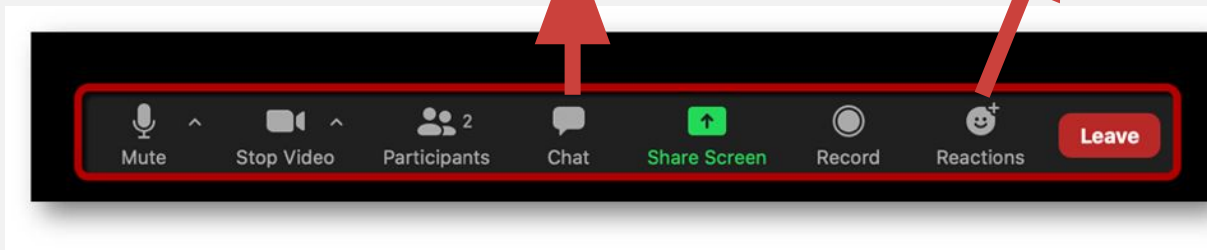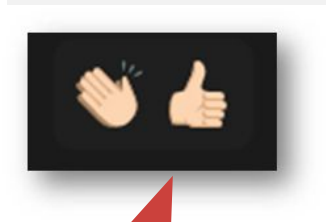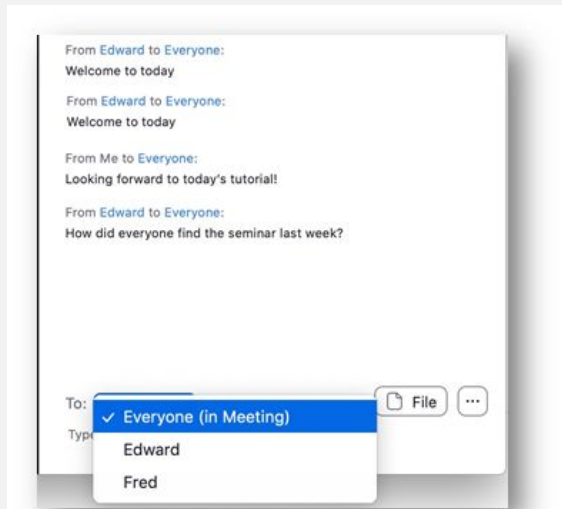
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Join the Conversation: Using Zoom

Turn on Video – Let's get interactive and enjoy ourselves

Unmute – Click the microphone icon to unmute and participate
Chat – Message everyone or just one person
Get Help – Use Chat
Show Captions - Click on MORE, click Show Captions

Catch Up with Parts 1-6 of our CMDB MasterClass Series!

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CMDB FOUNDATIONS

Unlock the Power of Your Platform with a Strong CMDB Foundation

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CMDB & SECURITY

Maximize Your Platform's Potential with Effective CMDB Data Loading and IRE Strategies

Cask USC University of Southern California

CMDB & CSDM

Aligning Your CMDB to the CSDM Framework to Support your Portfolio of IT Services

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CMDB & DISCOVERY

Maximize Your IT Potential: Discovery Meets CMDB

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CMDB & ITAM

A Strategic Approach to Visibility and Value

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CMDB CARE AND FEEDING

Ongoing CMDB Maintenance: Feed It, Fix It, Love It

CMDB MASTERCLASS: PART 1

Unlock the Power of Your Platform with a Strong CMDB Foundation

Join us to understand why a well-structured, well-governed CMDB is essential for leveraging the full potential of your platform and how you can create, remediate and maintain your own CMDB as a source of trusted data.

CMDB MASTERCLASS: PART 2

Maximize Your Platform's Potential with Effective CMDB Data Loading and IRE Strategies

Join us to explore why efficient data loading and the Identification and Reconciliation Engine (IRE) are crucial for harnessing the full capabilities of your platform.

CMDB MASTERCLASS: PART 3

Aligning Your CMDB to the CSDM Framework to Support Your Portfolio of IT Services

Join us for part 3 of our CMDB MasterClass Series, an insightful webinar where we will introduce the Common Service Data Model (CSDM) and demonstrate its crucial role in managing IT services more effectively.

CMDB MASTERCLASS: PART 4

Maximize Your IT Potential: Discovery Meets CMDB

In this electrifying webinar, we'll take you through the ins and outs of ServiceNow Discovery, revealing how it works like a backstage crew—quietly, but masterfully —bringing the power of the platform into full view.

CMDB MASTERCLASS: PART 5

A Strategic Approach to Visibility and Value

Join us to discover how integrating Asset Management with ServiceNow CMDB can create a unified source of truth, drive cost savings, enhance compliance, and transform your asset lifecycle management.

CMDB MASTERCLASS: PART 6

Ongoing CMDB Maintenance: Feed It, Fix It, Love It

In this session, we'll dive into practical tips and proven data strategies to help you maintain your CMDB, keeping it accurate, reliable, and a powerful asset for driving smarter decisions and operational success.

Join for our 7th CMDB MasterClass

on Service Mapping March 27!

Find recordings, resources & more here! https://casknx.com/cmdb-masterclass-intro/

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AUDIENCE POLL

How does your organization do **IT Asset Management** today?

A ITAM? We don't do that here. (Or if we do, I've never seen it.)

B We have some processes... mostly spreadsheets and good intentions.

C We use a mix of tools, but it's a work in progress.

D We use ServiceNow for all our hardware and software asset management—like ITAM pros!

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What is ITAM? Common Misconceptions

ITAM is just inventory tracking!

ITAM is too expensive and not worth it.

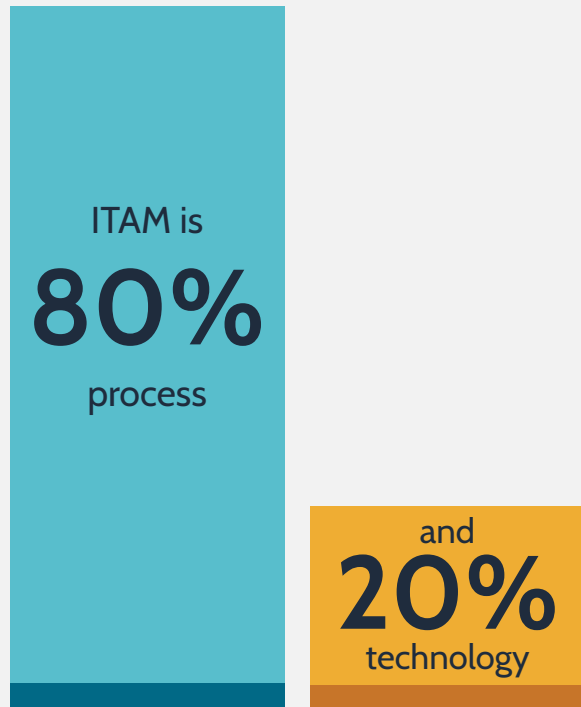Cloud assets don't need ITAM!

We don't need ITAM—our CMDB handles everything!

ITAM is only for big enterprises.

Once we set up ITAM, we're done!

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What is IT Asset Management?

ITAM is a Business Issue disguised as an IT problem.

☐ TRUE
☒ **FALSE**

ITAM is

80%

process

and

20%

technology

- · IT Asset Management is **not** an issue or a problem.

- · IT Asset Management is understanding the full lifecycle of all IT hardware, software, and services within your organization. It is knowing what you need, what you have, where it is, and how you use it in order to make informed decisions about how you spend your money.

- · Stewardship of the IT asset across its life-cycle from planning through disposal — and everything in between.

  - ◦ Managing associated software license, warranty, lease, and maintenance contracts

  - ◦ Track assets' monetary value or incurred costs

  - ◦ Know who is using it and/or how often it is being used

How do you ITAM?

Stage 0: Selection and planning

We call this Stage 0 because it is technically outside of the asset lifecycle, but it is the true beginning of the technology lifecycle. This stage brings in model management, budgeting, and forecasting. Decide who within your organization will set standards for each class. Standards reduce support costs, increase uptime, and generally make your life easier. This stage involves budgeting for hardware and software refresh, forecasting net new deployments, and providing annual estimates, by model, to your procurement team.

Common questions to consider:

1. What model or version do I need?
2. Does it meet my business needs?
3. Is it available?
4. How much does it cost?
5. Who are my potential vendors?
6. Who is responsible for the budget and expenses?
7. What is the expected useful life?

Output = Defined standards that meet the requirements of your business.

Stage 1: Request

This stage provides end users within your organization the means to request the hardware and software identified in Stage 0. Typically, approved models will be created and published to the service catalog. All required details should be captured during the request process to increase efficiency within request fulfillment. This stage includes model management, catalog management, and workflow design

Common questions to consider:

Who can request it?

How do they submit the request?

What information needs to be captured to fulfill the request?

Who needs to approve the request?

Output = Approved request with sufficient data captured to carry out fulfillment

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Stage 2: Fulfill

This stage facilitates the fulfillment of the request. Fulfillment is typically handled via a direct purchase or pulled from stock. This stage can include determining if stock levels are sufficient for fulfilling the request, and if not, then procuring and receiving, then the transfer or handoff to the appropriate group for deployment, or shipping directly to the requester. This stage includes procurement and inventory management.

Common questions to consider:

Who will fulfill the request?

Will they source from stock or send to purchase order (PO)?

What steps are required to fulfill the request?

When/how will the asset be created, or by whom?

Output = Asset ready to be deployed

Do you have defined standards for hardware and software today?

A Absolutely! We mind our standards - everything is documented and enforced.

B We try... but let's be honest, people still do whatever they want.

C We know we should have standards... we just aren't there yet.

D Standards? Ha! It's the Wild Wild West out here—anything goes!

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Stage 3: Deploy

This stage involves the actual deployment of the hardware or software to the requester. Depending on the item, this may also include configuration, installation, and testing prior to the deployment. This stage includes imaging, software installation, running updates, testing, and deployment. Deployment can be personally delivered and set up by an agent or shipped to the requestor. For assets requiring change approval, this may also include the change process within your organization.

Common questions to consider:

Who is responsible for the deployment?

What configuration needs to take place?

How will it be deployed and what information is needed?

What updates need to be captured on the asset record?

Output = Asset put in service, ready to be monitored. This stage introduces the CI record.

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Stage 4: Monitor

This stage is all about monitoring your in-use assets and is geared towards the configuration item (CI) record. You will need to utilize a monitoring or management system such as ServiceNow Discovery, Microsoft MECM, Tanium, or a similar tool, in order to appropriately monitor your assets/CIs. These data sources need to be integrated with your CMDB to continually feed data such as hardware configuration, software installations, IP addresses, logged on users, and so forth. This stage allows for you to proactively manage risk by ensuring your hardware and software is updated, monitored, and routinely checking in.

Common questions to consider:

Which management or monitoring systems do we use?

Do the systems provide the data I need to monitor my assets?

How will the data be fed into my CMDB? How often?

Do I need alerting on certain data conditions?

If more than one data source provides input to the CMDB,
which has precedence and what attributes are updated by what source?

Output = CI that is monitored while in service, processes to create and manage alerts, and reporting capabilities

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Stage 5: Service

This stage is about maintaining the health of your CI's while they fulfill their role in providing a service to your organization. Service requests can be triggered via the monitoring stage for things such as required software upgrades to maintain secure systems, potential hardware issues, etc. Service requests can also be triggered as an incident from an end user such as "my laptop will not power on" or "my screen is broken." Often service requests are triggered by a monitoring system.

Common questions to consider:

Will I proactively watch lifecycle stages to perform required upgrades on hardware and software?

What methods for requesting service will I implement (self-service, service desk, monitoring system, etc.)?

Will I track costs related to service requests?

What metrics do I want to track for service requests?

Output = Defined process to submit and remediate service requests for CI's

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Stage 6: Retire

This stage determines the end-of-life/end-of-service process for your assets. Understanding the useful life of the assets you are tracking is critical for this stage. This should have been determined in the planning stage and be used as a trigger for hardware and software refresh. Activities in this stage include asset retrieval, data destruction, retire, and disposal. You will typically work with one or more asset disposal vendors, and you will want to have a clearly defined contract with the vendor(s) outlining all of the requirements and communications needed.

Common questions to consider:

How will I collect the assets for disposal?

What are my internal controls for data destruction?

Will I sell, donate, or dispose of the assets?

Do I need to report retired and disposed assets to my financial team?

What needs to be written in my contract with my disposal vendors?

Output = An asset that has passed its useful life and has been retired and disposed of in accordance with corporate controls, as well as the appropriate storing of certificates of destruction.

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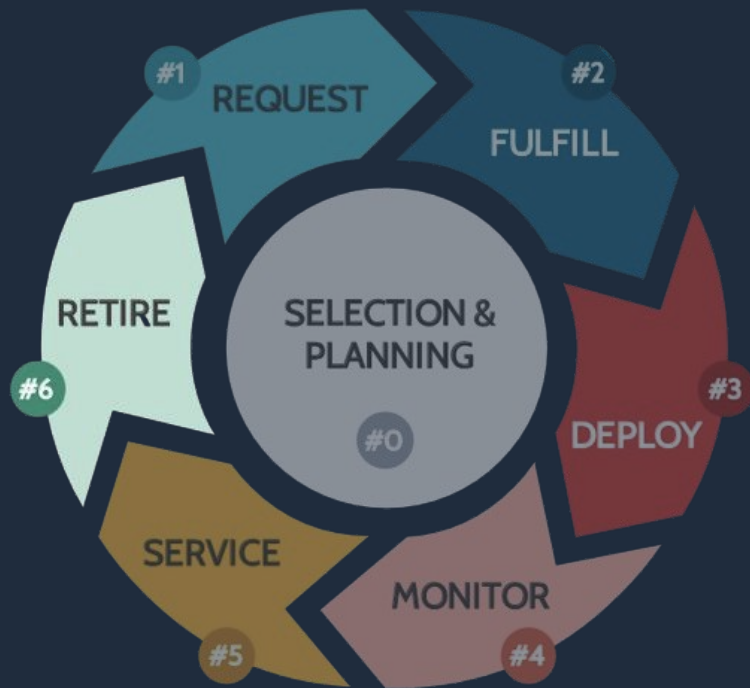
AUDIENCE POLL

Do you have a defined disposal process for end-of-life assets?

A   Of course! We cover our assets—nothing gets lost on my watch.

B   Sort of... I think Bob in accounting has a spreadsheet? Maybe?

C   Pretty sure there's a graveyard of old laptops in a closet somewhere.

D   There's a dark and scary warehouse where all old assets go to die... we don't ask questions.

💡 ITAM: The Lightbulb Moments!

ITAM helps with security and compliance too? This just keeps getting better.

So... CMDB and ITAM are not the same thing. Got it.

ITAM is 80% process, 20% technology. The tech is only as good as the process!

ITAM actually saves money? Why didn't we do this sooner?

Ohhh, ITAM helps prevent audit nightmares. I like that.

ITAM is an ongoing practice, not a one-time setup. Makes sense now.

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Summary

Getting Started Is Easy!

Cask meets you where your ITAM is today

Platform value realization roadmap and recommendations

CLEAR PATH
PLATFORM ROADMAP

Cask's HAM Essentials™ jumpstarts HAM-P in ServiceNow, giving you visibility into your hardware assets

HAM
ESSENTIALS

Cask's SAM Essentials™ sets up SAM-P in ServiceNow for software visibility, cost optimization, and automation

SAM
ESSENTIALS

SAM and HAM Expert Assist is a subscription service providing ongoing expert support to help optimize your ITAM solution.

SAM|HAM
EXPERT ASSIST

Tell us what ITAM topics you want to learn more about!

Look for a survey following this session!

The next ITAM MasterClass on Core Asset Management will be on 4/16

Join us 3/27 for our next CMDB MasterClass on Service Mapping

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CMDB & SERVICE MAPPING

From Chaos to Clarity: Mastering Service Mapping for CMDB Excellence

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Questions?

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Thank you!

Questions?

Email: Stephanie.edelman@caskllc.com