

Taking Your SAM Strategy to the Next Level

Christine Morris & Chelsea Cedeno | June 26, 2025



Agenda

Welcome & Introduction

1. Where We've Been, Where We're Going
2. Why SAM Pro
3. Common Challenges
4. Expert Tricks to Succeed with HAM Pro
5. Next Steps on the Maturity Roadmap
6. Summary
7. Q&A





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

4.62

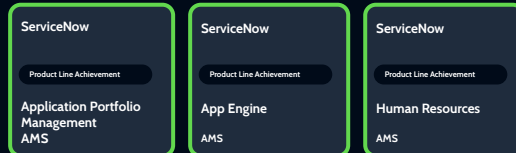
Customer
Satisfaction Rating

5.4K+

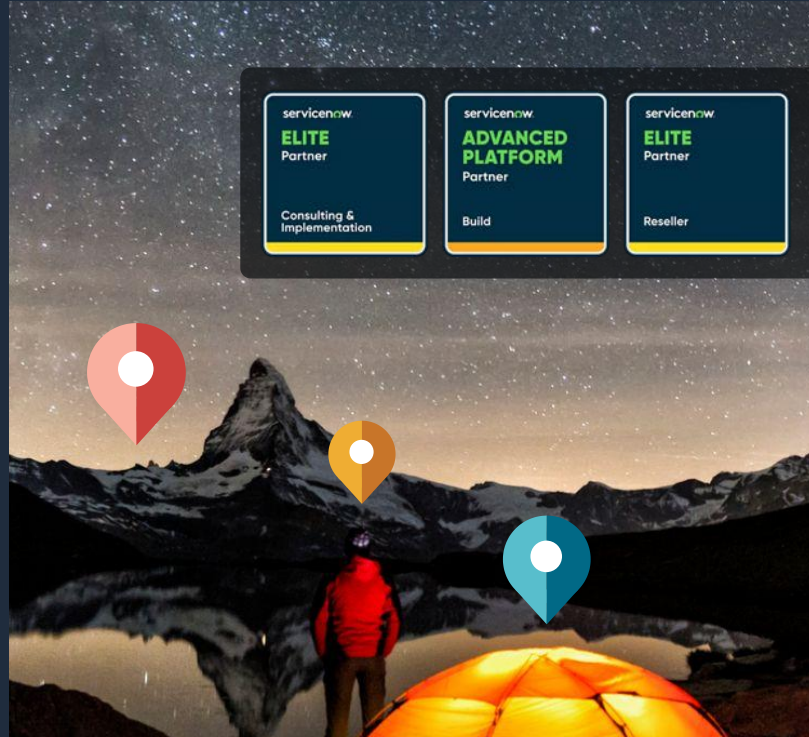
Certifications &
Accreditations



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

Cask Reserve

Introductions



Chelsea Cedeno
Associate Director,
ITAM | HAM | SAM | CMDB
Cask NX



Christine Morris
Sr. Director, Service Innovation
ITSM | Platform | UI/UX
Cask NX

Join the Conversation: Using Zoom

Turn on Video

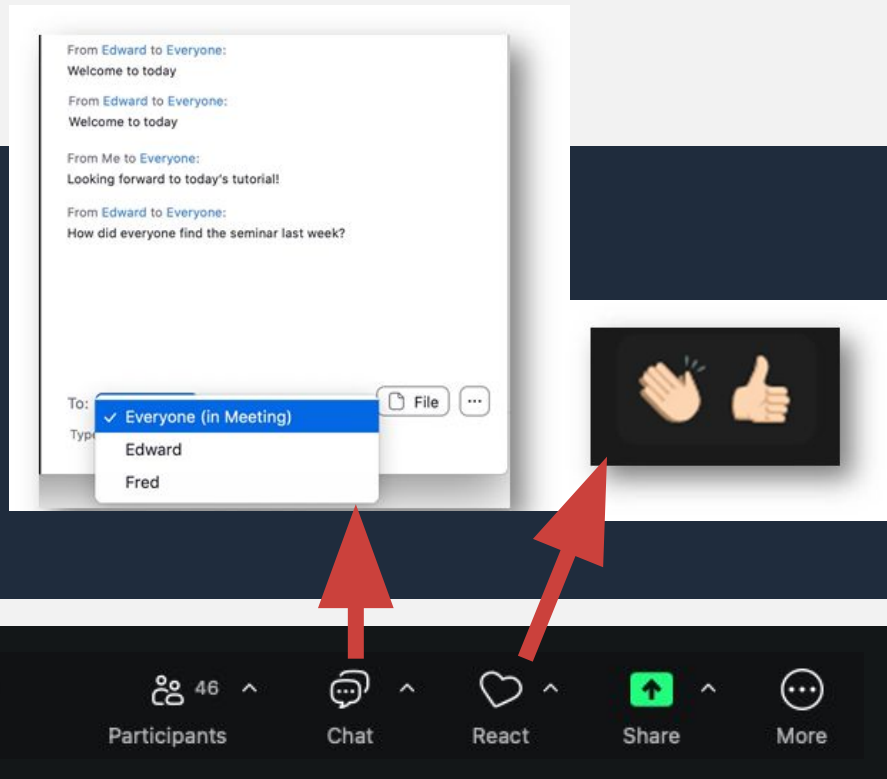
Let's get interactive and enjoy ourselves!

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

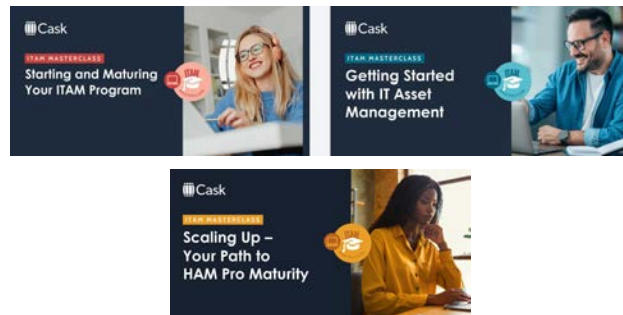


Catch Up with our CMDB & ITAM MasterClass Series!



CMDB MASTERCLASS

Join for our 9th CMDB MasterClass on
CMDB + Vulnerability Management July 30th!



ITAM MASTERCLASS

Find recordings, resources & more!



Where We've Been, Where We're Going





Quick recap of the journey so far:

Session 1: “How Do You Do ITAM?”

Understanding goals, capabilities, and org readiness.

Session 2: “Building a Scalable Foundation”

Core Asset + ITSM = a launchpad for value.

Session 3: “Scaling Up – Your Path to HAM Pro Maturity”

Advancing Your IT Hardware Asset Management Strategy.

Today: We take the next step

Taking Your SAM Strategy to the Next Level.



AUDIENCE POLL

**What best describes
your current SAM
maturity level?**

A

We're spreadsheet warriors—fighting the good fight.

B

We've got SAM Pro, but no idea if we're using it right.

C

We're pretty solid—until audit season.

D

We're SAM Superstars. We dream in entitlements and reconciliation.



Why would I want to consider SAM Pro?



Is Software Asset Management really worth it?

Working with SAM in ServiceNow provides visibility into your software position - allowing you to be prepared for true-ups or defend audits where needed.

It allows you to answer:

- What software do we own?
- What are we using?
- When do we renew?



Software Asset Management Benefits

Just like HAM, SAM provides similar benefits...



Accelerated Software
Deployment



Enhanced Accuracy
of your data

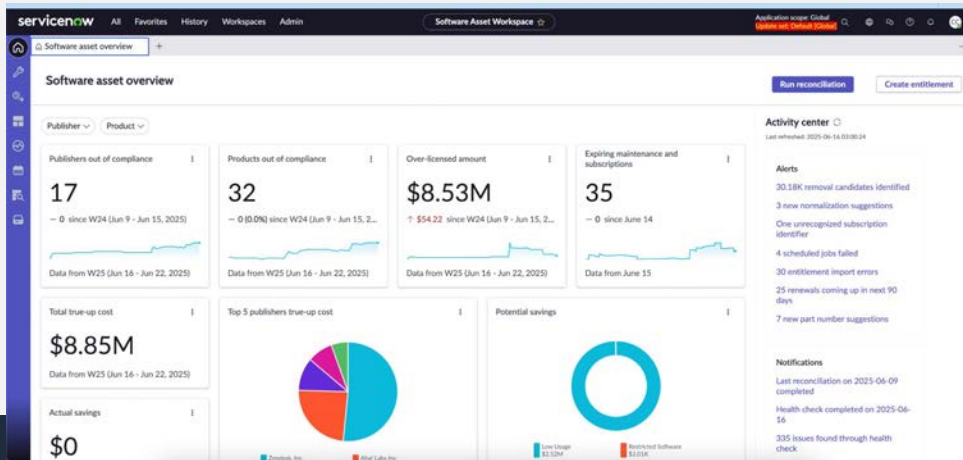


Improved Compliance
- set it and forget it!



Resource
Optimization

No more tracking licenses in Spreadsheets



One place to see and manage all of your software

Use already existing integrations with you CI records to reconcile with your SAM data

Kick off the renewal process for less manual work

See who is and isn't using software so you can reclaim and reissue - rather than buying more

Track cost of software and savings as well all in the same tool!

SAM Reduces Manual Effort

Tracking licenses manually takes a lot of time and effort - SAM reduces this effort by:



01.

Automatically allocate licenses from a request process. Don't have enough? That's ok! You can automatically kick off the process to procure new rights too!

02.

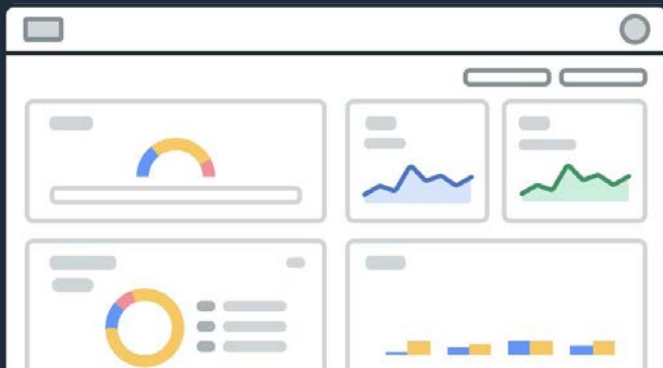
Automatically reclaim software from offboarding employees through a simple request/task process OR pull back software not being used to redeploy elsewhere!

03.

Renew software contracts in a few clicks - with new entitlements automatically created as well and the old entitlements automatically retired.

Leverage your reconciliation results

Enter Entitlements then run Reconciliation to utilize Remediation Options



Create Allocations

Remove Unallocated Installs

Remove Allocations

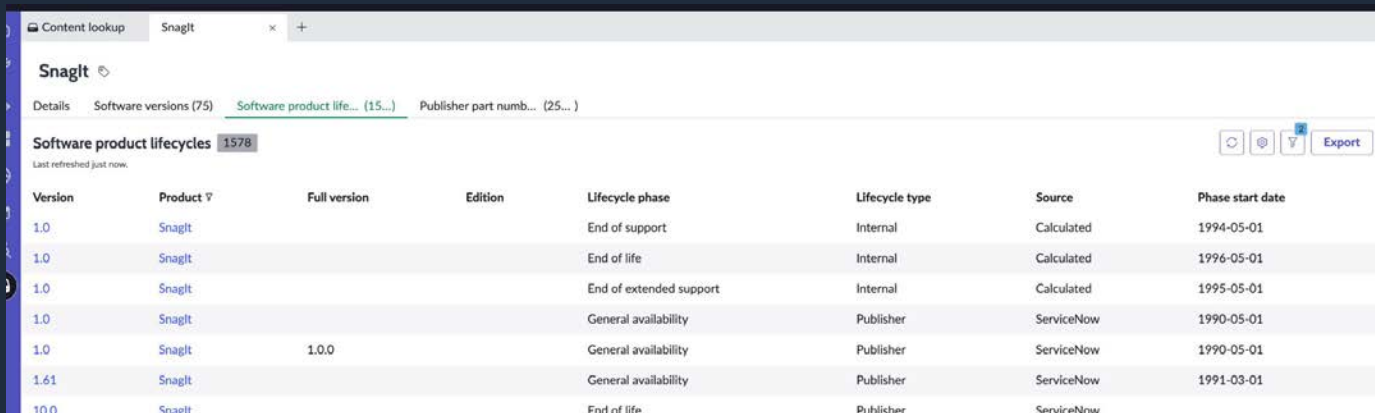
Add Allocations

Use the Content Library to its full advantage!

The SAM Content Library provides curated, structured content to support Software Asset Management (SAM) by offering software discovery models, normalization rules, and license entitlements. Track release dates and end of life dates to make sure you plan accordingly.

Benefits Include:

- Reduction in false positives and mismatched software data in your CMDB.
- Clean reporting and aggregation across multiple data sources.
- Better manage software risk and plan upgrades more effectively.



The screenshot shows a web application window titled 'Content lookup' with a tab for 'Snagit'. Below the tab, there are filters for 'Details', 'Software versions (75)', 'Software product life... (15...)', and 'Publisher part numb... (25...)'. The main section is titled 'Software product lifecycles' with a count of '1578' and a note 'Last refreshed just now'. Below this is a table with the following columns: Version, Product V, Full version, Edition, Lifecycle phase, Lifecycle type, Source, and Phase start date. The table contains 8 rows of data.

Version	Product V	Full version	Edition	Lifecycle phase	Lifecycle type	Source	Phase start date
1.0	Snagit			End of support	Internal	Calculated	1994-05-01
1.0	Snagit			End of life	Internal	Calculated	1996-05-01
1.0	Snagit			End of extended support	Internal	Calculated	1995-05-01
1.0	Snagit			General availability	Publisher	ServiceNow	1990-05-01
1.0	Snagit	1.0.0		General availability	Publisher	ServiceNow	1990-05-01
1.61	Snagit			General availability	Publisher	ServiceNow	1991-03-01
10.0	Snagit			End of life	Publisher	ServiceNow	

CMDB, SAM & HAM Working Together

Want to really propel and excel? Use your CMDB, SAM & HAM together!



Integrated workflows allow you to reclaim software along with your hardware, and deploy refreshed hardware with rights already allocated.



Leverage CMDB and Asset data to identify where software is installed - then reclaim as needed.



Monitor for usage of blacklisted software to ensure your Assets remain secure.

AUDIENCE POLL

How are you currently managing your software licenses?

- (A) One spreadsheet to rule them all

- (B) A mix of spreadsheets, email trails, and Jan's memory

- (C) We use ServiceNow, but not SAM Pro

- (D) Honestly, we just hope for the best



Common Challenges



Common Challenges Teams Face

Poor Discovery & Inventory Data

Unclean or Incomplete Purchase Data

Lack of Request Process Maturity
- or unwillingness to move to a catalog approach to request software

No Executive Sponsorship or Governance

Misunderstanding of License Metrics

Resistance to Change by Users

AUDIENCE POLL

**If your auditor walked
in tomorrow, what's
your plan?**

**(This is a safe space. No auditors
allowed here.)**

- A** Cry, then reboot the printer
- B** Offer them coffee and start digging through spreadsheets
- C** Show them what we think is our install base
- D** Welcome them confidently with dashboards and license positions

Expert Tricks to Succeed with SAM Pro



Expert Tricks to Succeed with SAM Pro

Start with a **clean foundation of data** - a **HEALTHY CMDB** will provide a better SAM experience!

Leverage **Reclamation Rules** to reclaim software based on usage thresholds

Utilize **Content Library** data to ensure mappings are accurate

Optimize **Discovery and other integrations** to keep utilize their data to support SAM

Collect **Publisher Part Numbers** from your vendors to ensure Entitlements are created correctly

Create **Success Goals** to track your progress - and Savings!

Integration with your **SaaS applications** as early as possible

Educate all **stakeholders** - Procurement, HR, Security, etc. - to ensure everyone follows the same processes

AUDIENCE POLL

**What would make
your SAM process feel
less like a dumpster
fire?**

- (A)** Automated license reclamation
- (B)** Better visibility across publishers
- (C)** Fewer manual steps and emails
- (D)** Honestly, just someone else to deal with it

Next Steps on the Maturity Roadmap



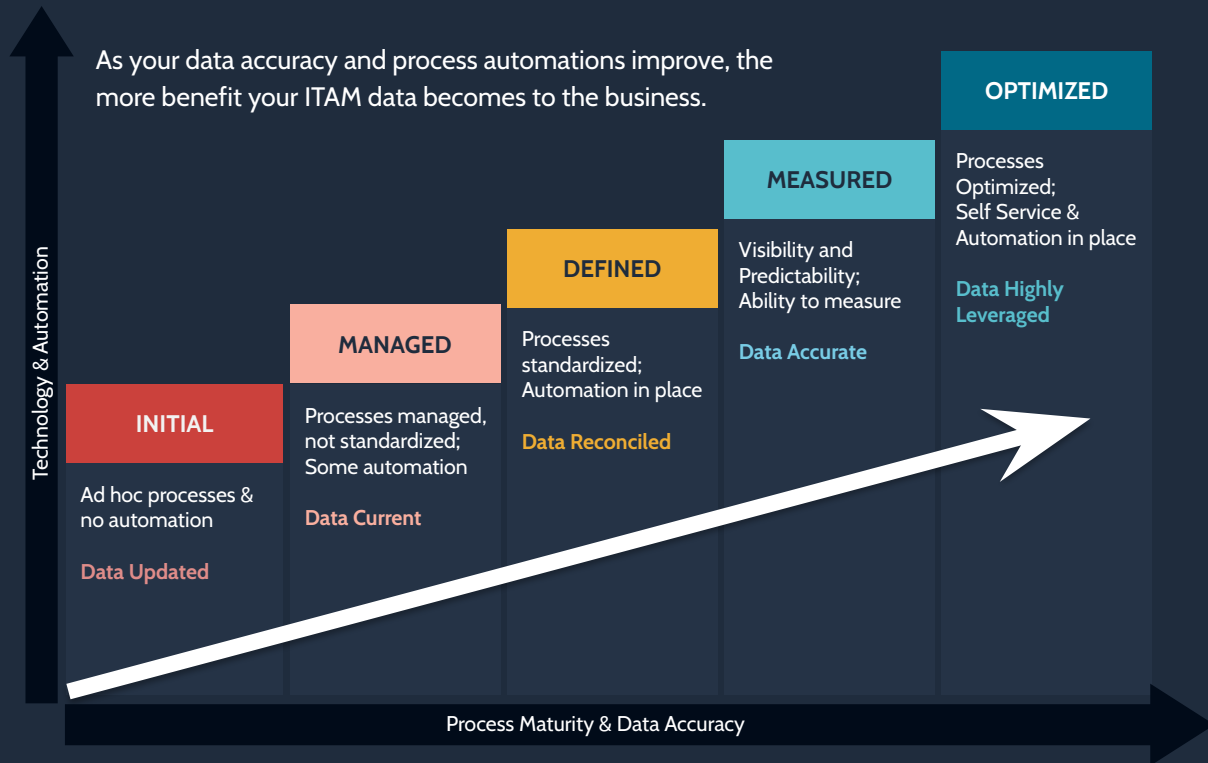
Next steps

Assess your readiness:
People, Process, Platform

Quick checklist: Is your model data
clean? Are your processes defined?
Are stockrooms mapped?

Plan your phased rollout—**don't SAM
everything at once**

Consider a partner (ahem... like us)
to guide you through setup and
governance



AUDIENCE POLL

**What's the first thing
your team would
need to do before
moving to SAM Pro?**

- (A)** Clean up our dirty, neglected CMDB
(it knows what it did)
- (B)** Centralize purchase data that
currently lives in 14 places
- (C)** Build a proper request process that
doesn't involve "just asking Jan"
- (D)** Get leadership to realize "SAM"
isn't someone from accounting
- (E)** All of the above. Send help.

Summary



Getting Started Is Easy!

Cask meets you where your IT Asset Management program is today.

Cask's Essentials™ offerings jumpstart your ServiceNow product journey with an MVP approach to rapid delivery and time to value



HAM | SAM
ESSENTIALS

Our HAM and SAM Foundations offerings are a “most requested” standard path to standing up HAM & SAM functionality.



HAM | SAM
FOUNDATIONS

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



HAM | SAM
EXPERT ASSIST



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

Look for a survey following this session!



Next CMDB MasterClass:
Vulnerability Management
on July 30.

Next ITAM MasterClass:
Enterprise Asset Management
on August 26.

Let's Meet in Person - See Where We'll Be!



ServiceNow Higher Ed Summit
July 15-16
Atlanta, GA



ServiceNow Asset Connect 25
October 7-8
Santa Clara, CA



ServiceNow Summit
August 26
Atlanta, GA



ServiceNow World Forum
September 18
Chicago, IL



**ServiceNow
CMDB Workshop**
July 16
New York City, NY

Questions?





Thank you!

Questions?

Email: inbound@casknx.com

