

# Scaling Up – Your Path to HAM Pro Maturity

Christine Morris & Chelsea Cedeno | May 21, 2025



# Agenda

## Welcome & Introduction

1. Where We've Been, Where We're Going
2. Why HAM 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

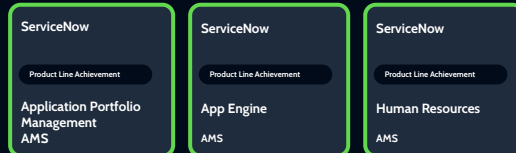
Customer  
Satisfaction Rating

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

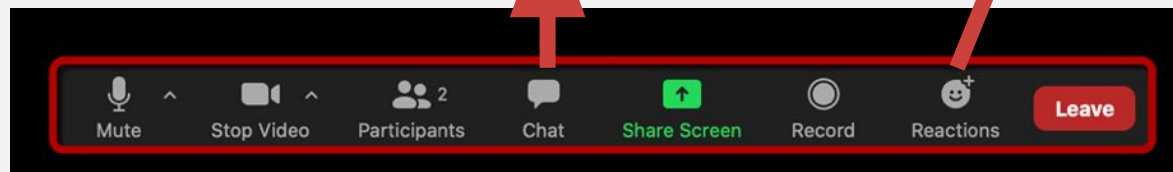
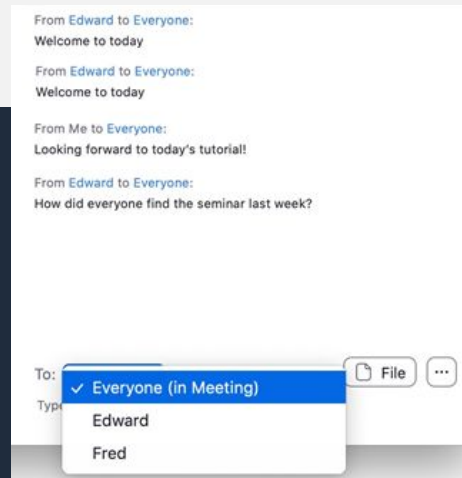
Let's get interactive and enjoy ourselves!

**Unmute** – Click the microphone icon to unmute and participate

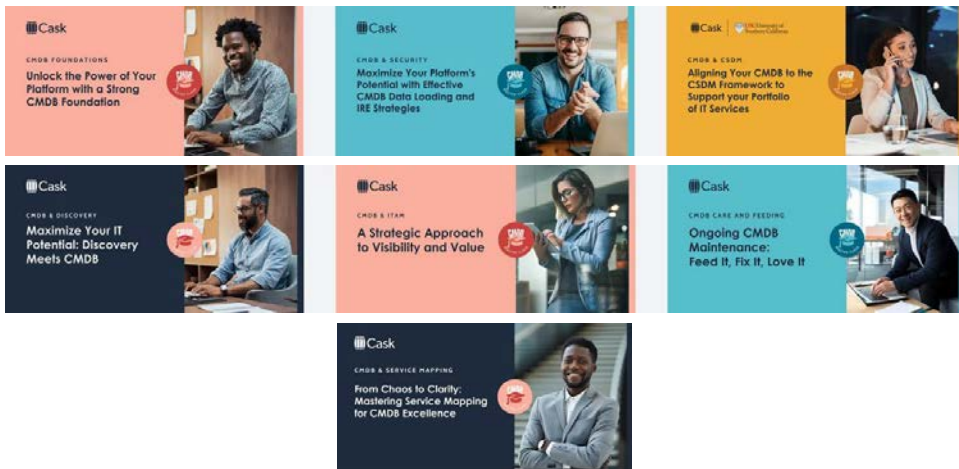
**Chat** – Message everyone or just one person

**Get Help** – Use Chat

**Show Captions** - Click on MORE, click Show Captions



# Catch Up with our CMDB & ITAM MasterClass Series!



Join for our 8th CMDB MasterClass on  
Event Management & AIOps June 10th!



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.





## **Today: We take the next step**

Maturing to Hardware Asset Management Professional.



## AUDIENCE POLL

**When someone asks  
your org how you do  
ITAM, the answer is  
usually...**

- A With grace and elegance like a swan 
- B Like a dumpster fire, but with flair 
- C Uh... we have a spreadsheet somewhere 
- D We don't talk about ITAM Club 



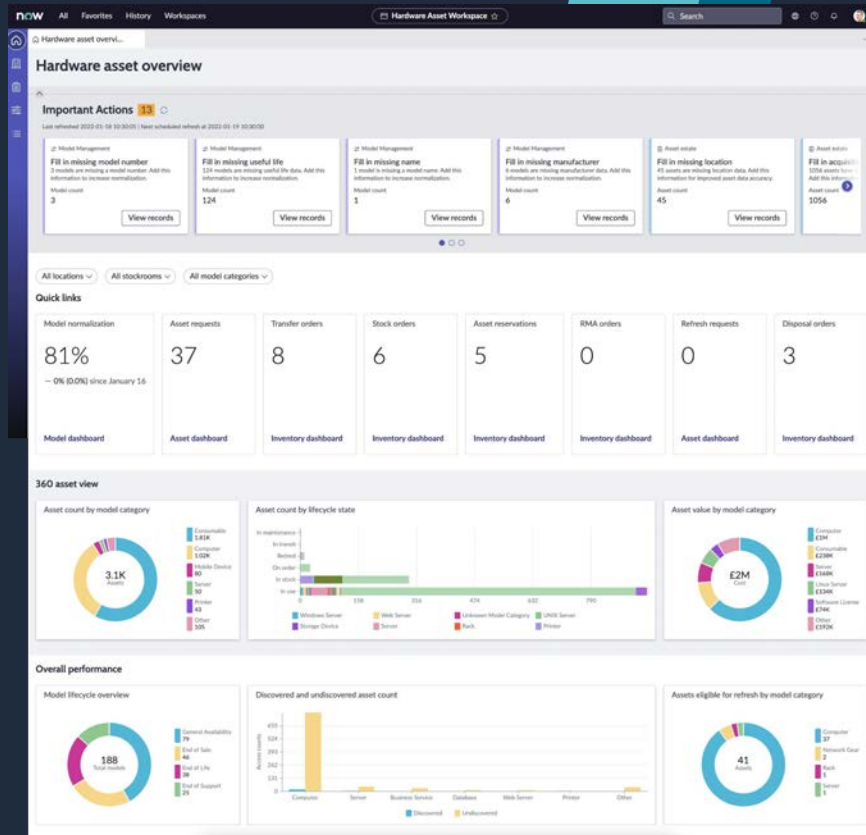
# Why HAM Pro?



# Beyond Core Asset

## Key benefits of HAM Pro over Core Asset:

- **Prebuilt workflows for automated lifecycle management** (stockroom > deployed > retired)
- **Hardware Model Normalization** – no more dirty models or SKU chaos
- Asset-centric views like **Hardware Asset Dashboard**, and full integration with CMDB
- Depreciation tracking, **refresh planning**, and warranty visibility
- Better planning for **leased** assets
- Advanced **workflow orchestration** for faster hardware deployment



# Beyond Core Asset | Getting to go faster

Prebuilt workflows for automated lifecycle management (stockroom > deployed > retired)



Accelerated hardware  
Deployment



Enhanced Accuracy  
of your data



Improved Compliance  
- set it and forget it!



Resource  
Optimization

# Beyond Core Asset | Better Model Data

Hardware Model Normalization – no more dirty models or SKU chaos

When a new hardware model record is created or an existing one is updated, ServiceNow's normalization engine evaluates key attributes (e.g., Manufacturer, Name, Model Number) against a curated content library. If a match is found, the system populates standardized values in the Normalization tab of the record.

01.

## BENEFITS INCLUDE:

Standardizes manufacturer, product, and model data and associates manufacturer lifecycle metadata to the hardware model

02.

Align the hardware model's device type to the global standard for product identification: UNSPSC

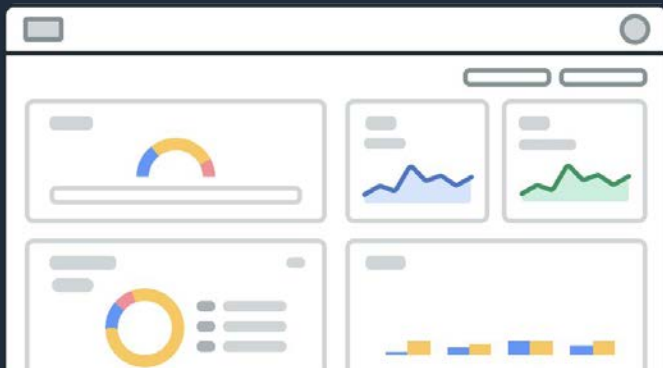
03.

Enables strategic planning with visibility to manufacturer lifecycle details



# Beyond Core Asset | Reporting to know where you stand

Asset-centric views like **Hardware Asset Dashboard**, and full integration with CMDB



Prebuilt reporting to keep track  
of your Asset program

Set goals and track your progress!

No need to keep separate data for finance  
and operations teams - let it sync and keep  
all sides up to date!

Check in on assets that stop reporting in

# Beyond Core Asset | Important financial data at your fingertips

Depreciation tracking, refresh planning, and warranty visibility



Help finance by reporting on depreciation, total cost spent and tracking to ensure all assets ordered were received



Plan appropriately for refreshes to reduce down time and unplanned expenses



Track warranty dates to ensure you are repairing rather than replacing when you should and replacing rather than repairing when the time comes

# Beyond Core Asset | Manage contracts for leased assets

Better planning for leased assets

Pre-built flows to facilitate lease management, including approval processes, notifications for lease milestones, and asset return procedures. This automation reduces manual effort and enhances operational efficiency.

On an asset by asset basis you can determine if you will return, buyout or extend each and ensure the appropriate updates are made to the records

## Contract overview

Type ▾

Vendor ▾

Contract expenditure by type



Software License	\$2.2M
Lease	\$3.45K
NDA	\$2.02K
Purchase Order	\$1.62K
Maintenance	\$1.39K
Other	\$1.75K

Leased Assets | [scripted relation] Asset | asset ▾ Search

Assets Covered

Asset asset	Lease action lease_action	Stage stage
DEMO0411AM01 - Lenovo ThinkPad E16 21JN...	Return	▶ ✓ ✓ ✓ ✓ ✓
DEMO0411AM03 - Lenovo ThinkPad E16 21JN...	Extend	▶ ✓ ✓ ✓ ✓
DEMO0411AM02 - Lenovo ThinkPad E16 21JN...	Extend	▶ ✓ ✓ ✓ ✓
DEMO0411AM04 - Lenovo ThinkPad E16 21JN...	Buyout	▶ ✓ ✓ ✓ ✓

# Beyond Core Asset | Automate & Integrate

Advanced workflow orchestration for faster hardware deployment



Automated Lifecycle Workflows using Flow Designer



Integration with Service Catalog



Dynamic Task Assignment



Real-Time Status Updates



Integration with other tools

## AUDIENCE POLL

**What finally made  
you consider HAM  
Pro?**

- (A) Tired of duct taping processes together in Core

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- (B) Your auditor showed up with a flashlight and a bad attitude

---
- (C) Your stockroom guy threatened to quit

---
- (D) We haven't - no one will give me funding



# Common Challenges





# Common challenges teams face

**Bad model data** breaks normalization and inflates effort

- **Always review Normalization results to ensure they are accurate!**

**Disconnected stockrooms** or misused locations cause fulfillment chaos

Misunderstanding **CI vs Asset** – duplicate tracking or data inconsistencies

**No governance over lifecycle states** = zombie assets galore

Resistance to process changes from logistics/field teams

Over-customization of ITSM Core Asset that has to be untangled

## AUDIENCE POLL

**What's been your  
biggest HAM  
headache so far?**

- (A) Dirty, filthy, never-been-cleaned model data
- (B) Everyone uses 'deployed' differently and it's ruining your life
- (C) CI vs Asset: Battle of the Acronyms
- (D) You set lifecycle states to '¬\_(ツ)\_/¬'

# Expert Tricks to Succeed with HAM Pro



# Expert Tricks to Succeed with HAM Pro

Take a hard look at your current processes and determine if they fit with the OOTB processes. If not – really ask yourself, is this customization needed? Is it worth the technical debt? Can I modify my current process to more closely align with OOTB?

Understand **Model Categories** and stick to OOTB, if possible. If not – understand ALL implications!

Align **Stockroom structure** to physical reality + use Transfer Orders properly

Use **flow logic** to drive asset lifecycle transitions automatically from fulfillment and returns

Leverage **Discovery and CMDB relationships** to keep assets and CIs in sync

Track **ownership, location, and cost center** data to prep for showback/chargeback conversations later

Consider **Advanced Receiving** if you have complex warehouse operations

## AUDIENCE POLL

**Be honest—how often  
do you *actually* use  
Transfer Orders?**

- (A) Daily, with pride and precision
- (B) Occasionally, when the stars align
- (C) Wait... what are Transfer Orders?
- (D) I just email Steve and hope he finds the laptop

# Next Steps on the Maturity Roadmap





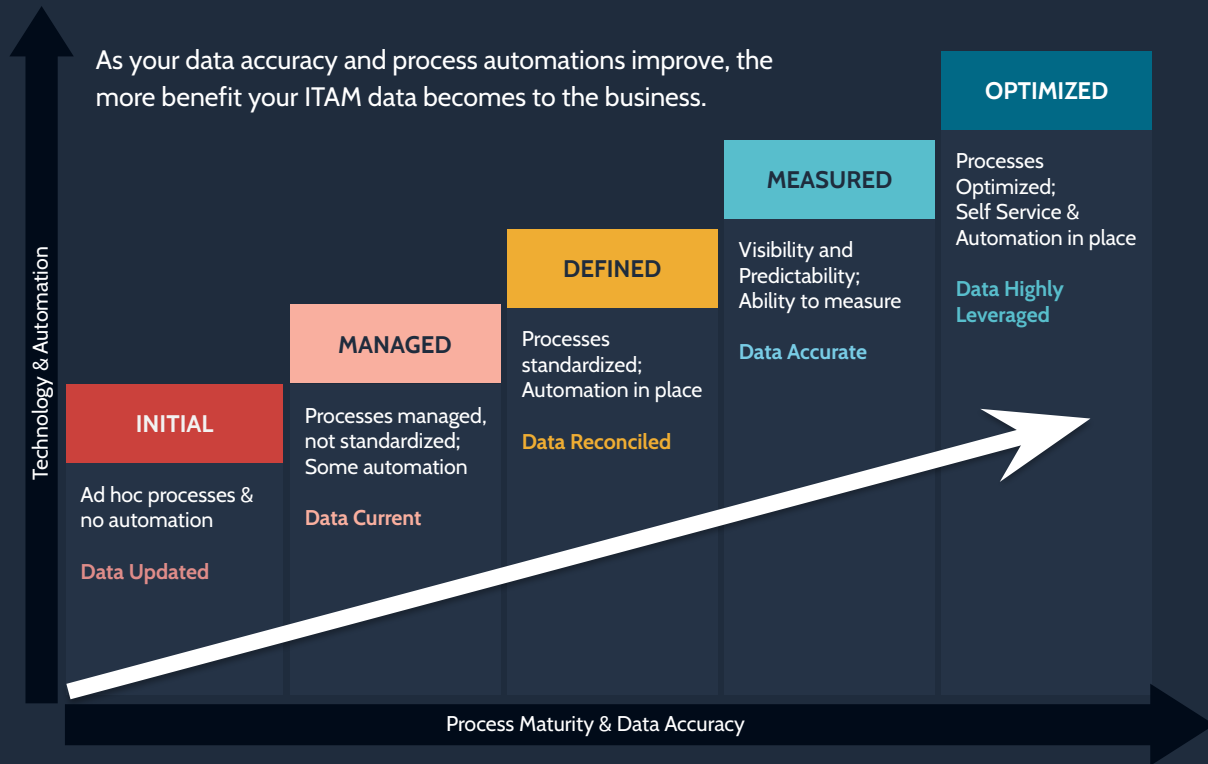
# Next steps

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 HAM**  
**Pro everything at once**

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



## AUDIENCE POLL

**How ready are you to  
make the leap to  
HAM Pro?**

- (A) Let's freaking go

---
- (B) I'm intrigued but mildly terrified

---
- (C) I'll do it after this next incident  
fire dies down

---
- (D) I need a drink and a nap before I can  
think about that

# 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!*



Supercharge IT  
Operations with Event  
Management & AIOps



**Next CMDB MasterClass:**  
**Event Management & AIOps**  
**Wednesday, June 11**

**The next ITAM MasterClass will be**  
**on getting started with SAM**  
**happening on Thursday, June 26**

Questions?





# Thank you!

Questions?

Email: [inbound@casknx.com](mailto:inbound@casknx.com)

