IT Asset Management and COBIT® 5:
Strategic ingredients for effective governance of enterprise IT

January 2018

Mark Thomas, Escoute Consulting
Welcome to our webinar!

Host / Moderator

Mark Constable
APMG International
mark.constable@apmgroup.co.uk

Presenter

Mark Thomas
Escoute Consulting
mark@escoute.com
Before we commence...

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mark.constable@apmgroup.co.uk
Areas of expertise

- Governance of Enterprise IT (CGEIT)
- Enterprise Risk Management (CRISC)
- COBIT® 5
- ITIL Expert
- PRINCE2 Practitioner

Experience

- VP, IT Operations and CIO
- Board Level GRC advisor
- Governance/risk frameworks consulting
Presentation Goals

- Understand the components that enable the governance of enterprise IT.
- Recognize the key COBIT® 5 processes, practices and activities that support IT asset management.
- Connect COBIT® 5 to the most relevant industry IT asset management models to enable a more robust governance capability.
- Learn the top ten tips to adopting and managing IT assets that creates value for your enterprise.
Agenda

A Primer in Asset Management

Asset Management in the Scope of GEIT
Frameworks and Standards in the Market
COBIT to the Rescue
Benefits of Leveraging COBIT and ITAM
Tips to Adoption and Maintenance
Closing and Questions
What are the things that keep me up at night when it comes to IT asset management?

- Do we know what assets we have and why we have them?
- Which assets are critical to the enterprise and why?
- What will happen if I get a licensing audit tomorrow?
- Are we providing value with our ITAM process?
- Are we effectively managing the lifecycle of assets?
- Are we optimizing the value of IT assets?
Constant Change

The world of assets and management of those assets is constantly changing and has become a critical part creating value for the enterprise.

- Movement to service models (cloud)
- Increasing trend to outsource portions of IT services, infrastructure and applications
- Drastic increases in mobile device adoption and use (BYOD)
- Significant growth of IP based devices, or The Internet of Things (IoT)
- Requirements for availability and speed of access
- Data and information storage requirements (Big Data)
- Legal and regulatory requirements (GDPR)
Key Terms

An IT asset is information, software, hardware or any other item that is used in the course of conducting business. Assets have financial or potential/strategic value to the enterprise.

IT Asset Management (ITAM)

The process that incorporates effective use and maintenance of assets through their lifecycle and ensures proper planning, procurement, security, protection, upgrading, replacement and disposal. ITAM can include:

• Hardware Asset Management (HAM)
• Software Asset Management (SAM)
• Information Asset Management (IAM)
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Closing and Questions
Governance Demands Exceed IT Capacity

*Corporate governance dependence on IT governance is constantly increasing. This need is driven by:*

- IT integration and alignment with the business
- Performance vs. conformance
- Accountability and controls auditability
- Increasing the need for efficiency and effectiveness while reducing cost
- Proper control and accounting of IT related assets to create value
Governance Objective: Value Creation

Creating Value

Benefits Realization
Are we getting the benefits expected from our assets?

Risk Optimization
Are we optimizing the risks to our assets?

Resource Optimization
Are we managing asset lifecycles optimally?

ISACA – Information Systems Audit and Control Association. ITGI – IT Governance Institute
Why is ITAM Important?

ITAM is a critical component of any governance program by enhancing the alignment between IT and the enterprise. Benefits include:

- Increased performance and conformance of assets
- Reduced risk/vulnerabilities
- Protect the reputation of the enterprise
- Reduction of IT costs – increased ROI
- Increased standardization (process, hardware, software)
- Integration through automation
- Improved IT services to increase customer satisfaction
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Framework Altitudes

Enterprise Governance

Enterprise IT Governance

Frameworks, Standards, Good Practices

Performance (Business Goals)

Conformance (GDPR, SOX, etc.)

BSC

COSO

COBIT® 5

ITIL

ISO

NIST

Others

www.apmg-international.com / www.apmg-cyber.com
Frameworks and ITAM

Asset Management is referenced in multiple industry best practices.

**COBIT® 5**: BAI09 Manage Assets, with a focus on practices designed to control processes.

**ITIL 2011**: Service Asset and Configuration Management, with a focus on IT services.

**ISO/IEC 19770**: Family of standards for ITAM, with a focus on SAM.

**ISO 55000**: Asset Management, with a focus on management systems.

**NIST SP 1800-5**: IT Asset Management, with a focus on cybersecurity.

**NIST SP 800-53**: Security and Privacy Controls for Federal Information Systems and Organizations.

**NIST Cybersecurity Framework (CSF)**, with a focus on the protection of critical infrastructure.

**Center for Internet Security CIS Controls “top 20”**, with a focus on protecting against cyber attack vectors.
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COBIT® 5

- Latest edition of ISACA’s globally accepted GEIT framework.
- Provides an end-to-end business view of the governance and management of enterprise IT.
- Builds on previous versions of COBIT® (including Val IT and Risk IT).
- Integrates other major industry frameworks and standards such as ITIL, TOGAF, PRINCE2, and related ISO and NIST standards.
Principles and Enablers

**COBIT® 5 Principles**
- Meeting Stakeholder Needs
- Covering the Enterprise End-to-End
- Applying a Single Integrated Framework
- Enabling a Holistic Approach
- Separating Governance From Management

**COBIT® 5 Enablers**
- Principles, Policies and Frameworks
- Processes
- Organizational Structures
- Culture, Ethics and Behavior
- Information
- Services, Infrastructure and Applications
- People, Skills and Competencies
Policies translate desired behaviors into practical guidance. Policy specifics will vary according to organizational needs, but are generally focused on the following areas:

- Asset Standards
- Support of "Non-Standard" and BYOD Assets
- Procurement Guidelines
- Security Guidelines
- Software Licensing Guidelines
- Support and Maintenance Practices
- Configuration Management Guidelines
- Inventory Practices
- Move/Add/Change Practices
- Disposal Guidelines
## COBIT® 5 Enabler: Processes

<table>
<thead>
<tr>
<th>Governance</th>
<th>Management</th>
<th>MONITOR, EVALUATE &amp; ASSESS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EVALUATE, DIRECT &amp; MONITOR</strong></td>
<td><strong>ALIGN, PLAN &amp; ORGANIZE</strong></td>
<td><strong>BUILD, ACQUIRE &amp; IMPLEMENT</strong></td>
</tr>
<tr>
<td>EDM01 Ensure Governance Framework Setting and Maintenance</td>
<td>APO01 Manage the IT Framework</td>
<td>BAI01 Manage Programs and Projects</td>
</tr>
<tr>
<td>EDM02 Benefits Delivery</td>
<td>APO02 Manage Strategy</td>
<td>BAI02 Manage Requirements Definition</td>
</tr>
<tr>
<td>EDM03 Ensure Risk Optimization</td>
<td>APO03 Manage Enterprise Architecture</td>
<td>BAI03 Manage Solutions Identification and Build</td>
</tr>
<tr>
<td>EDM04 Ensure Resource Optimization</td>
<td>APO04 Manage Innovation</td>
<td>BAI04 Manage Availability and Capacity</td>
</tr>
<tr>
<td>EDM05 Ensure Stakeholder Transparency</td>
<td>APO05 Manage Portfolio</td>
<td>BAI05 Manage Organizational Change Enablement</td>
</tr>
<tr>
<td>APO06 Manage Budget &amp; Costs</td>
<td>APO07 Manage Human Resources</td>
<td>BAI06 Manage Changes</td>
</tr>
<tr>
<td>APO08 Manage Relationships</td>
<td>APO09 Manage Service Agreements</td>
<td>BAI07 Manage Change Acceptance and Transitioning</td>
</tr>
<tr>
<td>APO10 Manage Suppliers</td>
<td>APO11 Manage Quality</td>
<td>BAI08 Manage Knowledge</td>
</tr>
<tr>
<td>APO12 Manage Risk</td>
<td>APO13 Manage Security</td>
<td><strong>BAI09</strong> Manage Assets</td>
</tr>
<tr>
<td>BAI01 Manage Programs and Projects</td>
<td>DSS01 Manage Operations</td>
<td></td>
</tr>
<tr>
<td>BAI02 Manage Requirements Definition</td>
<td>DSS02 Manage Service Requests &amp; Incidents</td>
<td></td>
</tr>
<tr>
<td>BAI03 Manage Solutions Identification and Build</td>
<td>DSS03 Manage Problems</td>
<td></td>
</tr>
<tr>
<td>BAI04 Manage Availability and Capacity</td>
<td>DSS04 Manage Continuity</td>
<td></td>
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<tr>
<td>BAI05 Manage Organizational Change Enablement</td>
<td>DSS05 Manage Security Services</td>
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<tr>
<td>BAI06 Manage Changes</td>
<td>DSS06 Manage Business Process Controls</td>
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<tr>
<td>BAI07 Manage Change Acceptance and Transitioning</td>
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</tbody>
</table>
**Description:**
Manage IT assets through their life cycle to make sure that their use delivers value at optimal cost, they remain operational (fit for purpose), they are accounted for and physically protected, and those assets that are critical to support service capability are reliable and available. Manage software licenses to ensure that the optimal number are acquired, retained and deployed in relation to required business usage, and the software installed is in compliance with license agreements.

**Purpose:**
Account for all IT assets and optimize the value provided by these assets.

<table>
<thead>
<tr>
<th>IT-Related Goal</th>
<th>Related Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transparency of IT costs, benefits and risk</td>
<td>• Percent of investment business cases with clearly defined and approved expected IT-related costs and benefits</td>
</tr>
<tr>
<td></td>
<td>• Percent of IT services with clearly defined and approved operational costs and expected benefits</td>
</tr>
<tr>
<td></td>
<td>• Satisfaction survey of key stakeholders regarding the level of transparency, understanding and accuracy of IT financial information</td>
</tr>
<tr>
<td>Optimization of IT assets, resources and capabilities</td>
<td>• Frequency of capability maturity and cost optimization assessments</td>
</tr>
<tr>
<td></td>
<td>• Trend of assessment results</td>
</tr>
<tr>
<td></td>
<td>• Satisfaction levels of business and IT executives with IT-related costs and capabilities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Process Goal</th>
<th>Related Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licenses are compliant and aligned with business need.</td>
<td>• Percent of used licenses against paid-for licenses</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Assets are maintained at optimal levels.</td>
<td>• Number of assets not utilized</td>
</tr>
<tr>
<td></td>
<td>• Benchmark costs</td>
</tr>
<tr>
<td></td>
<td>• Number of obsolete assets</td>
</tr>
</tbody>
</table>

*Source: COBIT5 Enabling Processes*
BAI09 Manage Assets

Management Practices for this process include:

**Identify and record current assets.** Maintain an up-to-date and accurate record of all IT assets required to deliver services and ensure alignment with configuration management and financial management.

**Manage critical assets.** Identify assets that are critical in providing service capability and take steps to maximize their reliability and availability to support business needs.

**Manage the asset life cycle.** Manage assets from procurement to disposal to ensure that assets are utilized as effectively and efficiently as possible and are accounted for and physically protected.

**Optimize asset costs.** Regularly review the overall asset base to identify ways to optimize costs and maintain alignment with business needs.

**Manage licenses.** Manage software licenses so that the optimal number of licenses is maintained to support business requirements and the number of licenses owned is sufficient to cover the installed software in use.

Source: COBIT5 Enabling Processes
BAI09 Manage Assets

**RACI for this process include:**

<table>
<thead>
<tr>
<th>Key Management Practices</th>
<th>Enterprise Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and record current assets.</td>
<td>Board</td>
</tr>
<tr>
<td></td>
<td>Chief Executive Officer</td>
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<td></td>
<td>Chief Financial Officer</td>
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<tr>
<td></td>
<td>Chief Operating Officer</td>
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<tr>
<td></td>
<td>Business Executives</td>
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<td></td>
<td>Business Process Owners</td>
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<td></td>
<td>Strategy Executive Committee</td>
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<td></td>
<td>Steering Committee</td>
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<tr>
<td></td>
<td>Project Management Office</td>
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<td></td>
<td>Value Management Office</td>
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<tr>
<td></td>
<td>Chief Risk Officer</td>
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<tr>
<td></td>
<td>Chief Information Security Officer</td>
</tr>
<tr>
<td></td>
<td>Architecture Board</td>
</tr>
<tr>
<td></td>
<td>Enterprise Risk Committee</td>
</tr>
<tr>
<td></td>
<td>Head Human Resources</td>
</tr>
<tr>
<td></td>
<td>Compliance</td>
</tr>
<tr>
<td></td>
<td>Audit</td>
</tr>
<tr>
<td>Manage critical assets.</td>
<td>Chief Information Officer</td>
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<tr>
<td></td>
<td>Chief Architect</td>
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<tr>
<td></td>
<td>Head Development</td>
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<td></td>
<td>Head IT Operations</td>
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<td></td>
<td>Head IT Administration</td>
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<tr>
<td></td>
<td>Service Manager</td>
</tr>
<tr>
<td></td>
<td>Information Security Manager</td>
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<tr>
<td></td>
<td>Business Continuity Manager</td>
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<tr>
<td></td>
<td>Privacy Officer</td>
</tr>
</tbody>
</table>

| Manage the asset life cycle.              | C |
|                                           | C |
|                                           | C |
|                                           | C |
| Optimize asset costs.                     | I |
|                                           | C |
|                                           | R |
|                                           | R |
| Manage licenses.                          | R |
|                                           | C |

Source: COBIT5 Enabling Processes
### BAI09 Manage Assets – Activities, Inputs and Outputs

#### PRACTICES

<table>
<thead>
<tr>
<th>Identify and record current assets</th>
<th>Manage critical assets</th>
<th>Manage the asset lifecycle</th>
<th>Optimize asset costs</th>
<th>Manage licenses</th>
</tr>
</thead>
</table>

#### DESCRIPTION

Maintain an up-to-date and accurate record of all IT assets required to deliver services and ensure alignment with configuration management and financial management.

#### SELECTED ACTIVITIES

1. Identify all owned assets in an asset register that records current status.
2. Maintain alignment with the change management and configuration management processes, the configuration management system, and the financial accounting records.
3. Identify legal, regulatory or contractual requirements that need to be addressed when managing the asset.
4. Verify the existence of all owned assets by performing regular physical and logical inventory checks and reconciliation including the use of software discovery tools.
5. Verify that the assets are fit for purpose (useful condition).
6. Determine on a regular basis whether each asset continues to provide value and, if so, estimate the expected useful life for delivering value.
7. Ensure accounting for all assets.

#### Inputs From

- **BAI03 Manage Solutions Identification and Build:** Updates to Asset Inventory
- **BAI10 Manage Configuration:** Configuration repository

#### Outputs To

- **APO06 Manage Budget and Costs and BAI10 Manage Configuration:** Asset Register
- **BAI10 Manage Configuration and DSS05 Manage Security Services:** Results of physical inventory checks
- **APO02 Manage Strategy:** Results of fit-for-purpose reviews

Source: COBIT5 Enabling Processes
COBIT® 5 Enabler: Organizational Structures

The goals include having a proper mandate, well-defined operating principles and application of other good practices. The outcome of the organizational structures enabler should include a number of good activities and decisions.

- Operating principles
- Composition
- Span of control
- Level of authority/decision rights
- Delegation of authority
- Escalation procedures
COBIT® 5 Enabler: Culture, Ethics and Behavior

Often underestimated as a success factor in governance and management activities, this enabler refers to the set of individual and collective behaviors in an enterprise that support the overall goal of providing value. Good practices include:

- Communication and awareness of desired behaviors
- Incentives to encourage and deterrents to enforce desired behaviors
- Leadership and role modeling
- Continuous improvement mentality
- Compliance is genuinely valued and appreciated
COBIT5 Enabler: Information

Information is not only an enabler, but a key organizational asset as well. Information is pervasive throughout any organization and includes all information produced and used by the enterprise.

- An information asset is a body of knowledge that is defined, organized and managed by the enterprise.
- Like any other asset, information has value and can have a different lifecycle than other (software or hardware) assets.
- An information asset can be classified according to any criteria that makes it easier to find, share and maintain.

Does it have value?
Does it fall into a specific category?
Is there an identified owner?
Is it useful?
Will it cost to re-acquire?
Are there repercussions for not being able to produce it on request?
Is there a risk of losing it?
What if somebody tampers with it?
What happens if is not accurate?
COBIT5 Enabler: Services, Infrastructure and Applications

Service level capability is expressed in terms of services which are supported by infrastructure and applications. This enabler is key to the ITAM process.

- Dependent on services catalog and service level agreements
- Majority of IT assets
- Links asset management to configuration management
- Based on enterprise architectural principles
COBIT® 5 Enabler: People, Skills and Competencies

People are required for successful completion of activities and decision making. Goals for skills and competencies relate to education and qualification levels, technical skills, experience levels, knowledge and behavioral skills required to provide and perform successfully process activities, organizational roles, etc.

- Education and qualification levels
- Technical skills
- Experience levels
- Requirements by role

Examples:
- Procurement and contacting
- Financial
- Quantitative and analytical
- Managerial and communication
- Business analysis and project management
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Which assets are critical to the enterprise and why?

What will happen if I get a licensing audit tomorrow?

Are we effectively managing the lifecycle of assets?

Are we providing value with our ITAM process?

Are we optimizing the value of IT assets?
## Using COBIT® 5 to Address Concerns

<table>
<thead>
<tr>
<th>BAI09 Manage Assets, Management Practices</th>
<th>Identify and record current assets</th>
<th>Manage critical assets</th>
<th>Manage the asset lifecycle</th>
<th>Optimize asset costs</th>
<th>Manage licenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do we know what assets we have and why we have them?</td>
<td>●</td>
<td>●</td>
<td>◔</td>
<td>◔</td>
<td>●</td>
</tr>
<tr>
<td>Which assets are critical to the enterprise and why?</td>
<td>◔</td>
<td>●</td>
<td>◔</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Are we effectively managing the lifecycle of assets?</td>
<td>◔</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Are we optimizing the value of IT assets?</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Are we providing value with our ITAM process?</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>What will happen if I get a licensing audit tomorrow?</td>
<td>●</td>
<td>◔</td>
<td>◔</td>
<td>◔</td>
<td>●</td>
</tr>
</tbody>
</table>

- ● Exceptional
- ◔ Satisfactory
- ◔ Limited
- ◔ Marginal
- ○ Not applicable

This information is based on the presenter’s experience and should not be considered a complete mapping.
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Tips to Adoption and Maintenance

Closing and Questions
Tip #1 – Gain stakeholder and executive support

Without this support, your efforts can only go so far. Here are some tips on how to gain support for your ITAM process:

- Identify internal/external stakeholder and analyse their needs.
- Link ITAM goals to enterprise goals and stakeholder needs.
- Link ITAM risk scenarios to enterprise goals and stakeholder needs.
- Identify a governing body to separate the governance and management of the process.
- Identify asset ownership and educate owners.

Hint: Go to the COBIT5 publications for examples of stakeholders, stakeholder needs, generic goals cascade, risk scenarios and governing bodies.
Tip #2 – Treat ITAM as a process and not a project

The first three questions from a sponsor when you mention the word project are: 1) when will you be done? 2) How much will it cost? and 3) What is the benefit?

- The journey is never complete.
- Process characteristics:
  - Roles and responsibilities
  - Meaningful measurements
  - Defined practices and activities
  - Inputs and outputs with other processes

Hint: Leverage COBIT5 and ITIL for excellent guidance on process governance and management.
Tip #3 – Identify critical assets

Determine critical assets by using multiple viewpoints to assist in identification and implementation of protection.

<table>
<thead>
<tr>
<th>GOALS CASCADING</th>
<th>The most important goals to the enterprise that ultimately meet stakeholder needs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>RISK SCENARIOS</td>
<td>Prioritized risk events that can negatively affect the achievement of business goals.</td>
</tr>
<tr>
<td>VITAL BUSINESS FUNCTIONS</td>
<td>Business identified functions, processes, or activities determined as vital to success.</td>
</tr>
<tr>
<td>REGULATORY &amp; COMPLIANCE</td>
<td>Required legal, regulatory, and compliance requirements.</td>
</tr>
<tr>
<td>KEY/CRITICAL SERVICES</td>
<td>Assets that support services required for vital business functions.</td>
</tr>
</tbody>
</table>

Hint: Critical assets can include more than just hardware and software. They can also be patents, copyrights, financial data, proprietary software, research, key services, unique processes, and of course, PII.
Tip #4 – Don’t forget about security

Assets are often targets where threats will attempt to exploit vulnerabilities for a multitude of reasons.

- Actively manage and monitor configurations.  
  Hint: COBIT5 process BAI10, Manage Configuration and ITIL Process Service Asset and Configuration Management.

- Actively manage and monitor access management.  
  Hint: COBIT5 Process DSS05 Manage Security Services, ITIL Process Access Management, and relevant NIST, and ISO standards.

- Use the risk management process to understand the potential threats, vulnerabilities and scenarios.  
  Hint: COBIT5 Processes EDM03 Ensure Risk Optimization and APO12 Manage Risk.
Tip #5 – Document the Lifecycle of Assets

Different types of assets have different lifecycles. Gain an understanding of the lifecycles for each asset class to assist in managing the value cycle.

Typical IT Asset Lifecycle

Plan | Request | Procure | Acquire or Receive | Deploy | Manage | Retire | Dispose

Typical IT Service Lifecycle based on ITIL®

Service Strategy | Service Design | Service Transition | Service Operation | Continual Service Improvement

Hint: COBIT5 offers information on enabler lifecycles as well as relationships with other processes. Also see ITIL for integration between ITAM and other service management processes.
Tip #6 – Get a handle on licensing!

There are many different licensing models currently on the market – each with unique terms and conditions that the licensee needs to adhere to.

- Violations can be expensive and embarrassing
- Audits are the last defense
- Choose a licensing model that suits the organization
- Integrate with other processes

Hint: Link your asset management, inventory, discovery, financial and configuration processes to integrate these into a single view.
Tip #7 – Consider COBIT® 5 as a “Framework to manage frameworks”

Resist the urge to use one framework for all of your needs – those don’t exist.

• COBIT® 5 as an integrator
• “Middleware”
• Adopt and adapt
• Link to value, enterprise needs

Hint: In the COBIT5 Enabling Processes guide, there are references to relevant industry frameworks. For ITAM specific areas, refer to the slide in this presentation for additional guidance.
Tip #8 – Automate as much as possible

Automation is a critical success factor. Leverage automation wherever possible to increase efficiency and reduce human error.

- End to end solution ideal, but may be cost prohibitive
- Allows for integration between processes and functions
- Assists in effective decision making
- Enhances lifecycle management

Hint: If you have an IT Service Management system in place today, you may be able to integrate asset lifecycle tasks into the tool, such as procurement, monitoring, management, and decommissioning.
Tip #9 – Adopt incrementally

Hint: Use a continuous improvement model that considers organizational change enablement such as the COBIT5 Implementation model, and make continuous improvement business as usual.
Tip #10 – Get the right training and certifications

**ISACA**
- Independent, nonprofit global association.
- Engages in the development, adoption and use of globally accepted, industry-leading knowledges and practices for information systems.
- COBIT, CGEIT, CRISC, CISM, CISA, CSX.

**APMG International**
- World’s leading accreditation and exam institute.
- Diverse portfolio of certification schemes supported by a network of APMG accredited organizations and trainers.
- Accreditation body for ISACA and IAITAM certifications.

**IAITAM**
- Professional organization for individuals and organizations involved in any aspect of managing IT assets.
- Includes best practices in ITAM, SAM, Hardware Asset Management, and the IT asset lifecycle management.
- Includes training and accredited certifications.

*Hint: Go to the APMG website for information on certifications and authorized training providers for any of the above training.*
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A Primer in Asset Management
Asset Management in the Scope of GE IT
Frameworks and Standards in the Market
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