Member Handbook

Developed **BY** asset management professionals **FOR** asset management professionals

Message from Alan Plastow, founder of The Institute:

For nearly a decade, The Institute for Technology Asset Management—*The Institute*—has been using our web presence to give away our knowledge and experiences at no charge. However, in order to serve you more effectively we are going to have to formalize our organization. But don't panic: ***You still have until 2400 hours MGT on April 15th, 2016 to join at no charge. After the 15th,*** memberships will be available for a nominal fee—as agreed-upon on by our voting membership.   Pricing for one year and two year memberships can be found on our website.

We'll still be our grumpy-humorous, seriously caring selves. We will still refuse to expect you, the members who helped build this organization, to support a bloated headquarters bureaucracy. We'll also continue to remind you that *The Institute* does not exist to rake in a profit—only to cover costs—the money you invest in this organization will be returned to expand the organization footprint and to enhance operations and services.

Over this brief time, we have generated and delivered, at no charge, well over 800 pages of focused Knowledge Briefings covering Technology Asset Management, Software and Copyright Compliance Assurance, Software Life Cycle Management, Negotiations, Basic Project Management, and Human & Organizational Change Management. Our version of an Anti-Piracy Campaign actually teaches the software consumer how to avoid falling victim to pirated products right along with proven methods of deflecting the predatory practices of the software police and copyright cops.

In excess of 1,000 people from around the world have attended training programs designed by our founder, Al Plastow. They've attended those programs in colleges and universities as well as on site and in cities located across the U.S., Canada, and Australia.. Beginning in 2016, we are offering our programs as blended learning opportunities via the Internet.

In these programs, business technology consumers have:
- learned techniques and strategies for managing and enhancing the ROIC of both software assets and technology assets across the entire product life cycle
- learned the absolute critical nature of correctly negotiated licenses and agreements (unfavorable agreements represent the root causes of a majority of highly expensive punitive audit events)
- learned how to monitor both the technologies and the related documentation in such a manner as to virtually eliminate most of the

threats posed by the predatory practices in software police and copyright cop confrontations

The Institute doesn't believe in the popular game of suing companies into submission. Instead we provide people and companies with the consumer-tested knowledge and methodologies necessary to reduce technology costs while increasing the life cycle value of a wide range of tech investments. Our knowledge doesn't come from the corporations representing the self-interests of the technology products industry—it comes from experienced front line asset managers who work to serve their companies just as you do.

Most importantly: We are the vendor-neutral community of professional asset managers. That means that the knowledge we deliver is not tainted with potential provider conflicts of interest. Our focus is not toward preserving the hefty profit margins of the software or tech industry players and their friends. It isn't about selling you consulting services, magazines, or products. Your presence with us is not seen as an opportunity to leverage member lists with those who wish to sell you goods or services.

Instead, we strive to deliver knowledge—the proven methods that business technology consumers use in cutting costs and minimizing risks. When we deliver a software asset management program, we deliver the knowledge necessary to counter the onerous licenses and agreements generated by powerful software and tech industry legal teams. At the same time, that SAM program empowers you to drastically expand the life cycle value you gain from the very same assets and services.

In the world of technology asset management—in the world of software asset management—your organization can remain a defenseless victim to industry sharp practices and insane profit margins, or you can do something to take away the absolute power the tech industry players have wielded for the past several decades.

You and your company are the customers. You, and people like you, represent the marketplace that pays the invoices. Isn't it time you had the rights—the capacity—to expect equitable and ethical treatment?

We have consistently stated for over a decade that the vast majority of tech producers are ethical companies that genuinely want to deliver quality products and services under mutually beneficial conditions. We wholly encourage the business technology consumer to locate these ethical providers and align with them to improve the tech landscape. Unfortunately, there is a small core of software and tech product companies that have somehow gained the impression that the customer base represents their personal limitless gold mine. Their

collective *"If you ain't with us, you're against us,"* mentality should no longer be tolerated in the global technology consumer community.

Maybe we're wrong, but the experiences of the sheer numbers of tech and software asset managers with whom we've communicated over the years certainly appear to confirm the almost desperate need for industry change.

So, here we are:
Collectively stranded on the sharpened horns of a very gnarly dilemma.

Your choices come down to three:
- You can continue to try and remain invisible to the predatory software auditors.
  - You need to know, however, that you are not. When industry players can blatantly advertise rewards of $10,000 or $50,000, or $200,000, even a ludicrous $1,000,000, for whistle-blowers to report your company for licensing errors, you are far from invisible. In fact, you are an easy audit target.
- You can remain the victim of existing "industry standard" licensing and contractual sharp practices.
  - In that case, you will remain easy prey for any of 100 different enforcement auditing groups. You will also continue to over-spend for virtually all tech assets you acquire—in some cases, as much as double.
- Or, you can take action to become proactively knowledgeable about the entire life cycle of the technology assets on which your company depends.
  - You can take back control over your tech environment and manage it to extract maximum value from your IT dollar investments.

The process is here. The time is now. Join us in becoming more professionally competent and respected in the asset management fields. Join with The Institute for Technology Asset Management in re-building the concepts of equitable and ethical customer supplier relationships.

So? Are you ready to change the industry?

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History

The roots of The Institute for Technology Asset Management reach back to prior to 1996. At that time, a group of practicing software asset managers recognized that there simply were no viable professional development training and credentialing programs. The only program that did exist at the time was developed by the software license enforcement industry – not what the typical business technology might consider a "supplier- or agenda-neutral resource". The time to change had come.

The Institute – A Global Community of SAM & ITAM Member Practitioners Just Like You

The Institute was originally envisioned by small multi-national group of practicing technology asset managers. We felt that too many of the available training, certification, and solutions options remained more tightly focused on supplier agendas and enforcement agency strategies than on genuine individual professional development practices.

Institute credential holders train locally to deliver SAM & ITAM value globally!

THE Mutually Beneficial SAM & ITAM Community of Practice

The founding members of *The Institute* have also recognized a need for transparency & honesty in describing and managing the organization. We've had more than enough experience with "representative associations" that fail to genuinely represent our professional interests. We do not believe our roles as professional association members should include serving as communication and sales bridges to suppliers in order to enhance the for-profit bottom line.

As a result, when we make the distinction of being supplier-neutral – we genuinely ARE supplier-neutral. When we make the distinction of being member-driven – it means that this organization is genuinely built around the needs of the membership and that members have a clear voice in our operations. When we claim to represent the needs of practitioners – it means that our membership is composed of individual practicing SAMs & IT asset managers. Further, we do not maintain corporate memberships nor do we offer specialized business memberships.

We train & certify individual practitioners. When we state that our training is unique and comprehensive – it means that our training and services are genuinely focused on making YOU better at what YOU do.

It's An Entirely NEW GENERATION of SAM & ITAM Professional Opportunities

At *The Institute*, we've changed the face of technology asset management training and created the next generation of software asset management (SAM) and technology asset management (TAM/ITAM) professional development opportunities. We chose to recognize the limitations of existing programs, and we responded with a more effective plan–one that gives *you* control over *your own* unique credential programming.

Traditional training had become unnecessarily costly and was being shaped around outcomes that were more heavily anchored in the needs of proprietary special interest providers than in the needs of business technology consumers. Both training programs and solutions frameworks needed to become more financially available and more genuinely useful to a majority of practitioners in enterprises around the world.

What's more, asset management training programs had become locked into mere exercises in short term memorization – locked into profitable "instant" certifications – rather than the continuous improvement competency tools of highly professional and globally respected trades.

The Institute: Competent ITAM/TAM & SAM Practitioners

SAM & ITAM practitioners needed to become genuinely competent in delivering value to their employers in enterprises of any size; in any industry; and in any country around the globe – not merely in the service of wealthy multi-nationals and not limited to the Wintel/Apple local area network systems platforms.

Practitioner competency needed to become rooted in applied professional practices that have been proven to complement and support enterprise initiatives and strategies at all possible levels and in a wide range of environments/cultures.

In the software asset management (SAM) arena alone, *The Institute* and its programs are designed to counter the trend (since prior to 2000) of special interest and proprietary industry sponsorship of software asset management & ITAM training and process management. An additional concern of our membership was the growth of for-profit corporate training and standards-drafting that seemingly channeled practitioners away from genuine professional development and practical, cost-effective frameworks–and again–toward narrowly defined and very complex/costly proprietary supplier programs.

The Institute Members: Your Trusted Partners in Professional Development

Through *The Institute*, the community of software asset management (SAM) and IT asset management (TAM/ITAM) practitioners now has a trusted partner that clearly advocates for the credibility and scope of the SAM and IT asset management professions. At the same time, our minimal bureaucratic footprint provides cost-effective, open source, professional development and credential support services across the globe.

Who We Serve

Short Answer? We Serve You!

No…seriously…

People like you are why this community of practice was formed and you're the reason we exist. We're here to build a credible profession–one you can be proud of. We are not focused on extracting money FROM your collective pockets. We're here to help you discover methods for KEEPING the money your enterprise earns. If you genuinely want to know how to get more value per dollar invested in IT, while reducing the costs and risks associated with the business technology portfolio of goods, services, and contractual relationships, this is the organization for you.

We are People Who "Get Things Done"!

The Institute membership is composed of individual practitioners, those who wish to become practitioners, and those who wish to understand the value of a structured asset management process founded on cost-effective common sense principles.

SAM & ITAM practitioner members from *The Institute* represent a unique group of individuals who genuinely "get things done" on the front lines of business & industry. We do not offer corporate memberships, nor do our membership rolls include consulting firms or product reseller companies. While some of our members may serve in these firms or industries, they join us as supplier- and product-neutral practitioner individuals.

We're from All Walks of Life!

Active Members of The Institute for Technology Asset Management include, but are not limited to:

- Everyday Business People
- People Who Just Want to Understand How IT Asset Management Works Without the sales hype
- Certified Asset Management Practitioners

- Software & Copyright Compliance Assurance Professionals (SCCA)
- Software Asset Management Professionals (SAM)
- Systems Asset Managers (HAM – hardware asset managers)
- Technology Asset Management Professionals (TAM / ITAM)
- Technology Portfolio Management Professionals (TPM)
- Practitioner Candidates
- Business Owners-Operators
- Management Professionals
- Accounting Professionals
- Internal Auditing Professionals
- College & University Students
- Academic Faculty

Get the maximum value at minimal cost for your professional membership in an asset management association.

What Differentiates The Institute Credentials?

The key differentiators of *Institute* training & certifications are founded in our member-centric perspective of how you, the individual practitioner, need to prepare for service as a true professional in the field. In brief:

- *Institute* programs address the entire scope & depth of SCCA, SAM, HAM, & ITAM; not merely what the enforcement groups & software industry players want you to know.

- *The Institute* is the first to separate Software & Copyright Compliance Assurance (SCCA) infrastructure from the wide knowledge base of Software Asset Management (SAM). This allows practitioners to genuinely focus on obtaining & maintaining compliance. Get ahead of the auditors by drastically reducing your exposure to crippling punitive compliance

enforcement audit costs. Remember: Audit response is nearly always the first step an enterprise takes in building the SAM initiative. So why wait until you are targeted?

- o *Don't try to jam compliance into generalized SAM training – this level of integration virtually ignores dozens of key compliance-related competencies. The Institute gives you two certifications – SCCA & SAM for the price most certifying bodies charge for only one.*

- *Institute* programs are designed around the competencies you need to succeed. Unlike a majority of certificates that focus only on what the costly, complex, and generic "standard" recommend you accomplish, we deliver the process skills you need to genuinely do the work.

  - o *Always keep in mind: ISO 19770 does NOT detail how SAM practitioners need to be trained. This standard only details what the enterprise should have in place; and, from our perspective, it is too tightly focused on compliance & ignores the enormous range of cost reduction & value delivery options a SAM practitioner should be capable of bringing to bear. Yet, a majority of SAM training merely communicates what ISO wants you to know, not how you'll actually do the work.)*

- *Institute* programs deliver competencies that can be applied to a majority of enterprises, of any size; in a majority of industries; in a majority of countries around the world. *The Institute* doesn't deliver "minimal" or "over-night" certificates. We deliver full-blown professional credentials, as well as ongoing professional development options, that empower you to step into nearly any enterprise & hit the ground running by delivering value from day one.

- *Institute* programs are designed to deliver maximum content in an extremely cost effective manner. No other SAM, HAM, or ITAM training program comes even close to the width & breadth of *Institute* program content. Further, *Institute* programs are designed by individuals who are experienced in the field, in cooperation with professionals in the higher education fields. At long last, comprehensive asset management content is delivered in an effective professional development framework.

- *Institute* programs are the only programs in the industry that reach beyond the typical client-server, WinTell/Apple limitations of classic SAM, HAM, & ITAM training to encompass real world midrange, mainframe & other critical technical environments that true credentialed practitioners genuinely need to understand.

- *Institute* programs are built around the skill sets documented in hundreds of actual employment descriptions. We don't "guess" what you need. We know, because we constantly poll both you & the job market – and we

constantly update content to match the real world practitioner requirements.

- *Institute* programs are the first to utilize a formal Learning Management System to provide employers (and you) with third party confirmation of actual training time-on-task as well as accurately document your training history.

- *Institute* programs are not proprietary. Once credentialed, you have the ability to actually choose your own local training sources, making *Institute* credentials the only "open source" option in the industry.

- *Institute* credentials are delivered in a "stacked" framework. Instead of the typical repetitive content of existing SAM certificates, each *Institute* credential builds on the information delivered in the prior credential. No more content repetition from course to course.

- *The Institute* has established the first in industry programs that address the key professional development factors of, "Comprehensive Credentialing", "Inclusive Credentialing", and "Certificate Enhancement". More on these later in this handbook.

- And, finally, *Institute* programs – the most comprehensive programs you've never heard of – demonstrate their superior nature because, since 2002, our competitors have been following OUR lead.

- Want more? We have it. Check out our credential programs. Compare them to the alternative certificates. Prove to yourself that *The Institute* is your best choice for the "Next Generation" of SCCA, SAM, HAM, & ITAM training & credentialing!

What is Competency-Based Credentialing?

Are You Interested in Becoming a Truly Competent IT Asset Manager?

How about a significantly more effective software asset manager?

Competencies can be viewed as the total accumulation of knowledge, skills, capabilities, and experience that IT asset managers bring to bear on building their careers as well as in effectively fulfilling their job responsibilities. Truly competent professionals can reach far beyond the limitations of narrowly focused certifications. At *The Institute* we help build the pros…

We've Changed the Definition of IT Asset Management Competency!

At *The Institute*, we believe that many certificate programs have reversed the professional development process–freezing practitioners in a cycle of rote memorization and minimalist certificates that limit our potential for genuinely growing the professions and our own careers. Typical training programs begin with a wide topic, then attempt to shovel information into the certification void.

Example: A majority of our current software asset management standards have been developed by committees populated by supplier representatives along with IT personnel from major corporations. In what ways do highly complex and costly standards that essentially apply to major corporations with fully trained IT teams and near-limitless funding represent the needs and capabilities of the small- to medium-sized enterprises that make up the majority of corporate entities?

The Institute programs are unique in the industry because they are the first to focus on the actual proven personal competencies necessary to build an effective technology asset management environment–and/or an IT asset management-related career–from the bottom up.

Instead of beginning with the wide topic (software asset management standards), members of *The Institute* took a more strategic perspective and identified the specific competencies (knowledge, skills, capabilities, & experience) that a practitioner needs to become a genuinely effective software asset manager, IT asset manager, or other ITAM practitioner–and we train to those competencies. As practitioners build their unique portfolio of competencies, they apply them to the entire range of the technology asset management process framework– without limiting themselves to a single narrow (or proprietary) view and this growth curve permits them to establish a more comprehensive portfolio than what's possible when attempting to reach some arbitrary global "standard." This "reality orientation" approach to professional development empowers practitioners to serve in a more wide array of positions around the globe.

Example: When you train with *The Institute*, you are training to deliver the specific SAM & TAM/ITAM competencies employers are searching for. *The Institute* is the only provider that tracks & embeds job-specific competencies that are actually being requested by employers into its training.

Competency: Practitioners Either Know the Information, or They Don't!

For example, in the average Software Asset Management (SAM) certificate training session the participant might receive less than 15 minutes of instruction covering the types of software licenses that exist in the industry today. It is impossible to establish any level of expertise in software licensing in such a short a training period. However, with *The Institute* programs, our membership has identified a clear understanding of software license types as a core competency. Result? That same practitioner, while working toward an *Institute* SCCA and/or SAM credential, would have access to anywhere from 2 to 6 hours of knowledge detailing over 40 distinct software license types.

Do the Math: The Institute's Differences are Clear

Do you want another aspect that differentiates *The Institute* Credentials from typical "take & test" certificates? Take a look at your existing certification. Count up the number of minutes–yes, minutes–you spent on each of the competencies that came together to enable you to truly function as an effective professional in the field. Then compare those minutes to the competency requirements for an *Institute* Credential. Which practitioner is more fully qualified to perform the job?

You will discover two critical factors:

- SAM practitioners are not only under-trained, but they're also not being prepared for global services. Instead, existing certificates provide "just enough" information to appear credible. In fact, many SAM certificates have been developed and delivered by the software industry and their allies, the very people who have created our difficulties in managing the software portfolio of goods, services, and contractual relationships.

- A majority of SAM certification training is proprietary in nature, developed to lock practitioners in to costly ongoing programs that benefit the provider and/or the software industry players more than the consumer.

Certificate Enhancement Program

Wouldn't it be nice to find a professional organization that was willing to take your existing certifications &/or prior training content and apply them toward a series of significantly more advanced professional credentials? *The Institute* is that organization: Think of it as our version of the "competitive upgrade."

Here a Stand-Alone Certificate, There a Stand-Alone Certificate

- You invested too much time and money – not to mention effort – in your professional development to discover that your certification is not mobile. All too frequently in the Software asset management (SAM) & IT asset management (ITAM / TAM) certification industries, if you move on to a different or more advanced training program, your previous proprietary certification disappears.

- Worse yet, in most cases, you will be expected to begin your training all over again, from scratch—repeating courses just to gain a certification you already earned. *The Institute* has taken steps to remove these obstacles and provide you with a credentialing "home."

The IT Asset Management Competitive Upgrade

- The concept is relatively simple: When you become a member of *The Institute* we encourage you to bring your existing training vitae and certificates with you.

- Our Credential Board will review your previous training and your certificates as well as your documented experience, and help you

establish a custom professional development path toward one or more of our comprehensive credentials.

- Your past training content and time-on-task can be applied for credit toward the next level in your chosen credential.

What a concept!

- Once you join, be sure to communicate with our Credential Board to set up your personal roadmap to improving those basic certifications.

Comprehensive Credential Program

The Institute is the first community of IT asset managers in the industry to empower you to gain access to the widest range of training options in the asset management-related competencies (See TAMBOK). Via this unique "open source" professional development and credentialing process *The Institute* puts training opportunities right in your back yard.

Comprehensive Technology Asset Management Programming

The Institute announces development of the industry's only "Comprehensive" training and credentialing opportunities for practitioners. For the first time in the asset management professional development industry, the members of *The Institute* have published standard credential requirements in our Member Handbook and TAMBOK for all to view and utilize.

Gone are the days when you were limited to single source proprietary training programs in the software asset management (SAM) or technology asset management (ITAM / TAM) fields.

As well, the proprietary content shroud has been lifted from the requirements for gaining your Software Asset Management, Technology Asset Management, or related certification. For the first time, practitioners can now choose from a wide variety of credential training options.

Train as a Technology (IT) Asset Management Professional at Any Time, in Any Location

The Institute, through its publicly available Guide to the Technology Asset Management Body of Knowledge (TAMBOK) has empowered the practitioner to take personal control over their own qualification and credentialing process.

Specifically, via the TAMBOK-defined asset management processes and competencies, practitioners can take advantage of the Comprehensive Credentialing Program to attend local training programs in such venues as:

- Community Colleges and Universities
- Private Training Companies
- Internal Corporate Training Programs
- Governmental Programs
- Aligned Professional Development Programs
- And more…

Become a Competent Technology Asset Manager – From the Ground Up

The Institute comprehensive professional development programs are grounded in 14 Core Competencies that support 6 Professional Practice Areas and 4 Life

Cycle Process Groups. The key differentiation of *The Institute* credential program means that you can acquire a majority of the focused training for the "24" comprehensive professional development functions within a few miles of your home or business. The source* is up to you–and that option opens the doors to an enormous number of cost-effective local training opportunities.

Consider the local availability of just a few of the Competencies detailed in the practitioner-developed TAMBOK:

- Business Process Management & Improvement
- Software License Ts & Cs Detailing
- Communications
- Contract Negotiations
- Contract Detailing & Management
- Negotiating & Managing Microsoft / Oracle / SAP / (Etc) Agreements
- Negotiating & Managing Support & Maintenance Agreement
- Project & Program Management
- SAM & ITAM Techniques for Notebooks Thru Mainframe Systems
- IT Audit Methodologies
- Risk Management
- Automated SAM & ITAM Tools
- Software & Copyright License Detailing
- Conducting Proactive & Responsive Software License Audits
- And more…

Choose Your Own Training Venue

For the first time in the technology asset management professional development industry, you can choose your own training venue–or even develop your own in-house programming! The Institute for Technology Asset Management has brought training and content controls back into the hands of the practitioners where they belong.

*Once approved by *The Institute* Credential Board, your investment in local courses–or in-house developed courses, can be applied to your formal preparation for *The Institute* credential or credentials of your choice. To be eligible, courses must be approved–in writing–prior to attending and content must conform to requirements set forth in *The Institute* Course Development Handbook.

Inclusive Credential Program

The Institute for Technology Asset Management is the first in its industry to enable credential candidates & practitioners to apply compatible professional development training from other industries to their asset management Institute credential requirements.

Parallel Training Programs Make You a Better Technology Asset Manager

Asset Managers are recognized knowledge workers. In today's volatile job market the wise knowledge worker does not limit themselves to a single narrow service option. *The Institute* community of practitioners have stepped up to the plate to help you acquire a significantly higher level of software asset management (SAM) & technology asset management (ITAM / TAM) credibility than ever before.

We all know that no specific professional capability stands alone as the "ultimate deliverable" in the enterprise mix of professional credentials. Instead, regardless of your qualifications, the effective technology asset manager truly needs to become capable in so-called parallel professions. Our understanding of these supportive competencies enable the SAM/ITAM to integrate our efforts with an enormous range of enterprise projects & initiatives.

The Institute is the first in its industry to recognize this requirement and to provide practitioners with a credentialing program that encourages parallel training options.

It's Not Just About Technology Asset Management

In keeping with the practitioner-driven model documented in the TAMBOK, members of *The Institute* have the exclusive option to attend professional development and training programs in a wide range of related–or "parallel"–fields. While pre-session approval is required, *The Institute* will apply your time-on-task learning in these alternative programs to the requirements for the credential or credentials of your choice.

This application also applies to credential renewal. Some of the complementary programming already on *The Institute's* resource list of candidates* include select sessions of:

- Training Programs Approved by The Project Management Institute*
- Training Programs Approved by The Information Systems Audit & Control Association*
- Training Programs Approved by The Contract Management Institute*
- Training Programs Approved by The U.S. Government Accountability Office*

- Training Programs Approved by The International Institute of Business Process Analysts*

- Training Programs Approved for use in ITIL certifications*

*Note: *The Institute* is the first professional organization in our space to define and use an Inclusive Professional Development & Credentialing Model. We are not affiliated with the organizations listed in any manner. Instead, we have independently reviewed a wide range of their professional development sessions and have found that our members can benefit from their specialized expertise. While we reach out to refer the organizations on this list as resources for our members, there is no assumption of relationship or reciprocity in terms of training content.

These program options will be updated on a regular basis. Please consult the web site for current status. All trainees and/or credential candidates must gain written approval from *The Institute* for inclusive programs prior to registering and attending or the course credit may be invalidated.

Membership Facts

Your membership in a professional association is an important aspect in your career. **You must be a member of The Institute to obtain an Institute Credential**. The member practitioners within the *Institute* communities of practice differentiate our organization in a very simple manner:

"*The Institute* is not a profit-focused corporation. Nor does it accept financial support from the software license enforcement players or the technology industry suppliers of goods or services. We do not serve as a conduit between our members & supplier sales agendas.

The Institute provides cutting edge training & credentialing to practitioners – individuals who genuinely work, or wish to work, in the front lines of software asset management &/or technology asset management. Our goals & objectives are driven by member expectations & member needs – by people just like you."

Professional Membership

The Professional credentialed member category represents *The Institute's* capstone credential option. This level indicates that you have fully committed to the scope of Institute Credential Requirements for your chosen field or fields – that you are focused on achieving the top credential in the game.

You work hard to become certified in an asset management field and you deserve credit for that effort. You have a right to belong to a professional organization that looks out for your interests while helping you ensure that your qualifications are constantly kept at the leading edge of real world value delivery.

The primary credential options are based upon comprehensively upgraded versions of the two typical industry certificates available today–Software Asset Management (SAM) and Information Technology Asset Management (TAM / ITAM). However, The Institute has developed an additional unique credential that isn't available from any other provider–Software & Copyright Compliance Assurance Professional (SCCA). Essentially, your Credentialed Professional

Membership Standing would look like one of these:

- SCCA Credentialed Professional
- SAM Credentialed Professional
- ITAM Credentialed Professional

- (Or any combination / all of the above)

So? What's your preference? *The Institute* is the only organization in its industry that provides you with a range of credential options tailored to your unique professional needs. Shouldn't you expect that level of service and professional development?

Student Membership

Are you interested in getting a job after graduation?
Who isn't – right?
Could you use a few Bucks for Books?*
Who couldn't?

At The Institute for Technology Asset Management we believe in helping students in our industry put a unique edge on their academic career as well as putting an edge on their resumes that virtually every enterprise on the planet needs!

Ever Heard of the "Software Police" and the "Copyright Cops"?

Most socially aware college/university students have heard of the software piracy and music piracy actions taking place on campuses around the world.

What you most likely haven't heard about is how frequently these punitive auditing groups go after small- to medium-sized enterprises, including medical facilities, schools, and community organizations.

You are probably also not aware that these enterprises are generally not guilty of much more than ineffective management of their software & copyright-related assets. Yet, the average punitive audit costs to the enterprise can run in excess of $2,000-$5,000 (USD) per computing device.

Fewer than 10% of these enterprises are prepared to counter a music or software compliance audit. And major corporations are not much better prepared.

What if you could prepare, today, to help them tomorrow?

The Institute for Technology Asset Management provides you with a resume enhancement option that's light years ahead of what's available to other students competing for scarce jobs.

Take a Step Beyond The Degree!

The Institute offers an enormous range of both free and very low priced competency-based learning opportunities that you can leverage into a better job – now or after graduation.

What's better is that the value you gain from our programs does not require you to have a technology background or diploma. Of even more worth in this confusing job market: *The Institute* programs can be applied to nearly any degree field in any industry – around the globe.

It's Not "Just" Your Diploma!

Students holding membership in *The Institute* come from a wide range of degree programs. While admittedly some are from IT fields, a majority of the university students who belong to *The Institute* are using our programs to boost their capabilities in complimentary fields.

These fields of study include, but aren't limited to:

- Business
- Technology
- Education
- Legal
- Medicine
- Engineering
- General Studies

It's the Options You Have!

Technology asset managers are responsible for tens of billions of dollars in technology goods, services, and contractual relationships–in companies and enterprises of all sizes and in every country on the planet.

The key to the value you'll gain from *The Institute* is that a majority of enterprises (around 90%) do not currently have an effective asset management program in place. You could be the one to help establish these high visibility initiatives.

Practitioner members of *The Institute* who interact with the technology asset management industry currently represent career fields such as:

- Accounting
- Internal Audit & Control
- Finance
- Business Management
- Purchasing
- Information Technology
- Education Technology
- Medical Technology
- Teaching
- Education Administration
- Computer Science
- Legal Aid
- Law

- Administrative / Executive Assistant

What if You Could?

What if you could participate in an online learning environment where people in key business fields deliver useful cost-effective Knowledge Briefings detailing the way things are accomplished–in the real world–on the front lines of business?

Student Members of *The Institute* are there–building skills that put a unique razor edge on their resumes.

* Student Membership requires valid student identification from recognized institution of higher learning.

Check with us for details!

Here's Another Option!

Students who take the lead in establishing & maintaining an ongoing campus chapter of ITAM Knowledge can qualify for a <u>free membership</u>.

Interested in being a Leader?

Contact *The Institute* to explore establishing your own Student Chapter.

studentchapter@taminstitute.org

Obtaining Your Credential

The membership of *The Institute* has determined that, for the time being (2014-2016), Institute credentials must parallel the basic existing requirements for certification. Those requirements do not represent effective best practices in professional certification. However, to remain competitive in the industry, *The Institute* will phase in more sound credentialing practices.

At this time, and temporarily, any practitioner who attends the courses, completes the quizzes, and passes the exam will be granted an Institute SCCA or SAM credential. Please recognize, however, that *The Institute* credentials expect significantly more performance from the practitioner candidate. These "Next Generation" programs are NOT the typical take-and-test certificates of completion.

Software & Copyright Compliance Assurance Professional (SCCA) Credential

The SCCA is unique in the industry. Studies have shown that a clear majority of enterprises begin their software asset management &/or technology asset management initiatives as a result of a compliance audit. It's also been proven that the foundation set in place by an effective compliance assurance framework represents the core success, or failure, components of the entire asset management portfolio.

For these reasons, *The Institute* has separated compliance from software life cycle management. The SCCA course includes between 20 and 40 hours* of actual training and serves as the practitioner's entry point into life cycle management by empowering both the practitioner, and their enterprise, to counter the growing threats of predatory software-related auditing. Through this focused study of compliance issues, practitioners can reduce their audit exposure by as much as 70%-90% while, again, laying a more effective groundwork for the next phase of IT life cycle management improvements—the SAM.

The SCCA includes a highly comprehensive Workbook to be completed by the credential candidate. The Workbook enables the candidate to thoroughly customize the training content to their unique technology environment and enterprise culture. Actual time-on-task for the 18 training modules is the

foundation of training time. Completion of the Workbook is in addition to coursework.

Software Asset Management Professional (SAM) Credential

The SAM credential from *The Institute* is the second in our professional development series. To be eligible to attend this credentialed training, the candidate must either complete the SCCA or pass the SCCA exam.

The 16 modules within the SAM program contain over 20 hours of time-on-task training while the Workbook will add between 10 and 25 additional focus hours. As with the SCCA, the SAM Workbook is designed to channel what you learn into directly actionable strategies and practices customized to your enterprise.

The results? Once you complete the training, the Workbook, and successfully pass the exam, you will significantly more qualified than the typical SAM. Our members have estimated that the differential rests around a 400%+ increase in take-away knowledge.

Courses are available in the following formats:

- Virtual, self-paced
- Live, Instructor Led
- Combined Live, Instructor Led, with time-Bound Access to Virtual, self-paced

Examination testing is also virtual in scope & delivered via secure online access.

Credential Maintenance & Renewal

Institute credentials are valid for three (3) years from the date you passed your exam. During that three year period you are expected to continue your professional development by attending the training programs of your choice. You will be expected to complete at least 60 hours of training to renew your credential over three years.

Professional Development Units

The Institute has taken the concept of professional development (PDU) to an entirely new level of SAM and ITAM practitioner service. Through our "open source" PDU programs, *The Institute* is the first in the industry to encourage practitioners to attend an enormous range of local, regional, or international training programs – as well as online web seminars – to build competencies that directly match their own unique needs.

Through *The Institute*, you are no longer limited to a single provider of training and/or professional continuing education.

Each hour you spend training can be translated into a single professional development unit (PDU) towards your credential renewal. (A PDU is equivalent to one hour of instruction.) See graphic.

Once credentialed, the SCCA and/or SAM Professional must begin working toward completing 60 (sixty) professional development units (PDU) over a three year period to maintain their credential and qualify to renew the certification at the end of the three year cycle. Your first Certified Credential Renewal (CCR) cycle begins from the day you pass the exam. Your first certification/CCR ends on the third anniversary day of passing the exam.

To be valid, your PDUs must be delivered via an Approved Training Resource (ATR). An ATR is defined as any accredited institution of higher learning or recognized Professional Training Program. To be approved, the PDU content must apply to one or more of the fourteen (14) Key Competencies; one of the six (6) Core Practice Areas; or one or more of the four (4) recognized Industry Standards as noted in The Institute's Guide to the Technology Asset Management Body of Knowledge (TAMBOK).

Each credential holder must complete at least two (2) hours of approved training in 7 of the 14 Key Competencies and two (2) hours in any of the Core Practice Areas during their three (3) year renewal period.

Sample ATRs

Our list of ATRs does not imply any formal relationship, approval, or endorsement on our part or on the part of the identified ATR. Our member training committee has merely reviewed their training requirements and noted that those requirements match up with the competencies in the TAMBOK.

This list is NOT comprehensive. The programs provided by the following ATRs may also include online, pre-approved private, and localized training programs such as:

- b-Lay - www.b-lay.com – b-lay delivers excellent online web sessions covering a wide range of licensing issues.

- CTMS - http://www.ctms-uk.com/software-licensing/software-licensing-training - CTMS provides a wide range of licensing training programs in virtual as well as live format.

Also, due to our inclusive credentialing perspective, pre-approved ATRs include providers approved by many of the following:

- The Project Management Institute – PMI.org
- Association for Project Management – APM.org/uk
- International Association of Project Managers – AIPM.net
- Project Management Association of Japan – PMAJ.or.jp/ENG/
- Australian Institute of Project Management – AIPM.com.au
- Information Systems Audit & Control Association – ISACA.org
- Institute of Internal Auditors – na.theiia.org
- Mind Tools – mindtools.com
- Prosci - prosci.com/
- International Institute for Learning – iil.com

Recognized ATRs will be posted and updated on *The Institute* web site. Always keep in mind the minimum and maximum PDU limitations, as well as the Core Competencies, Key Practice Areas, and Standards requirements when accumulating renewal training credits.

In addition: Most accredited colleges & universities world-wide offer professional development courses as part of their continuing education programs. Many of these courses fit within the PDU requirements.

This listing of approved training resources is not comprehensive. Inclusion in the list does not constitute any formal relationship between The Institute and the resource provider. We are constantly searching for supplier-neutral professional development resources for our members and we'll keep you updated as we locate, review, and approve additional options for your training needs.

Diametric Mentoring Program

If experience is the most effective teacher, then why don't more professional organizations emphasize shared experiences? The Institute for Technology Asset Management is the first to offer software asset managers & technology asset managers a credible mentoring program.

You Can't Learn SAM or ITAM in a Vacuum

One of the most endearing comments we've heard from individuals who have attended our professional development programs is this:

"Thank you… I am not alone anymore!"

At *The Institute*, practitioner members have consistently recognized that the average IT asset manager has been traditionally isolated–on the job and in terms of their professional development opportunities. That's a major criteria behind the growth of our Comprehensive Credentialing and Inclusive Professional Development programming perspectives.

But, more vitally, asset managers need a place – a trusted partner, a person – to turn to for questions and agenda-free answers. The Institute's Diametric Mentoring Program provides precisely that personal touch, but, as you may have come to expect, with a typically unique *Institute* twist.

At *The Institute*, Mentoring Is a Two-Way Street

Only at The Institute for Technology Asset Management will you find a two way mentoring program: one that not only encourages experienced IT asset

managers to mentor novices but also a mentoring process that encourages novices to provide their own vital—and, frequently, refreshingly unexpected—perspectives to their mentor as well as the organization.

Ever wonder how come *The Institute* has delivered the majority of IT asset management professional development firsts?

Think: Diametric Mentoring!

That's right: We actually LISTEN to what our members are saying!

Code of Professional & Ethical Behavior

Through our comprehensive Code of Ethics and Professional Behavior the members of The Institute for Technology Asset Management recognize their responsibilities to one another and to the businesses and industries they serve.

We Live & Work Ethically

The members of *The Institute* have recognized the need to establish and maintain a code of professional ethical conduct. As asset managers [be it software & copyright compliance assurance (SCCA), software asset management (SAM), hardware asset management (HAM), or IT asset management (ITAM)], we understand that our actions represent not only our enterprises but also the profession as a whole.

Our activities, our ethics, our conduct, and our perspectives reflect our commitment to excellence in practice as well as theory. Our attitudes toward such issues as software piracy, license compliance, intellectual property, budgetary oversight, honest and ethical communications, and mutual respect are the foundations of our personal and professional accountability. To these ends…

Our Code Is Global in Scope but Personal in Practice

The Institute Code of Professional Conduct has been developed through extensive review of existing professional codes as well as through communications with practitioners in the field. We have taken as our primary guideline the Caux Round Table (CRT) which has been established and recognized by successful business leaders from Europe, Japan, and the United States.

The Round Table was founded in 1986 by Frederik Philips, former President of Philips Electronics, and Olivier Giscard d'Estaing, Vice-Chairman of INSEAD in "…the belief that the world business community should play an important role in improving economic and social conditions. The CRT aims to express a world standard against which business behavior can be measured."

Source: Caux Round Table

In brief, the CRT covers the following principles:

1. Respect Stakeholders Beyond Shareholders
2. Contribute to Economic, Social, & Environmental Development
3. Build Trust by Going Beyond the Letter of the Law
4. Respect Rules & Conventions
5. Support Responsible Globalization
6. Respect the Environment
7. Avoid Illicit Activities

The Institute community of practitioners believes in and endeavors to govern our behavior according to a specific range of core ethical expectations. Read and follow the CRT. It's one of the critical differentiators separating us from the rising numbers of partially qualified asset managers.