

The SAM Toolkit Sample Pack

Preview the deliverables a SAM pro actually builds

A guided preview of the real artifacts you create with the right software asset management tools. See working samples of the core deliverables — and exactly how each one is built, read and adapted for your own organisation.

INSIDE THIS SAMPLE PACK

- ✓ A sample software licence register and a licence-types cheat sheet
- ✓ A vendor scorecard and a compliance event plan template preview
- ✓ A SaaS and cloud asset policy outline you can adapt at work
- ✓ How each deliverable is built, read and connected to the others

How to use this sample pack

This pack previews the deliverables a working software asset manager produces — the documents and registers that turn SAM from an idea into day-to-day practice. Each preview shows a realistic sample, a short guide to building it, and notes on adapting it where you work.

The samples are deliberately simplified to teach the shape of each artifact. The full, editable versions live inside the GSDC SAM toolkit; use these previews to understand what "good" looks like before you build your own.

THE FIVE DELIVERABLES YOU'LL PREVIEW

Tool 1	Software Licence Register — the master record of what you own and run
Tool 2	Licence-Types Cheat Sheet — how to recognise and count each model
Tool 3	Vendor Scorecard — rate and compare your software vendors objectively
Tool 4	Compliance Event Plan — a ready response for an audit or true-up
Tool 5	SaaS & Cloud Asset Policy — govern subscriptions before they sprawl

TOOL ONE

The Software Licence Register

The single most important SAM deliverable. It's the master record that answers the core question: what software do we own, what is deployed, and are the two in balance?

Sample: Software Licence Register

A licence register tracks every software title against what you're entitled to and what's actually installed. Here's a simplified preview with sample rows.

Software Licence Register							SAMPLE
Software	Vendor	Model	Entitled	Installed	Status	Renewal	
Office Suite	Vendor A	Per-user	250	241	Compliant	Mar	
Design Pro	Vendor B	Per-device	40	52	Over-deployed	Jul	
Database Std	Vendor C	Per-core	16	16	Compliant	Nov	
Analytics	Vendor D	Subscription	30	11	Over-licensed	Jan	
Security Ag.	Vendor E	Per-device	500	498	Compliant	Sep	

Two problems jump out instantly: Design Pro is **over-deployed** (a compliance risk), while Analytics is **over-licensed** (wasted spend). That's the register doing its job — surfacing both before a vendor or a budget review does.

These samples come from the full toolkit

RELATED

What you're previewing here is built into the GSDC SAM certification. Get the complete, work-ready toolkit by enrolling in the pathway.

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Building it: the column guide

A register is only as useful as its discipline. Each column captures one decision-grade fact. Here's what every field is for and how to keep it honest.

Software	The product name and edition — edition matters, as licensing often differs between them.
Vendor	Who you bought it from and who could audit you. Group rows by vendor for audit prep.
Model	The licensing metric (per-user, per-device, per-core, subscription) — this drives the count.
Entitled	How many you're licensed for, taken from proof of purchase, not memory.
Installed	How many are actually deployed, ideally from a discovery tool rather than a guess.
Status	The verdict: compliant, over-deployed (risk) or over-licensed (waste).
Renewal	When the contract is next due, so decisions are made before, not after, the deadline.

The golden rule

Entitled comes from contracts; installed comes from discovery. If either column is filled from memory, the register will quietly lie to you. Trustworthy data is the whole point.

TOOL TWO

The Licence-Types Cheat Sheet

Miscounting a licence model is the most common cause of compliance gaps. This one-page reference keeps the models — and how to count each — at your fingertips.

Sample: Licence-Types Cheat Sheet

Keep this beside you when reconciling. Each row tells you what the model means, how you count it, and the trap to avoid.

Licence-Types Cheat Sheet SAMPLE			
Model	You're paying for...	Count by	Watch out for
Per-user (named)	Each named person	Unique users	Shared logins hiding real user counts
Per-device	Each machine	Installed devices	One user, many devices
Per-core / capacity	Hardware power	Cores or processors	Virtualisation multiplying the count
Subscription	Time-bound access	Active seats	Auto-renewal & idle seats
Perpetual	One version forever	Installs of that version	Paying again for upgrades
Concurrent	Simultaneous users	Peak concurrent use	Undersizing the shared pool

The "count by" column is the heart of it. Pick the wrong basis and even a careful register will be wrong — which is exactly how accidental non-compliance happens.

LIMITED TIME

Unlock every template, not just the samples

Enrolment is open for a limited time. Move from these previews to the full set of SAM tools, templates and resources you can use at work.

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Quick-reference: counting rules

When you're unsure which way a count should go, these rules of thumb resolve most everyday cases.

- **Match the metric to the model.** Always count in the unit the licence is sold in — users, devices, cores or concurrent sessions — never a convenient substitute.
- **Count what's deployed, not what's used.** For most models, an installation counts whether or not anyone opens it. Usage matters for reclaiming, not for compliance.
- **Mind virtualisation.** Virtual machines and shared hosts can multiply a per-core count fast. Check the vendor's specific virtualisation rules.
- **Treat cloud as time-bound.** Subscriptions lapse when unpaid, so an old record can overstate what you actually hold today.
- **When in doubt, read the agreement.** The contract wording always wins over any rule of thumb — including these.

REMEMBER

The cheat sheet tells you *how* to count; the licence agreement tells you the *exact* rules. Use the first for speed and the second for certainty.

TOOL THREE

The Vendor Scorecard

Not all software vendors carry equal risk or value. A scorecard lets you rate them on consistent criteria, so decisions about renewals and audits are based on evidence, not impressions.

Sample: Vendor Scorecard

Score each vendor 1–5 across a few weighted criteria to get a single comparable figure. Here's a worked sample for one vendor.

Vendor Scorecard — Vendor B			
Criterion	Weight	Score (1–5)	Weighted
Audit aggressiveness	30%	2	0.60
Licensing complexity	25%	2	0.50
Spend with this vendor	20%	4	0.80
Contract flexibility	15%	3	0.45
Support & relationship	10%	4	0.40
Overall	100%		2.75 / 5

A low score on "audit aggressiveness" and "licensing complexity" flags Vendor B as higher-risk — a clear signal to keep their licence data especially tight and audit-ready.

Reading the scorecard

A scorecard's value isn't the number — it's the conversation the number starts. Here's how to turn scores into action.

High-risk signals

- ✗ Known for aggressive audits
- ✗ Complex, easily-misread licensing
- ✗ Large or growing spend
- ✗ Rigid, unfavourable contracts

What to do about them

- ✓ Keep their register data audit-ready
- ✓ Double-check every count against the contract
- ✓ Prioritise them at renewal negotiations
- ✓ Review their terms before they review you

Scored consistently across all your vendors, the scorecard tells you exactly where to spend your limited attention first — which is the essence of managing risk well.

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TOOL FOUR

The Compliance Event Plan

When an audit notice or true-up request arrives, panic is expensive. A pre-built event plan turns a stressful surprise into a calm, rehearsed process.

Sample: Compliance Event Plan

A compliance event plan is a phased playbook for responding to an audit or true-up. Here's the shape of one, ready to adapt.

Compliance Event Plan SAMPLE		
Phase	What happens	Your move
1. Notice	Vendor sends an audit / true-up request	Acknowledge; confirm scope & timeline in writing
2. Mobilise	You assemble the response team	Assign a lead; gather contracts & the register
3. Self-assess	You check before they do	Run your own reconciliation; find gaps first
4. Respond	You submit data to the vendor	Provide only what's in scope; keep records
5. Settle	Findings are negotiated	Challenge errors; negotiate from your own data
6. Improve	The event closes	Fix the root cause so it doesn't recur

The decisive phase is #3: a team that self-assesses before responding controls the narrative. A team that waits to be told its gaps is negotiating blind.

Who does what in an event

A plan without owners is just a wish. Decide these roles *before* an event, not during one.

SAM lead

Owns the response, runs the reconciliation, and is the single point of contact with the vendor.

Procurement

Supplies contracts and proof of purchase, and leads any commercial negotiation on findings.

IT / Infrastructure

Provides installation and deployment data, and explains the technical environment.

Response lead named and contactable

All relevant contracts located and current

Register reconciled within the audit scope

A single, agreed data set ready to submit

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TOOL FIVE

The SaaS & Cloud Asset Policy

Cloud and subscription software sprawls quietly — bought on cards, forgotten, and renewed on autopilot. A simple policy keeps it visible and under control.

Outline: SaaS & Cloud Asset Policy

A good policy is short enough to be read and clear enough to be followed. Here's a sensible section structure you can adapt at work.

SaaS & Cloud Asset Policy — Outline

SAMPLE

- 1 Purpose & scope** — what the policy covers (all SaaS and cloud subscriptions) and why.
- 2 Approval & procurement** — how new subscriptions must be requested and approved before purchase.
- 3 Central register** — every subscription is recorded, with an owner, renewal date and cost centre.
- 4 Ownership** — each tool has a named business owner accountable for its use and renewal.
- 5 Renewal & review** — subscriptions are reviewed for value before auto-renewal, not after.
- 6 Offboarding** — access is removed and seats reclaimed when people or projects end.
- 7 Security & data** — minimum requirements before company data goes into any cloud tool.

The two sections that save the most money are #2 (approval before purchase) and #5 (review before renewal). Together they stop sprawl at both ends of the lifecycle.

Sample clauses you can adapt

Plain-language clauses are easier to follow than legalese. Here are a few you can lift and adjust.

SaaS & Cloud Asset Policy — Sample Clauses

SAMPLE

APPROVAL

No SaaS subscription may be purchased on a personal or company card without prior approval and registration in the central SaaS register.

OWNERSHIP

Every active subscription must have a named business owner responsible for its usage, security and renewal decision.

RENEWAL REVIEW

Subscriptions over a set value must be reviewed for continued need and right-sizing at least 30 days before any auto-renewal date.

OFFBOARDING

When an employee leaves or a project ends, their SaaS access must be revoked and the freed seats recorded as reclaimable.

Adapt the thresholds and approvers to your organisation, but keep the clauses short. A policy people actually read is worth more than a perfect one they ignore.

50% OFF

Templates you can use on Monday

The full toolkit turns these previews into editable, work-ready deliverables. Get them — plus the certification — now at 50% off.

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How the five deliverables connect

These aren't five separate documents — they're one connected system. Each feeds the next.

- 1 **The register** holds the truth about what you own and run — the foundation everything else draws on.
- 2 **The cheat sheet** makes sure the register's counts are right by getting every licence model counted correctly.
- 3 **The scorecard** reads across the register to tell you which vendors deserve the most attention.
- 4 **The event plan** uses the register and scores to respond calmly when a high-risk vendor comes knocking.
- 5 **The SaaS policy** feeds new cloud tools into the register cleanly, so the whole system stays current.

Build them together and they reinforce one another. Build the register first — without it, the other four have nothing solid to stand on.

The toolkit in a real week

Here's how these deliverables show up in an ordinary week for a software asset manager.

A WEEK WITH THE TOOLKIT	
Mon	Update the register with last week's new purchases and installs
Tue	Reconcile a tricky title using the cheat sheet to get the count right
Wed	Review a renewal flagged by the vendor scorecard as high-risk
Thu	A vendor audit notice arrives — open the compliance event plan
Fri	Register three new SaaS tools under the cloud asset policy

No single task is complicated. The skill is in keeping all five deliverables current and connected — which is precisely what a structured toolkit makes manageable.

From sample to mastery

These previews show the shape of each deliverable. The full toolkit — and the certification it comes with — adds the depth that turns a beginner's version into a professional's.

This sample pack gives you

- ✓ The structure of each deliverable
- ✓ Worked, realistic examples
- ✓ The logic behind each field
- ✓ Confidence to start building

The full toolkit adds

- ✓ Editable, work-ready templates
- ✓ The reasoning tested in the exam
- ✓ Coverage of every licensing nuance
- ✓ A recognised credential to prove it

Previews build familiarity; the certification builds mastery — and the proof that you have it.

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A credential recognised worldwide

GSDC is an independent, vendor-neutral certification body trusted across industries. Pair the toolkit with a globally respected SAM credential.

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PUTTING IT TO WORK

Build These For Real

Knowing the shape of a deliverable and being able to produce one under real conditions are different things. This final part helps you bridge that gap.

The deliverables checklist

A competent SAM professional can produce all of these from scratch. Treat this as a portfolio to build — each one is something you can show an employer.

A software licence register with accurate entitled vs installed counts

A licence-types cheat sheet you can apply to any title

A vendor scorecard ranking your vendors by risk and value

A compliance event plan with named roles and clear phases

A SaaS & cloud asset policy adapted to your organisation

A reconciliation that correctly identifies over- and under-licensing

Build these for a real or sample organisation and you'll have something far more persuasive than a line on a CV: evidence you can do the work.

How these map to the certification

Each deliverable in this pack exercises a skill the GSDC CSAM certification teaches and assesses. The toolkit and the syllabus are two sides of the same coin.

Deliverable	Skill it proves
Licence register	Entitlement & deployment tracking; reconciliation
Cheat sheet	Mastery of licensing models and counting
Vendor scorecard	Risk assessment and prioritisation
Event plan	Audit and compliance management
SaaS policy	Governance and lifecycle control

Learn to build the deliverables and you're learning the syllabus by doing — the most durable way to prepare for both the exam and the job.

Built around the certification syllabus

50% OFF

Every deliverable here maps to a skill the CSAM certification teaches and tests. Get the full, syllabus-aligned toolkit now at 50% off.

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Common mistakes (and fixes)

A few predictable errors undermine these deliverables. Spot them early.

The mistake

- ✗ Filling the register from memory
- ✗ Counting every model the same way
- ✗ A scorecard with no weights
- ✗ Writing the event plan during the event
- ✗ A SaaS policy nobody can find

The fix

- ✓ Use contracts and discovery data
- ✓ Apply the cheat sheet per model
- ✓ Weight criteria by real impact
- ✓ Write and rehearse it in advance
- ✓ Publish it where requests happen

Every fix comes back to the same principle: good SAM deliverables run on accurate data and clear ownership, decided ahead of time.

Adapting the templates to your org

These samples are starting points, not finished products. Tailor them with a light touch.

- **Match the scale.** A five-row register works for a small team; a large enterprise needs grouping by vendor, business unit and contract.
- **Keep the columns that drive decisions.** Add fields only if they change what you'd do — extra columns nobody maintains are worse than none.
- **Set thresholds that fit your spend.** The renewal-review trigger and scorecard weights should reflect your own risk appetite.
- **Name real owners.** Replace generic roles with actual people, or the deliverable won't survive contact with a busy week.

The best version of each template is the one your organisation will actually keep up to date.

Quick-start: your first three deliverables

Don't try to build all five at once. Start here, in this order, and you'll have a working SAM practice within a week.

BUILD THESE FIRST

First	The register	Even a rough one beats none — list your top 10 titles, entitled vs installed
Second	The cheat sheet	So every count in that register is done on the right basis
Third	The scorecard	Rank those vendors so you know which to tighten up first

With those three in place, the compliance event plan and SaaS policy become straightforward additions rather than daunting projects.

The toolkit on one page

Five deliverables, one connected system. Pin this where you build.

Register	The master record — entitled vs installed for every title
Cheat sheet	How to recognise and correctly count each licence model
Scorecard	Rate vendors by risk and value to focus your attention
Event plan	A rehearsed, phased response to any audit or true-up
SaaS policy	Govern cloud subscriptions from approval to offboarding

THE THREAD THAT TIES THEM TOGETHER

Accurate data and clear ownership. Get those two right and every deliverable in this pack becomes genuinely useful.

Where the certification fits

This sample pack previews the deliverables; the **GSDC Certified Software Asset Manager (CSAM)** certification — and its full toolkit — is where you get the complete, editable versions and the depth to use them with confidence.

The toolkit is offered through the Global Skill Development Council, an independent, vendor-neutral certification body. You study at your own pace with the materials and templates provided, sit an online exam, and earn a credential aligned with widely used best-practice frameworks such as ITIL, ISO/IEC 20000 and COBIT — proof that you can build and use these deliverables for real.

You've seen the samples

The next step is the full toolkit and the credential that comes with it — everything you need to turn these previews into deliverables you build at work.

From samples to the real thing

ENDS SOON

You've seen the previews — now build the real deliverables. Enrol in the GSDC Certified Software Asset Manager certification before this offer ends.

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