



# ITAM Tool Implementation Checklist

Keep in mind that this is just a template; edit it according to your specific needs.



 People involved

 Due date

## 1 Designing the strategy



Define the objectives for the new ITAM system and agree on how they will be accomplished.



Design strategy around best practice guidelines such as ITIL and COBIT.



Include process steps that support both HAM and SAM process activities.



Ensure all relevant stakeholders have reviewed and approved the strategy.



Engage in supporting practices such as the service desk, change enablement, and IT security.



Align your strategy with your current GRC objectives.



Engage the business or other voice of the customer.



## 2 Identifying assets and creating a baseline



Conduct an inventory of all IT assets.



Verify asset inventory against existing documentation.



Verify asset ownership.



Reconcile licensing information against existing documentation.



Verify asset usage against the relevant organizational units.



## 3 Implementing a toolset



Create a deployment plan.



Confirm integration with your service desk or ITSM tool.



Confirm integration with third-party applications.



Ensure everything is codified in the appropriate SLAs and contracts.



Check and double-check your core functionality against your requirements and overall objectives.



**4 Preparing for an audit**

Create a plan.

Ensure the audit schedule is captured in the ITAM tool.

Ensure all colleagues are trained in audit activities.

Conduct internal audits before the vendor audit takes place.

Capture any findings and nonconformities in an improvement register to prioritize and address them before the vendor audit.

**5 Integrating with other teams**

Integrate your ITAM practice with Change Enablement processes.

Verify alignment with Governance, Risk, and Compliance objectives.

Design your ITAM practice keeping Finance requirements in mind.

Combine your ITAM efforts with the service desk and the technical teams activities.

Integrate ITAM with the organization's Incident Management practice.

Establish the necessary processes to align ITAM and Request Management.

## 6 Continual improvement



Measure the performance and confirm all performance criteria are met.



Create a process with support teams to update incorrect asset data in real time when logging incidents or requests.



Create close criteria with change enablement so a change can only be marked as successful when the asset information is updated.



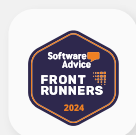
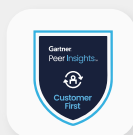
Combine your ITAM efforts with the service desk and the technical teams activities.



Integrate ITAM with the organization's Incident Management practice.



Engage with IT Security so that any security incidents are automatically linked to an asset or service so they can be managed more effectively.



InvGate  
Asset Management

### Take a test run of the best ITAM software out there



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Product tour

InvGate is a great fit for organizations of all sizes and industries



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