

ITAM by design: a practical enterprise guide

One connected IT & mobility asset lifecycle

An executive whitepaper for CIOs, procurement leaders, finance teams and organisations managing hardware, software and mobile estates.

Visibility

Build a trusted picture of what you own, where it is and who is accountable.

Control

Connect procurement, deployment, licensing, maintenance and retirement decisions.

Value

Consider redeployment and second-life routes before new purchases or disposal.

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Procurement · ITAM · HAM · SAM · ITAD · Asset Recovery

October 2026 | Practical guidance, not legal advice or a certification standard. Outcomes depend on estate quality, implementation and local requirements.

01 / What ITAM really covers

IT asset management (ITAM) combines people, processes and reliable data to govern technology across its useful life. Inventory is a starting point; ITAM also connects ownership, cost, contractual rights, business use and disposition evidence.

ITAM, HAM and SAM

Hardware asset management (HAM) governs physical devices, stock, assignment and condition. Software asset management (SAM) governs software usage, entitlements, subscriptions and contractual compliance. ITAM brings them together with finance, security and service management.

Discovery is evidence, not the whole inventory

Network scans, endpoint tools and cloud consoles show different parts of the estate. Offline stock, leased equipment and remote devices may be missed. Reconcile discovery with procurement records, physical checks and assignment history.

ITAM is not the same as a CMDB

A configuration management database (CMDB) focuses on configuration items and service relationships. An asset register focuses on commercial ownership and lifecycle control. Agree which system owns each field and how changes reconcile.

An illustrative situation

A business plans a laptop refresh. Purchase records show devices still in use, endpoint data shows fewer active devices and a storeroom contains unassigned stock. Reconciliation may reveal reuse opportunities before a new order. This is an example, not a client result.

Executive questions

Can we explain the difference between purchased, discovered and assigned assets? Who owns exceptions? Are licence rights and retirement evidence available when needed?

02 / Connect the lifecycle

These fourteen stages represent a connected consulting lifecycle. Assign an accountable owner and required evidence at each handover; the sequence may vary by asset type and business need.

Stage	Essential control
Requirement & specification	Business need, approved standard and budget
Procurement & negotiation	Lifecycle cost, support and exit terms
Vendor management	Contract owner and supplier obligations
Deployment	Serial number, user and location
ITAM / HAM / SAM	Reconciled records and licence position
Maintenance / refresh	Condition, warranty and support risk
Redeployment	Return, sanitise, reimage and reassign
Decommissioning	Authorised scope and serialised list
ITAD	Provider checks and custody evidence
Data erasure & compliance	Verified sanitisation or destruction records
Asset recovery	Transparent grading and valuation
Remarketing / liquidation	Approved channel and proceeds reconciliation
Second-life deployment	Traceable reuse and destination
Recycling	Authorised processor and disposition records

03 / Build one trusted asset register

Define the record

Start with a stable identifier, serial number, asset category, owner, assigned user, location, status, acquisition date and cost, vendor, warranty or support end date, and retirement evidence reference. Store personal data only where necessary and restrict access.

Reconcile sources

Compare purchasing and finance records with endpoint discovery, software inventories, cloud subscriptions, stock records and physical verification. Match records using reliable identifiers; do not treat hostname alone as permanent identity.

Resolve exceptions

Create an exception queue for duplicate records, missing serials, unexplained offline assets and conflicting assignments. Give each exception an owner, due date and resolution evidence. Report exceptions alongside inventory totals.

Control joiners, movers and leavers

Connect device issuance and return to employee workflows. Capture acceptance, location changes, remote returns and reassignment. Returned equipment needs assessment and sanitisation before reuse.

Set useful measures

Track inventory reconciliation coverage, unassigned stock, overdue returns, warranty exposure and missing retirement evidence. Define the numerator, denominator and review cadence before setting targets.

A practical first deliverable

Choose a manageable pilot, such as one office or one device category. Produce a reconciled baseline, an exception list and a named process owner before expanding.

04 / Make better cost and risk decisions

Software and subscription governance

Reconcile deployments and user access with purchased entitlements and actual agreement terms. An effective licence position depends on product rules, versions, metrics and rights. Review unused subscriptions, but check restrictions before changing agreements.

Procurement and total lifecycle cost

Compare bids on acquisition, deployment, support, downtime, financing, refresh and retirement costs, not unit price alone. Negotiate support, repair turnaround, return and end-of-life obligations before committing.

Refresh based on evidence

Use device health, user needs, warranty status, security support and repair economics. Assess idle stock for redeployment before replacement. A universal age-based refresh rule is rarely sufficient.

Secure retirement and ITAD

Approve the retirement list, choose suitable providers, record serialised collection and custody handovers, verify receipt, and reconcile each asset to sanitisation or destruction evidence and final disposition.

Recovery without compromising security

Grade assets transparently, compare channel economics, control resale and reconcile proceeds. Consider redeployment, refurbishment and second-life use; route material unsuitable for reuse through appropriate authorised processors.

Evidence and standards

Consult applicable versions of NIST SP 800-88 for media sanitisation, ISO/IEC 19770-1 for ITAM management-system requirements, vendor licensing agreements and local environmental rules. Requirements differ by jurisdiction; seek qualified legal or compliance advice when necessary.

05 / A practical 90-day starting plan

Days 1-30: establish the baseline

Agree scope and executive sponsor. Identify data owners, collect source records and map high-risk gaps. Reconcile a pilot estate and document assumptions. Deliver: baseline register, exception queue and initial risk priorities.

Days 31-60: connect the controls

Define assignment, return, transfer and retirement workflows. Agree procurement and licence reconciliation responsibilities. Review warranties, idle stock and retirement providers. Deliver: owner matrix, process controls and prioritised actions.

Days 61-90: operate and improve

Run a review cycle with IT, finance, procurement and security. Close pilot exceptions, test evidence completeness and agree wider rollout. Deliver: executive dashboard, improvement backlog and practical roadmap. Timing is illustrative, not a fixed engagement promise.

Executive readiness checklist

- ☐ Named sponsor and accountable lifecycle owners
- ☐ Reconciled inventory with documented exceptions
- ☐ Software rights and renewal calendar understood
- ☐ Device returns and redeployment controlled
- ☐ Warranty and end-of-support exposure visible
- ☐ Serialised ITAD custody and sanitisation evidence
- ☐ Recovery proceeds and final destinations reconciled

Start your company briefing

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