Customer Success Story

# A global investment management organization upgrades ServiceNow SAM business practices

## The Customer's Challenge

A global investment management organization wished to enhance the maturity of its software asset management processes and capabilities by taking advantage of recent ServiceNow SAM advancements.

The customer engaged Windward to comprehensively assess its current state, align current processes with evolving product capabilities, identify value opportunities, and educate its team on effectively utilizing ServiceNow SAM's latest features.

## Windward's Solution

Windward facilitated working sessions with key SAM and platform stakeholders to review the current state, existing configurations, use cases, and SAM-related plans to ensure efficient delivery and rapid results.

Windward analyzed the discovered information against current best practices guidance and ServiceNow SAM capabilities, identifying opportunities to improve tools, integrations, and processes. Windward recommended actionable COAs with estimated costs and benefits, advancing the health and performance of the customer's SAM practices.

Windward analyzed findings regarding the Coupa and ServiceNow systems and designed Coupa-ServiceNow integration. This included systems configurations, data mappings, triggers, processing, and process enhancements to best leverage integrated systems. They also delivered project close-out activities, summarizing work delivered and suggesting next steps.

## Results Achieved

Enhanced maturity within the customer's ServiceNow SAM operations, resulting in streamlined processes and improved efficiency.

Implemented and optimized tools, integrations, and processes based on current best practices and ServiceNow SAM capabilities.

Automated manual processes, resulting in increased accuracy, reduced manual effort, and improved overall performance.

Improved health and performance of the customer's SAM practices, leading to better compliance, cost optimization, and risk management.

Empowered the SAM team with coaching on best practice usage of ServiceNow SAM capabilities, ensuring ongoing success and adoption of new features.

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