

# 2025 Procurement–ITAM Integration Checklist

Streamlining processes for optimal results

## Stage 1: Foundations

Establish a solid base for integrating Procurement and IT Asset Management (ITAM). This stage focuses on setting up the necessary frameworks and understanding current processes.

- ☐ Define clear objectives for Procurement-ITAM integration.
- ☐ Identify key stakeholders from both the Procurement and IT departments.
- ☐ Document current Procurement and ITAM processes.
- ☐ Assess existing IT asset inventory and data quality.
- ☐ Establish a communication plan between Procurement and ITAM teams.

## Stage 2: Integration

Focus on creating seamless workflows between Procurement and ITAM. This ensures that asset information flows smoothly from the point of purchase to management and disposal.

- ☐ Integrate Procurement systems with ITAM tools.
- ☐ Automate data transfer between systems where possible.
- ☐ Develop a unified asset lifecycle management process.
- ☐ Implement a standardized asset tagging and identification system.
- ☐ Create a central repository for all asset-related information.

## Stage 3: Automation

Automate routine tasks to improve efficiency and reduce manual errors. This stage leverages technology to streamline asset management.

- ☐ Automate asset discovery and inventory updates.
- ☐ Implement automated contract management for software licenses.
- ☐ Automate software license reconciliation.
- ☐ Set up automated alerts for asset compliance issues.
- ☐ Automate the process for requesting and provisioning new assets.

## Stage 4: Compliance & Governance

Ensure compliance with regulatory requirements and internal policies. This stage focuses on establishing robust governance structures and audit trails.

- ☐ Establish a formal ITAM policy that aligns with Procurement processes.
- ☐ Implement regular audits of IT assets.
- ☐ Track and manage software license compliance.
- ☐ Ensure data privacy and security compliance.
- ☐ Develop a process for handling non-compliant assets.

## Stage 5: Optimization

Continuously improve the integration and processes. This involves analyzing data, identifying areas for improvement, and implementing changes to optimize asset utilization and reduce costs.

- ☐ Analyze asset utilization data to identify cost-saving opportunities.
- ☐ Optimize software license usage based on actual needs.
- ☐ Implement a process for asset retirement and disposal.
- ☐ Regularly review and update Procurement-ITAM processes.
- ☐ Track and report on key performance indicators (KPIs) related to asset management.

## Quick Wins Checklist for 2025

Achieve immediate benefits by focusing on these high-impact, easily implementable actions.

- ☐ Standardize asset naming conventions across Procurement and ITAM.
- ☐ Implement a simple asset tracking system using spreadsheets or basic tools.

- ❑ Establish a monthly meeting between Procurement and ITAM teams.
- ❑ Identify and eliminate redundant software licenses.
- ❑ Document a basic asset lifecycle process.

Learn more about procurement-ITAM integrations at [EZO AssetSonar](#)

