



**COMPANION
DATA SERVICES®**

A CELERIAN GROUP COMPANY

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Case Study: A Multi Year Transformation of Software Asset Management Through CDS Lifecycle Governance

Client Challenge & Initial Engagement

In 2021, a large federal agency engaged Companion Data Service, LLC (CDS) to address audit infractions to software license compliance. The agency required expert Software Asset Management (SAM) capabilities to reduce risk, strengthen governance and align software usage with contractual obligations.

CDS began by stabilizing the foundation of the program. Early efforts focused on strengthening software request workflows, improving governance and aligning operational practices with existing license agreements. These actions reduced immediate audit exposure and established consistent controls across the software estate.

Program Expansion & Operational Maturity

By 2022, CDS introduced a tool agnostic, full lifecycle software governance model. This approach enabled rapid program expansion and delivered the agency's first Effective License Position (ELP), a validated view of license entitlements versus consumption. The expanded scope introduced more granular data, enabling Financial Operations (FinOps) reporting and supporting cost optimization. CDS also implemented repeatable processes to manage ad hoc licensing and data requests. Each milestone increased visibility, control and compliance confidence.

Addressing Critical Gaps & Transitioning to Managed Services

In 2023, CDS further expanded the engagement to resolve two major operational gaps. The first was remediation of missing discovery agents across cloud environments. The second was the introduction of baseline license analyses to support contract renewals or potential realignment under CDS controlled agreements. These baselines provided executives with reliable decision support data and improved long-term planning accuracy.

By 2024, the agency demonstrated strong confidence in CDS' capabilities and transitioned full contractual responsibility to CDS as a Managed Service Provider (MSP) for the next 4 years. Under this model, CDS assumed responsibility for correcting missing agents, performing monthly internal baselining and preparing comprehensive data packages for official vendor reporting in 2025.

Program Outcomes & Business Impact

The SAM program reached full maturity in 2025. CDS submitted official contract reporting through a vendor sponsored reporting program using CDS-generated data. Reports for calendar year 2025 accepted with zero audit consequences. The strengthened governance model also enabled chargeback reporting, allowing the agency to allocate to MSP-related cost contractors and FinOps best practices. Discovery agent management became part of the standard operational cadence, and the software vendor agreed that CDS High Water Mark activities are in alignment with the vendor's current published guidance.

This multi year engagement demonstrates how CDS delivers measurable value through tool agnostic, full lifecycle software governance. By transforming SAM from a reactive compliance requirement into a strategic enterprise capability, CDS helped the agency improve financial accountability, reduce risk and gain long term operational confidence.

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