ESI's Educational Series offers robust training comprised of information from all ESI resources to ensure consistency across all components. The series benefits the ESI and DoD IT buying community—SPMs and KOs within ESI and Program Managers across the DoD—as well as ordering offices.

Course Title

Commercial Software Licensing

Chapter 1: Software Industry Ecosystem
• IT Environment Building Blocks
• Software Product Categories
• Key Industry Participants
• The Importance of Intellectual Property

Chapter 2: Software Publisher Organization & Operation
• Organizational Models
• Financial Metrics
• Who Gets Credit for Revenue and Why
• Emerging vs. Mature Software Companies
• Revenue Recognition/Compliance Issues

Chapter 3: Software Publisher Sales Strategies & Tactics
• Direct vs. Indirect Sales Models
• Sales Management and Processes
• Sales Compensation
• Impacts on Channel Pricing
• Sales Approach Impacts on

Chapter 4: Software Publisher Products & Services
• Software Types and Categories
• Open Source Software
• Software and Licensing Terminology
• Publisher Services
• Maintenance & Support Services
• Service Level Agreements (SLAs)
• How and Why SLAs Matter

Chapter 5: Pricing Models
• Comparing License Types
• Defining License Pricing Models
• Alternative License Models
• Publisher Channel Pricing Models
• ESI Pricing Portal Demo
• Benchmark Pricing

Chapter 6: Contract Terms & Conditions
• Contract Structure
• Key Terms and Conditions
• Key GSA and BPA Considerations
• Hot Buttons for Publishers
• Hot Buttons for Government Buyers
• Source Code Escrow
• Publisher vs. Reseller Obligations

Chapter 7: End User License Agreements (EULAs)
• Overview of EULAs
• COTS Software License Framework
• ESI Blanket Purchase Agreement and Order
• EULAs vs. Click-wrap Licenses

Chapter 8: Source Code Escrow
• Defining Source Code
• Why Escrow?
• License implications

Chapter 9: Software Self-Audit
• Audit requirements
• Commercial Best Practices
• Recommendations

Chapter 10: IT Asset Management
• Defining ITAM
• Commercial Best Practices Recommendations

Chapter 11: Software Implementation Services & Agreements
• Software Implementation
• Evaluating Contractor Capabilities
• Defining Services Contract Types
• Key Considerations by Contract Type
• Determining the Right Contract Type

Chapter 12: Cloud / Software as a Service (SaaS) Deployment Models
• Overview of Deployment Models
• Evolution of Cloud & SaaS
• New Cloud Computing/Virtualization Models
• Potential Benefits from Cloud & SaaS
• Deployment Model Impacts on Licensing
• SaaS Toolkit

Chapter 13: Best Value Toolkit
• Total Cost of Ownership (TCO)
• Rapid Assessment Checklist
• Best Value Process Roadmap
• Tools Library

Chapter 14: Ordering Off DoD ESI BPAs
• Authorized Users
• COTS Software Ordering Process
• Software Buyer's Checklist
• Inventory and Enterprise Licenses
• Ordering Guide Overview
• COTS Software License Framework for BPA-Based Orders

Chapter 15: Order Level Acquisition Strategies & Best Practices
• Software/Service Acquisition Strategies: Bundling, Discounts, Timing, Maintenance, Support, Training, Delivery Models
• Tips for Successful Procurement

Chapter 16: BPA Toolkit (for DoD ESI KOs & SPMs)
• Consideration and Presentation Phases
• Agreement and Kick-off Phases
• BPA Management Phase