10x YOUR IT OPERATIONAL EFFICIENCY

A CIO'S GUIDE TO IT AUTOMATION

Lately, it seems like the only constant for IT is change. From the pandemic, to labor market shifts, to inflation and fears of a recession, the last few years have been a wild ride for everyone. A recent Gartner survey shows that despite the current economic turmoil, ***69% of CEOs are still planning to increase spending on digital technologies***. However, this comes with high expectations for IT. CIOs are being asked to accelerate time to value on these new investments, which include SaaS and other cloud-based services.

While spending may be projected to increase, no one is immune from the ongoing mandate of operational efficiency. While IT has long been pushed to be as lean and cost-efficient as possible, other departments and processes are now being asked to improve operational efficiency as well.

IT is still primarily responsible for a ***SaaS tech stack that just keeps getting larger***, but they are now also increasingly responsible for business-critical digital transformation initiatives. This places a big burden on IT teams, who almost never get headcount even as expectations increase. IT leaders must find a way to keep up ongoing, day-to-day IT tasks and tickets while implementing new tools and solutions that drive greater business value.

This is why strategies and tools that improve operational efficiency have become more important than ever. A SaaS management platform like BetterCloud gives your team multiple ways to save time with quick insights, intelligent alerting, and easy-to-build automated workflows. With 70+ out of the box integrations and 1,000+ actions to automate, you can keep building more efficiency over time.

In this guide, we discuss the four key ways to drive your IT operational efficiency that don't take months to implement. We'll take you through the biggest time-savers, so you can focus on the strategic, business-critical technology projects that boost productivity and improve bottom lines.

10x Your IT Operational Efficiency

In this guide, we'll share four things you can do right now to not only improve your operational efficiency today, but also drive more efficiency over time. We'll also provide some handy metrics you can use to monitor and report out on your efficiency gains.

1 **Gain real-time visibility and control with centralized management**

2 **Automate user lifecycle management for the biggest, fastest time savings**

3 **Automate SaaS security to create a self-healing environment**

4 **Create self-service forms to reduce the number of incoming tickets**

5 **Metrics for measuring operational efficiency**

Centralize SaaS management for real-time visibility and control

We are now learning that context switching has big impacts on productivity. Administering a SaaS stack of 100 apps or more manually means numerous open tabs, logins, and clicks. All of this is using your IT team's time and brain power, and could be leaving them fatigued and overworked.

This leaves precious little energy for the strategic, critical work of implementing new technology solutions, researching new tools, and other digital transformation efforts. These are all now core drivers of business, often with multiple strategic goals depending on their success. A team tied up in tickets and manual tasks isn't well-positioned to tackle strategic work.

One easy way to tackle this challenge is with a SaaS management platform like BetterCloud. You can use BetterCloud to take over 1,000 actions inside every connected app, including administrative level tasks such as account creation and removal. You can also take bulk actions across apps and users at once to apply new or updated usage policies.

To enforce a least privilege access policy, you can create granular access roles inside of BetterCloud for every member of your IT team. This way, instead of creating multiple super admin accounts in multiple apps, everyone on your team can use BetterCloud to administer apps instead.

BetterCloud will uncover every app in your environment, so you instantly know what's in your stack. You get total visibility and control over your entire SaaS environment—all apps, all users, all data, and all policies. Centralized grid views help you quickly spot potential redundancies in app usage, such as having two or more project management apps. It also helps you identify gaps where you can strategically deploy new SaaS apps or tools.

> **"Our business grows very quickly, but our IT team doesn't. That's one reason we rely on the tools from BetterCloud."**

Philip Zhou,
Senior IT Manager
narvar

Automate user lifecycle management first for the biggest time savings

By far, IT automation produces the largest operational efficiency gains. It's one of the most powerful ways IT can accomplish more in less time. But not everybody is automating as much as they could be. A recent BetterCloud survey shows that 34% of IT teams spend half their week or more manually managing their SaaS environment.

This manual approach is incredibly time-consuming, and ripe for automating. At companies with more than 200 employees, it takes IT an average of seven hours to offboard one departing employee across their SaaS apps. Onboarding takes an average of six hours per new hire.

This is why the best place to start driving efficiency with automation is with user lifecycle management.

To get the most efficiency gains in the least amount of time, you'll want to use a SaaS management platform (SMP) like BetterCloud to automate the following:

New hire onboarding

Onboarding new hires is easily one of the most time-consuming processes IT is responsible for. Worse, every delay dampens the new hire's first experience with your company. The longer they wait for access, the more frustrated and unproductive they become. With BetterCloud automated workflows, you can onboard a new hire in minutes. Even better, it's easy enough to manage the workflows that anyone on your team can create and manage them. Whenever a new app gets added to your environment, you can update the workflow in just a few clicks to keep the process as automated as possible.

Check out our post, How to Automate Onboarding for Hybrid and Remote Employees, for more details.

> **"We worked to automate tasks that were stealing a lot of our employees' day. By automating work, we're giving them back time so they can make refinements in their department that have a more significant impact on the business as a whole. It allows them to really focus on initiatives that will improve the organization from top to bottom. Automation was something that I had been championing and really had a strong desire to keep improving. BetterCloud ticks a huge box there."**
>
> **Jeremy Oddo,**
> Director of Technology
> THE THIRD FLOOR

Employee offboarding

Offboarding departing employees can easily be just as time-consuming as onboarding, sometimes even more. Departing employees are often upset, especially if their departure wasn't voluntary. You want to be sure access is cut off as soon as possible to reduce the risk of a data breach or other potentially destructive action. To both save time and improve your security posture, you should use BetterCloud workflows to automate your entire offboarding process. You can add steps for device lockout, waiting periods, data backup, asset ownership transfer, and more.

Our Ultimate Checklist for Offboarding Employees includes a step-by-step guide for building a complete, automated offboarding workflow.

Mid-lifecycle changes

Once you've automated onboarding and offboarding, you should consider creating a series of workflows for mid-lifecycle changes. Think of all the manual steps your team is taking whenever:

- A user changes teams
- A user gets promoted
- A user goes on leave/vacation
- A user joins a project
- A user needs to reset their password
- A user's account is compromised

Every time one of the above mid-lifecycle events happens, you're likely doing some combination of:

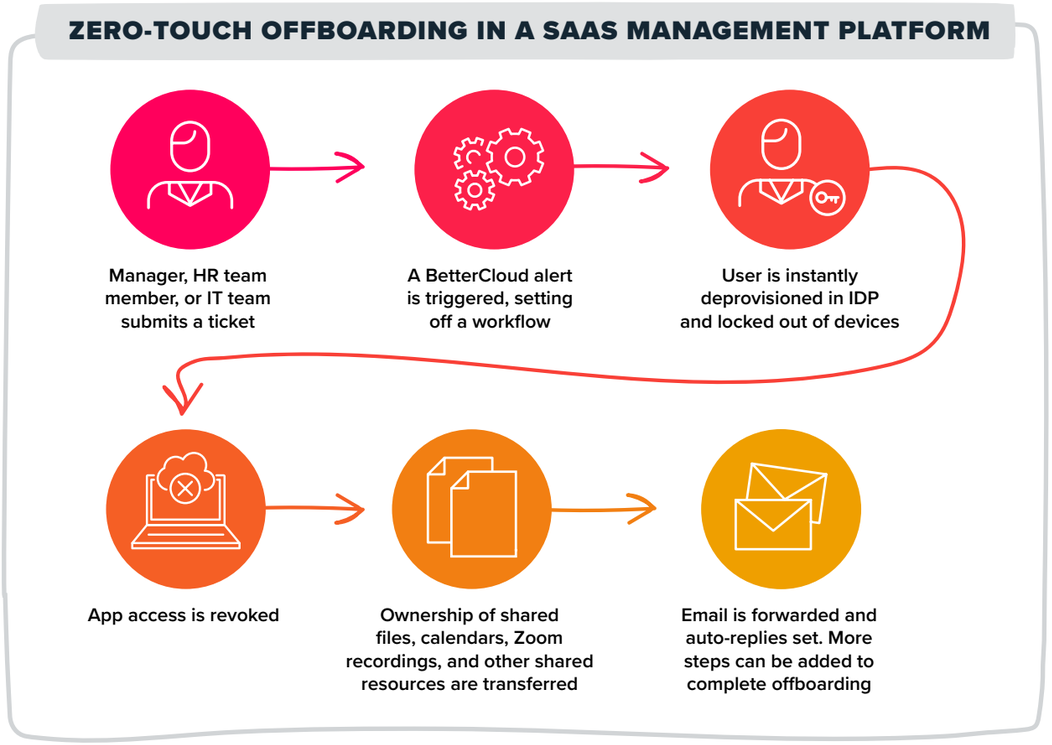
- Giving access to new files, folders, calendars, sites, applications, etc.
- Revoking access from certain files, folders, calendars, sites, applications, etc. that are no longer needed
- Updating group/OU memberships
- Granting elevated access rights (or taking away elevated access rights)
- Updating profiles, email signatures, and more
- Creating or updating email autoresponders
- Taking security steps to prevent unauthorized access

It's a lot to keep track of, especially once you multiply these steps across your entire SaaS stack for multiple users. Automating all of the necessary steps—or at least some of them—will make the user lifecycle management (ULM) experience much more streamlined and efficient. Even better, you'll reduce the chances of making an error from repeatedly retyping employee details.

These mid-lifecycle changes can become incredibly numerous right after a merger or acquisition. To learn more about how an SMP can streamline and automate tasks related to merging two or more IT environments, check out Four Ways BetterCloud Can Help IT Manage M&A Post-Closing Processes.

For even more efficiency gains, strive for zero touch

Once you have your foundational onboarding and offboarding automation in place, you can save even more time by integrating BetterCloud with your HRIS, ITSM, or even Google Forms to make them zero touch. BetterCloud "listens" for a triggering event, such as a status change for an employee in an HRIS, or a specific type of ticket submission in an ITSM like Jira, and then instantly runs the workflow. With zero-touch onboarding and offboarding, IT doesn't have to respond to an incoming email or ticket and kick off the workflow. The process runs immediately, without any intervention from IT. Check our blog and video demo series for a look at zero-touch workflows in action, as well as step-by-step setup instructions.



> "BetterCloud integrates so well with our HR system that as soon as HR creates a user account for any new hires that are coming in, it automatically starts the ball rolling. We know that once someone is created and their department is set, they're going to be put into the right groups. They're going to follow that workflow that's been created in BetterCloud. It takes out the need for IT to really get involved. BetterCloud gives IT the freedom to have a more hands off approach, making onboarding and offboarding almost zero touch."

Dani Gardner,
Senior IT Specialist
MiQ

Automate SaaS security to create a self-healing environment

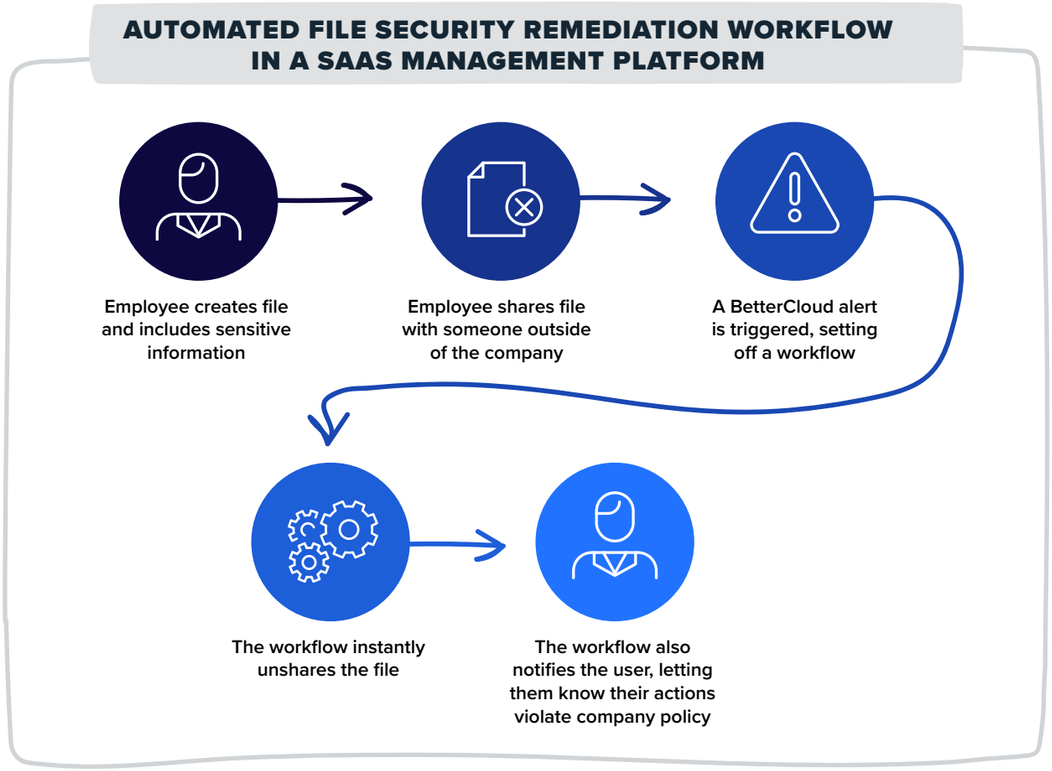
With any SaaS stack, sensitive data ends up everywhere across your apps. The question is: How are you securing that sensitive data, and how long does it take?

Realistically, it's impossible to do this manually and do it well, especially as your organization scales. It is extremely difficult and time consuming to:

- Manually check if any sensitive documents are shared publicly or with the wrong people (e.g., competitors)
- Manually correct those sharing settings
- Manually manage sharing settings for groups, calendars, folders, and files, especially if they're shared with people outside the organization
- Manually prepare security reports
- Manually pull and review audit logs from disparate apps to prove compliance
- Manually set and maintain proper compliance protocols
- Manually check how many super admins there are per app, to enforce a least privileged access model
- Manually revoke excessive super admin privileges as needed

The good news is that with a SaaS management platform like BetterCloud, you can address all these challenges in either a few clicks, or fully automatically. The automation process normally looks something like this:

- Create a security alert for each security issue, such as when a file is shared with a known competitor, or an admin account was created for an app that already had the maximum number allowed.
- Use the alert as the "triggering event" for a workflow
- Create a workflow that includes flexible remediation actions. For high risk issues, like a publicly shared file with credit card information included, your workflow can instantly unshare the file, and notify the file owner and their manager. For a lower risk issue, like a file shared with an external user, such as a contractor, you can set up a workflow to simplify notify IT and the file owner. That way, IT can follow up without disrupting work.



These “set and forget” zero-touch security workflows continuously detect and automatically remediate threats in your SaaS environment. This way, your SaaS environment becomes “self-healing” over time. Users learn to take less risky actions, threats get addressed without any IT involvement, and your SaaS security posture improves.

In fact, a recent Forrester study calculated that automating SaaS security management and compliance resulted in a time savings of 20 hours per week. Additionally, risk exposure for documents and accounts was reduced by 50 percent.

Securing lost or stolen devices

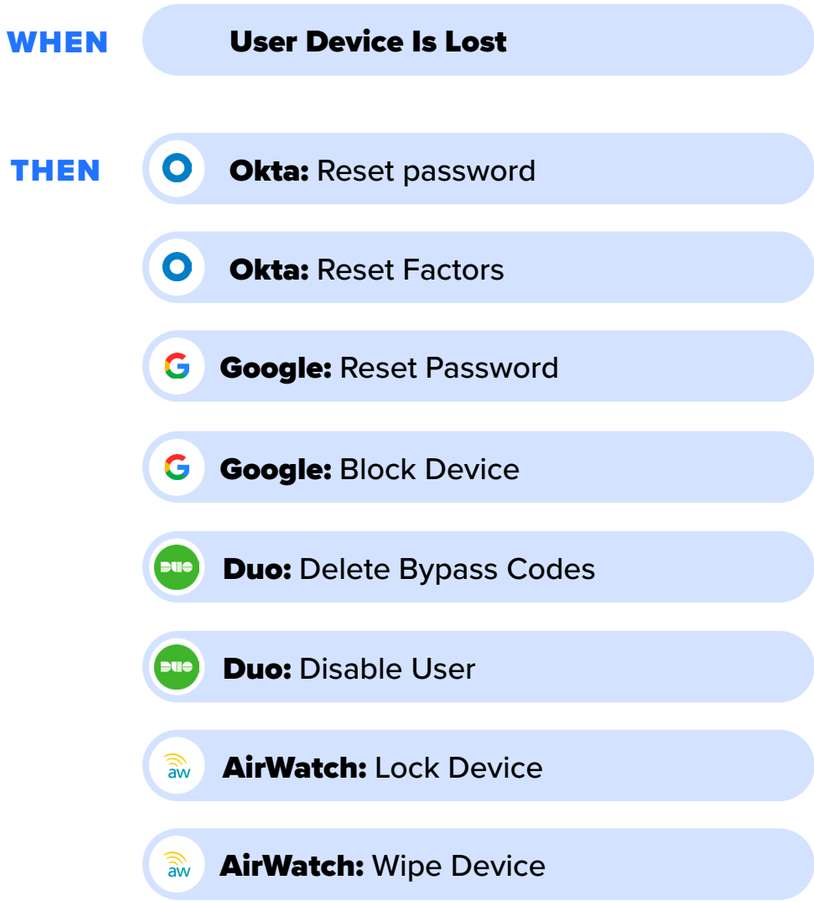
According to Security Boulevard, 86 percent of IT practitioners report that someone in their organization has had a laptop lost or stolen, with 56 percent of them reporting that this resulted in a data breach. Additionally, a report by Kensington found that over 70 million cell phones are lost each year.

Thanks to SaaS, employees can work from any device, anywhere in the world, at any time. While this is a major enabler for productivity, it also means that securing lost or stolen devices is more important than ever.

If you’re responding to these events manually, how long does that take you? What steps are involved? How many times a year does this happen? Larger companies may experience hundreds of lost devices a year. How much time, resources, and IT bandwidth does that take up?

Of course, every organization’s response may look different. By automating the remediation process, you can save hours of work, avoid scrambling, and rest assured that your organization’s sensitive data is safe.

THIS IS AN EXAMPLE OF WHAT AN AUTOMATED WORKFLOW FOR A LOST DEVICE MIGHT LOOK LIKE:



Quickly search, filter, and export audit logs across apps to prove critical workflows were performed

It's time consuming enough to export disparate audit logs across apps, much less sift through them all separately to find important events.

BetterCloud maintains audit logs in one centralized place, gives IT and security teams a comprehensive view of all administrator actions taken across connected applications. BetterCloud's Audit Logs never expire and can be searched, filtered, and exported, simplifying the process of documenting administrator actions for regulatory compliance and identifying rogue administrators.

Create self-service forms to reduce the number of incoming help desk tickets

Managed services provider Endsight, who provides IT support to over 260 companies, recently released their benchmarking stats. A few stats stand out:

- Their IT team takes an average of 57 minutes to handle an incoming help desk ticket
- Nearly half of their tickets are still open after a day
- It takes their support staff an average of 26.5 minutes to initially respond

Even in an IT company that prides itself on speedy resolution, their support engineers are still spending an average of an hour a ticket, with over half staying open and unresolved after a day. Given that it takes their IT team nearly 30 minutes to respond, that means employees are waiting at least 90 minutes or more to get their tickets resolved.

With the average company using 130+ apps, SaaS-related requests are often a large portion of overall incoming help desk tickets. A final way to both improve operational efficiency and reduce your team's ticket load is by automatically resolving these tickets with an SMP.

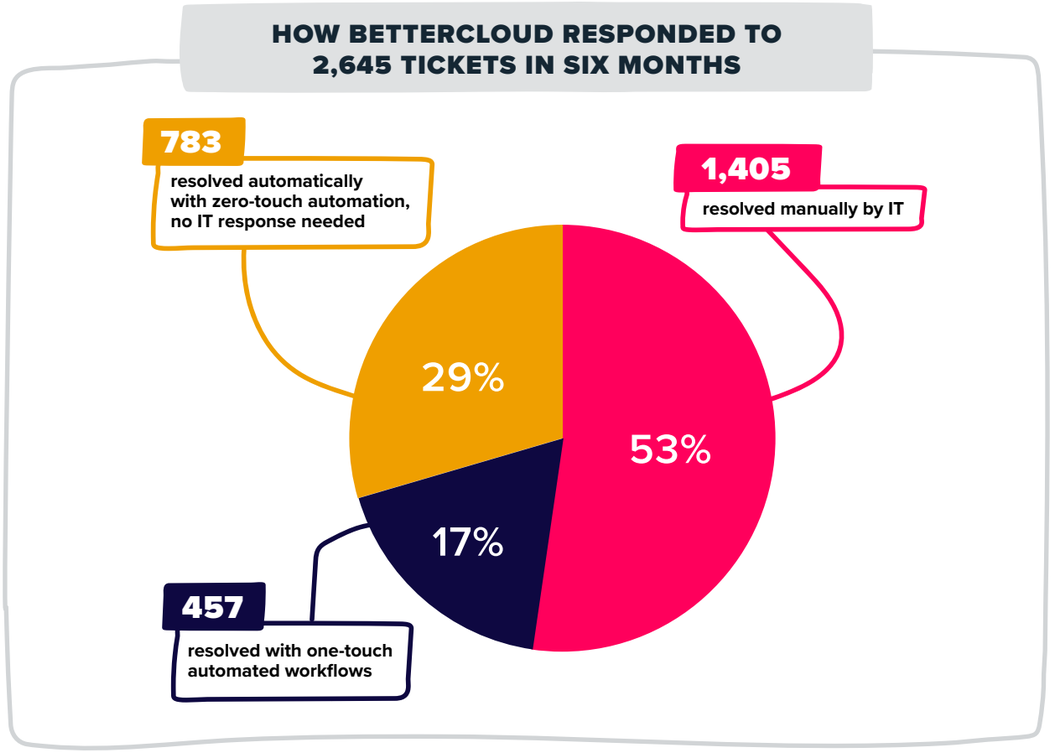
How can a ticket resolve itself? By combining the power of an ITSM, such as Jira or ServiceNow, and BetterCloud to create a zero-touch automated workflow. These ticketing systems, or even just a Google Form, can serve as "portals" for employees to submit their requests. When the ticket data is passed to BetterCloud, requests like account creation or modification can be fulfilled immediately, without IT having to be involved at all.

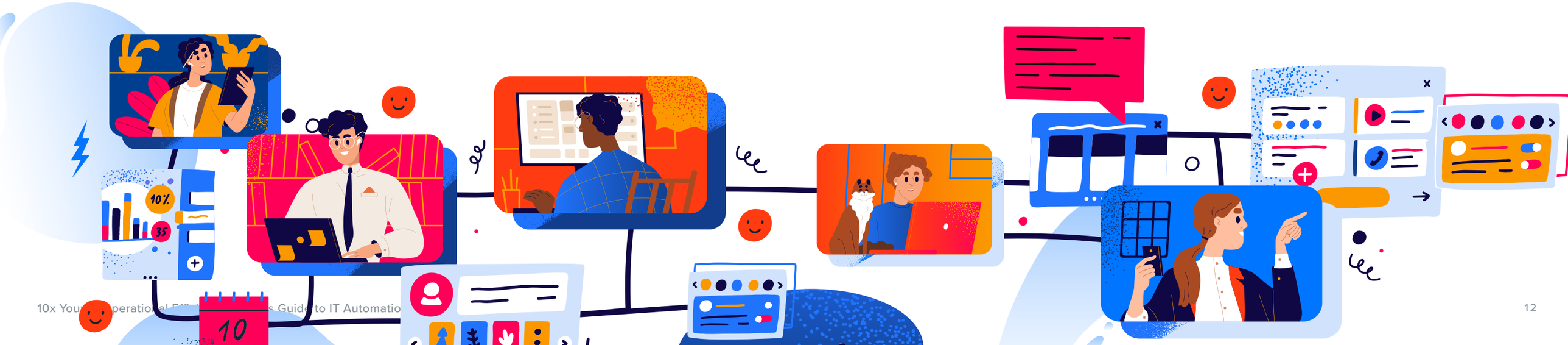
One example of a zero-touch help desk workflow could be:

1. The employee submits a ticket or Google Form, requesting access to a SaaS application.
2. BetterCloud instantly receives the ticket data and starts the workflow.
3. The workflow automatically sends a pre-generated email to the employee's manager.
4. Their manager clicks a button to approve the request.
5. The workflow resumes and provisions the new account.
6. The workflow then sends the user an email with the login instructions
7. The ticket is automatically closed.

And just how much time can this save? BetterCloud's own IT department began automating ticket resolution, and the results were staggering. Over the course of six months, 2,645 tickets came in. Zero-touch and one-touch automated workflows were able to resolve 46% of them—17% of which resolved themselves entirely without IT having to do anything.

Reducing the number of tickets your team has to spend an hour or more on by almost 50% can be game-changing for an IT department. This can be a huge boost to operational efficiency. Even better, your team can use their newfound time to drive more efficiency. Without having to spend all day on tickets, team members can identify and resolve root causes of incoming tickets, and uncover new processes and requests to automate.





How to measure IT operational efficiency

Now that you understand the four essentials to improve your IT operational efficiency, let's take a look at the metrics you should baseline and monitor. There are three broad types of metrics relevant to the SaaS-based workplace:

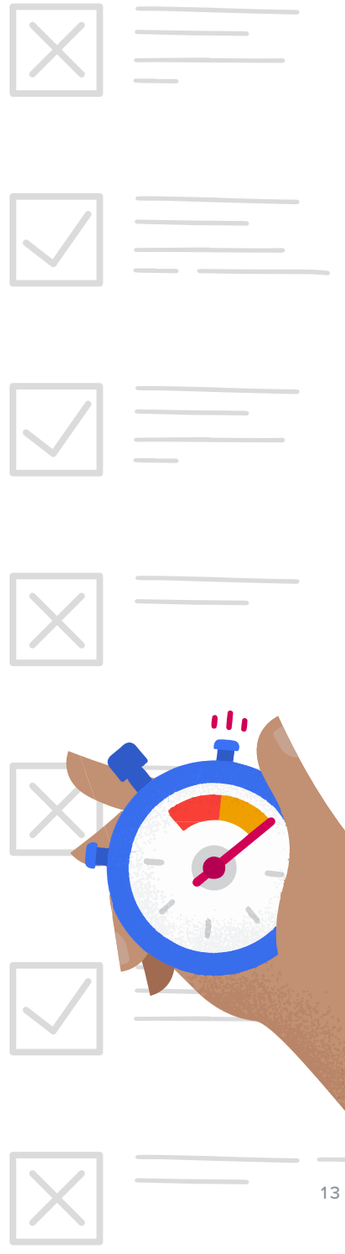
1. First, you'll want to monitor the real-time big picture of SaaS in your organization. After all, you can't control and secure what you don't know.
2. Second, you should keep a pulse on productivity-related metrics that track the amount of time spent performing key tasks within the SaaS workplace.
3. Third, you'll want to track your overall IT team effectiveness that proves the quality of your team's work.

SaaS visibility metrics

- Percent of SaaS apps meeting SLAs
- Number of IT-sanctioned SaaS apps
- Number of non-IT sanctioned SaaS apps
- Number of SaaS apps with admin access in IT
- Numbers of active users
- Number of super admins per app
- Number of read/unread data protection alerts by severity
- Number of unused SaaS licenses
- Number of underutilized SaaS licenses
- Number of users not enrolled in MFA
- Number of third-party apps installed by users

Productivity-related metrics

- Time to remediate policy violations
- Time spent scanning files for sensitive information (e.g., PII, payment information, passwords)
- Time spent managing group security settings
- Time spent managing file/folder security settings
- Time spent managing calendar security settings
- Time spent managing mid-lifecycle changes (e.g., promotions or role changes)
- Time spent auditing or collecting data for reports (e.g., security, onboarding, unused licenses, publicly exposed files)
- Time spent collecting disparate audit logs to prove compliance
- Time spent in hours to onboard a user
- Time spent in hours to offboard a user
- Time spent fixing unplanned script or API changes
- Time spent on planned script or API changes
- Time spent cleaning up unused/empty groups or channels
- Time spent managing email forwarding settings
- Time spent on SaaS access request tickets

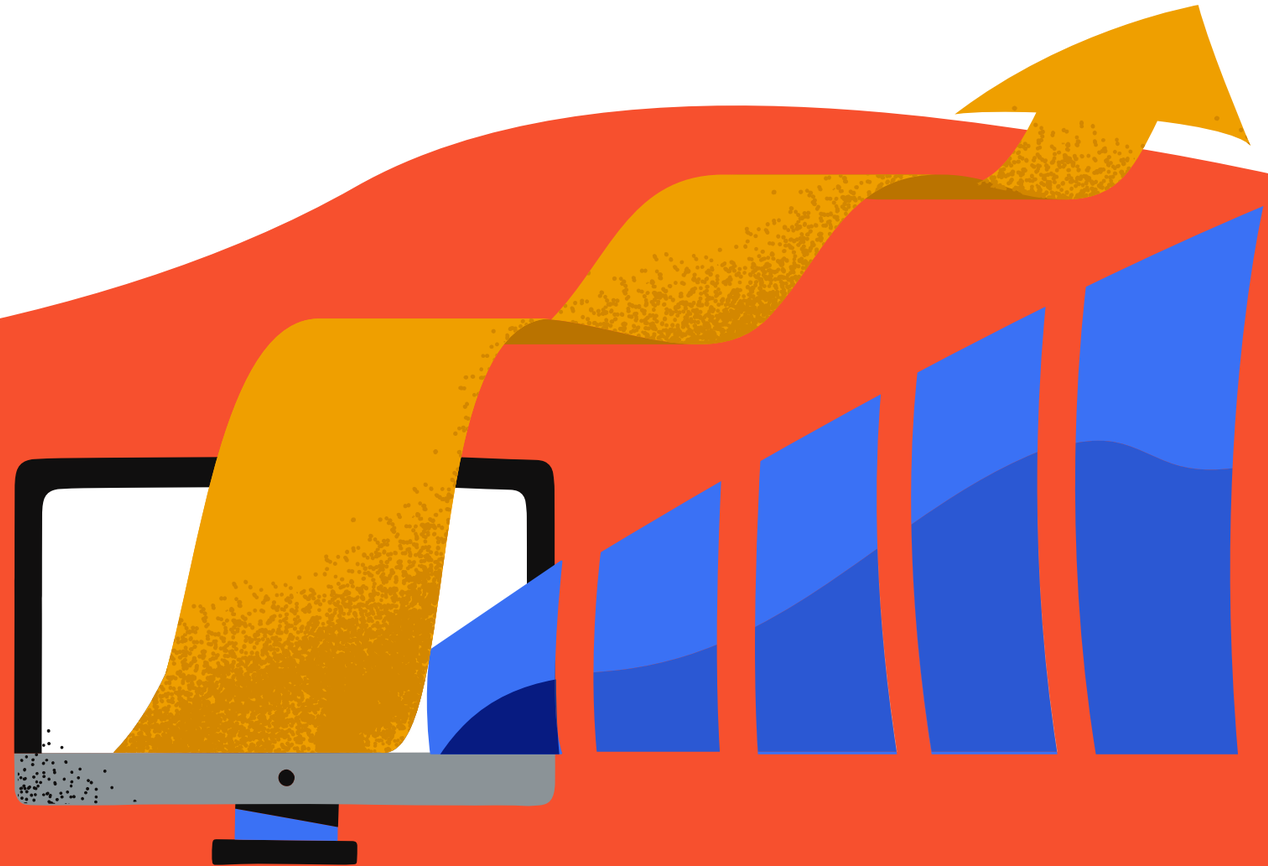


Effectiveness-related metrics

- Amount of IT time saved by using automation
- Revenue per IT employee
- Staffing ratio (IT team member : user ratio)
- Net Promoter Score (NPS) or level of satisfaction with IT
- Budget variance (actuals compared to budgeted dollars)
- Percent of defects like broken APIs or scripts
- Percent of script failures
- Number of help desk tickets related to SaaS access
- Number of help desk tickets related to SaaS entitlements
- Number of help desk tickets related to SaaS incident response

Conclusion

In the era of digital transformation, IT needs the right tools and strategies to manage the help desk day-to-day while successfully delivering on strategic technology initiatives. Driving operational efficiency is key to meeting both goals without adding resources or headcount. However, it all starts with knowing where the biggest inefficiencies are—and perhaps more importantly, how to eliminate them. By leveraging the strategies outlined above, IT can unveil massive time and cost savings, allowing their teams to run leaner, do more with less, and ultimately set up their organizations for long-term security and success.



About BetterCloud

BetterCloud is the market leader for SaaS Operations, enabling IT professionals to transform their employee experience, maximize operational efficiency, and centralize data protection. With no-code automation enabling zero touch workflows, thousands of forward-thinking organizations like HelloFresh, Oscar Health and Square now rely on BetterCloud to automate processes and policies across their cloud application portfolio.

With 10+ years experience pioneering the SaaS Operations movement, BetterCloud now serves the world's largest community of SaaSOps experts. As host of Altitude, the industry's leading SaaSOps event and publisher of The State of SaaSOps Report, the category's definitive market research, BetterCloud is recognized by customers (G2) and leading analyst firms (Gartner and Forrester) as the market leader in SaaS Operations Management.

Headquartered in New York City, with a product and engineering office in Atlanta, GA, as well as innovation hubs & remote talent across the U.S. BetterCloud is backed, among others, by some of the best technology investors including Vista Equity Partners, Warburg Pincus, Bain Capital, and Accel.

For more information, please visit *www.bettercloud.com*.