BetterCloud

The SaaS Management Platform Mega Checklist:

# How to Buy an SMP and Stop a Helpdesk Meltdown

The pandemic forever changed the modern workplace. Throughout 2019, SaaS adoption was already exploding. Managing all that SaaS left IT with endless open tabs, growing ticket queues, and a whole new set of security challenges.

But in early 2020, "shelter in place" orders required offices to close. In just a matter of days, IT had to enable remote work for entire workforces. New tools were frantically put in place. Everyone suddenly needed Zoom, a laptop, and a secure, reliable internet connection just to have a meeting. IT had to hustle, scramble, and work overtime to support remote workers—all while working remotely themselves.

This "new normal" is a double whammy for IT. Managing a large SaaS portfolio was already straining lean IT teams. Supporting a permanently remote workforce added a whole new set of demands—from shipping laptops to answering tickets coming in across time zones and continents.

Getting through the pandemic required a heroic effort from IT. However, much of the extra effort had to continue after offices reopened, because not everyone came back. To retain workers and attract new talent, many companies permanently chose to become hybrid or even go fully remote.
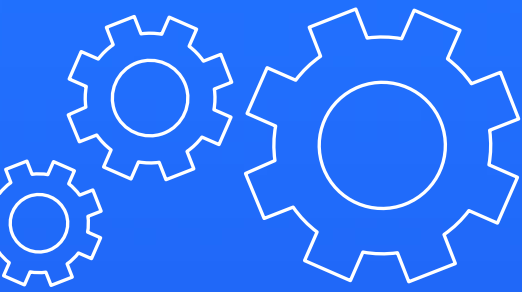
While SaaS management platforms (SMPs) have been around for several years, IT has never needed one more than now. IT can get back desperately-needed time by automating onboarding, offboarding, app access request tickets, and more. Environments can be kept safe from the actions of negligent employees (and even malicious actors) with alert-based workflows that revoke OAuth access, unshare files, and block the creation of super admin accounts. Remote employees stay productive with immediate access to shared resources and new apps.

When fully implemented, an SMP can make life better for IT in weeks—not months. Over time, more processes are automated, security posture improves, ticket queues become manageable, and app visibility enables smart purchasing. Every year, the ROI of an SMP continues to grow. To keep up with the new demands of "remote-first" workplaces, an SMP has now become a foundational tool for IT.

With the need for an SMP becoming more urgent as workplaces evolve, you need to make sure you select the right one for your IT team. The market for SMPs (and other point solutions) has grown crowded, with lots of tools claiming to offer the same capabilities.

We created this guide to help you choose a solution that:
- Is purpose-built for IT (not finance, procurement, or engineering)
- Includes a workflow builder your team can actually use
- Will deliver benefits across your company (not just for IT)
- Doesn't cost more time than it saves

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Identifying Your
Current IT Challenges

Between SaaS sprawl, remote work, and hiring challenges, IT has a lot to tackle. When fully implemented, the right SaaS management platform can alleviate a wide range of issues and challenges. To find out if an SMP is a good fit for your IT department, take a moment to answer the following questions.

Operational Issues

☐ Does your IT team spend way more time resolving tickets than on strategic priorities?

☐ Is your ticket queue filled with repetitive requests like resetting passwords and granting SaaS access?

☐ Are you now supporting work from anywhere (WFA) employees who also need the flexibility to work any time?

☐ Are you "throwing bodies" at repetitive, but critical IT tasks?

☐ Does your ticket queue never get to zero (or even close)?

☐ Are you consistently missing SLAs?

☐ Are your IT team members regularly turning over?

☐ Does it seem like new SaaS apps are being added to your environment all the time?

☐ Are you having to train up staff every time a new SaaS app is added to the portfolio?

SaaS Security Issues

☐ Do you need visibility into what kinds of sensitive or proprietary company data employees are storing in your SaaS apps?

☐ Is it difficult to know how many files contain potentially sensitive data, or who created those files?

☐ Does offboarding a single employee take hours or even days?

☐ Have you ever uncovered active accounts for ex-employees days, weeks, or months after they have left the company?

☐ Is it difficult to pinpoint how many files are being shared publicly, or with others external to the company?

☐ Do you lack visibility into which app shared files are located in and who created them?

☐ Are business units in your company subscribing to SaaS apps outside of IT's purview or governance?

☐ Are you spending too much time tracking down SaaS configurations and data for compliance and audit checks?

Employee Experience Challenges

☐ Do new hires (or their managers) have to submit tickets or email IT for access to the SaaS apps they need to do their job?

☐ Do lengthy manual IT processes (onboarding, offboarding, etc.) cause wait times and delays, as well as friction between managers and IT?

☐ Are current employees (maybe even in different time zones) facing delays when they request access to new apps?

☐ Are redundant SaaS apps keeping teams and departments siloed?

☐ Are your employees using shadow IT (unsanctioned apps) to fill productivity gaps and needs?

If you find yourself answering "yes" to any of these questions, a fully-featured SaaS management platform is a good fit for your IT team. Even better, the right SMP can deliver value and address many of these challenges in just a few weeks.

What Should a SaaS Management Platform Be Able to Do?

A new tool seems to pop up every few months that claims to help "manage SaaS." However, delivering on all the core capabilities of an SMP is a very tall order, and not all products calling themselves SMPs are up to the task. To provide a baseline for evaluation, let's quickly review the core capabilities of a SaaS management platform.

In 2021, Gartner published its Market Guide for SaaS Management Platforms (SMPs). In this report, "Gartner defines SMPs as stand-alone tools that can discover, manage, and secure multiple SaaS applications from a central admin dashboard, delivered as a turnkey service." Let's take a closer look at what exactly Gartner means when they say **discover, manage, and secure.**

Discover

An SMP serves as a single, centralized location that pulls in data from various sources to provide full visibility of your IT environment. From a single view, it can show you every app employees are logging into. An SMP should also uncover the way each app is being accessed, such as OAuth or via SSO. The insights provided by an SMP should enable IT leaders to optimize their SaaS purchasing decisions and reduce risk from shadow IT.

Manage

From centrally managing all of your SaaS apps without having to log in to each separately, to implementing role-based controls, an SMP is a "one-stop shop" for all of your SaaS management activities. To save time and reduce errors, an SMP needs to include powerful automation and orchestration capabilities.

Any member of your IT team should be able to use an SMP's no-code builder to orchestrate workflows that automate employee onboarding, offboarding, internal job changes, and more. For one-time updates or changes, you can also use an SMP's centralized user grid to quickly and easily take bulk actions in different SaaS apps.

Secure

From insider threats to data loss prevention, an SMP is a core tool for improving your SaaS security posture. Using the information it pulls in from connected apps, it can quickly locate sensitive or proprietary data, giving you valuable insight into which app it is located in and who owns the file.

An SMP can send you real-time security alerts, such as when files are shared with outsiders (such as competitors), and or when too many administrative-level accounts have been created. Security-related workflows created in the SMP should automatically remediate policy violations to enable your IT environment to "self-heal." To create and enforce a least privilege access policy, you can use an SMP to administer your app portfolio, instead of creating multiple admin accounts directly in each app.

The summaries above only just touch on the deep capabilities of a fully featured, all-in-one SaaS management platform. When evaluating whether or not an SMP is a good fit for your IT department, you should make sure the platform truly delivers everything Gartner says it should.
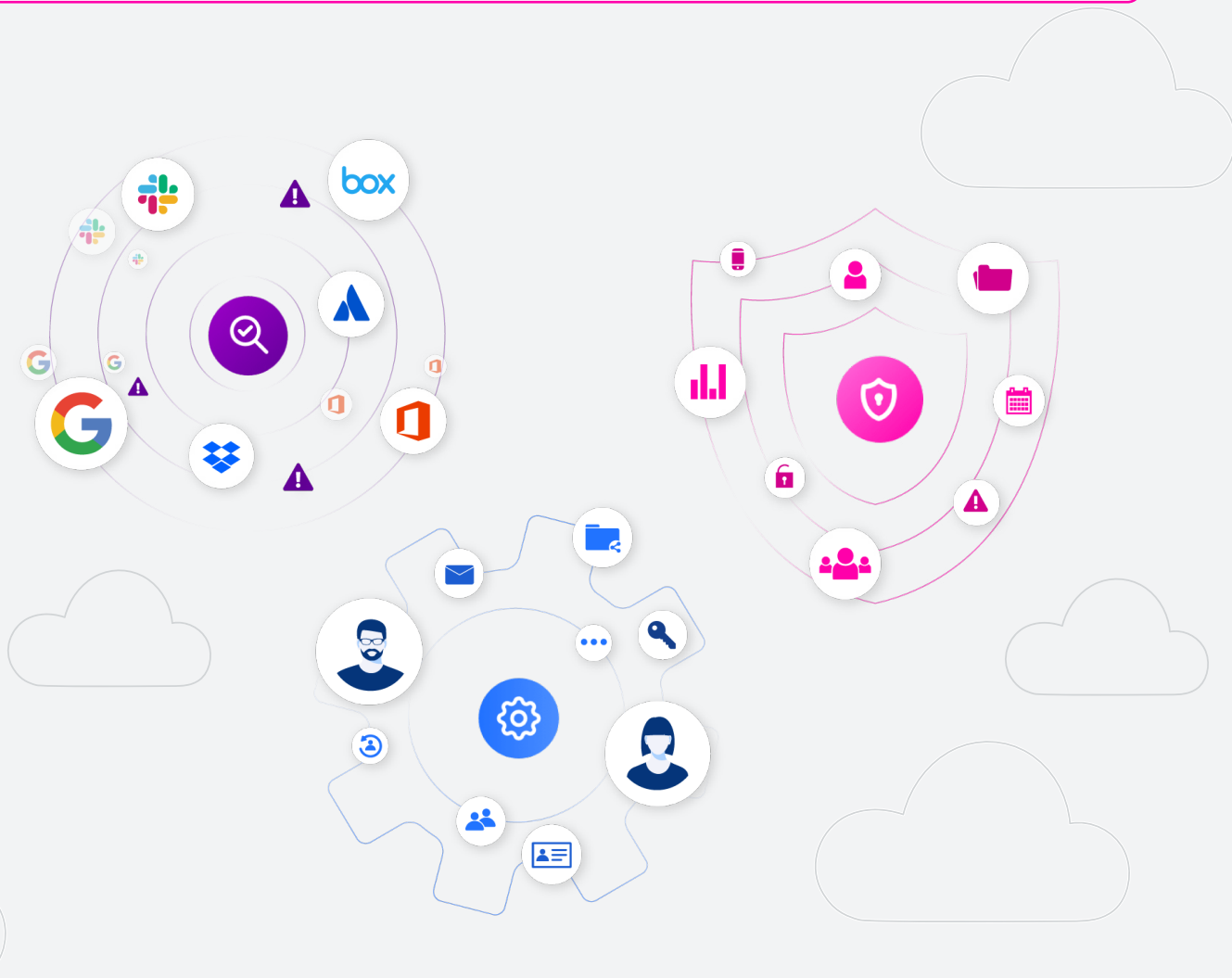
SMP vs. Point Solutions

Other related product categories, such as IDaaS, IdP, CASB, and iPaaS, are starting to offer some of the capabilities of an SMP. More often than not, these solutions are not built primarily for IT. This is why it is critical to make sure the solution you choose doesn't come with unexpected opportunity costs.

With IT teams already lean and overburdened, you don't want team members spending their valuable time in extensive product-specific training or trying to bolt siloed, disparate

Core Capabilities	IDaaS	SMP	CASB	iPaaS
Discover	Yes	Yes	Limited	No
Manage	Yes	Limited	No	Yes
Secure	Yes	Limited	Yes	Limited
Single Platform	Yes	Yes	Yes	Yes

point solutions together. The table below shows you quickly how each solution—an SMP, IDaaS, CASB, and an iPaaS—performs each of the core capabilities we reviewed above.

CASB (Cloud Access Security Broker):

Most mid-market and SMB companies do not need any additional platforms to create and enforce a robust set of IT security policies. Larger organizations, or those with very high compliance requirements, sometimes deploy a CASB alongside an SMP to create a single control point for SaaS application data flow.

IDaaS (Identity as a Service):

Many IT departments leverage IDaaS to enable single sign-on (SSO) and to determine whether a new user can have access to an application based on company-specific policies. For some SMBs and mid-market companies, they are able to benefit from centralized and automated SaaS management without the need for one.

iPaaS (Integration Platform as a Service):

iPaaS platforms are often capable of automating some of the more granular SaaS management tasks that an SMP can. They are best suited for short, simple automations, such as sending a Salesforce event to Slack. However, because an iPaaS doesn't ingest and analyze data, orchestrating a lengthy automated onboarding or offboarding process leads to incredibly long, complex workflows that often require a developer to manage.

Product & Vendor Evaluation

Once you've got a shortlist of contenders, the final step is to closely evaluate each. The following questions are designed to help you deep dive into each provider and platform to make sure you get the most for your SMP investment.

Vendor

- How deep are their roots in SaaS management and in SaaSOps?

- Do they have an active community dedicated to all things SMP & SaaSOps?

- As SaaS APIs constantly change, how well does the platform vendor keep up?

- How well does the provider and platform support remote/hybrid users?

- What are their security compliance certifications (i.e. SOC 2, ISO 27001)?

- Which business unit is the platform primarily designed for? Is it IT, finance, HR, or even more specific?

- What size company is the platform best suited for? Enterprise, startup, SMB?

- What are the details of their installation process? How long, on average, does it take to get up and running?

- Is technical support included? Do they provide a CSM to help you maximize your investment?

- Do they offer expert-level professional services to help accelerate your time-to-value with minimum friction as your business grows?

- Does the provider offer interactive courses and professional certification programs?

- What do your peers and other customers have to say on review sites like G2?

Manage

- Does the platform include a single pane of glass centralized console for you to view and manage apps?

- Can the workflow engine manage bulk changes across multiple apps?

- Does the platform include an intuitive, no-code workflow builder? Or is the builder low-code, requiring specialized training or a background in development?

- Does the platform come with pre-built workflow templates for automating the most common IT tasks?

- Does the platform ingest app metadata to simplify workflows? (Platforms that do not pull in and analyze app data require you to create more complex workflows with more steps.)

- Do workflows automate both the assignment and completion of tasks? Or, do workflows automate the task assignment, and the tasks must then be completed manually?

- Does the workflow engine support automatic error handling and/or retry logic when actions fail? (If this is not handled automatically, error handling/retry logic must be programmed into each workflow.)

- Does the workflow engine have access to the full API response for actions that fail?

- Can workflows be triggered off of a webhook and/or API request to enable zero-touch orchestration? (For example, a workflow that is triggered automatically from a ticket submission in Jira or ZenDesk)

- Does the workflow engine have access to more extensive automated actions beyond basic on/offboarding? Can you include actions such as "send envelope"' in DocuSign, or "enable watermarking for file" in Box?

- Can automated workflows be executed on-demand?

- Does the platform come with pre-built actions and alerts that are ready to go "out of the box"?

- Does the platform provide indefinite audit log retention for compliance needs (ie. SOX, SOC 2 Type 2)? Or does it have a time limit (30 days, 60 days, 90 days)?

Secure

- Is the SMP constructed to offer deep operational context to automate security alerting that doesn't add to the already unmanageable alert fatigue?

- Does the platform provide data-loss prevention (DLP) content scanning capabilities for sensitive data discovery and threat protection?

- Can the SMP automatically gather file-level details and provide alerts when employees open up access to data externally?

- Can the platform prevent accidental or rogue attempts to side-step policies with automated actions that rescind access to data?

- Can the platform monitor and configure privileges across SaaS apps such that delegated admins have access only to those resources that are essential for them to perform their intended functions, for the durations required by those functions?

- Can the platform easily locate and decommission unwarranted "super admins" and fine-tune individual account privileges to align with user needs?

- Can the platform customize file content scans to monitor for and respond to potential breaches with industry-specific standards such as HIPAA for healthcare or GDPR for financial institutions?

- Can the platform leverage automation to maintain a consistent security policy across the SaaS environment to prevent excessive internal, external or public sharing of an organization's data?

- Does the platform maintain a consolidated audit log across all SaaS apps?

- Does the SMP make audit logs available indefinitely or are they truncated/removed after a set period of time?

- Does the platform offer the ability to customize alerts?

- Are you able to add wait time and email approval steps into automated security workflows?

- Can the platform support security self-healing automated workflows that unshare files and/or block admin account creation?
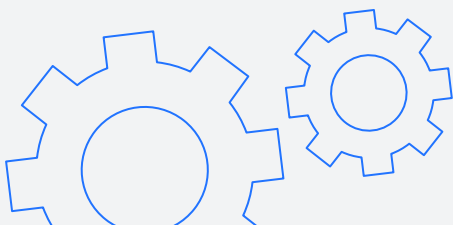
Discover

- Does the platform have a way of discovering shadow IT SaaS apps?

- Is there a way to track application usage to identify under-utilization?

- Can the platform uncover apps being granted OAuth access, and which user has granted them?

- Is there a single view that shows all apps in the environment, who is accessing them, how they are being accessed, and if they are sanctioned or unsanctioned?

Integrations

- How large is their marketplace of pre-built integrations where the larger the inventory, the greater the time and cost savings?

- Do they provide two-way 'full' app integrations or just one-way 'read only' integrations?

- Do they provide an API to extend the platform beyond its native capabilities?

- Can your platform make custom API calls to external endpoints?

Evaluating ROI (Return on Investment)

Some of the value of an SMP is fairly easy to quantify, especially when it comes to outright savings on license costs. However, the value of the right SaaS management platform that is fully leveraged extends far beyond simply optimizing spend. The following list of questions can help you think about how to assess the total value an SMP can deliver, from operational efficiency to employee productivity.

Operational Overhead

What percentage of your help desk tickets relate to user lifecycle management (ULM) tickets (onboarding, offboarding, role changes)?

How many ULM-related help desk tickets do you process in a week?

What is your average time-to-resolution for help desk ULM tickets?

What is the average fully-burdened cost per help desk ULM ticket?

What are your current help desk customer satisfaction scores relative to ULM tickets?

What percentage of help ULM desk tickets are meeting SLA standards?

How long does it take your help desk to fully onboard a new hire?

How many discrete steps are required to onboard a new hire?

What is the average number of birthright applications new hires need as part of their onboarding process?

How long does it take to fully offboard an employee?

What is the cost associated with escalation and resolution of incomplete offboarding of employees?

License Optimization

How many employees are using redundant applications?

How many single users have access to multiple redundant applications?

How many SaaS apps is the company paying for that might be under-utilized (90 day license cost multiplied by the number of inactive users over the last 90 days)?

Employee Productivity & Satisfaction

How long do new hires typically have to wait for access to the devices, apps, and resources they need to be productive?

What are the lost productivity costs associated with employees waiting for access to required devices, apps and resources?

Security & Compliance

How long does it take, and how many people are involved in accessing and consolidating application data required for audits?

What is the cost associated with non-compliance penalties?

What is the (potential) cost and impact of the exposure of sensitive company data?

What is the (potential) cost and impact of a security breach and/or loss of data as a result of an incomplete offboarding of an ex-employee?
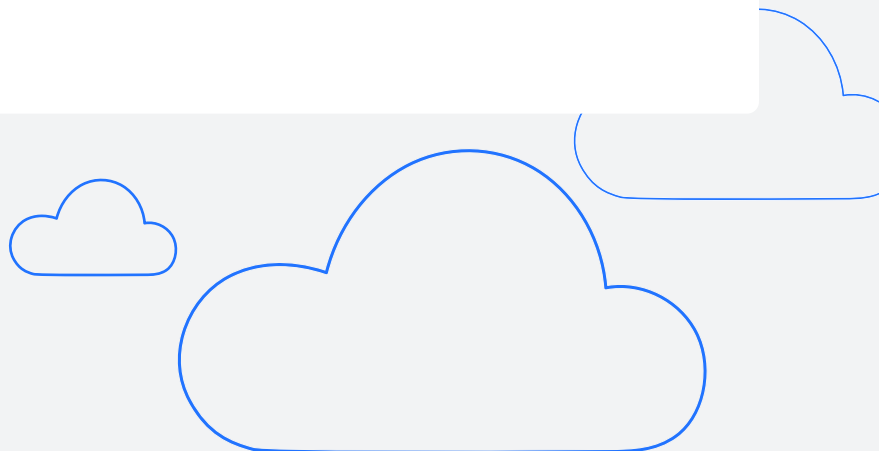
When IT takes full advantage of everything a fully featured SMP has to offer, they can drive tremendous value in their company. Let's walk through the benefits experienced by just one BetterCloud customer, **a growing company with 1,200 employees that is saving over $1.12 million annually.**

After their IT team saw all their apps in one place, they gained important insights into what was and wasn't being used. They are now saving

$140,000
per year through license optimization.

They used zero-touch automation capabilities to create a self-service SaaS access portal. As a result, they realized

productivity gains of $796,000 annually

as employees no longer had to wait or IT to manually grant app access.

By automating their onboarding, offboarding, and mid-lifecycle change processes, they

save $184,000
annually in IT staff time.

Their operational efficiency improved so much that

two full-time

employees could refocus their responsibilities to support go-to-market efficiency and revenue growth.

They identified and **revoked OAuth access to**

312 risky apps

that did not meet security standards.

To implement a least privilege access model, they reduced the number of users with super admin access from

15 to 3.

The company's sensitive and proprietary data is now being protected with proactive monitoring and automated remediation policies on

over 4,000,000 files.

While every company doesn't always realize over $1 million in savings, the stats above highlight all the different ways a SMP can deliver value. From efficiency to security, a fully featured SMP is a single platform that provides multiple, far-reaching benefits for IT.

Summary

The "one-two punch" of remote work and SaaS sprawl has placed a huge burden on IT that gets more challenging by the day. IT support teams are overloaded with tickets, struggling with morale, and facing unprecedented security challenges. Many companies are now in the midst of what is being called a "helpdesk meltdown."

While many solutions are competing to address this meltdown, a SaaS management platform is the one, single platform that can help the most. With many IT departments seeking to consolidate their sprawl, an SMP can quickly become a foundational tool that eliminates the need for multiple point solutions.

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 Walmart, 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 has raised $187 million to date.

To learn more about how BetterCloud can help you transform your employee experience, centralize data protection, and maximize operational efficiency, **schedule a demo**.