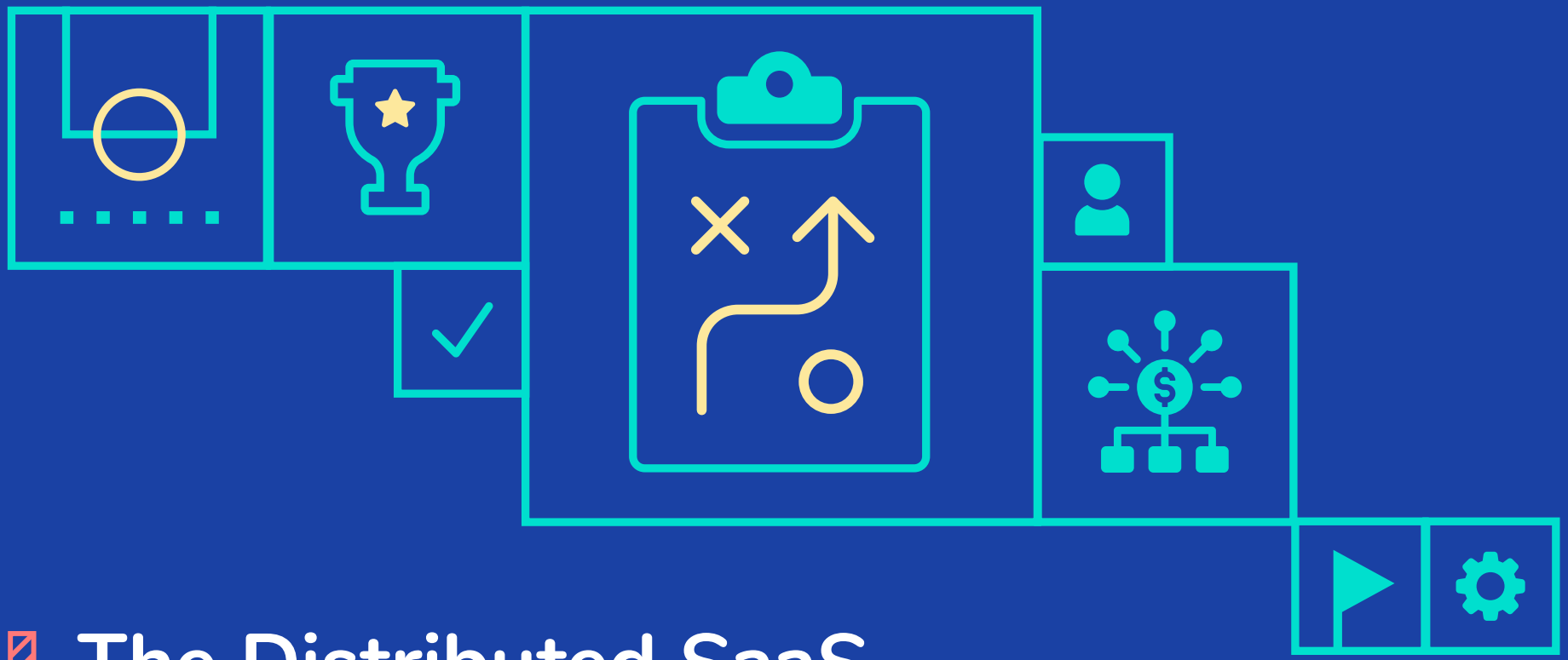

The Distributed SaaS Management Playbook:

How to Lead Your Team to Victory in a Cloud-First Workplace

Torii

The Distributed SaaS Management Playbook

Dear reader,

Our businesses have a remarkable tolerance for change. Things, once radical, quickly become standard.

The perfect example is cloud applications. Once rare, today's workplaces depend on these apps. However, how we've adopted these applications has also changed. For many apps, bottom-up has replaced top-down procurement, leaving IT professionals in the dark about the full spectrum of business apps within their organization.

To succeed in this new reality, IT leaders must take a new approach. A way to strategically lead while empowering other teams and application owners to help in the critical mission of SaaS Management. That's what this playbook is. This resource will help you adapt your IT Management strategy to support distributed SaaS environments, bring new collaborators into the game, realize significant cost savings, and gain greater operational efficiency.

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Distributed SaaS Management: Defined

Traditional IT Management strategies and tactics were designed for previous iterations of organizations. As a result, they often fail to account for distributed SaaS adoption and how distributed app ownership changes IT's ability to see and act on SaaS-related tasks.

Distributed SaaS Management is a modern strategy designed for today's (messy) SaaS reality. It acknowledges that IT can't do it all alone. Instead, everyone from IT, finance, procurement, security, and even individual app owners must play a role.

The outcomes of implemented Distributed SaaS Management are:

- **Continual and complete discovery of applications**
- **Unified and actionable insights**
- **Collaboration and empowerment enabled by automation**
- **Reduced SaaS spend and optimized ROI**

For today's organizations, Distributed SaaS Management provides the right framework to manage SaaS at scale, and this playbook is the perfect starting point to bring that strategy to life.

The New Workplace: Everyone is an App Owner

Distributed adoption means that anyone can add an application to the company. If not properly managed, these applications can pose direct threats to security and budgets. They also silo knowledge and scatter data about application users, usage, costs, and more.

Think of it like working on a puzzle. You'll never get the complete picture if pieces are scattered around the home. Likewise, in today's workplace, any employee or team might hold pieces of that SaaS management puzzle in their back pocket—harming your visibility. Without unified visibility, we lose time, money, efficiency, and strategic decision-making, so collaborating with the people holding those puzzle pieces is critical. But how can you collaborate more effectively? One way is to properly recognize and empower the numerous application owners within your organization.

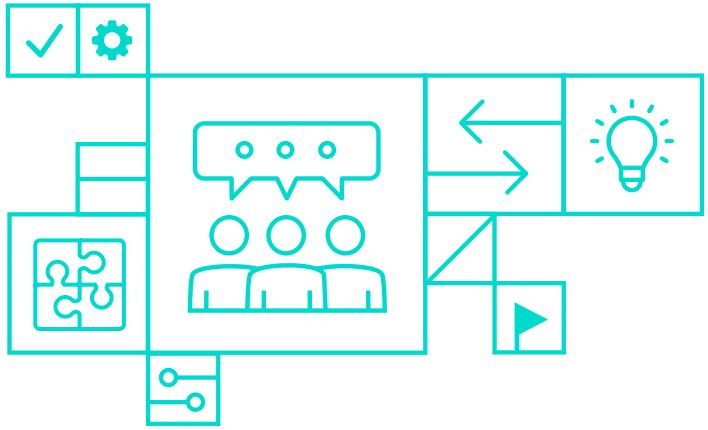
When empowered, application owners have the power to multiply the impact of IT pros alone, while lightening IT's burden. Therefore, a critical facet of Distributed SaaS Management is providing app owners the ability to share insight, raise concerns, and take action on their app's access, licenses, costs, and renewals.

WHAT IS COLLABORATION?

In a recent survey, Torii found that only ⅕ of IT professionals collaborate with other teams often. Which means they're making decisions in isolation. So, what is collaboration? People think it's Slack messages, email updates, and meetings. Of course, communications like these are essential, but they're only a tiny fraction of how collaboration happens.

To be effective, collaboration must include three specific things:

1. **Shared insight into critical data**
2. **Collective understanding of business goals**
3. **Alignment on execution toward those goals**



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Distributed SaaS Management: A Playbook for the Whole Team

Distributed SaaS Management needs to be treated as a team sport. And like players on a baseball or football team, each person's roles and responsibilities can look very different, but remain critical to overall success. In this team-first approach, IT's role switches from the player doing all the work to the coach or manager. Their contribution becomes more strategic and enabling. **This allows execution capacity to scale beyond their own human limits.**

This playbook breaks down how key teams and individuals in a company can (and should) be empowered to contribute to the state of SaaS, how each player fits into the game, and how their specific tasks can strengthen the team, and SaaS management as a whole.

How to read this playbook

Your strategy will happen in four phases, like four quarters in a game. The difference is that the first quarter is always ongoing. As you add the next phase of the Distributed SaaS Management strategy, it's vital to maintain the previous phases as well.

These phases are:

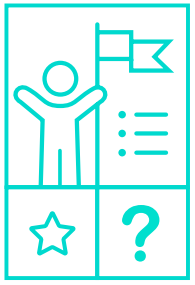
1. **Discovery**
2. **Unified (and actionable) Insight**
3. **Collaboration enabled by Automation**
4. **ROI Optimization**

For each of these phases, we'll examine how IT teams can work with, delegate to, and empower these three groups:

- **IT leadership for the company**
- **Department heads or departments as a whole**
- **Application owners**

Ready? Break!

WHO IS THIS PLAYBOOK FOR?



While anyone in leadership can benefit from the strategies in this playbook, this is intentionally designed for IT leaders. Therefore, all of the sections will focus on how IT can either take action, advise the strategic moves of leadership, or enable the tactical tasks of others including app owners, procurement, security, finance, and HR departments.

Distributed Discovery: Find Every App

Discovery—finding all the apps within your company, both sanctioned and Shadow IT—is the most crucial element of Distributed SaaS Management simply because you can't analyze, secure, govern, or act on what you can't see. Torii's customer data shows that most companies have about **3x more apps than their IT pros estimate and have only sanctioned 25% of their cloud apps.**

Think of discovery as scouting for new talent. Of course, some will be turned away, but others will become incorporated into your group of winning applications. The important thing is to stay vigilant. Discovery is never "done." New apps and integrations are constantly introduced into your ecosystem, so **discovery must be ongoing and real-time.**

Running the Plays

With IT Leadership:

- Designate a central location for a complete list of the applications you find. This will serve as your single source of truth (SSOT).
- Within this SSOT, include critical app data (such as status, owner, cost, etc.). Different stakeholders will require specific data from this source—for example:
  - Cost (Finance, Procurement, App Owners)
  - Usage and users (IT Admins & App Owners)
  - Contract terms (Procurement)
  - Risk analysis (IT Admins & Security/Compliance)
- Automate discovery processes and adopt tools like a SaaS Management Platform that notify IT and stakeholders like security and finance teams when anyone subscribes to a new app.

With Department Leaders:

- Open communication with department heads. Make sure they understand the purpose and importance of this discovery initiative.
- Work with department leaders to assign application owners for every app within the SaaS stack.
  - Note: Do not skip this step! Ownerless apps increase risk and are more likely to be neglected through each phase of their lifecycle, which allows waste to persist.

With Individuals:

- Encourage all employees to take stock of their daily apps and report any unsanctioned apps they've adopted to IT.
- Create a series of questions for individuals to answer before they subscribe to Shadow IT apps:
  - What is the purpose of this tool? Who will 'own' this app? Do similar tools already exist in the company's ecosystem?

SEE IT IN ACTION

Technology is critical to ensuring discovery is complete and sustainable. A SaaS Management Platform like Torii is both an SSOT for app data and a way to automate essential steps like real-time discovery of new apps and changes to users, utilization, costs, and licenses.

Make Strategic Decisions from Unified, Actionable Insights

Sports teams don't study film just for the fun of it. They do it to evaluate strengths and weaknesses in their (or their opponent's) gameplay and adjust accordingly. In the same way, an **SSOT provides a place to review your current SaaS state and make the smartest and easily actionable decisions.**

The purpose of this phase is to **turn the data uncovered through discovery into actionable insights.** To do this, IT, department leaders, and application owners should conduct periodic reviews of SaaS data to determine the best actions moving forward.

Running the Plays

With IT Leadership:

- Set up recurring review cycles with key leaders for things such as SaaS security, offboarding workflows, spend management, license and renewal management.
- Based on the review results, identify areas that need improvement and advise on realistic goals.
- Set goals, key performance indicators (KPIs), and a reporting cadence to track progress.

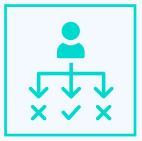
With Departments:

- When setting up periodic reviews with leaders from different departments, clearly articulate the purpose of the reviews and how they will assist with achieving department and company goals.
- Support department leaders with insight, automated workflows, and other measures to ensure the insights from the reviews lead to tangible outcomes.

With Application Owners:

- Once application owners are designated for each application, ensure they have the appropriate privileges to view data related to their specific app's usage, spend management, and security.
- Empower them to act as the first line of defense, scout, and problem solvers for critical tasks within their scope of responsibilities. For example, app owners should:
  - Flag when they see declining usage across an app
  - Be able to update contract information for an app
  - Offboard an employee from their app immediately

SEE IT IN ACTION



Hypothetical example: IT and Finance conduct a SaaS Spend review at the start of the year and find that the company is spending 37% above target. With the SaaS data (cost per seat, license utilization rate, etc.) in hand, you can set a goal to bring that back down to your target by Q3 via the following plan:

- **64% of spend reduction by eliminating unused licenses**
- **28% from removing applications with duplicate functionality**
- **8% reduction from upcoming contract renewal negotiations**

Cross-Functional Collaboration, Enhanced by Automation

While preparation is crucial, so is action. To help ensure outcomes will be "just like we practiced," IT can **leverage automation to minimize miscommunication, reduce oversights, and make your processes more flexible.**

With automation, you streamline non-IT's ability to contribute. Automation helps by making collaboration as frictionless as possible and reinforcing IT governance guidelines. You also **free up IT team members to operate more strategically and tackle other business-critical projects.**

Running the Plays

With IT Leadership:

- Establish app policies and standards based on factors like risk profile, costs, data-sharing requirements, or number of licenses. Then use automation as guardrails, so any time a policy is broken it triggers an alert to IT admin or app owner, and enables consistent action to be taken at each phase of the application or user lifecycle.

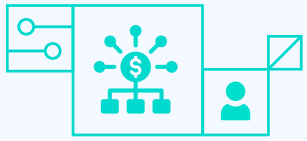
With Departments:

- Work with department leaders to design workflows and automation to accomplish critical tasks based on the goals and KPIs for the apps that they manage.
- Orchestrate cross-department automation to ensure actions align, hand-offs happen, and they do not interfere with or contradict one another.

With Application Owners:

- Schedule check-ins with app owners to maintain accountability while continuing to empower them with critical functions.
- Build workflows that deliver relevant data from app owners across the Distributed SaaS Management roster of players.

SEE IT IN ACTION



A major way to save costs and reduce security risks is through app deprovisioning during employee offboarding.

Within Torii, IT can create a workflow that notifies appropriate application owners that the user has left the organization and they should revoke license access. For high-priority apps or those with critical information (such as Salesforce or Dropbox), the workflow can automatically freeze or suspend the user accounts until they are fully deprovisioned to eliminate the risk of intellectual property theft. Application owners then have time to reclaim licenses.

ROI Optimization: Get What You Pay For (And Then Some)

The explosion of app adoption resulted in an explosion of costs. For many organizations, this means that they overspend on their SaaS. Fortunately, with Distributed SaaS Management, **cloud applications can quickly become a source of significant cost savings without hurting your productivity.**

Running the Plays

For IT Leadership:

- Schedule regular application rationalization periods to audit the overall SaaS stack to ensure that employees use the best apps for their needs while also getting the maximum value relative to costs.
- Evaluate apps with redundant functionalities, eliminate unnecessary ones, and transition users to the "winning" apps.
- Find unused licenses and reclaim or reassign them, so they don't go to waste and you don't purchase more.
- Based on the strategic decisions made by department leaders regarding optimization, IT can orchestrate specific automation to support cost-saving policies.

With Departments:

- Work closely with Finance and Procurement for optimization:
  - Finance leaders should work directly with app owners to monitor costs and find out if apps are being used in a way – and by enough people – that justifies both the apps and their price tag.
  - Procurement leaders, likewise, collaborate with application owners to understand what contract terms are appropriate for the tool, if renewals are warranted, and if so, for how many users.

For Application Owners:

- Application owners should also recommend or take action to reclaim, reharvest and (if appropriate) renew licenses based on usage.
- Remind app owners to actively engage with users to understand whether the app helps them accomplish their work.

SEE IT IN ACTION

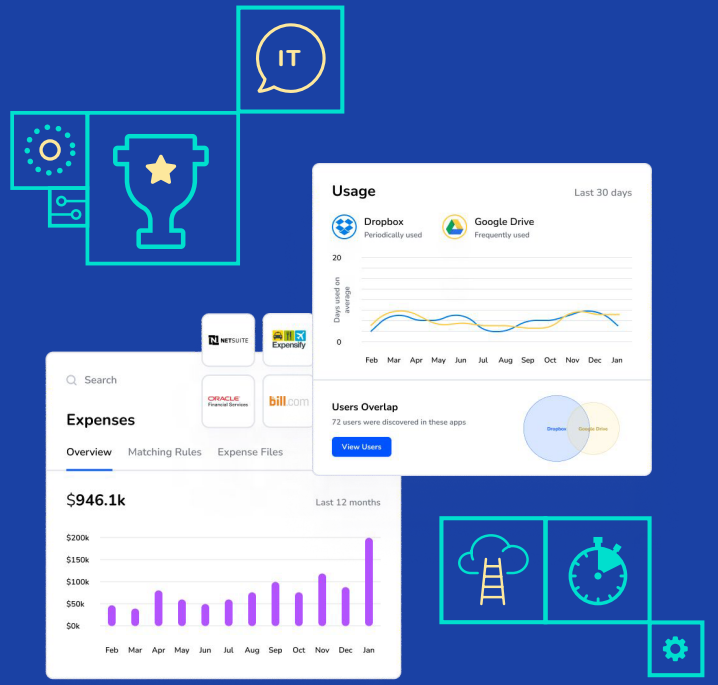
Let's say you want to clean up idle licenses and right-size others. You start with Zoom due to its cost and broad adoption. First, you communicate with department heads to identify a good set of rules for what constitutes "idle."

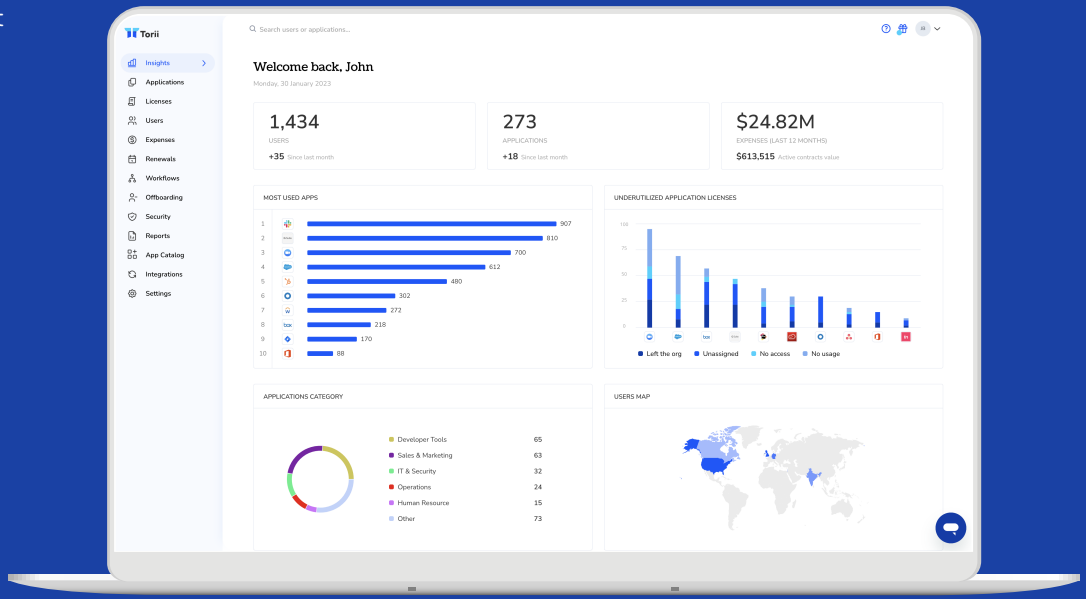
Torii users can create a workflow to trigger if a Zoom license is unused for 60 days. This workflow automatically emails the user asking if they still need this application. If they do not, this sends an email to Zoom's app owner to reclaim the license. It can also automatically create a ticket (within Jira, Freshservice, ServiceNow, etc.), assigned to the app owner for the reclamation of the license.

Every Team Needs the Right Equipment

There's a lot of information in this playbook. Here are some key takeaways:

- Distributed SaaS Management is a team-first approach designed for today's distributed app ownership and need for collaborative SaaS management.
- It can help your business intelligently reduce costs, accelerate operations, boost agility, and gain a competitive advantage by enabling: real-time app discovery, informed decision-making, empowered team players, automated actions, and optimization of application investments.
- IT professionals are the key to effective Distributed SaaS Management, advising leadership, orchestrating execution, and enabling players with the right insights and actions.
- To get ahead of the game and stay on top, organizations need to transition to modern Distributed SaaS Management and back it with the right technology. Torii is the only end-to-end SaaS Management Platform built for today' distributed SaaS world.





Get a demo of Torii, including:

- Automated Shadow IT Discovery
- Spend Optimization
- Dedicated Access for stakeholder including:
  - App owners
  - IT admins
  - Procurement
- Drag and Drop Workflow Builder
- And much more

Request a Demo **www.Toriihq.com**

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