oomnitza

Financial Services Company transforms employee offboarding, improves endpoint reclamation and reduces data exposure risk with Oomnitza

32%
increase
in endpoint
reclamation

Zero
touch offboarding,
down from 30+
manual touch points

100+
IT staff hours
saved per month
on offboarding

FinCo is a global financial services firm, based in the US, that provides innovative technology-driven services to investment professionals. As such, they have invested heavily in technology to manage their operations, and systems and tools needed to manage their environment.

While FinCo has a substantial number of employees working out of their many offices, an increasing number of their team now work remotely, or under a hybrid model, on a permanent basis. Also, they have event-driven and seasonal periods with upwards of 3,000 temporary contractors and consultants joining their team.

This dispersed and dynamic workforce created pressure on their joiners, movers and leavers HR and IT processes, especially during periods of increased employee turnover. Their IT team would get bogged down with repetitive tasks related to deprovisioning access, recovering endpoints and reassigning data and workspaces. With some of their industry peers in the news due to unauthorized PII access from ex-employees, FinCo decided it was time to streamline, secure and automate their offboarding processes.

Business Profile

- 7,500+ employees
- $5.7 billion annual revenue
- $600 billion in assets under management
- 12,000+ endpoints
- 150+ IT managed and unmanaged SaaS apps

The Spider Web of Tickets

FinCo has a large variety of systems and applications that are used by the various business units throughout the company. The multiple tools they use to manage their IT infrastructure don't integrate well enough to support their workflows. Hence, processes such as offboarding, technology audits, decommissioning assets etc. require many manual tasks and service desk tickets. As a result, the IT team needs to login to multiple tools, then use tickets and spreadsheets to drive those siloed actions.

To run their offboarding workflows, the IT team would first receive a ticket from Human Resources, then initiate a series of 30+ downstream steps in various systems to deactivate and deprovision departing users, reassign work data to appropriate personnel and reclaim all physical endpoints. With a SaaS footprint of 150+ IT managed and unmanaged apps, some of which are provisioned outside of Okta and vary by business unit and functional teams, this would entail a lot of manual tracking and effort spent on mundane tasks.

FinCo utilized tickets in ServiceNow to run offboarding, but had no capability nor workflows in place to automate the execution of the individual tasks. As a result, they would average 32 separate tickets to execute the entire offboarding process from separation to recovery.

This also created gaps in offboarding process security and controls. For example, they did not have mechanisms in place to check if departing end-users still had access to some systems, and weren't able to easily provide evidence of offboarding controls, decommissioned assets and security procedures to auditors. They needed to ensure that former employees and contractors no longer had access to systems and proprietary data, but lacked the means to verify without manual steps. This had led to PII exposures in the past and an audit failure.

In addition to their deprovisioning challenges, FinCo had issues in recovering endpoints assigned to their employees and contractors in a timely manner. Besides costing FinCo tens of thousands of dollars per year in "inventory shrinkage," this also created security issues due to the proprietary company data residing on those uncaptured endpoints.

FinCo's environment:

- VMware Workspace ONE Suite for endpoint management

- Crowdstrike for endpoint security

- Microsoft Intune on a subset of machines as a result of an acquisition

- Jamf on all of Mac and iOS devices

- SHI relationship for procurement

- Dell leasing program

- Okta for single sign-on

- Workday Human Resource Information System

- ServiceNow for service management and ticketing

"Before Oomnitza, we thought we had automated processes, but in reality, we had an automated ticket system."

Director,
IT Operations

Converting Chaos to Order

Since FinCo wasn't able to implement and scale a secure, auditable and efficient offboarding solution using their service management and ticketing platform, they decided to look for an IT automation solution instead. They evaluated and implemented the Enterprise Technology Management solution from Oomnitza over a three month period in late 2021. FinCo leveraged Oomnitza's best practice methodology to define and automate their Separation to Recovery (S2R) secure offboarding process.

As a result of Oomnitza's powerful and easy to use low-code workflow automation engine, and the native integrations to all their key systems and SaaS applications, FinCo was able to take their desired policies and outcomes and make them programmatic across their digital estate.

Now, when an employee departs from FinCo, the employee status change in their HRIS system triggers secure offboarding workflows in Oomnitza to deprovision access to systems and SaaS applications, reassign work in progress to designated users, and help in endpoint reclamation with integration to logistic services.

> "Thanks to Oomnitza's solution, we were able to reduce the number of tickets used for secure employee offboarding from 32 to only two for logging purposes, and now have a real automation system."
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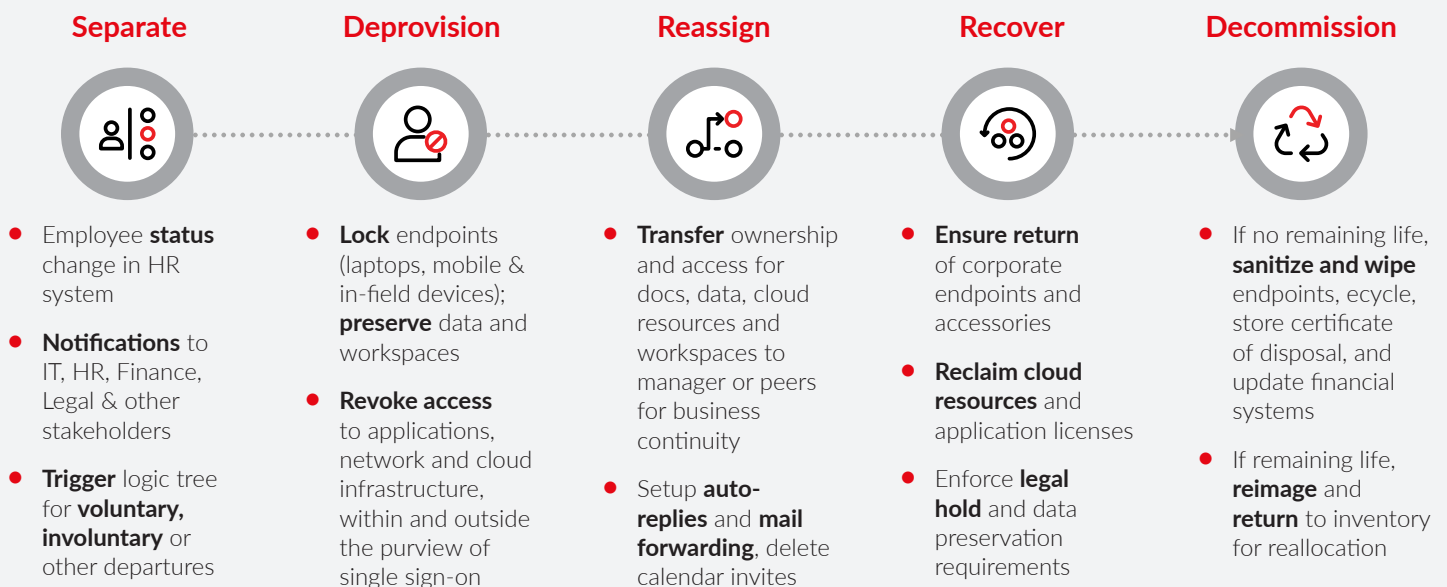> **Chief Information Officer, FinCo**
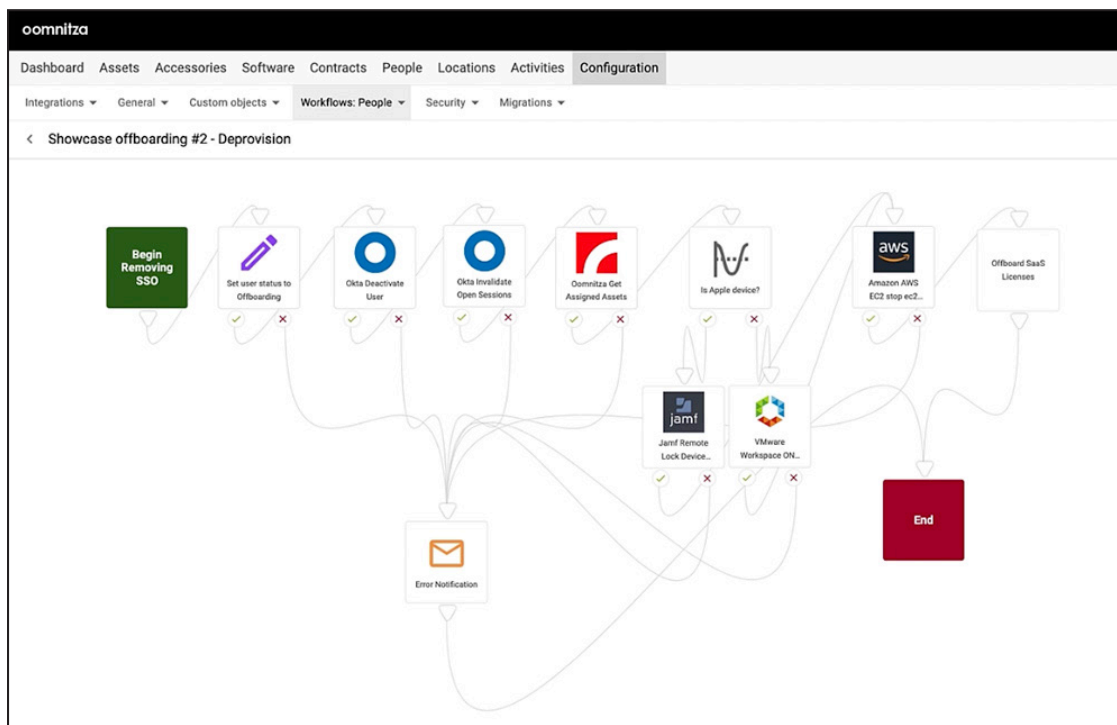
The results were practically immediate. A cumbersome, mostly manual process that required 32 separate service desk tickets was reduced to two tickets for logging purposes only. FinCo was able to share their completely automated S2R process with auditors, and show evidence of how they are enforcing security and compliance controls for offboarding employees.

Real Returns. Real Savings. Real Results

As a result of deploying Oomnitza for employee offboarding, FinCo was able to realize significant cost savings, security improvements and IT efficiencies.

- **Cost efficiencies:** FinCo increased their endpoint recovery and reclamation from offboarded employees by 32%. This alone achieved savings of several hundred thousand dollars per year.

- **Resource efficiencies:** As the extensive number of manual processes were reduced, FinCo's IT team was able to save 100+ hours per month on offboarding tasks and repurpose scarce IT resources towards business critical projects.

- **Security improvements:** The completion time to remove access to key systems for departed employees was reduced from 8 hours using multiple tickets, to 15 minutes using the automated S2R process, dramatically reducing the risk of proprietary data exposure and PII related audit fines.

- **Automation:** One of the most important benefits experienced by FinCo was achieving efficiency through IT automation. Prior to Oomnitza, the tools they had in place were simply automating tickets that required human action. After deploying Oomnitza and leveraging the power of the low-code automation engine, FinCo now has deep connections and integrations to all their systems. And most important, they have zero touch offboarding automation to achieve their goals and desired state.

Secure Offboarding Process with Oomnitza

Separate

- Employee **status** change in HR system
- **Notifications** to IT, HR, Finance, Legal & other stakeholders
- **Trigger** logic tree for **voluntary, involuntary** or other departures

Deprovision

- **Lock** endpoints (laptops, mobile & in-field devices); **preserve** data and workspaces
- **Revoke access** to applications, network and cloud infrastructure, within and outside the purview of single sign-on

Reassign

- **Transfer** ownership and access for docs, data, cloud resources and workspaces to manager or peers for business continuity
- Setup **auto-replies** and **mail forwarding**, delete calendar invites

Recover

- **Ensure return** of corporate endpoints and accessories
- **Reclaim cloud resources** and application licenses
- Enforce **legal hold** and data preservation requirements

Decommission

- If no remaining life, **sanitize and wipe** endpoints, ecycle, store certificate of disposal, and update financial systems
- If remaining life, **reimage** and **return** to inventory for reallocation

About Oomnitza

Oomnitza offers the industry's most versatile Enterprise Technology Management platform that delivers key business process automation for IT. Our SaaS solution, featuring agentless integrations, best practices and low-code workflows, enables enterprises to quickly achieve operational, security and financial efficiency leveraging their existing endpoint, application, network infrastructure and cloud infrastructure systems. We help some of the most well-known and innovative companies to optimize resources, mitigate cyber risk, expedite audits and fortify digital experience.

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Learn more at
www.oomnitza.com