oomnitza

Empowering a Distributed Workforce with Automated IT Asset Management for a Conversational Relationship Platform (CRP)

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Oomnitza just made the most sense. It was the most well-rounded solution.

IT Lead for the CRP Platform

About the Company

This Conversational Relationship Platform (CRP) is designed to help businesses build stronger customer relationships through personalized, messenger-based interactions. As the only platform supporting conversational experiences across the customer journey, they power over 500 million conversations monthly among 4 billion unique end users. With 30,000 paying customers—including Facebook, Amazon, and Lyft—the platform serves as a critical tool for Conversational Marketing, Engagement, and Support.

Business Profile

- **Industry**
  Technology

- **Technology Assets**
  1,400 assets
  including desktops,
  laptops, monitors,
  servers, and tablets

- **Location**
  Global

Transforming IT Asset Management for a Global, Remote Workforce

As a rapidly scaling SaaS leader in conversational customer engagement, the organization faced escalating challenges managing IT assets across five offices spanning three continents. The sudden shift to remote work during the pandemic further complicated device distribution, tracking, and security.

With a small IT team juggling multiple roles across IT, HR, legal, and compliance, spreadsheet-based asset tracking became a bottleneck—slowing response times, increasing risk exposure, and jeopardizing compliance with frameworks and regulations such as SOC 2 and GDPR.

Recognizing the urgent need for a scalable, integrated solution, they turned to Oomnitza's unified IT asset management platform. This transition replaced fragmented, manual workflows with automated, real-time asset visibility, streamlining device tracking, assignment, and security processes. By integrating with existing tools such as Okta, Jamf, and Intune, Oomnitza empowered the platform's IT, compliance, and finance teams with reliable data for audits, faster ticket resolution, and improved planning.

This transformation not only enhanced the CRP company's compliance posture—helping pass SOC 2 audits with confidence and supporting GDPR obligations—but also boosted operational efficiency, reduced manual effort, and fortified security across its distributed workforce. Their experience illustrates how a modern ITAM solution can enable hyper-growth companies to maintain control, compliance, and security while scaling globally.

> **We realized our processes were really antiquated. We needed something that would scale with the rapid growth of our company.**
>
> IT Lead for the CRP Platform

Struggling to Scale IT Operations in a Distributed Environment

As the company expanded rapidly with a distributed team, their IT asset management became fragmented and inefficient. The pandemic-induced shift to remote work exposed critical gaps in visibility, tracking, and compliance—highlighting the need for a scalable, unified solution.

Limited Visibility and Manual Tracking

Managing IT assets with spreadsheets made it nearly impossible for the team to identify which devices were located where and who was using them. The IT Lead had no way to generate quick reports or track assets across global offices.

"We are the first line of defense when someone loses a laptop or leaves it in the back of an airplane or coffee shop or vehicle that is burglarized. We had no easy way to generate a report, say, showing all devices in the Dublin office and who was using them," he claimed.

Complications from Remote Work

The pandemic accelerated remote onboarding and offboarding, requiring a new process for device tagging and shipping directly to employees' homes. The IT Lead spoke of this shift, saying, "We had to create a process where our vendors do all the device tagging and then drop-ship directly to our employees' homes." This further fragmented visibility and control over IT assets.

Challenges

A Conversational Relationship Platform (CRP)'s rapid growth and distributed workforce introduced mounting IT asset management complexities. As they tried to track assets across five global offices, the company needed a scalable, automated solution to replace manual processes and support compliance demands.

- Time-consuming, error-prone spreadsheet-based tracking

- Inability to quickly locate assets for security or compliance

- Difficulty supporting SOC 2 and GDPR requirements

- No centralized system to manage device assignments, ownership, or aging data

- Limited ability to scale processes to match company growth
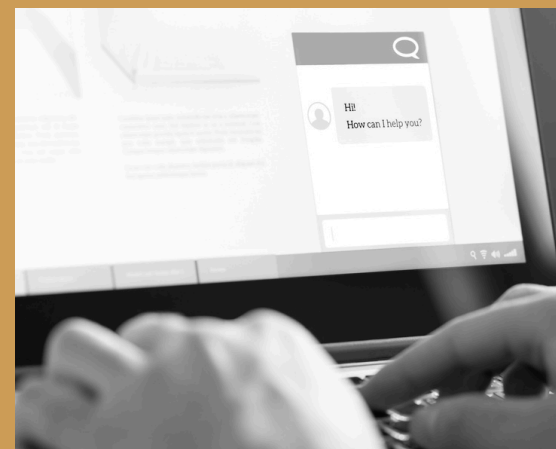
Burdensome Compliance Requirements

Preparing for audits and maintaining certifications like SOC 2 became a significant pain point due to data fragmentation. The IT Lead admits he eventually reached a tipping point.

"We got a small yellow flag on our SOC 2 certification because it would take us so long to find required data by sifting through endless spreadsheets. After that we moved quickly to find a unified asset management tool."

Antiquated Systems and Lack of Integration

The company's legacy systems couldn't keep pace with their growth or evolving needs. The IT Lead and his team needed a platform that could consolidate asset data, integrate with Okta SSO, and eliminate manual processes.

Security and Data Hygiene Gaps

Without a central source of truth, tracking asset status in the case of a loss or breach was slow and unreliable. The IT Lead emphasized the importance of having up-to-date, accurate data to maintain strong security practices.

A Single Source of Truth for Asset Management

Implementing Oomnitza empowered the CRP platform with a centralized system for asset tracking, enabling faster audits, better data hygiene, and seamless integration with existing tools. These improvements reduced manual effort, supported regulatory compliance, and increased operational efficiency across IT and related teams.

Unified ITAM Platform with Extensible Integrations

Oomnitza's agentless discovery and out-of-the-box integrations with Jamf, Intune, and Okta enabled seamless data unification. The company can now generate real-time reports and insights with minimal effort.

The IT Lead feels confident, "I can now ask someone, 'Get a report for how many assets of a certain model and a certain year are assigned in Dublin,' and get the information immediately."

Streamlined Compliance and Audit Readiness

With Oomnitza, the company's audit and compliance teams gained direct access to accurate and up-to-date asset information, drastically reducing their dependence on IT for report generation. This autonomy accelerated SOC 2 and ISO 27001 audit processes and enabled timely fulfillment of GDPR data requests.

Simplified IT Support and Onboarding

With centralized visibility, the IT Lead's team resolves support tickets faster and ramps up new team members with ease, regardless of technical familiarity.

The Outcomes

Implementing Oomnitza brought clarity, control, and compliance to the platform's IT operations. With automation and integration, asset tracking and audit prep became streamlined and accurate.

- Automated reporting and faster ticket resolution

- Direct support for GDPR and SOC 2 compliance

- Improved data hygiene and reduced manual labor

- Simplified onboarding and support processes

- Enhanced collaboration across IT, compliance, legal, and finance

"It makes support work a lot easier because you have one place to look into the state of any machine or asset. This radically reduces the investigation that someone has to do when we get a new ticket, and when we get new people on the team, they may not be familiar with the technology, but Oomnitza makes it easy to figure everything out."

Improved Cross-Departmental Planning and Control

Accurate and timely asset utilization data has enhanced collaboration between IT, finance, procurement, and legal teams. The company can now make data-driven decisions on equipment refresh cycles, budgeting, and compliance strategies. This holistic approach minimizes resource wastage and helps forecast future asset needs with confidence.

"Oomnitza already provides a first line of legal defense against CCPA by improving response time to theft and breach incidents."

Enhanced Data Hygiene and Reduced Manual Labor

Automation of asset discovery, tagging, and data synchronization eliminated many manual processes, greatly reducing the risk of human error. This improved data hygiene ensures asset records are always current and reliable—foundational for security investigations and audit trails. Consequently, the platform's IT team spends less time on tedious administrative tasks and more on strategic initiatives.

Thanks to Oomnitza, the platform is improving IT asset management by:

- Unifying management of all IT assets across laptops, smartphones, and ChromeOS AV devices into a single, accurate, and responsive system-of-record

- Enabling and streamlining key compliance processes such as SOC 2 and ISO 27001

- Reducing manual labor for teams in IT, compliance, and legal

- Improving data hygiene by automating ROT data collection and management tasks

- Simplifying key asset management tasks and reducing time-to-resolution on tickets

Learn more at oomnitza.com