



Turning Dozens of Tickets into Zero-Touch, Automated Offboarding 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

About the Company

A global financial services firm, based in the US, provides innovative technology-driven services to investment professionals. They had invested heavily in technology to manage their operations, and systems and tools needed to manage their environment.

While the firm had 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. They also had 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.

Business Profile

- **Industry**
Financial Services
- **Annual Revenue:**
\$5.7 billion (2024)
- **Assets Managed**
\$600 billion
- **Endpoints**
12,000+
- **SaaS Apps**
150+ IT managed and unmanaged

Moving from Ticket Chaos to Touchless Offboarding

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, the financial services firm decided it was time to streamline, secure, and automate their offboarding processes.

Faced with these sprawling, manual, and error-prone offboarding processes, the firm knew they needed a better way to manage departures—especially with thousands of hybrid workers and seasonal contractors. Their reliance on tickets, spreadsheets, and disconnected systems not only strained their IT team but also left security gaps and compliance risks.

Untangling the Spider Web of Tickets

As the financial services firm scaled and shifted to a more remote and flexible workforce, their legacy offboarding process simply couldn't keep up. What started as a manageable workflow became a logistical and security nightmare.

Fragmented Tools, Fragmented Process

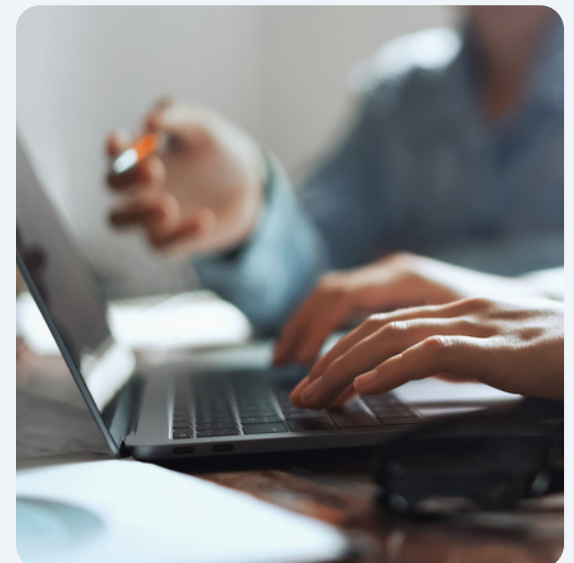
The firm has a large variety of systems and applications that are used by the various business units throughout the company. The multiple tools they use to manage their IT infrastructure didn't integrate well enough to support their workflows.

Processes such as offboarding, technology audits, and decommissioning assets required many manual tasks and service desk tickets. As a result, the IT team needed to log into multiple tools, then use tickets and spreadsheets to drive those siloed actions.

With Oomnityza, the financial services firm implemented an automated, zero-touch offboarding process that saved time, improved endpoint reclamation, and significantly reduced data exposure risk.

The Financial Services Firm'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 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



Manual Overload

Their Offboarding process began with an HR ticket, after which IT triggered 30+ downstream steps across multiple systems to deactivate and deprovision the user, transfer work data to the right owners, and reclaim physical endpoints.

With 150+ SaaS apps and having some outside Okta and varying by business unit, much of the process depended on manual tracking and repetitive tasks. ServiceNow tickets orchestrated the workflow, but there was no automation to execute the individual tasks.

The result? An average of 32 separate tickets to execute the entire offboarding process from separation to recovery!

Gaps in Security and Compliance

The lengthy and manual offboarding process also created gaps in security and controls. They 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 they lacked the means to verify that without manual steps—something that had already led to PII exposures and compliance failures in the past.

Missing Endpoints and Lost Dollars

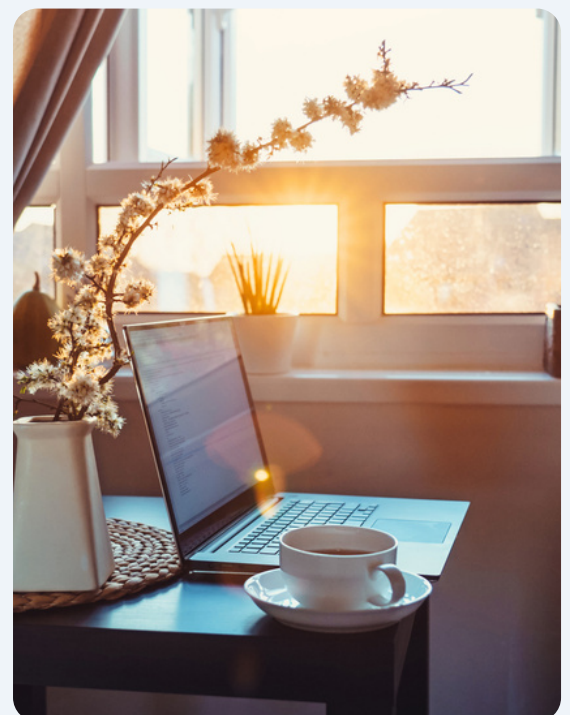
On top of their deprovisioning challenges, the financial services firm struggled to recover endpoints assigned to their employees and contractors in a timely manner. Besides costing the company tens of thousands of dollars per year in "inventory shrinkage," this also created security issues due to the proprietary company data residing on those uncaptured endpoints.



Challenges

As a financial services company's workforce became more dispersed and dynamic, their offboarding process struggled to keep up. Here's what they were facing:

- Over 30 manual steps and 32 separate tickets just to offboard one employee
- Endpoint recovery delays leading to inventory shrinkage and security risks
- No automated verification of offboarding tasks for audits or compliance
- Incomplete visibility into SaaS app access, especially for ex-employees



Real Returns. Real Savings. Real Results.

After struggling to scale and secure their offboarding process using traditional ticketing tools, the financial services firm turned to Oomnitza's modern IT Asset Management (ITAM) solution. Over a three-month rollout, they used Oomnitza's best practices to automate their Separation to Recovery (S2R) process.

Thanks to Oomnitza's low-code workflow engine and native integrations with their key systems, the firm transformed their offboarding into a fully automated, policy-driven workflow—triggered directly by status changes in their HR system.

Now, when an employee departs from the financial firm, the employee status change in their HRIS system triggers secure offboarding workflows in Oomnitza. Access deprovisioning, work reassignment, and endpoint recovery all happen seamlessly and securely, with zero manual effort.

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

Cost Efficiencies

The financial services company increased their endpoint recovery and reclamation from offboarded employees by 32%. This alone achieved savings of several hundred thousand dollars per year.



The Outcomes

After implementing Oomnitza, the financial services organization turned their offboarding chaos into a well-oiled, automated process:

- 32% increase in endpoint reclamation
- Zero-touch offboarding, reduced from 30+ manual steps
- 100+ IT staff hours saved per month
- Access removal time dropped from 8 hours to 15 minutes



Resource Efficiencies

As the extensive number of manual processes was reduced, the firm'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 the firm 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, the financial services firm 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.



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

-Director, IT Operations, Global Financial Services Company



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



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.

- Chief Information Officer, Global Financial Services Company

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
- Set up 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, recycle, store certificate of disposal, and update financial systems
- If remaining life, reimage and return to inventory for reallocation

Learn more at oomnitza.com