CoreView

The SaaS Management Platform (SMP):
A 'Single Pane of Glass' to Make SaaS
Management More Secure, Streamlined
& Cost-Effective

Get more productivity, savings and value out of SaaS solutions like
Microsoft Office 365 with a SaaS Management Platform

CoreView

Discover the SaaS Management Platform

For end users, Software as a Service (SaaS) solutions like Microsoft Office 365, Google's G Suite and Salesforce are productivity game-changers, putting daily functions like email, messaging, file sharing and contact management at their fingertips in a highly streamlined, highly intuitive format.

For a SaaS administrator, however, it's often a very different story — one of escalating challenges related to administration, security, compliance and cost savings.

See the benefits of a Single Pane of Glass for your SaaS administration tasks.

SaaS Management Needs are Outgrowing Native Consoles

Many IT departments today are spending too much of their time supporting Office 365 and other day-to-day SaaS applications and not enough time developing new products, exploring innovations like AI and other initiatives that sharpen the organization's competitive edge.

As organizations grow, so, too, do the number of required administrative tasks. The level of concern regarding security and compliance increases significantly as adding new users and managing their roles and permissions become increasingly burdensome. The same with training new employees on the system, rolling out new features and helping users discover and master the applications they need for their specific roles.

To make things even more frustrating, several administrative processes, like assigning calendar permissions and provisioning and re-provisioning resources, are manual. Many help desk and support functions are restricted to the highest-level administrators. Delegating access to other team members can be difficult or impossible without customized scripts or workarounds.

Meanwhile, organizations face security and compliance challenges with their SaaS solutions. Internal policies and controls must keep pace with evolving GDPR, PCI and HIPPA regulations. This, plus the demands of compliance reporting, can exceed the capabilities of native SaaS management consoles.

> By 2021, 75 percent of organizations that do not proactively manage their SaaS environments will spend 30 percent more on their deployments than their counterparts with on-premise solutions, according to Gartner.[1]

Throughout, saving money remains a priority, particularly for a "cost center" like IT. Take, for example, licenses for employees who've left or moved on or applications used only at a fraction of their full functionality. For an organization with thousands of employees and consultants, the waste adds up. But monitoring adoption and optimizing license usage also requires an investment of time and resources many time-strapped and stretched IT departments don't have.

In short, native SaaS administration consoles offer many useful features and functions. But too many IT departments today are grappling with their limitations: **creating their own scripts for automation and custom reporting, delaying rollouts and accepting IT management limitations and increased risk as a fact of life**. And these limitations are threatening to erode the value SaaS solutions were designed to deliver.

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[1] **Source**: The ITAM Review - Software Usage Monitoring - June 28, 2011

A New Platform for Streamlining & Supercharging SaaS Administration

In late 2018, a Gartner report highlighted an emerging product category: the SaaS Management Platform (SMP). These platforms deliver additional capabilities for the day-to-day management of frequently used SaaS applications like Office 365.

SMPs are designed to address the tactical challenges to SaaS administration, such as:

IT Administrative Tasks
like resetting passwords, assigning licenses and creating users

Role-Based Access Control (RBAC)
for departments/regions and specific functions

Policy Management
for tracking compliance and alerting and responding to atypical behaviors

License Management
for monitoring usage and optimizing subscriptions

Workflow Automation
for manual tasks such as scripting and provisioning

Reporting
for compliance, adoption and training purposes

An SMP strengthens an IT administrator's ability to manage application policies, track usage, take corrective actions and automate IT administration.

For an organization, an SMP enables:

Visibility
into service usage, licensing costs and governance

Security and Compliance
for policy monitoring and enforcement and forensic investigations

Delegation
for more effectively scaling administrative functions

Automation
that reduces human error, reduces costs and improves performance

Putting an SMP to work in your organization

IT departments are beginning to consider how an SMP might add value to their organizations. According to Gartner, security, compliance and policy management are the most common pain points. But these are just three areas where SMPs can be of service. An SMP can deliver significant value to several areas of IT administration. This includes license management, training and adoption, which all leverage the platform's ability to deliver visibility and resources from a single source.

Furthermore, SMP solutions are expanding from support for a single SaaS application, such as Office 365, to the management of multiple SaaS applications. Imagine administering, securing and supporting the leading communications, collaboration and CRM solutions all from one integrated and highly intuitive interface. This is where the future of SaaS management is headed.

For getting started, this report details four areas where an SMP can add value, and things to look for in each.

1. Security & Compliance

IT departments have much on their plates today in the areas of security and compliance. They need to make sure their internal controls on file sharing, passwords and emails reflect evolving regulations like GDPR, PCI and HIPAA. The same challenges apply to their capabilities for data storage, remediation and reporting. For an audit or forensic investigation, they may need to access emails or messaging data from months, or even years, ago and produce a customized report in a short period of time.

Furthermore, in today's escalating threat environment, IT departments need situational awareness. If an employee has clicked on a phishing email or downloaded a piece of malware, they need to be alerted to the situation as soon as possible, so they can respond swiftly and effectively to meet any customer notification and service level requirements.

An SMP can help.

This platform supplements native SaaS administrative portals to provide:

Monitoring of suspicious activities like unauthorized or atypical sign-ins

Greater control and visibility over privileged credentials

Automation of tasks such as continuous assessments for finding and correcting vulnerabilities and detecting incidents. (An SMP's ability to automate tasks also reduces the likelihood of human error throughout the platform.)

Robust analytics and reporting for timely, compliant forensic investigations

SMP Checklist for Security & Compliance

AN SMP SHOULD OFFER:

- An intuitive single-view dashboard
- The necessary information (e.g. sign-in data, enhanced audit data) for investigations and audits
- Powerful searching and analytics capabilities
- Customization for preparing internal policies and external reports

2. IT Administration

With an SMP, IT administrators are able to streamline, centralize and automate time-consuming responsibilities such as assigning RBAC for new employees, running reports and provisioning and deprovisioning resources. They can delegate access rights for routine tasks, like password changes and calendar permissions, to a regional office or lower-level admin. They also reap the many benefits of workflow automation.

Many of the tasks of Office 365, like user provisioning and re-provisioning, are repetitive, manual and consume hundreds of hours of IT admin time each year. They're also prone to human error. An SMP with workflow automation capabilities can help. Here different steps in a task are "chained" together into a pre-set process that automatically run from the workflow engine, ideally with full auditing capabilities. When a SMP offers this automation in a fully customizable way, organizations open the door to unlimited automation scenarios.

In the area of daily IT administration, an SMP addresses the limitations of native SaaS management consoles through enabling:

- Account management from a single interface
- User grouping and segmentation for rights management and task delegation
- The automation of routine tasks and workflows
- Visibility into license usage

> Through automating administrative tasks and delegating admin rights to lower-level support teams, an organization with 10,000 employees can save over $86,000 a year.[2]

Workflow automation speeds up processing, reduces errors (and related support tickets), and improves the quality and professionalism of IT administration. This all adds up to optimized IT resource costs, more efficient execution of daily tasks and more time for IT admins to spend on core business functions and innovation.

Key benefits of an SMP

Faster execution of day-to-day IT administration

Less chance of human error

More time to spend on core business functions and innovation

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[2] **Source**: Cost Saving Opportunities for Office 365, CoreView white paper, pg. 4

Meanwhile, an SMP's tracking and reporting capabilities offer powerful benefits in the area of license management. When employees leave an organization or consultants end their engagements, the subscriptions for these user accounts often remain, even though the accounts have been disabled. Or an organization may be paying too much for oversized licenses, which means that it purchased the highest-level license available, but employees ended up using only a small subset of services.

Proactive management of Office 365 subscriptions can reduce an organization's license costs by 10% or more. [3]

An SMP delivers insight into who is using specific Office 365 services, to aid in the right-sizing of licenses, and facilitates the identification of underused and inactive accounts, so these subscriptions can be efficiently reassigned or refunded. For busy IT departments that don't have the time to proactively monitor license usage and manage optimization, it's a seamless way of capturing cost savings. For an organization with all of its 10,000 employees in higher-level E3 and E5 plans, moving just 13 percent of users to an E1 plan (because these employees don't use Office ProPlus or extended enterprise features) can save nearly $1.5 million. [4]

SMP Checklist for IT Administration

AN SMP SHOULD:

- Support RBAC and task delegation
- Be able to embed complex administrative scripts and processes into a single-click workflow
- Automate tasks like resource provisioning and deprovisioning
- Offer a range of reporting options (including out-of-the-box, custom, pivot and scheduled reports)
- Track and report license usage and chargebacks
- Integrate with applications like Teams, SharePoint, Office 365 Help and Dynamics CRM

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[3] **Source:** Cost Saving Opportunities for Office 365, CoreView white paper, pg. 3
[4] **Source:** CoreView

3. User Adoption

In many organizations, some SaaS applications (Outlook, for example) become essential tools, open on desktops and laptops throughout the business day. Meanwhile, a wealth of other programs within the SaaS solution (think SharePoint or OneDrive) may remain underused because staff aren't aware of them or don't see the relevance to their jobs. Even within an essential program like Outlook, employees may use a fraction of the features that can make their lives easier and themselves more productive.
As a result, organizations only get a fraction of the productivity gains they're paying for with an Office 365 investment.

An SMP can help organizations:

- Accurately track actual usage of SaaS applications and features

- Efficiently and cost-effectively administer user adoption campaigns

- Monitor campaign effectiveness

- Analyze metrics and run reports

An SMP's user adoption capabilities support other areas, like licensing and training. By tracking specific tasks and behaviors, organizations can gain a clearer picture of the types of licenses they need for departments, business units and job roles. Organizations can also identify which employees and business units require training—and on what features and tasks.

SMP checklist for user adoption

AN SMP SHOULD OFFER:

- Customizable tracking and analysis of SaaS usage—both overall adoption and individual features
- Dashboard visibility
- Robust data analysis
- Templates and automation for efficient adoption campaigns
- Reporting capabilities

4. User Training

Given how essential applications like Office 365 are to daily office life, maximizing employee dexterity and productivity is a worthy goal. Yet training a global workforce across time zones and job responsibilities can be easier said than done. Traditional webinars and in-person classes can be costly and time-consuming to execute. Individual calls with questions also can sap IT staff time and resources.

According to Deloitte, the average employee spends 6.5 hours per week learning.[5] Learning Solutions Magazine reports that 70 percent of new material is forgotten in one day. [6]

With an SMP, an IT department can:

Gain visibility into SaaS usage, to identify specific training needs.

Identify behaviors in need of correction, which may have security and compliance consequences

Customize training content to user and business unit needs

Deliver this content on demand, so employees can learn what they need to know, on their own schedule

Track consumption of and progress with training content, including areas in need of further attention

Send automated reminders to encourage participation

SMP checklist for User Training

AN SMP SHOULD OFFER:

- A robust library of self-service training content, like videos
- The ability to customize training to users and tasks
- Monitoring and tracking capabilities
- Targeted communications like automated reminders

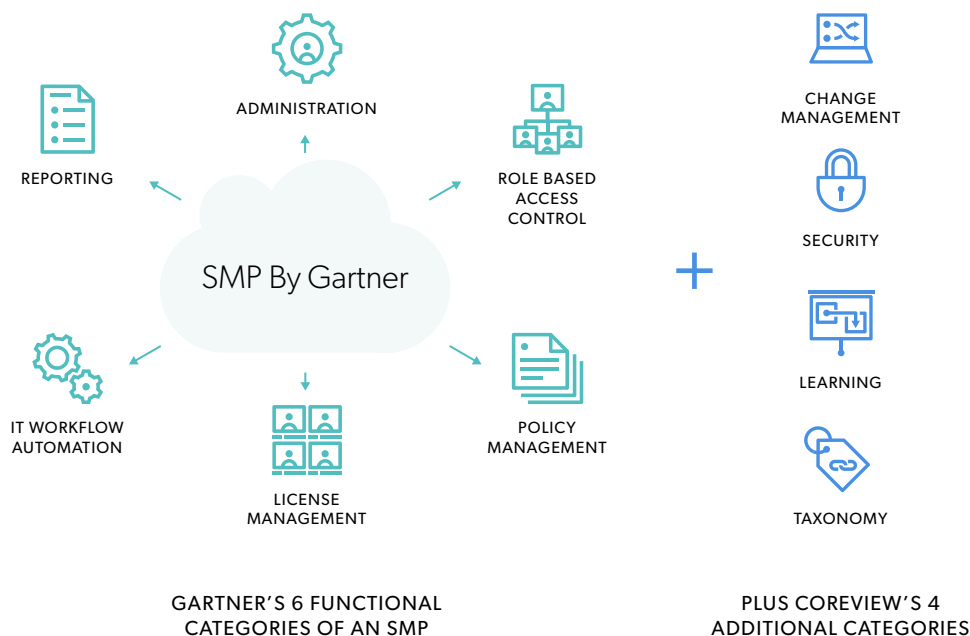[5] **Source:** Deloitte – Global Human Capital Trends 2016

[6] **Source:** Learning Solutions Magazine – Brain Science: The Forgetting Curve – the Dirty Secret of Corporate Training

Getting started with your SMP

Organizations are exploring SMPs for their security, compliance and policy management capabilities — **but this is just the beginning of the value such a platform can deliver.** An SMP's automation and delegation capabilities empower IT administrators to deliver higher quality service and support with greater speed, efficiency and cost-effectiveness.

For licensing managers, an SMP facilitates the usage analyses and chargebacks that lead to cost savings and resource optimization. Meanwhile, workforce executives and their teams benefit from streamlined access to the training videos, targeted campaigns and other resources that improve adoption, productivity and ROI.

What should your organization do next to leverage this powerful platform? Thoroughly evaluate vendors, as capabilities vary, and let administrative roles and responsibilities drive your SaaS and SMP implementations — not the other way around.

ADMINISTRATION

REPORTING

ROLE BASED ACCESS CONTROL

SMP By Gartner

CHANGE MANAGEMENT

SECURITY

LEARNING

IT WORKFLOW AUTOMATION

LICENSE MANAGEMENT

POLICY MANAGEMENT

TAXONOMY

GARTNER'S 6 FUNCTIONAL CATEGORIES OF AN SMP

PLUS COREVIEW'S 4 ADDITIONAL CATEGORIES

CoreView's SMP solutions include Gartner's six required core components for an SMP and four additional components. To learn more and schedule a demo, visit coreview.com

About CoreView

CoreView is the leading SaaS management platform for Office 365. It provides a fully integrated product to help customers stay in control of their Office 365 deployment. The comprehensive features and the advanced functionality built into CoreView allow organizations to improve security, streamline administration, optimize licensing, and empower usage adoption. CoreView's commitment to innovation is demonstrated by a close alliance with Microsoft as a Gold Certified Partner.