

# Enterprise Financial Services Company Improves Compliance and Enhances IT Efficiency by Automating Key Business Processes with Oomnitza ETM

## Introduction

This case study of a medium enterprise financial services company is based on a September 2022 survey of Oomnitza customers by TechValidate, a 3rd-party research service. The profiled company asked to have their name blinded to protect their confidentiality.

“Although Oomnitza does a lot, the two main areas that it has added value to is in the area of compliance and reclamation. Prior to Oomnitza, we used spreadsheets cross-referenced across multiple security systems to determine compliance. Oomnitza has allowed us to automate those processes, adding huge value through time savings and accurateness. The technology reclamation efforts have dramatically improved through automation in Oomnitza.”

## Challenges

The business challenges that led the profiled company to evaluate and ultimately select Oomnitza:

- Before using Oomnitza's ETM Platform they had:
  - Lack of complete visibility/inventory into technology assets (endpoints, SaaS/on-premises applications, infrastructure, cloud)
  - Time-consuming, manual processes for managing technology assets across their entire lifecycle
  - Inefficient, manual and error-prone tasks to complete regulatory, industry and vendor audits
  - Inability to effectively manage employee onboarding and offboarding in an automated, secure and compliant manner
- Before they adopted Oomnitza, they were using spreadsheets
- Before Oomnitza, they had trouble offboarding employees because of:
  - Timely and complete reclamation of all endpoints and accessories
  - Document execution, attestation and audit proof for reclamation, legal hold, data retention, asset disposal, etc.

## Environment

- The number of SaaS and on-premises applications in use in their organization is between 1-25
- They have between 2,001 and 5,000 technology assets including endpoints (laptops, mobile devices, IoT), infrastructure (servers, storage, cloud instances), network devices, SaaS/on-premises software licenses, and accessories managed with Oomnitza.

## Results

The surveyed company achieved the following results with Oomnitza:

- To deploy and start benefiting from Oomnitza took 3 to 6 months
- The business process improvement they have seen since using Oomnitza are:
  - Unified and centralized technology inventory
  - Improved asset context and response time for service desk
  - Hardware reclamation, cost savings and refresh forecasting accuracy
  - Ability to identify and mitigate security and compliance gaps
- They have achieved a cost savings of between 16 to 20% from managing their technology assets with Oomnitza.
- The time saved managing their technology assets with Oomnitza is up to 40 hours per month (1/4 FTE)

### Company Profile

The company featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Company Size:  
**Medium Enterprise**

Industry:  
**Financial Services**

### About Oomnitza

Oomnitza offers the industry's most versatile Enterprise Technology Management platform that delivers critical 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 by 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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