Auvik SaaS Management guide for MSPs

Guide

Eliminate Shadow IT for your clients with Auvik SaaS Management. With SaaS Management practices being essential to the modern MSP, it's time to take the next step of securing and supporting your client.
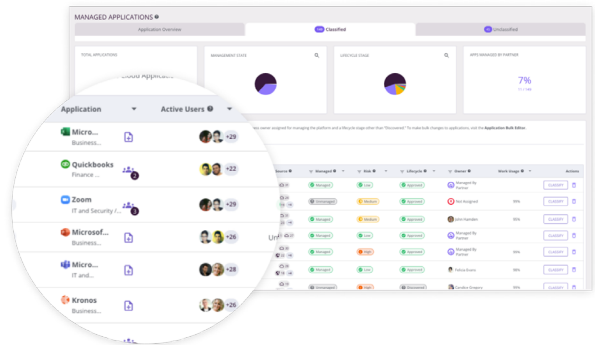
Contents

Overview

Powerful automations

Discover and automatically document your entire desktop, business, and SaaS applications inventory. Onboard and offboard employees to key SaaS applications with the click of a button thanks to API integrations

Access & account inventory management

Understand where s risks come into play across the entire app stack. Be alerted and stay up-to-date on compliance risks in your business, such as employees sharing accounts or using service accounts.
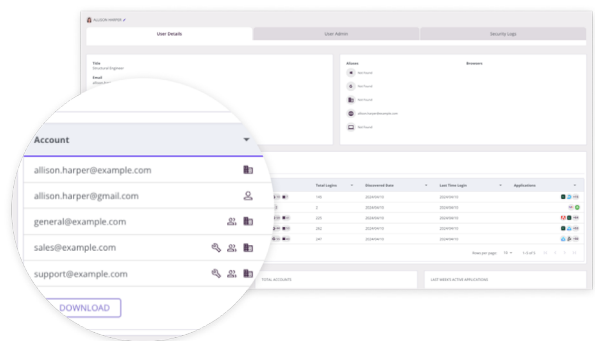
Understand risky shadow IT

Quickly spot what applications employees are adopting in the shadows that are putting your critical business data at risk.
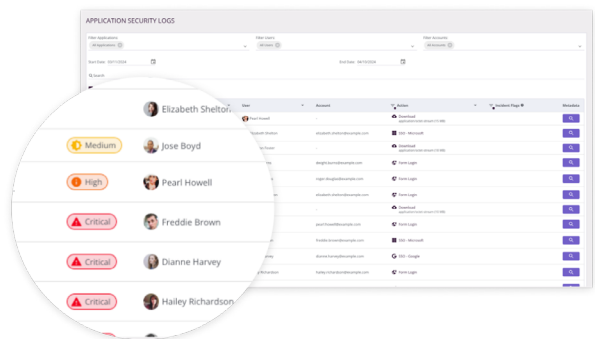
"Understanding what is in use within an organization would otherwise be a mostly manual process... The big return for us is the creation of efficiencies within our service delivery team."

Jon Fitrzyk, Braden Business Systems
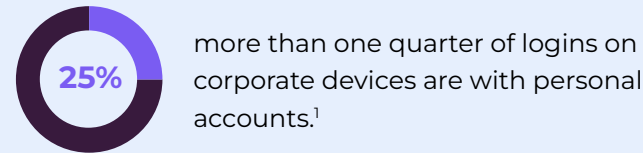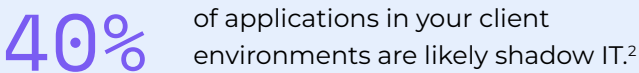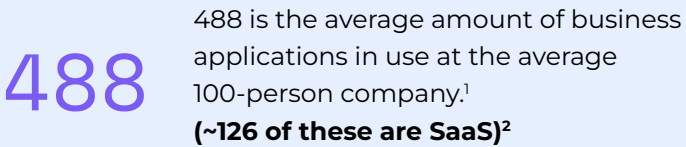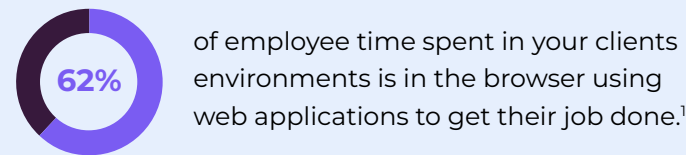
SaaS Management and CIS controls

As your client's employees work day to day, they use one critical thing to get their job done: **SaaS.** Software-as-a-service has exploded in organizations, especially those with hybrid environments. So much so that the average company has nearly **126 SaaS applications.**

As a result, modern MSPs have begun introducing SaaS Management solutions into their core business stack. With the proper usage of a SaaS Management product, MSPs can expect to be more efficient in supporting clients while offering the right technology for a more secure client environment.

Unlocking visibility for your MSP

It's critical to understand everything in your client environment so you can be a knowledgeable, trusted advisor. This includes what SaaS tools are in use and how employees access them. ASM can help with these supporting CIS controls:

Applications in your client environments by the numbers

62% of employee time spent in your clients environments is in the browser using web applications to get their job done.[1]

488 is the average amount of business applications in use at the average 100-person company.[1] **(~126 of these are SaaS)[2]**

40% of applications in your client environments are likely shadow IT.[2]

25% more than one quarter of logins on corporate devices are with personal accounts.[1]

1: According to an Auvik Study "The Growing Problem of Shadow IT" (Link)

2: Study completed by Gartner (Link)

Supporting CIS Controls:

Applications - Identify & Respond	**CIS 2.1 / 2.3:** SaaS inventory & address unauthorized software
Data - Detect	**CIS 3.14:** Logging account access to sensitive SaaS hosting critical data
Users - Identify	**CIS 5.1 / 5.5:** Shared accounts & service account usage
Users - Respond	**CIS 5.3:** Identifying dormant accounts in environments
Applications - Protect	**CIS 9.1:** Ensure use of only fully supported browser/email clients

Customer environments by the numbers

Supporting the ever-evolving SaaS ecosystems of your clients can be complicated, but Auvik SaaS Management is here to make it easy. Built for MSPs to help solve the SaaS Management problem your way.

Designed for MSPs

Supporting client environments of SaaS can already be challenging, so Auvik SaaS Management was designed to be deployed, managed, and used in client environments without friction for your customers.

- Multi-tenant deployment with all major RMM vendors. (<10 minute per client)

- Application Stack alignment with your MSP business stack & global rules/overrides.

- Branded reports for client onboarding, employee onboard/offboarding, and CBR/QBR reports

- Dual pane of glass for co-managed clients with granular permissions.

Unlock serious efficiency within your MSP by using Auvik SaaS Management.

Automate the SaaS and account inventory build to support critical CIS controls.

Troubleshoot client environments faster with accurate information and turn SaaS-based and web application access tickets over faster.

Leverage your valuable vCIO/TAM resources even better. They can focus on strategic discussions, knowing they will have top 10 shadow IT in their CBR/QBR reports.

Recover significant time back when onboarding & offboarding employees in your client environments with automation.

"It's an integral part of what we want to do with our clients. Employees often do the wrong thing, and they'll continue to do the wrong things unless you can have a big bright flashlight on those things. ASM tells us which systems people are using. It's a problem if they're outside the scope of the standard system provided by the company. That's crucial because employees don't necessarily protect their own systems adequately."

Dean Mechlowitz, CEO, TEKRiSQ

MSP customer lifecycle

1

Day 1: As soon as you deploy your RMM into the client environment, deploy the Auvik SaaS Management agents. Once the agent is pushed from the RMM, configure your identity provider (Workspace/Azure) with the automatically created client in the partner hub. Set up a 30-minute meeting with your client 30 days out to showcase your findings.

> **Pro-tip:**
> Remove time-consuming and error-prone questionnaires about SaaS from your SOP. Start asking <u>WHY</u> certain SaaS apps are being used not <u>WHAT</u> is being used.

14

Day 14: Set aside thirty minutes to review the unclassified applications in your environment and classify applications discovered during the sales/onboard journey, and set lifecycle stages/business owners for applications that are known.

> **Pro-tip:**
> Never classify an application that is not known. Keep them in the unclassified view.

30

Day 30: Prepare the three key reports to share your findings with the ASM platform.

✓ With the **Discovery Report,** ask,
"What applications are here that should not be?"

✓ With the **QBR/CBR Report,** show top ten unclassified applications and ask,
"What business problem are these applications solving?"
We know our customer will share if it's approved or not.

✓ Share the **Onboarding and Offboarding Reports,** and make it clear to the customer that they can request offboarding or onboarding of employees through this tool, which will help you automate the process and ensure less waste.

90

Every Quarter (CBR/QBR): Present the CBR/QBR on a regular interval and work with the customer to review the top ten shadow IT (unclassified apps) each time and continue to work away on the list of SaaS apps. **Recommended 4x a year**

> **! Hint:**
> We do not recommend classifying applications between CBR/QBRs unless they're known to ensure you have fresh CBR/QBR topics each time.

MSP customer onboard checklist

Pre-deployment checklist:

☐ **Discuss ASM** during the sales/onboarding journey with the customer.

☐ **Share what the user will experience:**

"To better serve you as a client, we will deploy Auvik SaaS Management to your workstation. Don't worry! There will be no impact on the performance of your device or experience. However, you may notice a new icon installed in your browser extensions dropdown. This allows us to build your compliant inventory of SaaS applications for your business. If you have any questions, please reach out!"

Deployment checklist:

☐ **Deploy ASM desktop agents** onto all workstations in the customer's environment.

☐ **Configure identity provider,** either Google Workspace or Microsoft Suite.

☐ **Select and activate the integrations** for SaaS apps shown or known by the client.

☐ **Set up an internal review of the environment 14 days** from now. Carve off 30 minutes with the account vCIO to review the findings and classify known applications discovered during the sales cycle.

☐ **Set up a client review of the environment 30 days** from now. Carve off 45 minutes to share your findings with the customer.

Client review checklist:

☐ **Prepare your reports.** The Discovery, QBR/CBR, and Employee on/offboarding are always recommended, but prepare anything specific to the customer's needs (cost controls, product adoptions, etc.).

☐ **Review your reports.** Introduce the concept of reviewing the top ten shadow IT regularly in your vCIO process. Schedule your regular shadow IT reviews if they need to be added to the calendar. **(We recommend doing this 4x a year.)**

- Make sure to update the top ten shadow IT after each vCIO process

- Take note of any applications that could unlock new revenue projects with your customer

- Identify if there are any strategic initiatives you can help with.

☐ **Identify scheduled reports.** Look for use cases in your client environment where they may benefit from recurring reports, such as:

- **Cost savings:** Schedule Product Adoption/Contract Insight Reports.

- **Security:** Schedule a Discovery Report of all unclassified applications.

- **Performance:** Schedule Product Adoption/Usage Reports on critical applications.

☐ **Please look over action items and notes** and make sure all items are executed on your checklist within the platform.

VCIO application stack alignment session

Monthly VCIO application stack alignment session:

Meet with the internal VCIO/TAM team to review the Auvik SaaS Management platform Application Stack for your MSP. Review and share internally how each team member uses the product in their QBRs and share successes. The 45-minute meeting should look like the following:

- **Recurrence: Every 4 weeks**

- **Duration: 45 Minutes**

- **Calendar title:** Auvik VCIO Application Stack Alignment Session

- **Calendar description:** In this meeting, we will discuss the Auvik SaaS Management platform and revisit the platform's internal usage in our QBR/CBRs. This meeting aims to share wins, enhance our usage of the Application Stack component in the tool, and ensure App Stack notes are used as effectively as possible.

Agenda

- **A leader should facilitate this meeting and share their screen in the Auvik SaaS Management platform to be successful.**

- 5 Minutes - Getting Started

- 15 Minutes - Round-Robin (meeting organizer to call out each TAM/VCIO to share) team members share a win with the product in a client environment you have had in the last 30 days.

  - The leader should document any new use cases as Application/QBR Notes in the product.

- 15 Minutes - Review the top 100+ applications in your environment to ensure a QBR note for every strategic application you want to discuss in your client environments.

  - **(Hint)** You can expand the view in the bottom of the table to view more than the default amount of applications per page.

MSP packaging, pricing, and ROI

The following calculations are based on the following **example customer profile.**

Additionally, this assumes that you use Auvik SaaS Management as a part of the MSP core product offering, which allows for a maximized pricing discount and ROI benefit. Finally, following this guide's customer lifecycle is recommended to reduce unnecessary overhead costs.

TECHBRIGHT Technology Services

Users:	5,000
Customers:	100
Average Client Size:	50
MSP Growth (YoY)	20%
Contract Cycle:	36
Cust. Renew Contract / Mo:	~2.8
Tech Salary (Fully Loaded):	$75.00
MSRP	$3.00

Efficiencies		Savings Per	Total Savings
Client documentation & onboarding (8 hours / client one-time)	20 clients /annually	$600.00	$12.000.00
SaaS documentation maintenance (2 hours / client annually)	100 clients /annually	$150.00	$15,000.00
Employee on/offboarding (20 minutes / employee - 20% Turnover)	1,000 employees/ annually	$18.75	$18,750.00
Revenue		**Licensing**	**Revenue**
Year 1 client renewals licensing (2.8 clients renewing monthly)	1,650 users / annually	$3.00 MSRP	$4,950 MRR
Employee time costs		**Cost Per**	**Cost**
QBR prep & shadow IT review (4x annually, 15 minute prep)	100 clients / 4x annually	$75.00	$7,500.00
Onboarding deployment + prep (1 hour / client one-time)	20 clients /annually	$75.00	$1.500.00

Year 1 - ~$60K ARR
(1.6k endpoints covered)

Year 2 - ~$120K ARR
(3.3k endpoints covered)

Year 3 - ~$180K ARR
(5.0k endpoints covered)

Efficiency savings:	$45,750
Licensing revenue:	$59,400
Total savings & revenue:	$105,150
Employee management costs:	$9,000
Licensing cost:	Discuss With rep
Savings + revenue - management:	$96,150

Additional resources

Product line item: Auvik SaaS Management Discovery & Security - Per User

Product MSRP: $3.00

MSA product line item description:
Auvik SaaS Management (ASM) is the SaaS discovery solution allowing us to uncover, manage, and secure your critical SaaS ecosystem and its sensitive data.

ASM builds an inventory of Accounts and SaaS to help fulfill CIS controls: CIS 2.1 / 2.3, CIS 3.14, CIS 5.1 / 5.5, CIS 5.3, and CIS 9.1. ASM helps us uncover and address vital security risks to your organization by providing visibility into the cloud-based applications your team is already using. Includes quarterly top shadow IT review, employee off-boarding checklists, and initial discovery with environment recommendations.

Recommended supporting graphics:

Supporting brand colors

- #8E77FB
- #7FB0F6
- #37193C
- #CCCCCC
- #000000

Shareable assets (**click to download**)

Features	**Overview**	**Discovery**	**Offboard**	**CBR/QBR**	**Shadow IT & AI eBook**
Informational	Informational	Sample Report	Sample Report	Sample Report	Ebook

Recap checklist

Below is a checklist to recap to make sure you have everything you need to be successful with Auvik SaaS Management in your MSP.

Standard operating procedures:

- [ ] **Added ASM into the onboarding lifecycle with three phases:**
  - **Deploy** the agent and configure the IDP.
  - **Review** the information 14 days after deployment.
  - **Share** your findings and recommendations with the customer.

- [ ] **Added ASM to your QBR lifecycle emphasizing top ten shadow IT**

- [ ] **Added ASM to your employee onboard/ offboarding process**

- [ ] **Introduced a quarterly VCIO/TAM session to review app stack alignment**
  - **Review** sales opportunities with customers.
  - **Identify** tactical actions to be completed during customer onboarding.
  - **Secure** customer environments by flagging risky shadow IT.

Sales & marketing:

- [ ] **Added ASM into the pre-sales discussions/ presentations**

- [ ] **Downloaded available content to share with customers from the sales hub in the ASM product**

- [ ] **Copied the verbiage for your master services agreement**

- [ ] **Added ASM into your margin calculations for your MSP stack**

More questions?

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