Secure Co. interview notes

All entities are fictional, and any resemblance is a coincidence. Data provided in this document is illustrative.

Interview with Jane Jansen, marketing employee and software user at Cumulus Inc.

Cumulus Inc. is a Fortune 100 cloud storage provider with $2B in revenue and based in San Francisco, CA

Q1: Could you start by telling us about your role at Cumulus Inc.? How do you use software as part of your role?

I have been a creator in Cumulus' marketing department for the past four years, working on campaigns for our different cloud offerings (e.g. compute, cold storage, hot storage). I require a lot of software tools to be effective in my job, from using Figma for wireframing and mock-ups to think through website design to Tableau to visualize engagement with our campaigns.

Q2: Thank you Jane. We would love to learn a bit more about software access at Cumulus as we think through how to improve the overall process. Could you walk us through the steps in gaining access to the software you use at Cumulus? What are you trying to accomplish in each step?

Whenever I'm trying to get access to a new software tool, like Figma, I'd have to go through about 5 steps:

1. First, I need to find the right solution that can satisfy my work needs. This requires me to determine the application requirements for my workstream and then search online for a solution that meets those requirements.

2. Once I have identified my desired application, I need to obtain authorization from my team director with a written email. I will first shoot them an email with pricing details, purpose and functionality of the application. Then, my director will usually respond over email with an approval and acknowledgement of the price.

3. Next, I need to forward the written approval via email to the IT admin desk with the product details and my reason for request. They will review the request, assess the security standards and then either approve or reject the application.

4. Upon installation, I need to set up and configure the application. Sometimes, I have to set up the app twice on both my phone and my laptop.

5. Finally, once my application is set up and configured with the relevant integrations, I can start using the solution.

Q3: What are the most painful aspects of the software onboarding experience for you?

If I don't have the exact application in mind, I have to spend a long time on different internal and external websites to find the solution that I want. There is not a centralized list of applications from Cumulus I can view and select from.

When I finally find the application I want to use, I then need to email my directors asking for approval. These are people that get a hundred emails a day and may not be able to respond quickly, if at all.

After sending the approval via email to IT, I just have to wait around. If IT rejects my request, they sometimes will not provide an alternative solution – it's entirely dependent on the person responding to the request.

When I use the application, my license will sometimes expire and my access will be revoked without sufficient warning, leaving my entire workflow disrupted.

Q4: If you were reimagining the experience, what would your ideal experience be?

All I want is the easiest path for me to use an application that I need for work. There are many things I don't like about the current process but my two biggest pain points in this experience are searching for the application and getting approval:

1. It would be great to have a centralized list of open to use applications so I don't have to request access for every tool.
2. I would love to have a more streamlined method than email for requesting approval from my director. They are one of the biggest bottlenecks in the process.
3. I would also appreciate some more visibility into the timeline for any application requests, so I can plan my workflow better.

Interview with John Fallworth, IT admin at Cumulus Inc

Cumulus Inc. is a Fortune 100 cloud storage provider with $2B in revenue and based in San Francisco, CA

Q1: Could you tell us about your role at Cumulus Inc.? What are your main responsibilities?

I have been an IT administrator for the past six years, specifically part of our software management team. My main responsibilities include reviewing and responding to software access requests, supporting the in-use software, and ensuring secure, efficient usage of the software.

Q2: Thank you John – we would love to learn more about Cumulus' software management practices as we think through how to revamp the process. Could you walk us through the steps in distributing and managing software to users from the IT admin team? What are you trying to accomplish in each step?

The distribution and management of enterprise software is a multi-step process for our IT admin team. I'll break it down into 4 main steps:

1. First, I get notified about a new access request. I need to understand all details of the software request (e.g. software provider, required team director approvals, pricing and need for the tool) as well as understand our internal license availability. I maintain a log of software licenses requested as well as track the number of licenses our organization that are procured and available in Excel.

2. After becoming aware of the details, I need to review the request and respond to the requester. My goal is to make compliant and quick decisions for all access requests. To decide on the request, I need to estimate the costs in purchasing the new software licenses if we do not have any licenses procured. I then need to receive written approval from our IT leaders to purchase the new software.

3. After providing access to the software and issuing the license, I then need to support the software on an ongoing basis. My main goal here is to address any software issues quickly to minimize usage disruptions. This usually entails first receiving the support ticket either over email or phone from the software user and logging the ticket in Excel for our records.

4. Finally, I need to track the organization's software and license usage for our internal reporting. My goals are twofold: 1) ensure efficient software spend and license usage and 2) ensure secure access to the software by only the appropriate users. To address the former, I need to periodically generate reports through Excel for our IT leadership with usage activity and cost by software product. Once we have identified the software areas with surplus licenses, I then need to optimize our software spend by reducing the number of unused licenses we maintain.

Q3: What are the most painful aspects of the onboarding experience for you?

There are a lot of access requests that come in and unfortunately it takes a lot of manual effort to go through the emails and log the software requests. It is especially painful since we have seen many of the requests for the same software but still end up going through the entire arduous process.

When we review and respond to the request, we have to go through a lot of back-and-forth communication with the employee and leadership to obtain the supporting documentation or justification.

As we support the software, we have to coordinate with the software vendor a good bit to provide all necessary details of the issue and identify a solution. Again, there is a lot of back-and-forth manual communication between us and the vendor.

In tracking the software and license usage, the software usage and user activity reports we generate through Excel take significant manual effort. We also need to manually ensure that unused licenses are deactivated on time, otherwise we are faced with additional costs.

Q4: If you were reimagining the experience, what would you want it to look like?

All I want is for our users to have the fastest and most secure path to get access to their software tools and for me to identify the unused licenses so we can optimize our software spend.

1. Ideally, we could remove our IT admin team as a bottleneck as much as we can by maintaining a collection of open-to-use software tools.
2. Whenever software tools are not pre-approved, I'd love to not have to go back and forth with employees to get all the necessary details to process the request.
3. I'd also appreciate if I didn't have to rely so much on Excel and could automate license tracking and report generation.

Interview with Sarah Doe, CIO, ABC Bank

ABC Bank is a large financial services firm that offers retail and corporate banking services, with $4B in revenue, based in New York, New York

Q1: Can you describe your role at ABC Bank? What are your goals or objectives?

As a business leader at ABC Bank, I am in charge of setting technology strategy that helps enable business outcomes, the agenda for the organization and growth aspiration for our group. Given the digitization of our bank's workflows over the past 15 years, I now have to oversee our large portfolio of solutions that ABC's teams use. This portfolio expands every year as my team vets new providers and solutions for the organization. My goals are five-fold:

- Establish the role of technology as an innovation partner to business driving key business outcomes
- Secure organization's systems against cyberattacks and meet regulatory compliance standards
- Ensure a smooth and streamlined IT experience for employees to use digital solutions
- Make developer experience the cornerstone of talent strategy
- Know customers as well as knowing the organizations technology

Q2: How do you measure success in your role?

Overall, success in my role is measured through metrics related to the IT organization, the broader bank, and the end customers.

Within the IT organization, success is primarily measured by deployment costs (actual vs planned), employee productivity and satisfaction and system uptime/service availability. Accurately estimating the development costs of a project is important at a large institution where budget needs to be approved for large capital expenditures far in advance. Our technology also needs to be reliable around the clock - tracking service availability and system uptime is a key measure of my team's success.

My performance is also related to our customer-facing technology products. We track the downloads of the application, as well as the monthly active users. Our customers' satisfaction with our mobile banking solutions is a direct reflection on the IT organization and me, so we track application satisfaction ratings as well.

Q3: Can you walk me through your journey as CIO and the responsibilities that come with it?

I see the CIO journey in three parts: reimagine the role of technology, then reinvent the way we deliver technology and finally future proof our organization's foundation.

Technology is traditionally seen in organizations, especially in legacy sectors such as financial services, as strictly a supporting function. We need to change that and show technology should be considered a business and innovation partner within the bank. This can be done through quantifying the business value of our initiatives.

We then need to reinvent how we deliver the technology. We need to ensure our employees have a positive experience engaging with our digital solutions with minimal hoops from IT to jump through. Our IT services themselves should be cutting edge and so we want to develop strategic long-term partnerships with technology companies. Our tools should integrate well with other tech partners, such as cloud service providers and identity authentication providers, to form a well-functioning ecosystem.

Then we need to focus on future-proofing the foundation of our business, so it is resilient. We must implement a flexible architecture supported by modular platforms. As our technology stack grows, so do our vulnerabilities. We need to ensure our systems are airtight and protected against cybersecurity attacks. The regulatory environment only further ensures we have our work cut out for us; we must quickly meet many different compliance standards as part of our responsibility to safeguard sensitive data.

Q4. What are the key pain points across these business processes?

As we position IT as an innovative business partner, we need to come in with the business case on why we should have a seat at the table. Unfortunately, business KPI to IT metric connections are opaque and difficult to track. We are enabling new revenue streams and businesses, but it is hard to really measure how much incremental revenue we generate. I want my technology teams across the organization to work together well, but our tools are not built for broad cross-functional collaboration.

It is also difficult to get buy-in from the rest of the C-suite to support and promote our IT initiatives – this is how we need to drive adoption throughout the organization.

In reinventing our technology delivery to the organization, we face even more challenges.

We are using so many different apps and each user requires different permissions. Users often forget to include all required authorizations from their directors and my IT team needs to follow up several times.

Much of the software we allocate to the organization, though, goes unused and we end up paying for tons of licenses that essentially collect digital dust. License utilization tracking is difficult as we need to coordinate with tons of different vendors, which can take weeks if not months.

Recruiting top tech talent is difficult when competing with big tech companies that can offer a far different value proposition to potential candidates than we can.

As we try to future proof the organization, we can get bogged down with reactive, rather than proactive, tasks.

Cybersecurity and compliance now are at the forefront of our minds at most times. Attacks have skyrocketed and attackers become more sophisticated – it's nerve-wracking thinking our systems could be compromised

There are also many different regulatory bodies that all require different types of compliance reporting, which can also be fairly time intensive. My IT team spends a large amount of their time on redundant processes for a variety of compliance standards to ensure we can keep the regulatory agencies off our back.

Q5: Which among these are the top pain points?

The top pain-points for us are:

1. Improving employee IT experience while minimizing unused enterprise app licenses and software waste
2. Adhering to changing regional regulations requires constant adaptation and additional investments
3. Demanding technology management due to increased organizational software/app usage

Q6: Have you tried solving these in the past? What is the improvement you anticipate in key success metrics (e.g., sales)?

My team estimates that solving these pain-points can reduce our software spend while streamlining employee experience. I can share a few details with you:

1. Optimizing IT spend is an issue of concern for CIOs across large organizations right now. Industry reports indicate that ~30% of software spend is unused at similar-sized organizations. By ensuring spend efficiency on software, we can save ~25% of spend that gets wasted. If we can also expedite the process for employees to get access to their applications, we can realize a 0.6% increase in productivity.
2. Another key initiative that I believe could help us save ~2% on our total IT spend is adopting consistent technology management across organizational silos, specifically in investment optimization. Industry reports reveal that nearly ~40% organizations are currently struggling with this and can benefit from business-driven technology decisions to deliver value.
3. Typically, enterprises spend ~30% of their security spend on compliance. My cybersecurity team spends a large amount of time on redundant processes, we have estimated automating the compliance work could lead to at least ~30-40% savings on spend on security, compliance, and governance tools.