
CASE STUDY:

Intercom Improves Compliance and Auditing, Eliminates Manual Asset Tracking with Oomnitza



COMPANY: INTERCOM

Intercom is a Conversational Relationship Platform (CRP) that helps businesses build better customer relationships through personalized, messenger-based experiences. It's the only platform that delivers conversational experiences across the customer journey, with solutions for Conversational Marketing, Conversational Customer Engagement and Conversational Support. Intercom powers 500 million conversations per month across 4 billion unique end users worldwide while providing service to 30,000 paying customers, including Facebook, Amazon, and Lyft.

ENVIRONMENT:

Industry: Technology

Assets: ~1,400 assets including desktops, laptops, monitors, servers, and tablets

Employees: ~600

Sub-ITAMs: Multiple (Jamf, Jamf Mobile, Microsoft Intune)

SSO: Okta

OS: Windows, Mac, Android, iOS, ChromeOS

Locations: San Francisco, Dublin, Chicago, London, Sydney

User Personas: IT, Compliance and Legal

Introduction:

Intercom is a hyper-growth enterprise SaaS company with a small IT staff and employees spread across five locations on three continents. During the COVID-19 pandemic, the company's employees worked remotely from their homes. Residing within the engineering team, the IT team handles multiple tasks including information security, IT asset management, IT asset compliance, and cloud infrastructure management. "We manage all internal systems, IT and assets including cloud, devices and software - anything that is not customer-facing," says Joao Fernandes, the IT Lead for Intercom.

Challenges:

Fernandes and his small team have numerous responsibilities across IT, HR, Legal, Compliance and Security functions. For all employees, Fernandes is charged with assigning, maintaining and keeping their devices secure. The pandemic has complicated the process of device assignments to new employees and equipment refreshes. "We had to create a process where our vendors do all the device tagging and then drop-ship directly to our employees homes," he explains.

To identify which assets were assigned to which locations and which employees, Fernandes needed to pore over multiple spreadsheets in a time-consuming and cumbersome process. "We had no easy way to generate a report, say, showing all devices in the Dublin office and who was using them." The speed of finding a device and its owner in case of a theft or security breach was critical. "We are the first line of defense when some-

one loses a laptop or leaves it in the back of an airplane or coffee shop or vehicle that is burglarized,” says Fernandes. Data hygiene was another key goal of Fernandes, who wanted to make sure that all information his team was pulling on device status, usage, and ownership was accurate and up to date.

With Intercom growing very quickly, Fernandes and the rest of the IT team realized that “...our existing systems were really antiquated. We needed something that would scale with the rapid growth of our company.” This meant moving to an IT asset management platform that could integrate all asset tracking into one system-of-record, automate key processes for management of devices, and accelerate the audit and compliance processes. The unified ITAM would integrate with Intercom’s Okta SSO and, eventually empower the company’s finance and procurement teams to improve planning processes by providing more timely and accurate asset utilization and insight into aging data.

The final catalyst for adopting a new system came when Intercom’s ability to quickly retrieve asset status and location data impacted critical compliance certifications. “We passed a tipping point when we got a small yellow flag on our SOC-2 certification because it would take us so long to find required data by sifting through endless spreadsheets,” says Fernandes. “After that we moved quickly to find a unified asset management tool.” As a bonus, Fernandes knew that a unified ITAM would enable GDPR compliance, which is essential for a company with a heavy European presence both in terms of customers and employees.

To summarize, Intercom wanted to solve these IT asset management challenges:

- CREATING**
a unified, accurate view of all IT assets across 5 offices on 3 continents
- REDUCING**
reliance on spreadsheets to track IT assets
- ACCELERATING**
speed of compliance processes and improving compliance results
- IMPROVING**
security by allowing IT to quickly associate any asset with a person, location and system status
- ENABLING**
GDPR and SOC-2 conformance
- IMPROVING**
data hygiene by removing manual processes and automating workflows

Solution and Results

Fernandes had worked with Oomnitza previously while at Yelp. He knew and liked the product but kept himself removed from the evaluation process so as not to bias the findings. The team looked at ServiceNow’s ITAM offering and found it too manual and labor-intensive. Salesforce had a number of ITAM add-ins but that would have required customization. Intercom even considered building their own ITAM with engineering resources but discarded this option due to the required effort and ongoing maintenance. In the end, “Oomnitza just made the most sense. It was the most well-rounded solution,” says Fernandes.

The out-of-the-box integration and agentless discovery that unified data from Jamf and InTune and the simple Okta integration was a key consideration in the buy decision. This allowed Intercom to build workflows around key IT asset management processes for frequently required lookups, alerts and actions. Fernandes also liked the extensibility of Oomnitza via Python-based connectors that his own team can write and run: this enables a wide array of future integrations with applications for finance, procurement and HR. The unification of all IT asset data sources into one repository that was clean and deduped would improve Intercom’s data hygiene by reducing potential for manual error and enabling better asset data transparency. “I can now ask someone ‘Get a report for how many assets of a certain model and a certain year are assigned in

Dublin, and get the information immediately. It's a huge difference from looking over spreadsheets," says Fernandes.

By using Oomnitza, Intercom has reduced time spent on ticket investigations by making the entire process much faster. By simplifying the entire ticketing process, Oomnitza has also helped Fernandes onboard new IT employees more efficiently. Says Fernandes "It makes support work a lot easier because you have a one place to look into the state of any machine or asset. This radically reduces the investigation that someone has to do when we get a new ticket. And when we get new people on the team, they may not be familiar with the technology, but Oomnitza makes it easy to figure everything out."

With Oomnitza, Intercom's audit and compliance processes have become more reliable. Intercom's audit and compliance team has direct access to Oomnitza and can run queries themselves rather than ask for help or file a ticket. Fernandes relies on Oomnitza to validate and fulfill any GDPR requests and compliance tasks that touch on specific assets. The company is exploring using Oomnitza for CCPA requests, as well; Oomnitza already provides a first line of legal defense against CCPA by improving response time to theft and breach incidents which demonstrates a defensible "best efforts" approach as mandated by CCPA.

Thanks to Oomnitza, Intercom is improving IT asset management by:

- ▶ Unifying management of all IT assets across laptops, smartphone and ChromeOS AV devices into a single, accurate and responsive system-of-record
- ▶ Enabling and streamlining key compliance processes such as SOC-2 and ISO 270001
- ▶ Reducing manual labor for teams in IT, Compliance and Legal
- ▶ Improving data hygiene by automating rote data collection and management tasks
- ▶ Simplifying key asset management tasks and reducing time-to-resolution on tickets

Says Fernandes, "We pass our audits easily now. We spend less time on IT asset management. We feel more confident about our security stance. It's almost hard to quantify how much things have improved because it's so much better now with Oomnitza."

“
We feel more confident about our security stance. It's almost hard to quantify how much things have improved because it's so much better now with Oomnitza.
”

About Oomnitza

Oomnitza delivers the IT industry's most comprehensive and integrated view of the IT estate, correlating assets with people across the entire asset lifecycle, delivering value across a broad range of industries and process requirements. Oomnitza is headquartered in San Francisco

www.oomnitza.com