

Enterprise SaaS Management Certification Report



AJ Witt, The ITAM Review

Executive Summary



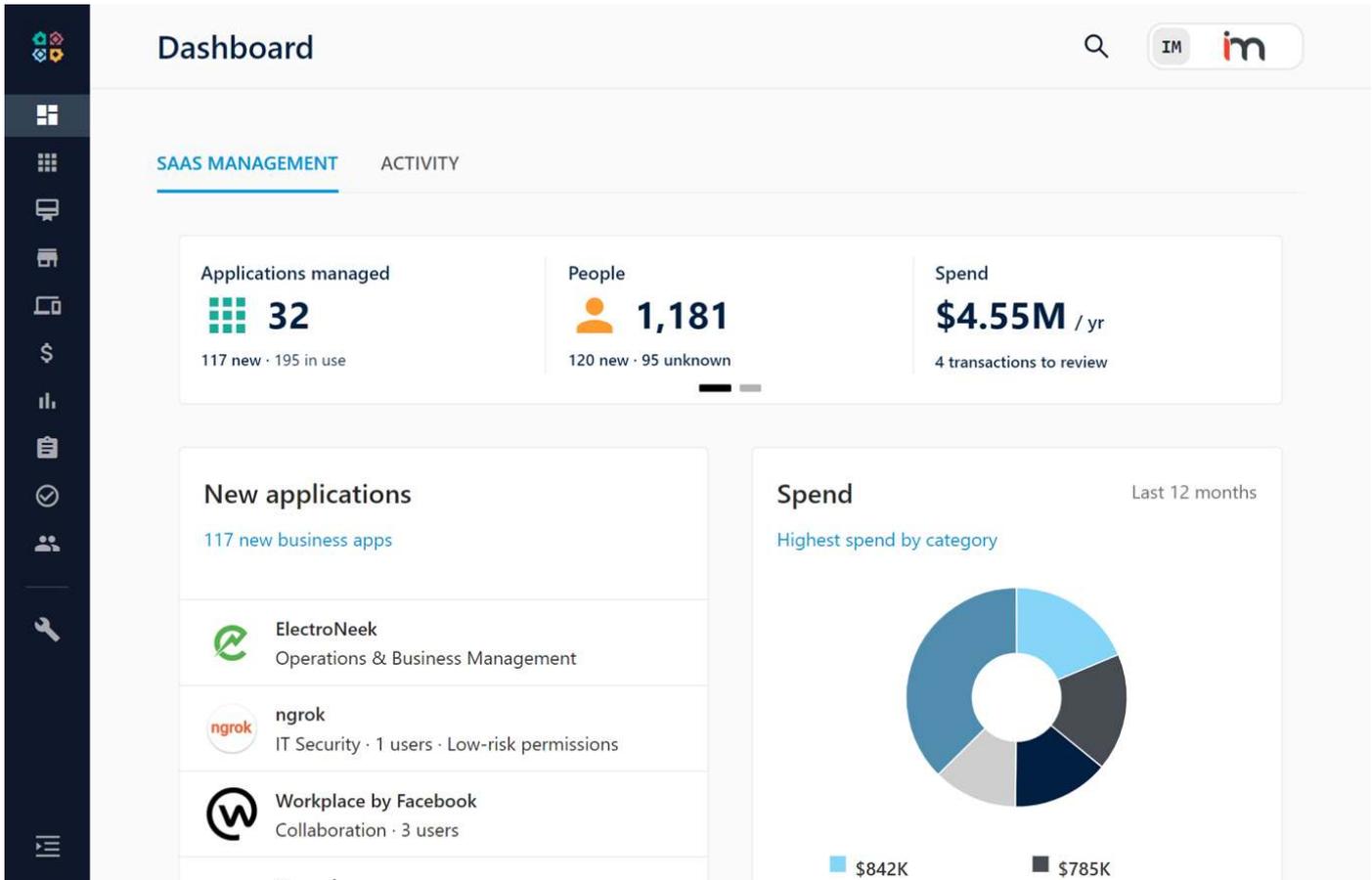
The ITAM Review certifies [Trelica](#) as having met the requirements for Enterprise SaaS Management certification in accordance with our public community-sourced [open standard](#).

Background

Trelica were founded in 2018 by [Richard Kirby](#), [Iain McGhee](#) & [Robert Stiff](#). They're co-headquartered in the US and the UK and are part of the "second-wave" of SaaS Management platforms and solutions. Privately held, they focus on discovering, optimising, and securing SaaS usage through automation and integration. Their approach recognises that IT teams no longer directly control – or wish to control – much of their organisation's software spend. To this end, much of their functionality and feature-set is based around acknowledging the difference in governance approach between sanctioned, centrally-managed software spend and what they call "informal IT".

Analyst Review

This analyst review is based on the detailed responses provided by Trelica to the [certification survey](#), customer references, and an in-depth demo provided to the author. The review assesses and provides commentary on Trelica's adherence to the standard in five areas - Discovery & Inventory, Cost Management, Optimisation, Automation, and Risk Management.



Discovery & Inventory

Trelica discover informal IT – that which isn't procured through central channels – via two primary methods:

- Integration with systems of record such as finance applications and IdP/SSO/OAuth tokens
- Deployment of an optional browser plugin, which detects applications used via web browsers and protocols

Furthermore, for sanctioned IT – those applications usually centrally-procured and known to IT – Trelica provide over 160 direct integrations with SaaS publisher APIs. The ITAM Review recognises API connectivity as the "gold standard" for SaaS inventory and discovery and Trelica have comprehensive coverage here, with more being added based on customer demand. Customer requests for new integrations are free of charge and usually implemented within a working week.

Data from the various inventory and discovery methods is normalised via Trelica's proprietary SaaS application library, which contains over 19,000 SaaS apps.

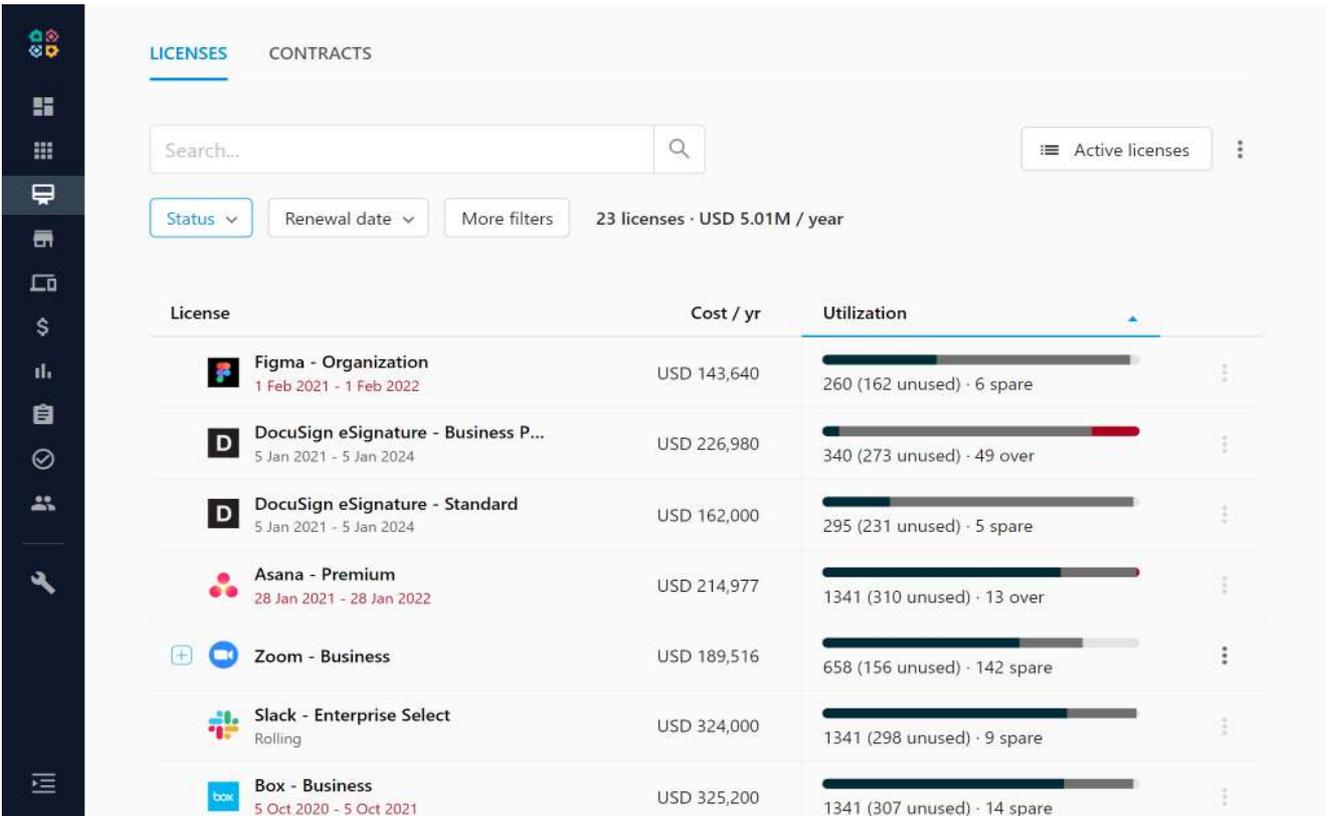
The tool integrates multiple discovery sources into a single view of an application, showing in the application profile page which discovery methods have "seen" that application. For example, an app may have been detected via GSuite/Google Workspace OAuth and the browser extension. This builds confidence and trust in the data gathered by the tool.

This approach to discovery ensures that Trelica is very strong in discovering shadow IT and particularly free applications. The ability to track OAuth authorisations generated when users acquire free SaaS apps by using the ubiquitous "Login with Google" method is particularly welcome as it gives rapid insight into potentially risky free app usage. OAuth tokens issued via "Login with Microsoft" are also supported.

Trelica's approach to the browser extension is also noteworthy. Rather than silently reporting SaaS usage back to IT, the extension informs the end user that a new SaaS app has been detected, thus providing an opportunity to make the user aware of any policies relating to SaaS usage, and potentially "nudging" them to follow the policy. This approach of engaging with the end user rather than trying to block unsanctioned applications further reinforces Trelica's perspective on governing informal, unsanctioned SaaS usage.

Cost Management

Cost management remains the primary use case for most SaaS Management applications, and we tend to see most tools offering similar capabilities. Trelica provides a single dashboard for each application showing unit costs, number of licenses, total spend, and wastage based on utilisation. This dashboard generates a potential savings per year based on the unit cost and utilisation.



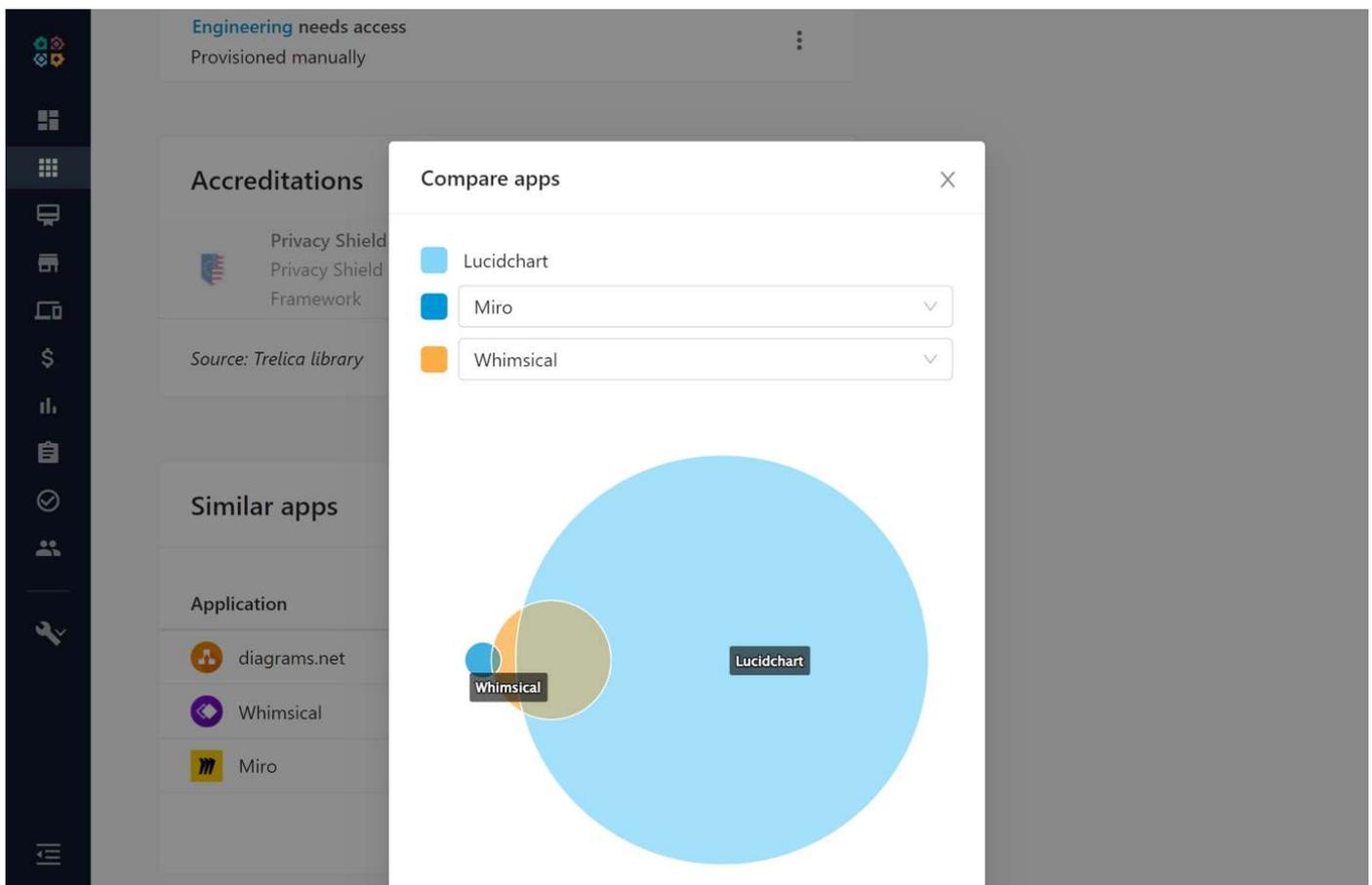
License	Cost / yr	Utilization
 Figma - Organization 1 Feb 2021 - 1 Feb 2022	USD 143,640	260 (162 unused) · 6 spare
 DocuSign eSignature - Business P... 5 Jan 2021 - 5 Jan 2024	USD 226,980	340 (273 unused) · 49 over
 DocuSign eSignature - Standard 5 Jan 2021 - 5 Jan 2024	USD 162,000	295 (231 unused) · 5 spare
 Asana - Premium 28 Jan 2021 - 28 Jan 2022	USD 214,977	1341 (310 unused) · 13 over
 Zoom - Business	USD 189,516	658 (156 unused) · 142 spare
 Slack - Enterprise Select Rolling	USD 324,000	1341 (298 unused) · 9 spare
 Box - Business 5 Oct 2020 - 5 Oct 2021	USD 325,200	1341 (307 unused) · 14 spare

The tool utilises machine learning to OCR purchase orders down to the individual line-item level. Typically, Trelica find that customers will use multiple systems of record to gather entitlement and cost data. For example, financial transaction data may come from accounting or expense management systems such as NetSuite or Expensify, whereas entitlements, contracts, and other commercial aspects may be sourced from systems such as Coupa, or extracted from purchase orders or order forms via machine learning.

Application dashboards provide a one stop shop for SaaS managers to carry out common cost management tasks. For example, for certain apps, it's possible to drill down into usage based on feature usage (e.g. number of Zoom Pro meetings that user has hosted, or sales opportunities created in CRM tools) and more standard metrics such as date of last use. If permitted by the app's API, it's even possible to deprovision users right from within the tool.

Optimisation

Trelica supports common optimisation requirements such as application and contract consolidation. For application consolidation it displays visually via Venn diagrams where overlapping usage is occurring – enabling administrators to quickly identify users who have more than one application providing the same or similar capabilities. There is also a searchable, end-user accessible application catalogue which Trelica refer to as the App Hub.

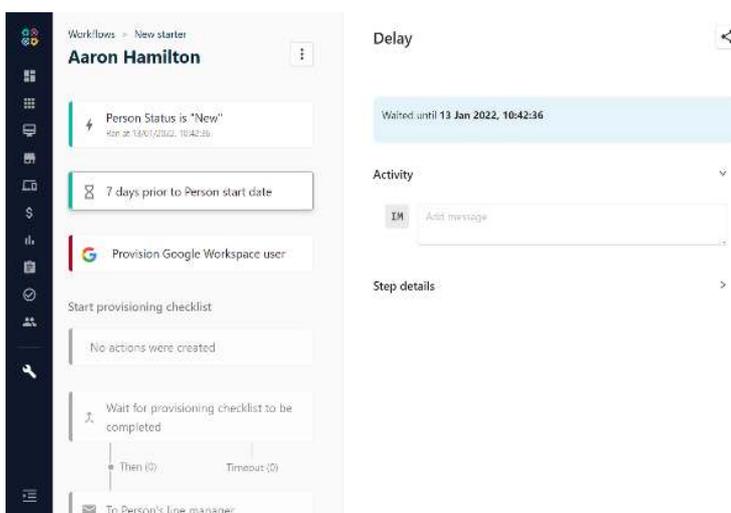


App Hub enables users to track down existing tools by capability and potentially cuts down on unnecessary duplication and overlaps. It clearly indicates which tools are sanctioned/approved, thereby nudging users to select existing apps rather than bringing a new one into the estate. This matches our view that users aren't actively going out to subvert established IT processes but rather simply don't have the knowledge, without a tool like Trelica, to discover exactly what is in use already.

App Hub provides users with a simple process to request access to an application and to optionally gain approval from an application owner or their line manager. This request process integrates with commonly used ticketing systems such as Jira, ServiceNow & Freshdesk. Additionally, Trelica can be configured to automatically deliver a standard set of apps to a given role – for example, provide all developers with access to GitHub.

Automation

Trelica has a comprehensive “no-code” workflow engine which includes several templates for common use cases – for example automatically deprovisioning users. The workflow integrates with systems including email and Slack for notifications, with Teams being added in Q2 2022. The no-code approach is highly visual, giving non-technical users the confidence to build potentially complex workflows.



Trelica provides a comprehensive onboarding and offboarding system which supports user profiling. So, for example, it's possible to automatically deploy a standard set of applications – or send tickets to a ticketing system for manual deployments – based on which department a user is in. Furthermore, it's possible to automate deployment of apps standard to every user – a “gold build” which will

be familiar to end user computing teams.

Risk Management

For apps where OAuth tokens have been requested it's possible to evaluate the access risk associated with that application. For example, an app granted edit/delete rights to a Gmail account is riskier than one with read-only access to just the calendar. For OAuth tokens issued via Google accounts it's possible for an administrator to centrally revoke tokens and block the application. Optionally, notifications can be sent to the user prior to doing this.

Trelica also tracks data breaches and other information useful to security teams on a per application basis, and retains full audit logs of actions carried out, which are useful for SOC2 and Sarbanes-Oxley compliance reporting. The Access Matrix feature provides a compliance check for processes such as identifying who retain access after leaving, or who have access to a system that isn't part of the standard set of apps for their role.

Finally, Trelica enables administrators to interact directly with SaaS users via a comprehensive and highly customisable assessment process. This process uses surveys to interact with early adopters of SaaS apps discovered by the inventory and discovery functionality. Assessment surveys can be used to determine almost anything about why the user has selected the application. For example, the survey can ask the user why they selected the application, nudge them towards a similar app that's already in the App Hub, or start the onboarding process for the new application.

Review Summary

Trelica have provided a comprehensive tool suitable for enterprise-scale SaaS Management. They have used their "second wave" advantage well to provide a well-rounded set of capabilities which match and, in some cases, exceed the capabilities of the market leaders.

Two highlights stand out. The automation and workflow engine is easy to use, even for non-technical users, and extensible and powerful. It goes beyond automating onboarding and offboarding, enabling the second highlight - class-leading user engagement capabilities.

Trelica's philosophy is that users and departments are well placed to make their own technology decisions, provided that IT is defining the overall governance framework and strategic direction. It's therefore important to facilitate this IT / business user partnership, empowering users to make balanced technology choices whilst still enabling IT to set governance standards. The ability to "nudge" users to do the right thing by combining comprehensive discovery with a powerful notification engine achieves this. These highlights are backed with full compliance with the Enterprise SaaS Management certification standard, meaning that Trelica can perform all the essential tasks organisations require: comprehensive normalised discovery and inventory, renewals management, and cost and risk optimisation

Customer References

Trelica provided two customer references for this certification. These were interviewed independently by an ITAM Review analyst. The ITAM Review welcomes further references and reviews for Trelica. If you wish to contribute, please submit your review on [The ITAM Review Marketplace](#).

Customer Reference 1: APAC eCommerce platform provider

This customer operates a diversified eCommerce platform across the Asia-Pacific region. Trelica was selected in a competitive bid process ahead of two other tools. The reference noted that it was Trelica's flexibility in meeting their needs which was key in winning the contract.

Day to day the reference primarily uses Trelica for cost management. Culturally, the organisation empowers end users and departments to select their own SaaS solutions and Trelica is key in managing this behaviour. For example, the early view of applications entering the organisation enables the SaaS Management team to engage with stakeholders to ensure new applications are onboarded into the managed or sanctioned SaaS stack. The renewals calendar functionality helps IT & Procurement work together to negotiate contract renewals, because of the trustworthy usage data provided by the tool.

Trelica is used with other stakeholders including Security, Finance, and Procurement. Trelica's ability to set a security status for each application enables the reference to categorise applications according to risk. Whilst this isn't directly integrated, largely due to those teams wishing to use existing tools, Trelica provides near-instant discovery of applications entering the organisation, which helps all stakeholders address their application governance needs.

The reference states that Trelica are very responsive to meeting their needs and provide them with a direct link to developers to discuss potential new features.

Customer Reference 2: Global Software enterprise

This reference operates globally as an NYSE-listed organisation with around 3,000 employees. As a highly distributed organisation operating solely in the cloud (no on-premise software) they needed a tool to help manage their software stack, optimise costs, and reduce risk.

Whilst now a large organisation they still retain a startup mindset, empowering all users to make their own technology decisions. Trelica has proved vital in fostering that culture whilst still providing the governance a public company requires. For example, Trelica's discovery enables them to determine whether an application meets their minimum security standards around single sign on.

The reference also makes use of the automation workflows for provisioning and deprovisioning subscriptions. These workflows enable effective cost management whilst still providing a responsive service to end users. Via the App Hub users are able to request software to be provisioned and also to find out the tools in use elsewhere in their highly distributed organisation.

In addition to the comprehensive technical capabilities Trelica offers the reference was also very pleased with the approach to customer service and success. Trelica actively worked with the reference to develop new features and enhance existing ones to meet their needs

Conclusion

Trelica's highly experienced and successful founders have made rapid strides in building a powerful SaaS Management platform suitable for modern IT Governance teams. Customer references indicated that it is suitable for all sizes of organisation and that the Trelica team were very responsive to customer requests. Highlights include a powerful and easy to use automation engine, and the ability for SaaS administrators to engage with end users directly, enabling them to build detailed knowledge of the SaaS stack and encourage behaviours which protect their organisation from unnecessary risks and costs. The tool is visually appealing and easy to navigate, striking a fine balance between ease of use and detail through the use of extensive drill down and filtering functionality. Whilst Trelica are a small team the experienced management team are well equipped to grow the tool to meet emerging and ever-changing SaaS Management needs.

About ITAM Review Certifications

The ITAM Review develops and maintains community-sourced certifications for ITAM-related tools and services. Each certification consists of a survey, product review and two independent customer references. We welcome additional reviews of the product or service via The ITAM Review Marketplace.

About The ITAM Review



Founded in 2008, The ITAM Review provides independent news, reviews, and analysis for the global IT Asset Management community. The ITAM Review also runs in-person, online, and hybrid conferences for the global community. ITAM Review Learning & ITAM Review Careers provide online and in-person training and recruitment services respectively.