

IT MANAGER'S GUIDE

Streamlining onboarding and offboarding



Introduction

Successfully onboarding and offboarding employees is one of the most important tasks for an IT manager, but it's become increasingly complex, thanks to factors like hybrid and remote work, BYOD, and employees' prolific use of SaaS apps – including unsanctioned shadow IT.

The sheer number of devices, apps, and accounts to keep track of, many of which can't be managed by SSO, creates an environment prone to mistakes, and those mistakes create risk. Improper offboarding leads to orphaned accounts, lost data, and excess SaaS spending.

As an IT manager, you know that efficient and secure onboarding and offboarding are critical for a healthy business for many reasons:

- **Productivity** hinges on fast access to systems and technology for new hires
- **Security and compliance** depend on airtight offboarding of departing employees
- **Business continuity** requires saving and transferring assets like files and email inboxes

To address these risks and reduce IT workload, growing businesses need to automate onboarding and offboarding processes as much as possible.

The go-to solution for managing onboarding/offboarding is SSO, but it can't manage every app or every account. And although SSO can revoke access to accounts, it doesn't always remove users' licenses in each app. That leaves IT managers responsible for a long list of time-consuming manual tasks.

So how can you go beyond SSO to provide truly comprehensive, automated onboarding and offboarding? Use this guide to help your team identify gaps in your company's onboarding and offboarding processes and assess how a SaaS management platform – like [Trelica by 1Password](#) – can help.

Trelica by 1Password

Extend the value of SSO across your entire SaaS environment with a SaaS management platform:

- **Discover *all* the apps employees use**, including managed apps, Shadow IT, OAuth (“sign in with Google”), and integrations with business systems
- **Build a unified inventory** of all apps, users, licenses, and contracts
- **Automate license management** and remove licenses when employees leave
- **Optimize spend** by recovering orphaned accounts and managing contract renewals

Gap spotter checklist

- ☐ Do we know all the apps employees are using?
- ☐ Can we offboard in minutes, not days?
- ☐ Do we remove access or delete the actual license in each app?

1. Onboarding:

Setting employees up for success

A new employee's experience getting onboarded should be fast, frictionless, and always secure. A lot of that experience rests on IT managers' shoulders, since IT serves as the linchpin between employees, managers, and departments – including HR, legal, and security. IT provides the platforms and tools needed to fulfill work responsibilities, manage the employee lifecycle, deliver trainings, enforce policies, and keep data secure. (IT maintains this role for existing employees too, who need access to approved apps and automated approval processes.)

IT's goal should be to make an employee's first day “click-and-go” and avoid creating a ticket backlog of onboarding issues. A comprehensive onboarding checklist includes:

- ✓ Provision birthright access
- ✓ Provide access to a self-serve catalog of business-approved apps
- ✓ Field access requests
- ✓ Train employees on security and compliance policies
- ✓ Assign and track assets (company-issued computer)

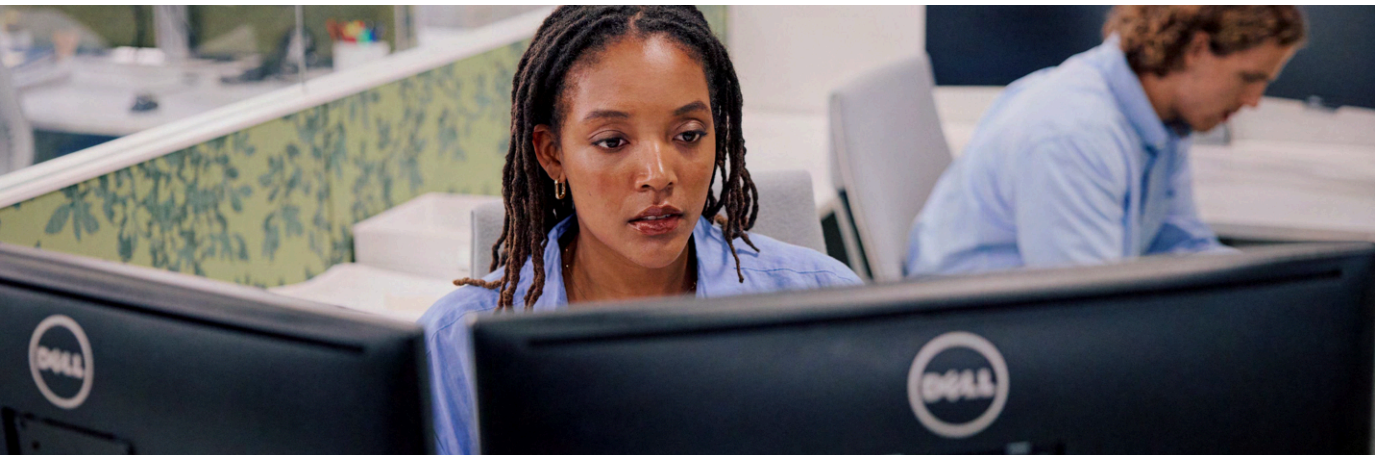
IT best practices for onboarding

- Integrate triggers from HR and IT platforms, such as the employee's start date
- Standardize onboarding workflows
- Monitor license usage (so orphaned accounts don't pile up)

What's the secret to making onboarding seamless? Reducing friction requires leaning into standardization and automation. A SaaS management platform can help.

How single sign-on (SSO), IT service management (ITSM), and SaaS Management Platforms work together for automated onboarding:

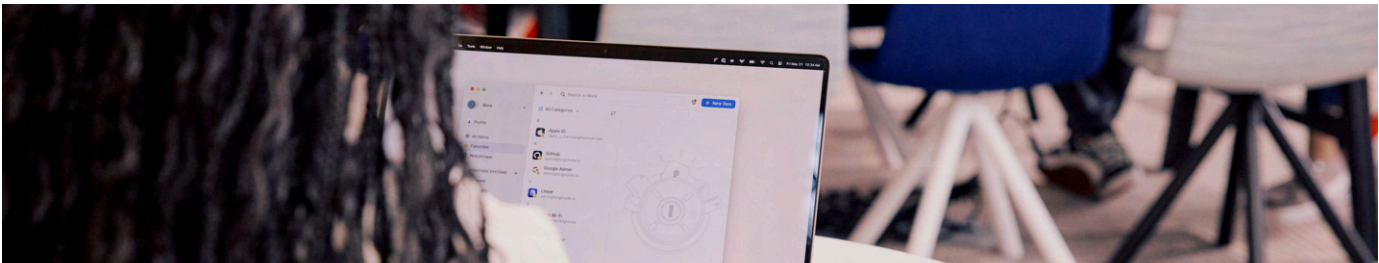
You have...	SSO	ITSM	SaaS Management Platform
Onboarding capabilities are...	<ul style="list-style-type: none">• Assign users to managed apps• Manage access to sanctioned apps	<ul style="list-style-type: none">• Alert IT when there's a new employee• Receive access request tickets	<ul style="list-style-type: none">• Assign users to apps, regardless of SSO status• Discover unsanctioned apps• Assign licenses



2. Offboarding: Protecting the organization

In theory, offboarding should be as easy as flipping a switch: revoking a departing employee's access to company systems, accounts, and data.

In reality, offboarding is more complex due to factors like disconnected systems, shadow IT, personal devices, and a remote workforce. Without a solution to track shadow IT in addition to sanctioned apps, often it can be a guessing game of who had access to what. And without standardization and automation, it can be easy to skip an offboarding step, which can result in unnecessary risk.



Revoking access to SSO doesn't go far enough. While it's an essential first step, fully offboarding employees requires deleting or transferring accounts so that they don't persist in the cloud; this leads to orphaned accounts and wasted spend. This becomes nearly impossible to do for SaaS apps that IT doesn't know about.

A comprehensive offboarding checklist includes a systematic way to:

- ✓ Immediately revoke access to accounts
- ✓ Recover and reassign software licenses
- ✓ Transfer data, delete accounts
- ✓ Lock/wipe/return devices

IT best practices for offboarding

- Integrate triggers from HR and IT platforms, such as departure/termination date
- Automate all offboarding steps – not just access removal
- This includes file/data recovery, email inbox forwarding/archiving, and license reclamation
- Communicate with managers to confirm termination date and actions like file transfers
- Create clear audit trails for compliance

Offboarding reality check

- Do we transfer Google Drive files?
- Do we delegate email inboxes for business continuity?
- Do we reclaim licenses consistently across SaaS apps?

Get more granular offboarding than SSO alone can provide:

You have...	Manual processes	Single Sign-On	SaaS Management Platform
Offboarding capabilities are...	Individually remove accounts to apps, usually in consultation with an employee's manager	Ensure ex-employees can't log in to protected apps	Ensure data, emails, files, and licenses are properly handled – automatically

3. Automation:

An IT manager's advantage

Let's face it: manual onboarding and offboarding is tedious, error-prone, and unsustainable. Automation of each step – particularly for the increasingly complex and high-risk offboarding process – ensures compliance and gives IT managers their time back to do more strategic and urgent work.

What can be automated? More than you might think

If you use...	Google Workspace	Microsoft 365
If you use automated workflows with Trelica by 1Password you can	<ul style="list-style-type: none"> • Assign apps, groups with the right level of access • Sign user out, auto-revoke tokens • Clear user's recovery email • Forward email, export inbox • Transfer Google Drive files • Reassign archive licenses • Notify managers • Delete accounts 	<ul style="list-style-type: none"> • Add users to groups, SharePoint, Teams • Sign user out, auto-revoke tokens • Reclaim licenses • Transfer OneDrive files • Forward email, save user email inbox content • Notify managers • Delete accounts

Automate shadow IT discovery to ensure comprehensive offboarding

Plainly, IT can't onboard or offboard employees from apps they aren't aware of. And since employees routinely use unsanctioned apps for work purposes, this leaves orphaned accounts and exposed data on unsanctioned applications – a threat that's only becoming more serious with the rise of highly-permissioned AI-based tools.

Therefore, comprehensive offboarding requires IT to continually, automatically discover shadow IT apps, so they can be either blocked or brought under centralized management.

Automate provisioning/deprovisioning for apps outside of SSO

An SSO provider adds a lot of value for an organization, including removing a user's access to federated apps.

However, no matter how robust your SSO environment is, some apps will live outside it. These are often legitimate, enterprise-grade applications, but they're not integrated with SSO because either the SaaS vendor doesn't support it, it is too time-consuming or complicated to integrate, or the organization hasn't paid for the enterprise license tier.

Trelica by 1Password complements SSO tools by extending governance to business-unit-managed and unmanaged SaaS apps.

Here's how:

- **SaaS discovery:** Trelica by 1Password helps you uncover the full footprint of apps being used at your organization, with or without IT's knowledge. This ensures that when employees depart, IT knows exactly which apps their access needs to be revoked from.

- **Breadth of integrations:** With over 350+ integrations, Trelica by 1Password connects to the tools enterprises use every day. That ecosystem means customers can extend governance and security to both business unit-managed and unmanaged apps without manual workflows.
- **Unified app inventory:** Trelica by 1Password's app library includes more than 40,000 pre-populated profiles. That makes it easier to build a unified inventory of applications, so IT and business leaders can see what's in use across the organization, how it's categorized, who owns it, and how many licenses are being utilized.
- **License management:** Trelica by 1Password provides workflows to automatically identify which licenses are actually being used, or whether licenses should be revoked or reassigned. This includes automatic communication with employees over Slack and Microsoft Teams to ask if they still need a specific app license.
- **Redundant applications:** In addition to recovering orphaned accounts, Trelica by 1Password helps IT and finance teams identify redundant apps and streamline upcoming renewals. This enables teams to cut waste and make smarter SaaS investments.



4. Building a future-proof process

Successfully automating onboarding and offboarding processes requires alignment across IT, HR, and finance. A SaaS management platform helps to coordinate between various functions with several key components:

- **Alignment with HR systems** (Workday, BambooHR, etc.) to incorporate triggers that kick off onboarding and offboarding workflows
- **Integration of SSO** (Okta, Azure AD, etc.) and **ITSM** (such as Jira), with a **SaaS management platform** (Trelica by 1Password)
- **Metrics** in place to measure success, such as time-to-provision, license utilization, and deprovisioning speed

Action plan for IT managers

Are you ready to take action? Here are the next steps to get you on the road to onboarding and offboarding automation:

- **Immediate:** Map your current onboarding and offboarding processes
- **Medium-term:** Automate the basics (triggered provisioning/deprovisioning)
- **Long-term:** Move from reactive, ticket-based IT to proactive lifecycle management to anticipate future needs, risks, and optimization

Trellica by 1Password can help you automate your onboarding and offboarding workflows. Schedule a [demo](#) to see it in action.