

snow*

2021 IT Priorities Report

An in-depth look at the key challenges, opportunities and technology intelligence imperative facing today's IT leaders



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Introduction

For years, IT leaders have faced a complicated landscape of priorities, but 2020 has been truly unprecedented in terms of the competing pressures faced by IT teams. Enabling remote work, adopting new technologies, managing security risks and balancing budgets became both more critical and more complex than ever before. As they continue to deal with high levels of disruption and uncertainty from Covid-19, IT leaders are now faced with setting priorities for 2021.

How will hybrid work environments, disruptive technologies, increased security threats and economic concerns impact IT? Will organizations fundamentally change the way they manage their IT assets, find value in their technology, support business agility and remain resilient?

To better gauge how IT leaders are setting their agendas and handling these new challenges, Snow Software surveyed 1,000 IT decision makers and 3,000 workers from the United States, United Kingdom, Germany and Australia on how technology is currently used and where there may be gaps in alignment between technology resources and business objectives. We set out to determine:

- **How is IT currently using and managing technology? Where are their most pressing challenges?**
- **Are there differences in how IT and employees perceive and use technology? Is this creating a more perilous risk landscape?**
- **Can the current state of technology investment and use provide a roadmap to developing priorities for 2021?**
- **Are there commonalities between organizations that have strong visibility and management of their technology resources? How could this impact the larger IT agenda?**
- **How much has Covid-19 impacted the role of technology in business?**

Ultimately, our findings showed that having strong technology intelligence – a complete view, understanding and management of IT investments – is interwoven with organizations' confidence to weather events like Covid-19 and drive innovation forward.

Key Findings

1. The IT landscape is changing rapidly, and these changes are compounded by the challenges of enabling the workforce in new ways. IT leaders reported that their biggest challenges over the past twelve months were managing cybersecurity threats (43%), implementing new technologies (40%) and supporting remote work (39%). Overall, complexity continues to increase as spend on all technologies – software, hardware, SaaS and cloud – was up across the board. It's no surprise then that for 63% of IT leaders, technology management has also become more difficult over the past 12 months.
2. As IT environments become more complex, employee enablement must be a top priority. While 41% of workers report that access to technology has improved, IT leaders overestimate how easy it is for teams to procure the software, applications and cloud resources they need compared to employees by 22 points. This provides an opening for shadow IT and a lack of comprehensive governance.
3. Both IT leaders (72%) and employees (52%) agree that security is the most pressing business problem caused by unaccounted for and unmanaged technology. It seems that IT's continuous efforts to reinforce security best practices may finally be paying off – it was the only area where over half of both groups recognized the potential risk to their organization. But there is a lower level of awareness for additional issues, especially among employees, with 16% believing unaccounted for and unmanaged technologies does not cause any business problems whatsoever.
4. Employee attitudes towards IT have improved over the last year, with 50% of employees noting they had more empathy, had more respect or were more grateful for IT. Yet employees still report some significant IT challenges over the past 12 months. Their biggest frustrations were dealing with old and outdated technology (37%), getting support for remote work (33%) and getting support tickets resolved (31%).
5. Now more than ever, IT is facing a difficult set of business priorities. Tied at 38% each, the top three IT priorities for organizations in 2020 were reducing security risks, reducing IT spend and adopting new technologies. Yet these areas of focus can often be in conflict with one another. If IT leaders want to balance these priorities moving forward, they need a more advanced approach for managing their technology environment.
6. There is a clear correlation between strong technology intelligence and impactful IT. This was especially striking when it came to innovation: 100% of IT leaders with mature technology intelligence programs said innovation was a strategic priority for their organization, versus 75% of other respondents. It is likely that innovative companies have prioritized technology intelligence, but also that technology intelligence enables innovation. Overall, these leaders indicated they are better positioned to tackle their top priorities and challenges.
7. Leaders with mature technology intelligence are also more confident in their organization's outlook. 79% of IT leaders with mature technology intelligence strongly agreed that their organization was prepared to weather current global events, yet just 32% of other respondents felt the same way. Across the board, IT leaders noted that during Covid-19 their traditional challenges have become more heightened and intertwined. However, those with mature technology intelligence felt more empowered and were able to pivot more successfully, highlighting the benefits of a holistic approach to technology asset management.

Defining Technology Intelligence

One term you will see us use throughout this report is technology intelligence. So, what exactly is technology intelligence, and why is it important to understand its current state?

When organizations achieve complete visibility and comprehensive manageability of all their technology resources, IT leaders have the power to make more informed and strategic decisions to create agility, growth and innovation. This holistic approach to IT management is technology intelligence.

But gaining a total understanding of what is technology is purchased, used or accessed is incredibly difficult. Consider the landscape most businesses face today:

- **Many applications and cloud services can be spun up in minutes with a credit card**
- **Software licenses can easily be overstretched or underused, causing potential for significant fees from vendors during renewal periods**
- **While the overall cost of a laptop or portable device is relatively cheap these days, the data on those devices is important to track and secure, as mandated by many data privacy regulations**
- **Supply chain shortages caused by the global pandemic created challenges for organizations looking to acquire more devices**

Overall, the technology landscape that many enterprises, public agencies, universities and even non-profits face is increasingly complex – and in many cases very expensive, despite promises of a simpler, cheaper and more effective outcome.

Even companies that are “born in the cloud” face similar challenges when it comes to gaining clarity into and governance over their investments. Public cloud services were billed as agile and scalable, but the assumption is that without their previously significant investment in hardware, organizations could dramatically reduce their overall infrastructure bills. For many, the benefit of public cloud is the additional services they offer, not the value-based pricing. And the reality is that most organizations will continue to embrace a hybrid cloud environment for the foreseeable future.

This landscape that organizations confront is everchanging, and more technologies have accelerated into the mainstream as a result of the response to the global pandemic. Visibility across all these assets – software, hardware, SaaS and cloud – has never been so critical. Technology intelligence can help IT leaders successfully adapt to this new normal and ensure their investments are working for them.



Chapter I

The Biggest Challenges of 2020

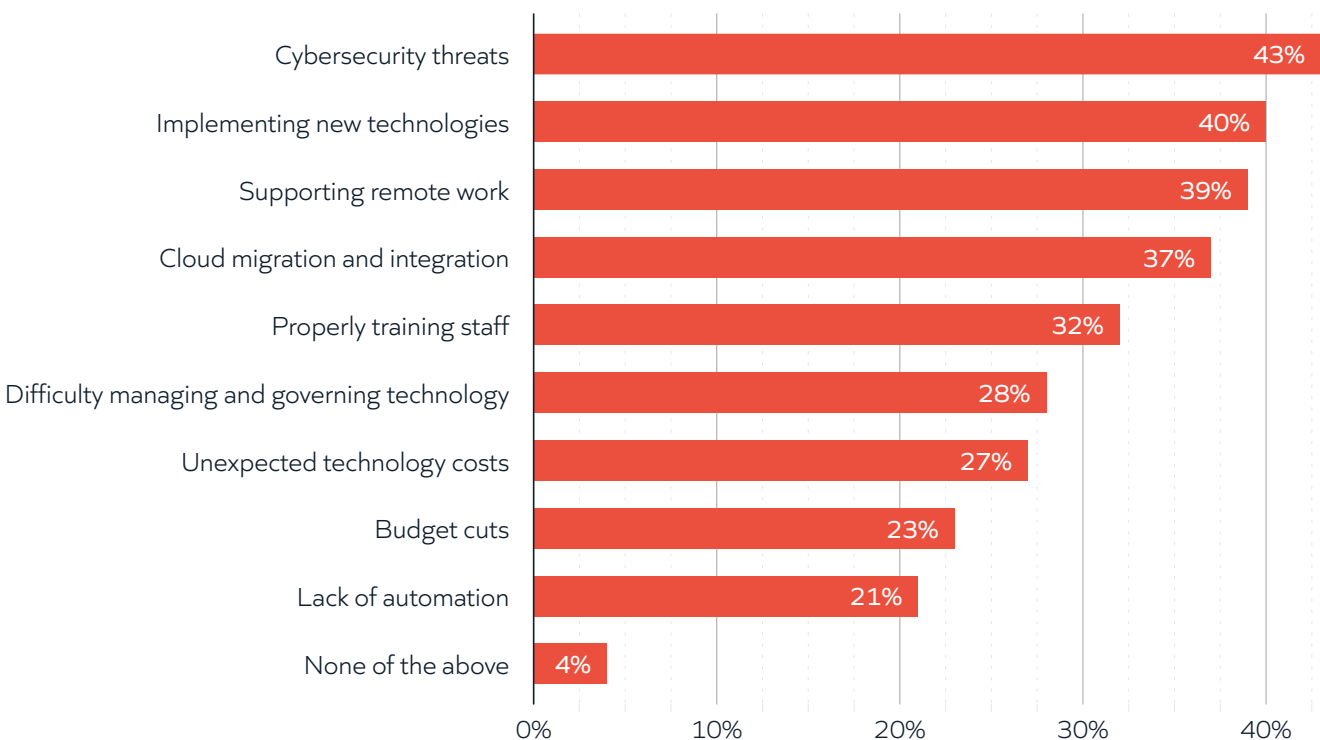
IT teams are consistently under pressure as they deal with business-critical issues. It's no secret that IT teams have had to juggle a lot over the last decade and increasingly been asked to handle more, from remediating cybersecurity threats to enabling employee productivity and driving digital transformation. While the events of 2020 have been felt across all industries and functions, it especially impacted IT and brought about a whole new set of challenges that upended normal operations.

We asked IT leaders to select their team's three biggest challenges over the past 12 months. From the list, 43% said addressing cybersecurity threats was the most pressing issue. This was followed by implementing new technologies (40%) and supporting remote work (39%). Considering the

massive shift to new ways of working for many organizations, as well as the disruptions some industries like retail have undergone in a short period of time, it's not surprising that these are the top three challenges IT faced in 2020.

Coming in a close fourth, 37% of IT leaders also said cloud migration and integration was a challenge, followed by properly training staff (32%) and difficulty managing and governing technology (28%). Only 27% noted unexpected technology costs and 23% indicated budget cuts were issues, demonstrating the important role technology has played in terms of enabling businesses to forge through some of the more difficult elements of this past year.

What were your IT team's biggest challenges over the past 12 months?

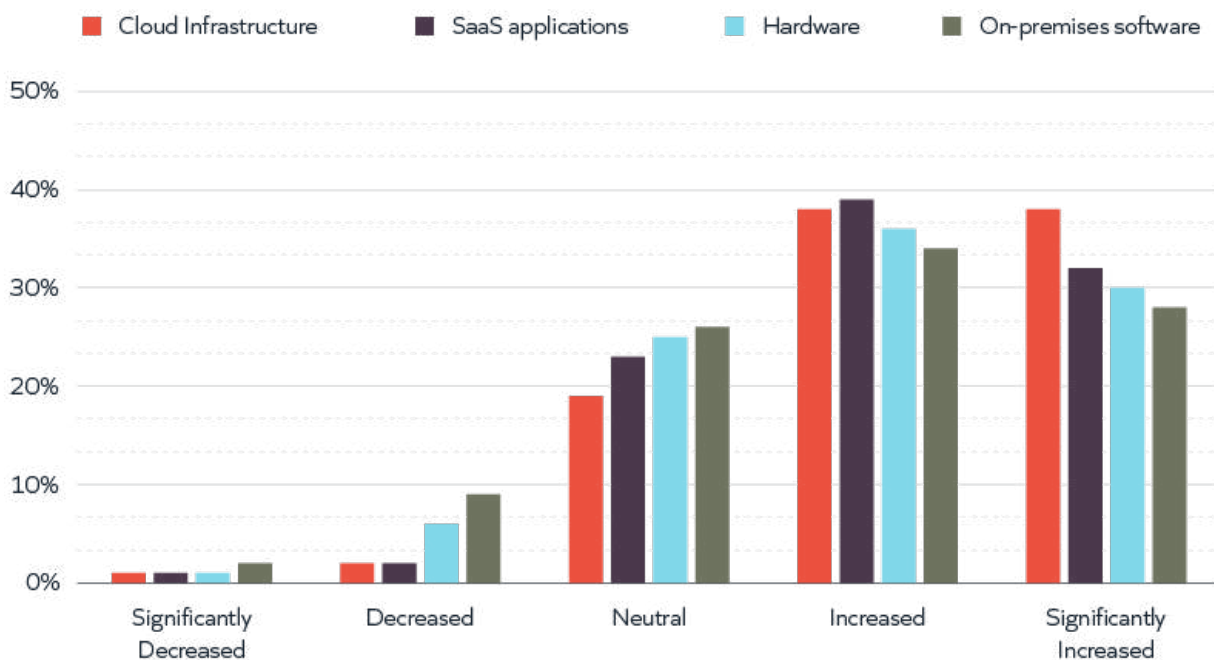


Source: Snow Software, 2021 IT Priorities Survey

Solving for these challenges can require new technologies, time and agreement across various stakeholder groups within the organization. In short, many are not solved overnight, even without the variability of 2020. Therefore it is no surprise that technology investments increased across the board.

When asked if the organization’s investment in various types of technology had changed over the past 12 months, IT leaders indicated they had increased spending on cloud infrastructure (76%), SaaS applications (71%), hardware (66%) and on-premises software (62%). The only notable area of reduced investment was on-prem software, with 11% of leaders reporting they had cut spend in that area.

How has your organization’s investment in the following technologies changed over the past 12 months?

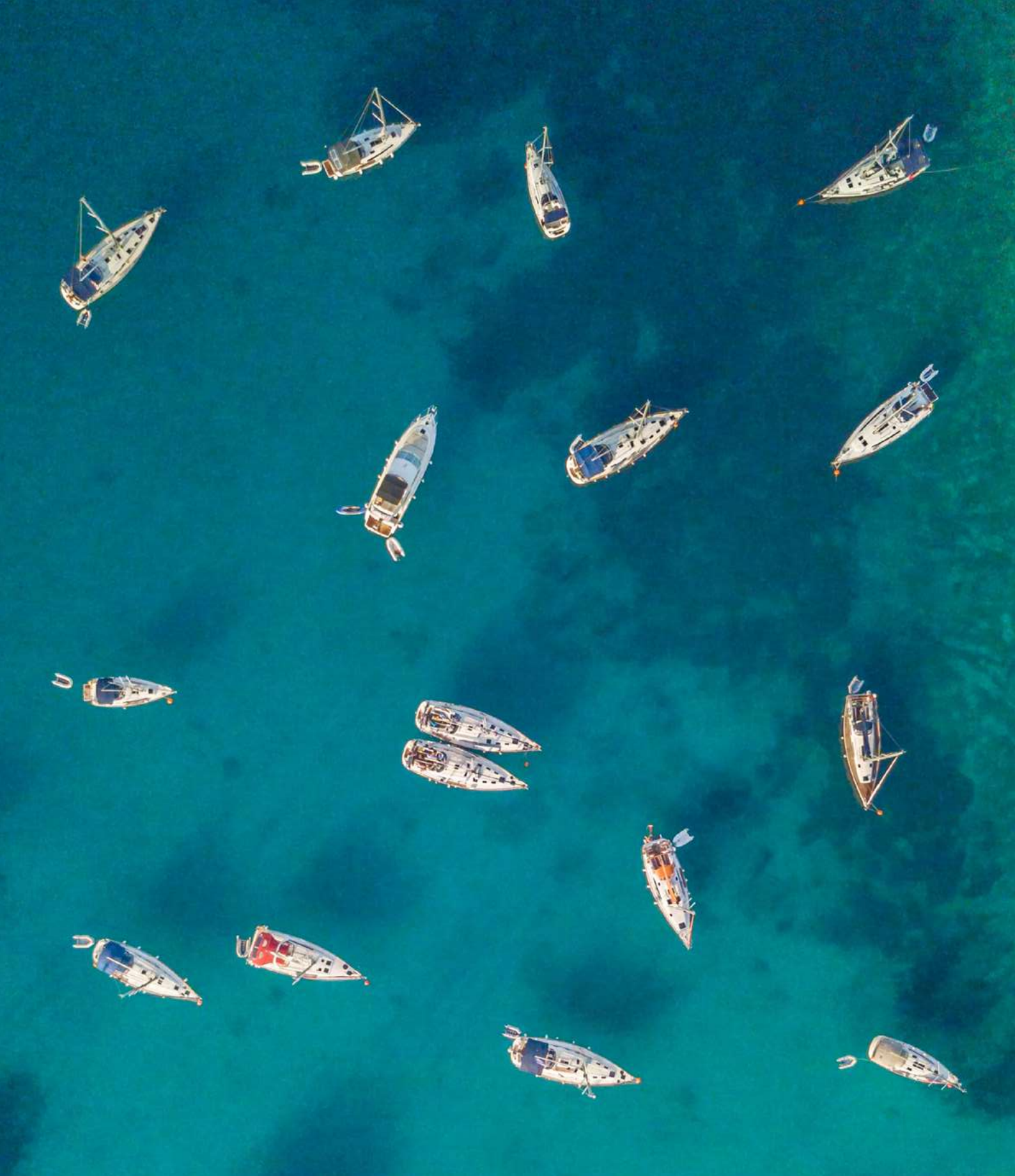


Source: Snow Software, 2021 IT Priorities Survey

While increased investment in technology resources is typically seen as a positive, it is clear that many IT leaders and teams had to make decisions to enable remote workforces early in the pandemic – and the question remains if they would have made these same decisions or investments had they known the duration and impact of Covid-19. When considering 2021 priorities, these investments may be called into question in favor of larger cost cutting and optimization initiatives.

Whether this is feasible or not will depend on expectations around remote work and the pace of digital transformation. In fact, 76% of IT decision makers agreed that the pace of digital transformation has dramatically increased at their organizations in 2020. Interestingly enough, only 55% of employees agreed with this assessment.

Given these trends, it is not surprising that 63% of IT leaders indicated that technology management had become more difficult over the past 12 months.



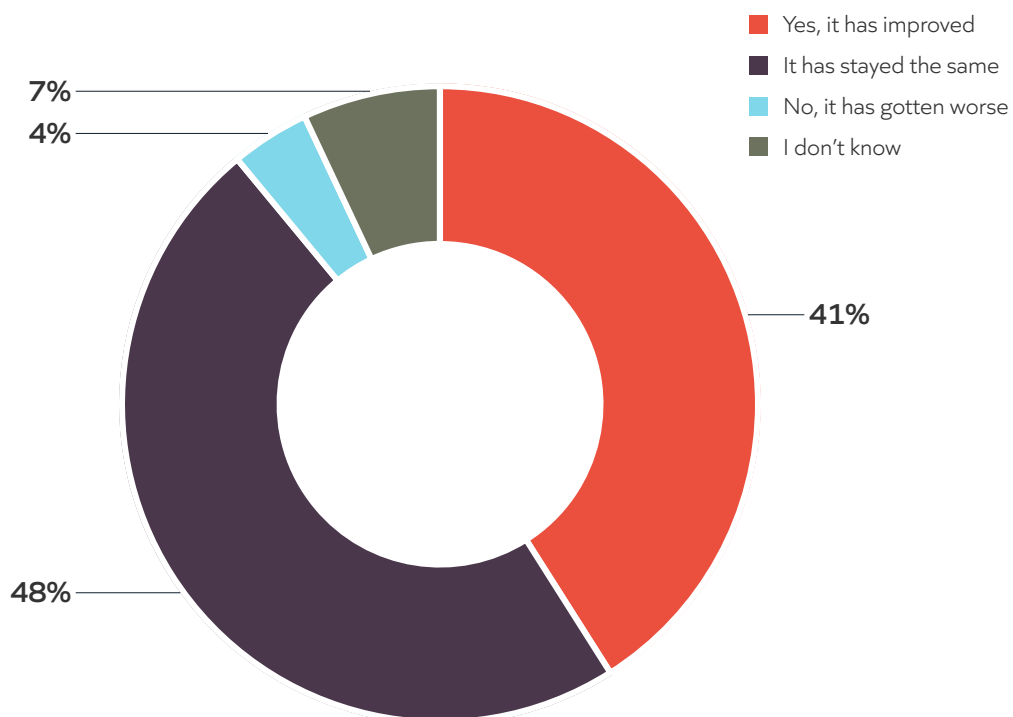
Chapter II

The State of Employee Enablement

As we look at how technology management in particular has become more difficult for IT teams, it is worth considering how employees are accessing these resources and how that aligns with IT's understanding of these activities. Even in an era of self-service apps and business-led technology purchases, IT plays a critical role in ensuring employees not only have the tools they need but also use them, and any associated data, responsibly.

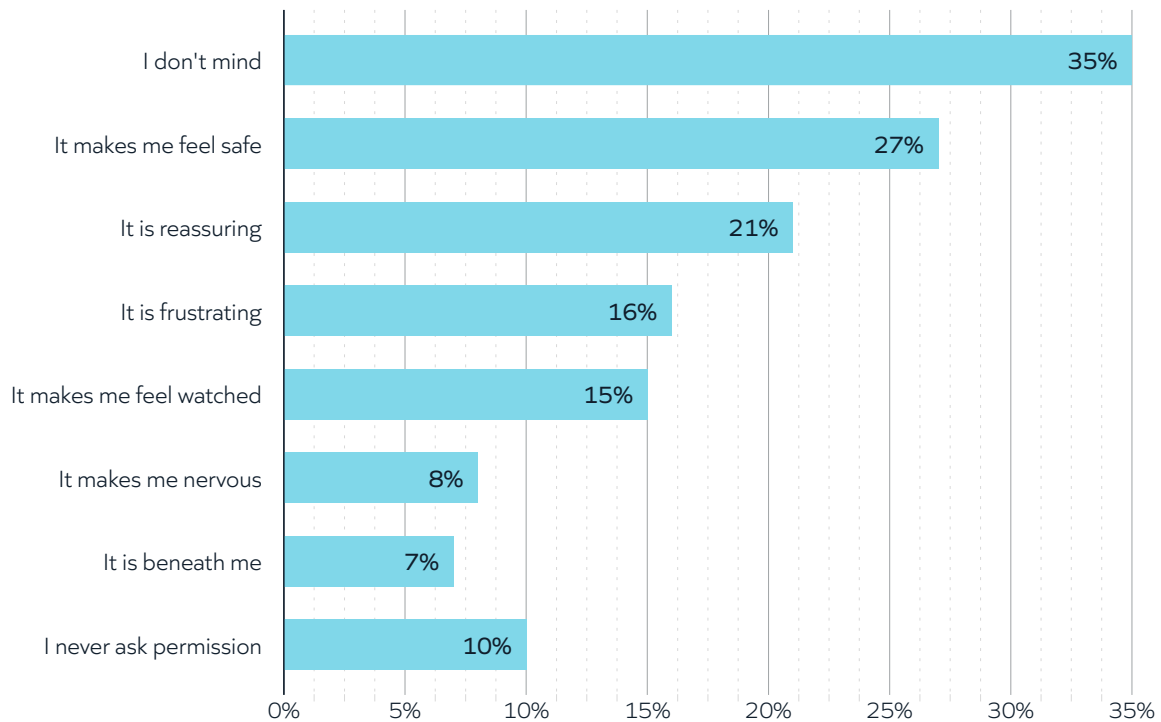
We asked employees if they believed their access to software, apps and cloud services had improved over the past 12 months. Overall the sentiment was positive – 41% said access to the technology they need had improved over the past year and 48% indicated that it has stayed the same. Despite the extreme disruptions of 2020, only 4% said that it had gotten worse.

Do you believe that access to the software, apps and cloud services you need to do your job has improved in the past 12 months?



Source: Snow Software, 2021 IT Priorities Survey

How does asking IT for permission to get work software, applications or cloud services make you feel?

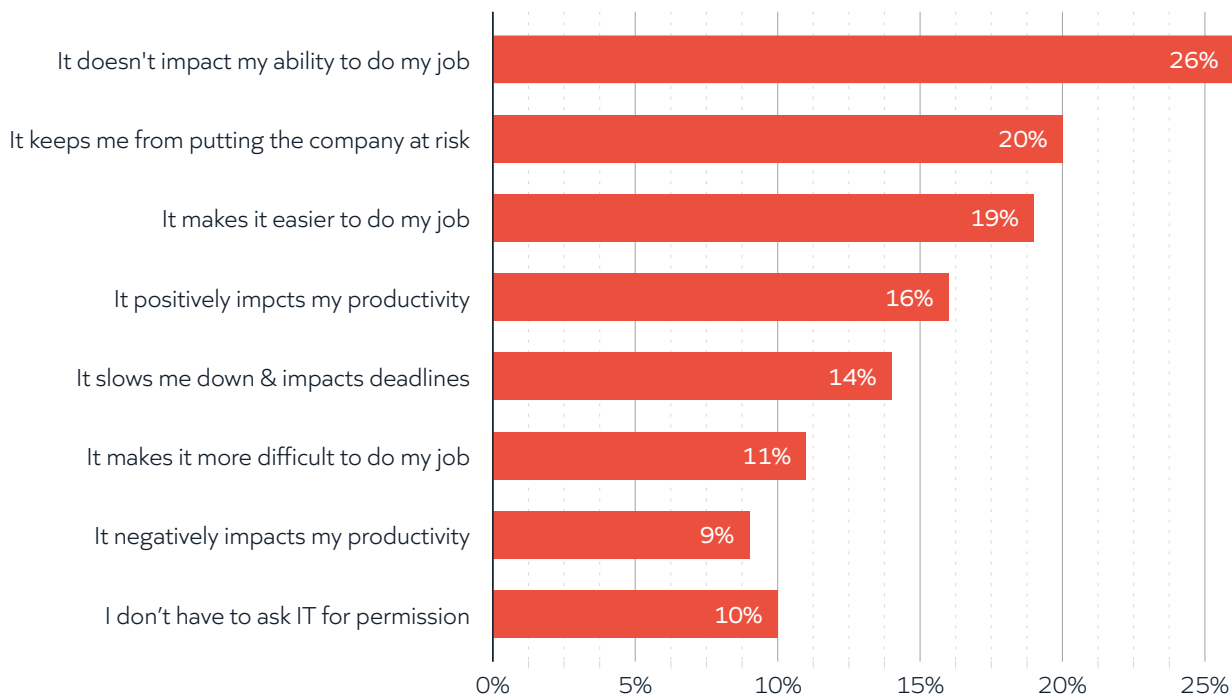


Source: Snow Software, 2021 IT Priorities Survey

The ability to access tech tools looks promising, but it appears IT is overestimating how easy it is for teams and individuals to actually get the software, applications and cloud resources they want. While 75% of IT leaders believe it's easy for departments and teams to procure software, applications and cloud, just 53% of employees agree. When asked about individual employees, the numbers dip slightly for both groups, with 70% of IT leaders believing it is easy for individuals to procure technology versus 50% of employees.

Despite potential hurdles in purchasing technology, 35% of employees said they don't mind asking IT for permission to get software, applications and cloud services. In fact, 27% said it made them feel safe and 21% felt reassured. This data in particular seems to indicate progress in enablement and collaboration between IT and employees. However, the potential for blind spots across an organization's IT environment still exist, due in part to the 10% of employees who never ask for permission.

How does asking IT for permission to get work software, applications or cloud services impact your ability to do your job?



Source: Snow Software, 2021 IT Priorities Survey

In terms of effectiveness and productivity, 46% of workers indicated that using IT approved technologies had some positive impact on their ability to do their job. That cohort included 20% who said it kept them from putting the company at risk, 19% who indicated it made it easier to do their jobs and 16% who said it positively impacts their productivity. Another 26% said it doesn't impact their ability to do their job one way or the other. These figures demonstrate that IT enablement initiatives may be moving in the right direction.

This is a good reminder that even with the continued shift in purchasing decisions from IT to business leaders, IT is critical to employee enablement and governance. Teams should work on policies and processes that account for decentralized IT and support self-service while still providing guidance for employees. By becoming trusted advisors and collaborators to the business, IT can address enablement while also ensuring they have the necessary oversight to reduce risk across the organization.



Chapter III

The Evolving Risk Landscape

While the current complexity of the technology landscape is creating some hurdles for IT, especially when trying to understand usage and offer appropriate enablement, additional challenges loom large. The most notable one is managing risk.

We asked both IT leaders and employees about the most pressing business problem created by unaccounted for and unmanaged technology.

72% of IT leaders and 52% of employees agreed that security is the biggest issue. But awareness of additional problems dropped sharply after that, with 16% of employees saying they don't believe unaccounted for and unmanaged technology cause any problems whatsoever. Considering the emphasis on remote working in 2020, this may be one of many things that are exacerbating the potential risk landscape.

What do you believe are the most pressing business problems caused by unaccounted for and unmanaged technology for your organization?

	IT Leaders	Employees	Difference
Security	72%	52%	-20
Privacy	55%	42%	-13
Financial Risk	42%	28%	-14
Compliance	41%	25%	-16
Legal Risk	35%	24%	-11
Reputational Risk	28%	16%	-12
No Issues	3%	16%	+13

Source: Snow Software, 2021 IT Priorities Survey

Based on this data, it seems likely that IT's focus on cybersecurity training and policies has had a positive impact – it is the only area where over 50% of both groups recognized the potential risk. When asked if they have received adequate training on how to securely use the technology resources they have access to, 64% of employees agreed, 18% were neutral and only 11% disagreed. Considering that 68% of IT leaders reported that their organizations are currently facing a higher level of security risk, continued focus on this area will be critical in 2021.

Risk is not just about security though. In addition to the myriad of impacts from a data breach, unmanaged technology can lead to soaring IT expenses, unexpected true-up costs, government fines, contractual breaches and more. With the uncertain and somewhat unpredictable nature of the global markets in 2020, it's essential that organizations consider how they are managing their technology stack and the data stored on it to appropriately mitigate an increase in these risks.

While a majority of IT leaders felt their organization was managing, monitoring or securing their technology resources effectively, employees seemed slightly less confident. When asked about if their organization:

- **Took appropriate measures to store and secure sensitive data – 80% of IT leaders vs. 74% of employees agreed**
- **Monitor and manage software, application and cloud usage – 83% of IT leaders vs. 69% of employees agreed**
- **Tracks and manages work devices – 82% of IT leaders vs. 68% of employees agreed**

Effective visibility and governance can significantly reduce overall risk for organizations. As IT leaders move away from the idea that shadow IT is a prevalent threat and just how business is done today, other market forces like global data privacy regulations like the General Data Protection Regulation (GDPR) set minimum requirements for how organizations must manage, secure and handle sensitive data, understand how activities impact the security posture of their network, and more that require a degree of control.

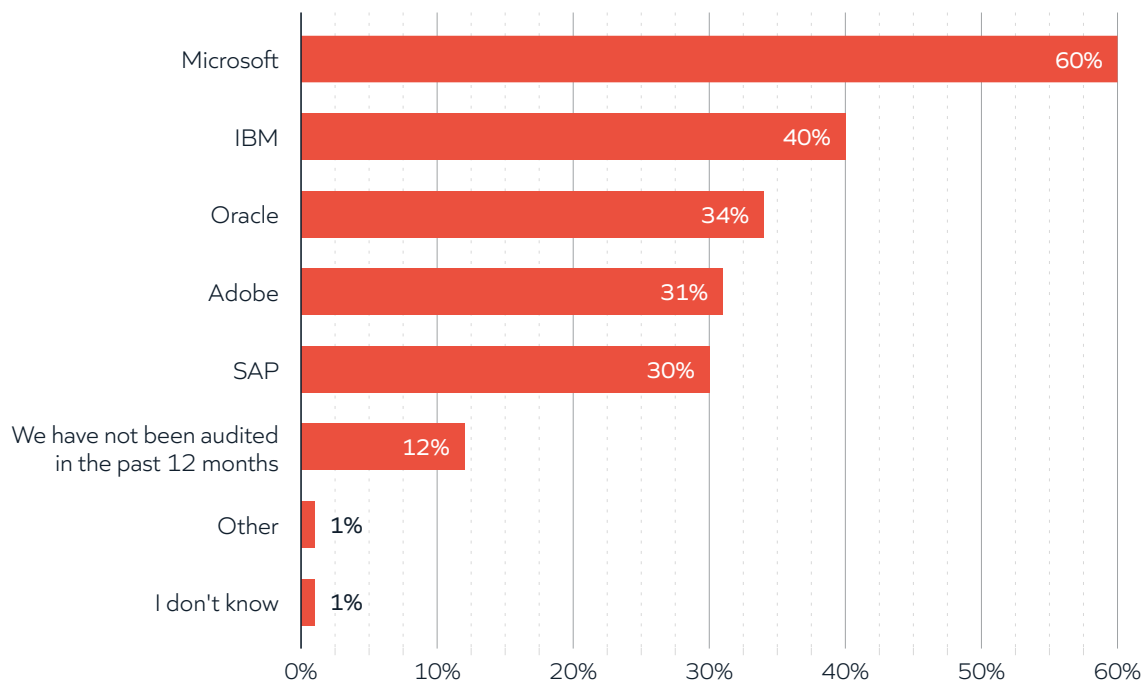
A Deeper Dive on Vendor Audits

One area of risk that deserves additional attention in 2021 is audits. Overall, 87% of IT leaders reported that they were audited by a software vendor in the past 12 months. In terms of which vendors are auditing the most, Microsoft came in number one accounting for 60% of audits, followed closely by IBM (40%), Oracle (34%), Adobe (31%) and SAP (30%). Just 1% of leaders said they were

audited by another vendor, with write-ins including Amazon, Cisco and Micro Focus.

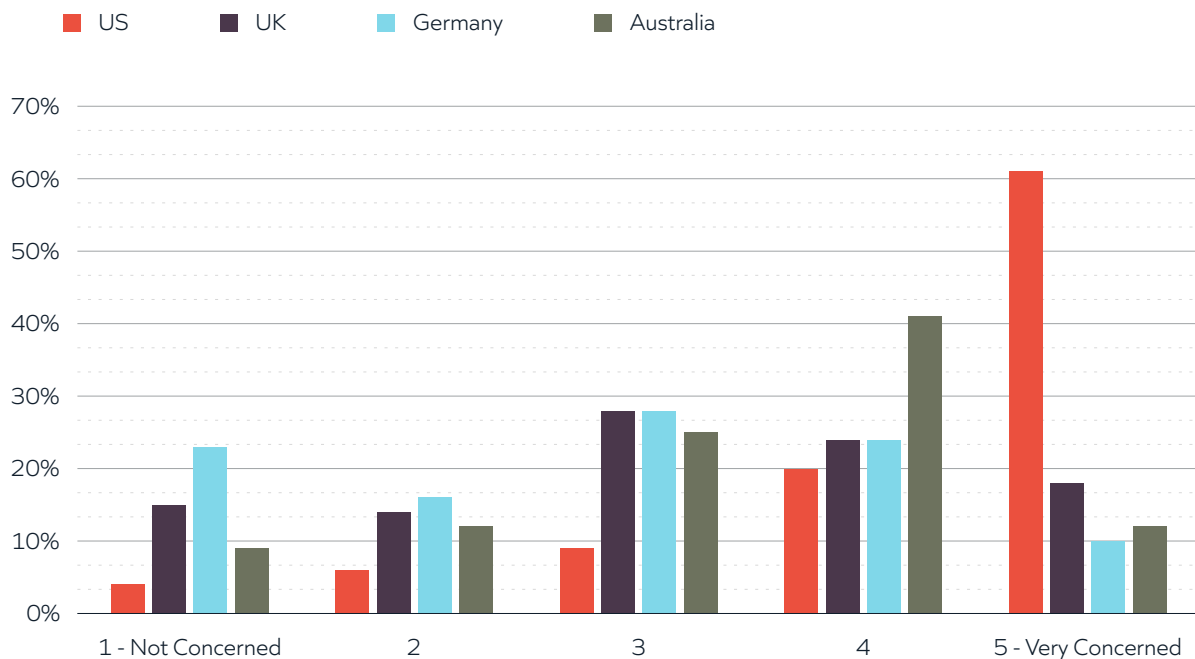
Yet only 51% of IT leaders say they are concerned about vendors audits occurring in the next 12 months, with 21% saying they are unconcerned and 23% reporting they are neutral.

Which vendors have audited your organization in the past 12 months?



Source: Snow Software, 2021 IT Priorities Survey

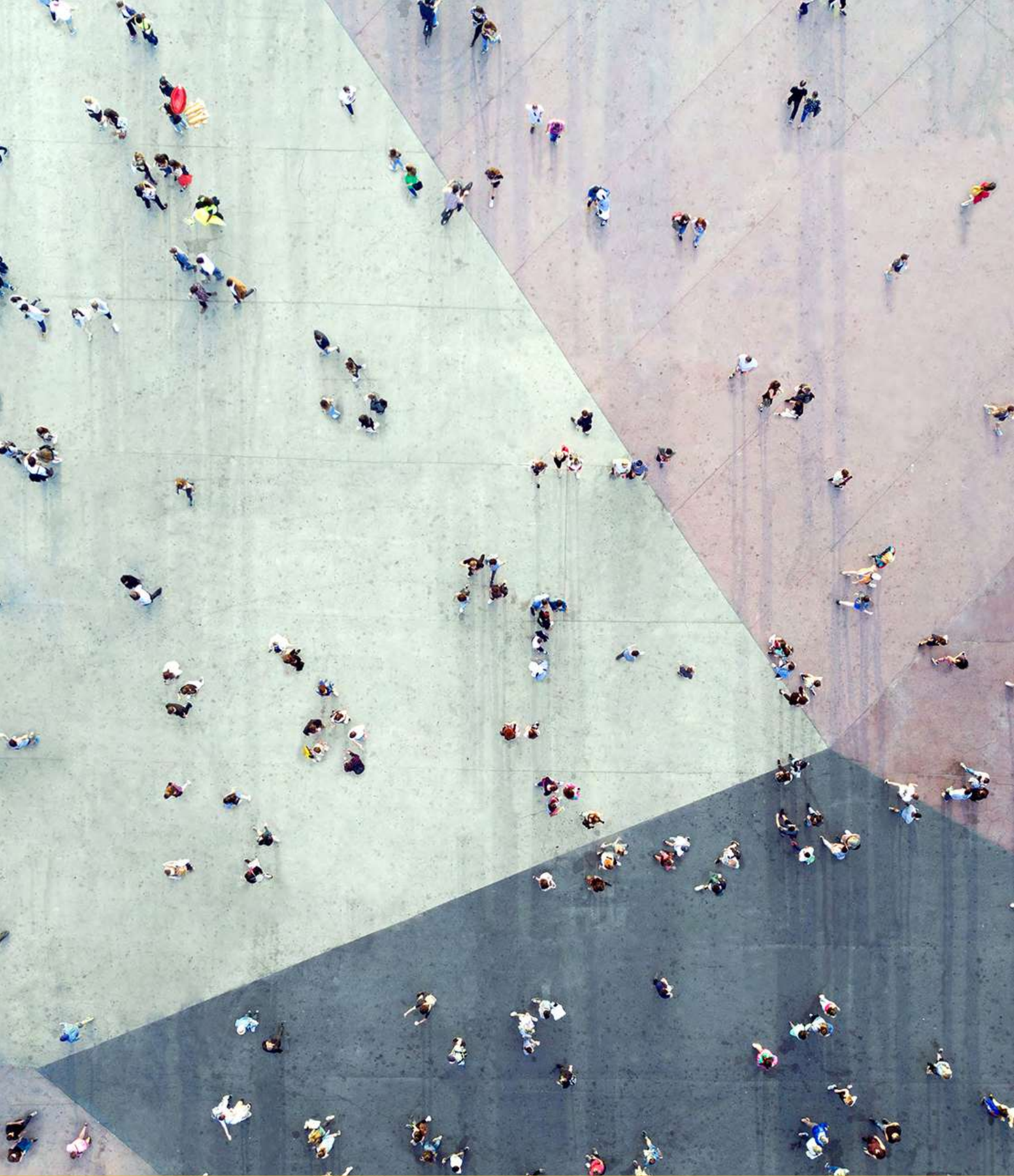
How concerned are you about vendors audits in the next 12 months?



Source: Snow Software, 2021 IT Priorities Survey

These answers were dramatically different in the US – 81% of American IT leaders are concerned and just 10% were unconcerned. Germany was also surprising, with more IT leaders saying they were unconcerned (40%) versus concerned (30%). The US did report higher rates of being audited over the previous 12 months at 93%, but that doesn't account for the dramatic difference in concern. One interpretation of the data is that US IT leaders don't anticipate vendors will change their behavior much in the next 12 months, whereas those in the UK, Germany and Australia may believe vendors will back away from audit activity due to current events.

Based on the trends that followed the global economic crisis in 2008, that is not a safe assumption – vendors actually increased their audit activity in an attempt to recoup lost revenue, and that may foreshadow similar behavior in 2021 and beyond. Considering only 41% of IT leaders strongly agreed that they could quickly gather information and confidently defend their position for a vendor audit, this is an area where IT leaders need to devote more attention, especially in light of increased and unexpected technology caused by the pandemic.



Chapter IV

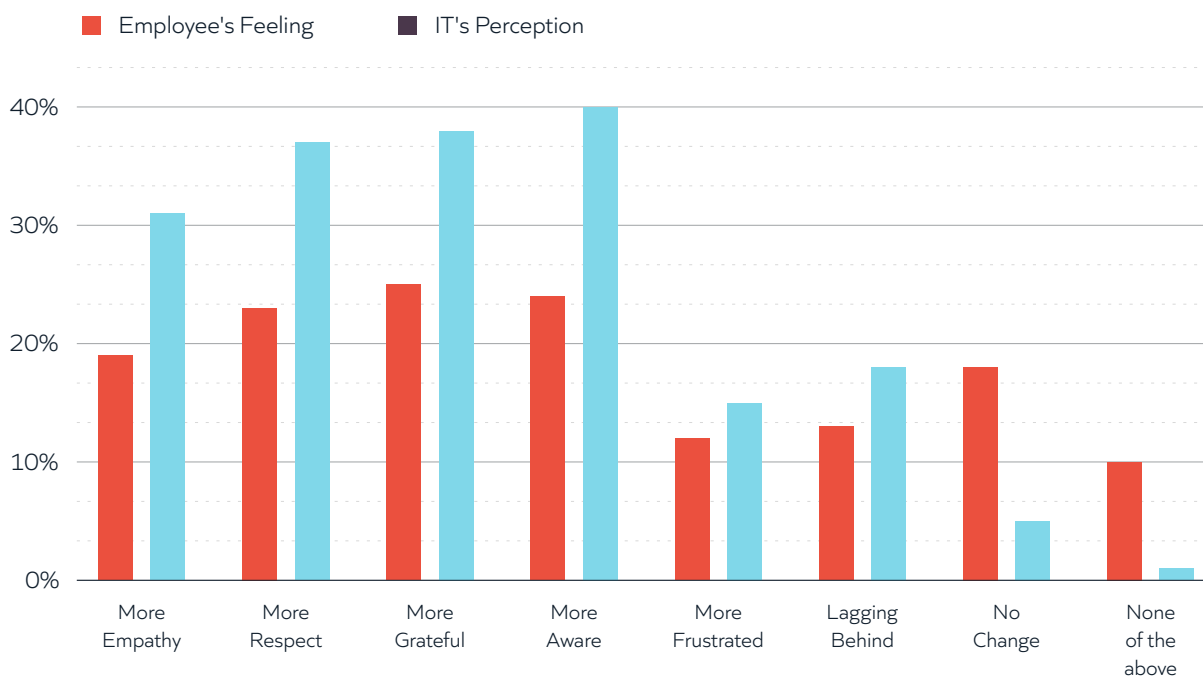
An Improved Dynamic Between IT & Employees

The relationship between employees and IT has been fraught in recent years. Easy access to applications and cloud instances compounded old tensions and created new issues for IT. While there has been progress to mend fences between these two groups, the global pandemic may have accelerated that good will.

Many employees report that sentiment towards IT has improved significantly over the past year.

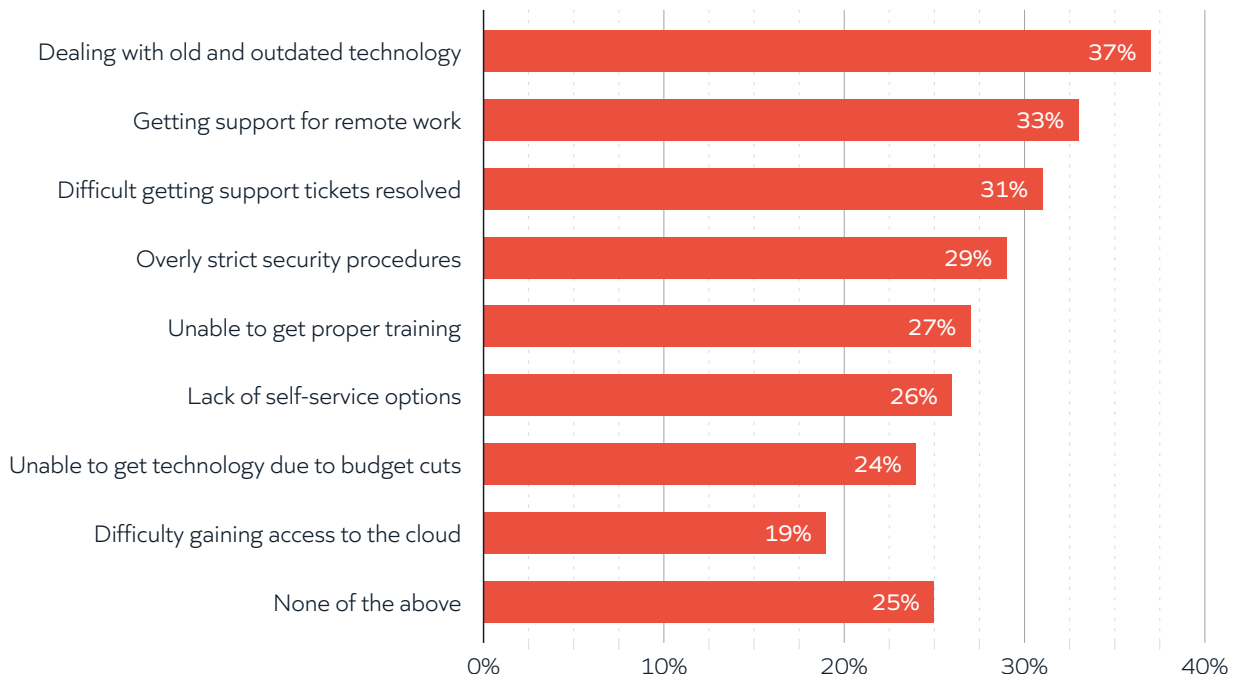
Overall, 50% of employees said they had more empathy, had more respect or were more grateful for their IT department. IT does seem to be overestimating this positive shift in attitude, but they also overestimated negative shifts in attitude as well – 28% of IT leaders said they think employees were more frustrated or believed IT was lagging behind, yet only 22% of employees reported that.

How have employee attitudes towards IT changed over the past 12 months?



Source: Snow Software, 2021 IT Priorities Survey

What were your biggest challenges when dealing with IT over the past 12 months?



Source: Snow Software, 2021 IT Priorities Survey

When asked about the biggest challenges employees have faced with IT over the past 12 months, their top three issues were dealing with old and outdated technology (37%), getting support for remote work (33%) and difficulty getting support tickets resolved (31%).

While the shift towards more positive sentiment between IT and employees is overall an important development, there's a question about how long this will last. It is very plausible that attitudes could shift again in 2021, especially as IT leaders make difficult decisions about cost cutting measures which could impact new technology investment or continued support for remote work.



Chapter V

Considering 2021 Priorities

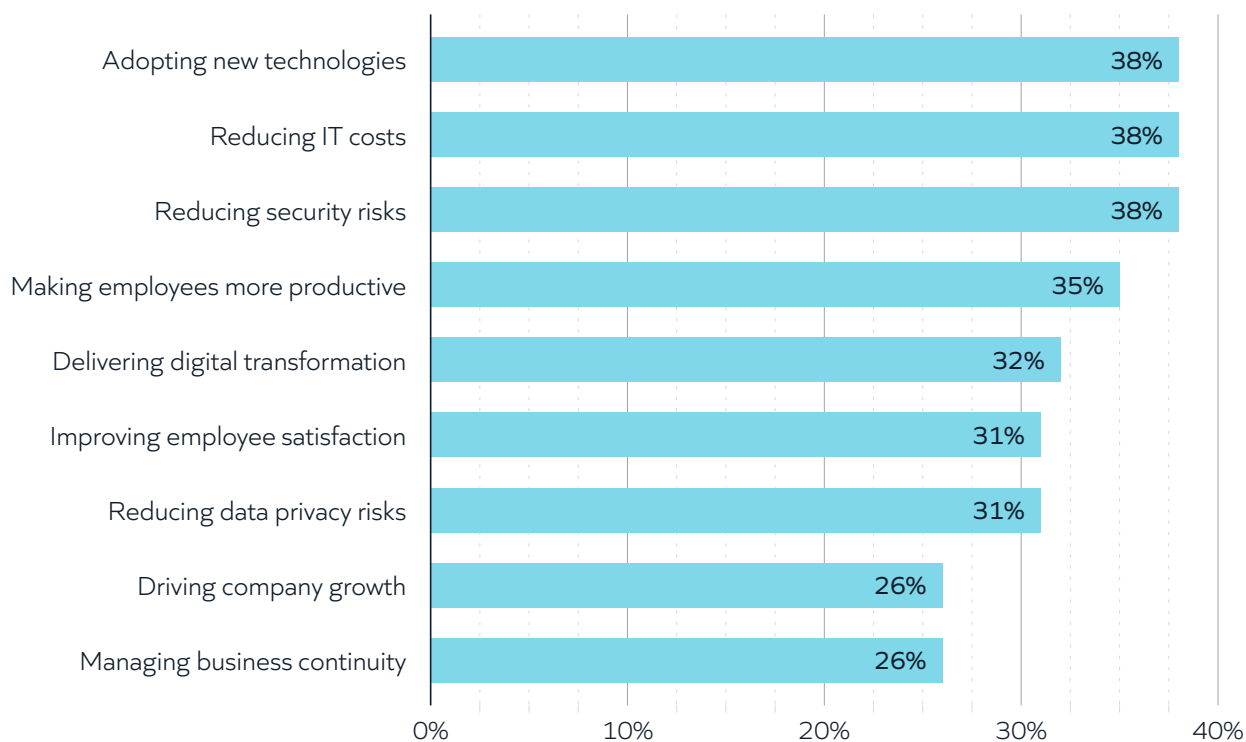
The sudden disruption and lingering uncertainty of 2020 has made defining priorities for 2021 especially difficult for IT leaders. For many organizations, next year's priorities will closely mirror those from the past year as they continue to fight against many of the same headwinds. However, it appears that the tension between these priorities, and the importance of achieving all of them in concert, will be heightened.

Among the top IT priorities for this past year, reducing security risks, reducing IT spend and adopting new technologies all tied for the top slot at 38% each. Not only does that mean these

priorities are likely competing in importance, but they may actually be in conflict with one another.

For example, implementing and integrating new technologies can be expensive and open up new security risks. If reducing IT costs is achieved with blunt instruments like cuts and freezes, that hobbles new technology purchases and key security investments. Similarly, an overly restrictive security posture may limit the introduction of new technologies and require significant budget to support. This is a difficult balancing act during the best of times and will require a more holistic and innovative approach in today's environment.

What were your organization's top IT priorities over the past 12 months?



Source: Snow Software, 2021 IT Priorities Survey

When looking at the next 12 months, IT leaders will need to contend with the decisions they made in 2020 to adjust to the new normal. Significant trends noted earlier in this report that will impact 2021 priorities include:

1. **Accelerating digital transformation.** Over three-quarters of IT leaders said the pace of digital transformation has significantly increased in the past year, and it is unlikely to slow down as organizations continue to adapt. And while adopting new technologies was tied as a top priority, implementing new technologies was also IT's second biggest challenge. This will be an area that needs extra attention and governance.
2. **Increased spend across the board.** Rather than simply reallocating budget, many organizations had to quickly enable their employees to work remotely, and then sustain that unplanned investment for many months. Of course, this is at odds with priorities to reduce IT spend. With the economy still struggling around the globe, IT leaders will likely be asked to trim spend without sacrificing employee productivity.
3. **Risk from current events.** These include a rise in cyberattacks, but also evolving workplace practices and changing vendor behavior. Managing vulnerabilities and training employees will be key, but IT leaders will need to maintain a holistic approach to risk as they deal with the fallout from 2020, both internally and externally.
4. **New employee challenges.** Making employees productive was just shy of the top three priorities, coming in fourth at 35%. It is notable that getting support for remote work was the second biggest challenge for employees and supporting remote work was the third biggest challenge for IT leaders.

Ultimately, if this year has proven anything, it is that IT leaders must be prepared for the things you can't prepare for. That means you need a solid foundation on which you can pivot quickly when the unexpected happens, which relies on having complete visibility and manageability of your entire technology ecosystem.

However, based on the responses from those surveyed, there may be some improvement required here to ensure an effective and efficient 2021. For example:

- **41% of IT leaders strongly agree they can report on all technology use and spend across desktop, mobile, data center and cloud**
- **42% strongly agree they have clear visibility into cloud spend and can predictably stay on budget**
- **38% strongly agree they can identify duplicate and overlapping functionality to optimize technology spend**
- **40% say they can confidently identify and address known vulnerabilities across the entire IT ecosystem**

As we'll explore in the next chapter, comprehensive insight and understanding of the activities occurring across an organization's IT environment plays a significant role in determining how to prioritize, and ultimately solve for, competing business challenges.



Chapter VI

The Technology Intelligence Imperative

For those respondents with a complete understanding of how their technology investments impact the larger organization – what we consider mature technology intelligence – there was a notable correlation with operating an impactful IT program.

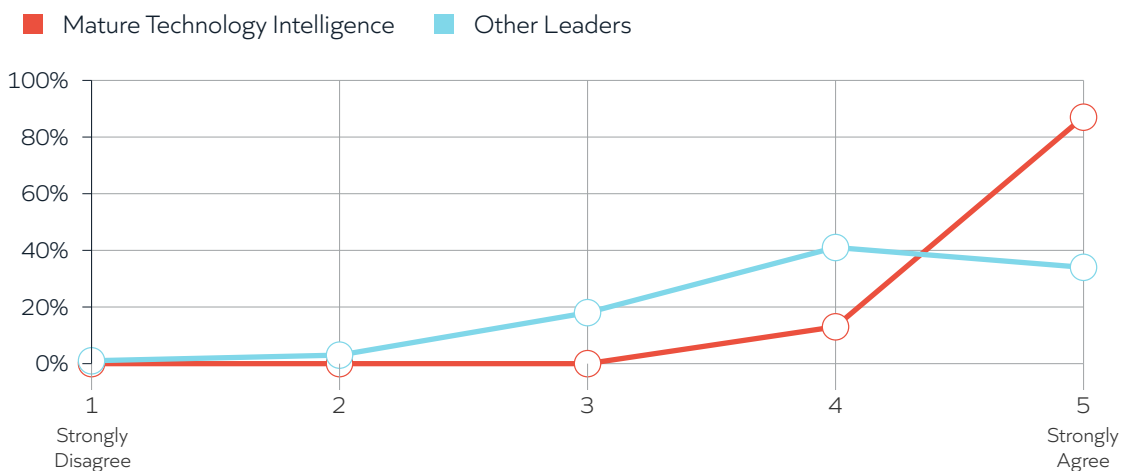
This year, 14% percent of IT leaders reported that their organization had mature technology intelligence. This assessment was based on their response to the following questions:

1. My organization can accurately report on all technology use and spend across desktop, mobile, data center and cloud.
2. My organization can identify and reassign unused software licenses, SaaS subscriptions and cloud services.
3. My organization can identify duplicate and overlapping functionality to optimize technology spend.
4. My organization has clear visibility into cloud spend and can predictably stay on budget.
5. My organization can quickly gather information and confidently defend our position for vendor audits.
6. My organization can identify and address known vulnerabilities across the entire IT ecosystem.

Leaders who strongly agreed with all six of these statements passed the bar for a mature technology intelligence program. When their survey responses were compared to those who scored lower on the maturity curve, some clear trends emerged. Overall, those with mature technology intelligence were better positioned to tackle their top priorities and challenges.

Beyond the statements used to determine technology intelligence maturity, there was only one question where all the respondents either agreed or strongly agreed. For those IT leaders who have a mature technology intelligence program, 100% said innovation was a strategic priority for their organization versus 75% of other respondents. It is not clear whether innovative companies have strong technology intelligence, strong technology intelligence is required to foster innovation or a mixture of the two. However, the correlation between the two elements is clear among those surveyed and ultimately impacts an organization’s ability to deliver on the four key priorities emerging for 2021.

Innovation is a strategic priority for my organization.

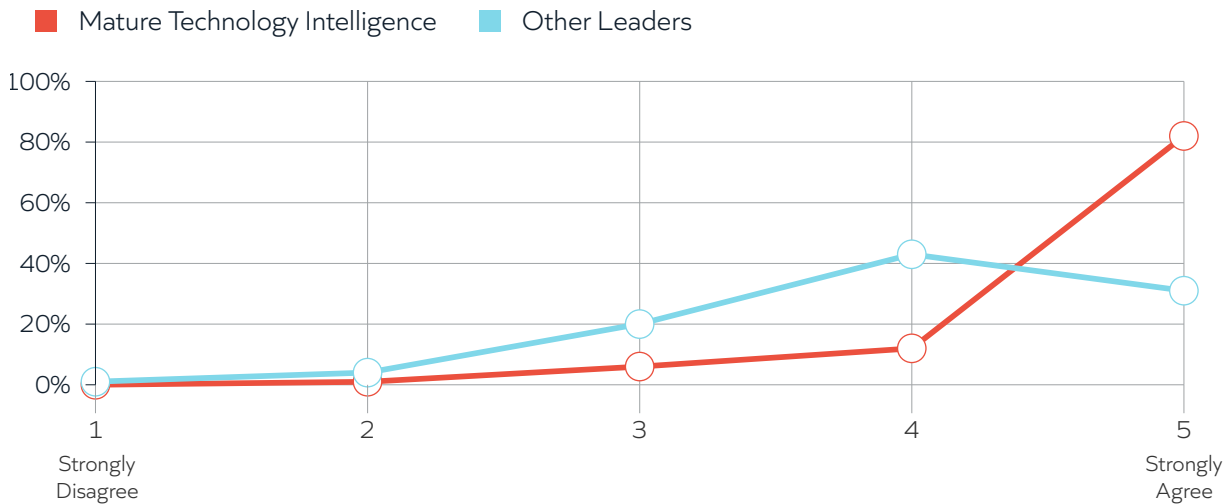


Source: Snow Software, 2021 IT Priorities Survey

Adopting New Technologies

Closely related to innovation, implementing new technologies and ways of working is an area where leaders with strong technology intelligence thrived. 82% of IT leaders with mature technology intelligence strongly agreed that the pace of digital transformation had dramatically increased at their organization compared to 31% of IT respondents who lack a similar approach.

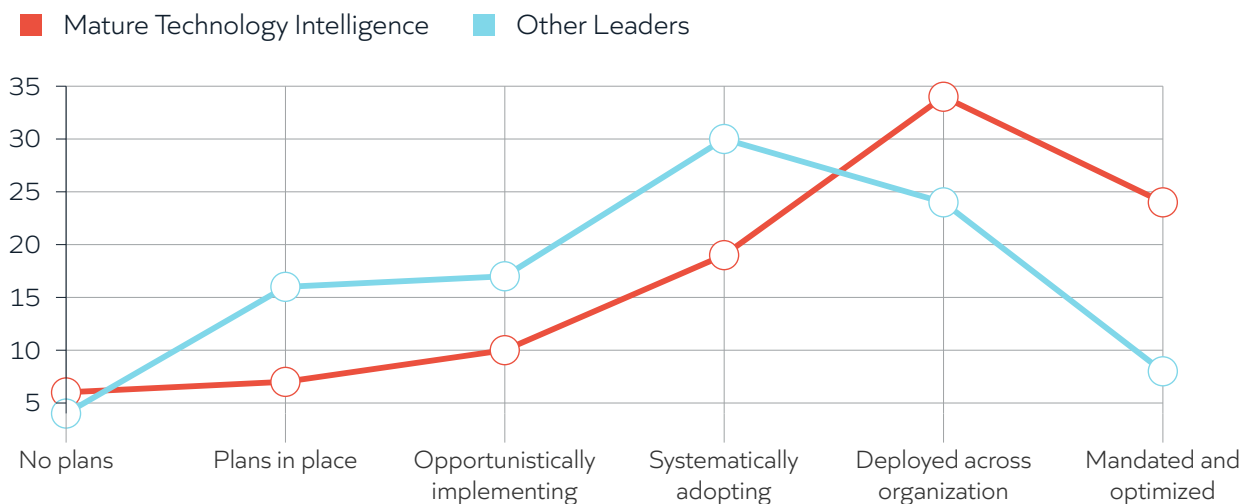
The pace of digital transformation has dramatically increased at my organization.



Source: Snow Software, 2021 IT Priorities Survey

Cloud maturity is also farther along for these IT leaders and their organizations: 58% have deployed or mandated cloud services compared to 47% of their IT counterparts who are only just beginning to implement and adopt.

Level of cloud maturity



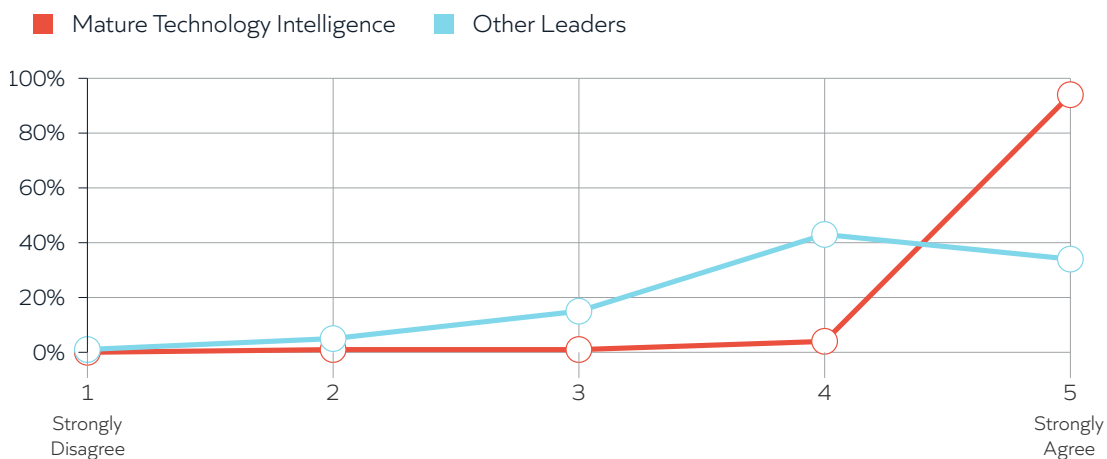
Source: Snow Software, 2021 IT Priorities Survey

Reducing Security Risk

One of the requirements for mature technology intelligence was vulnerability management – 100% of the group said they strongly agreed they could identify and address known vulnerabilities across the entire IT ecosystem. It is no surprise that the group exhibited a strong security posture in other areas as well.

Beyond vulnerability management, mature technology intelligence had a very significant correlation to employee education on how to securely use technology – 98% agreed or strongly agreed that employees received adequate training on all software, apps and cloud services they have access to.

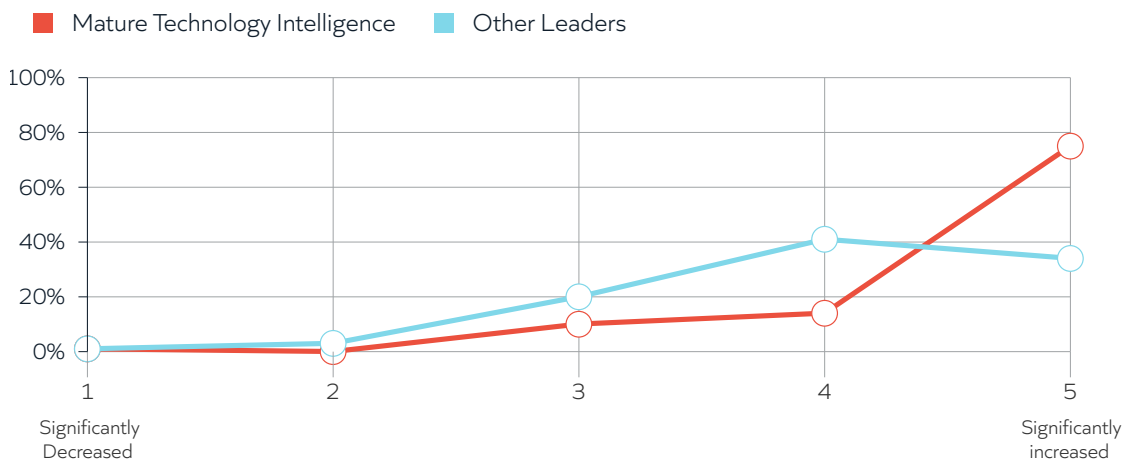
Employees have received adequate training on how to securely use all the software, apps and cloud services they have access to.



Source: Snow Software, 2021 IT Priorities Survey

Investment in security tools stood out as well, with 75% of mature respondents saying they significantly increased spend on security tools in the past 12 months versus just 34% of the rest. This combination of tools, training and vulnerability management shows mature technology intelligence is associated with an organization-wide commitment to security.

How has your organization's investment in security tools changed over the past 12 months?



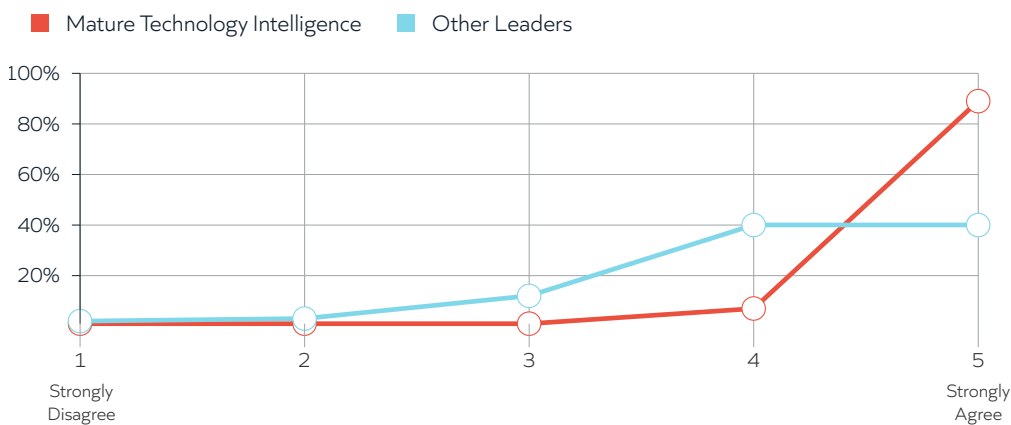
Source: Snow Software, 2021 IT Priorities Survey

Enabling Employees

While ensuring employees are productive is always an important focus area for IT, 2020 put a whole new emphasis on enablement with the unexpected shift to working remotely. As covered earlier, providing support for remote work was the third biggest challenge for IT leaders, while getting sufficient support for remote work was the second biggest challenge for employees.

When asked if employees have access to the technology they need to successfully do their job, the net agreement showed just a 16-point difference. However, the vast majority of those with mature technology intelligence strongly agreed (89%) compared to less than half of other respondents (40%). This question may be indicative of the organization's larger investment in both innovative technology and employee enablement.

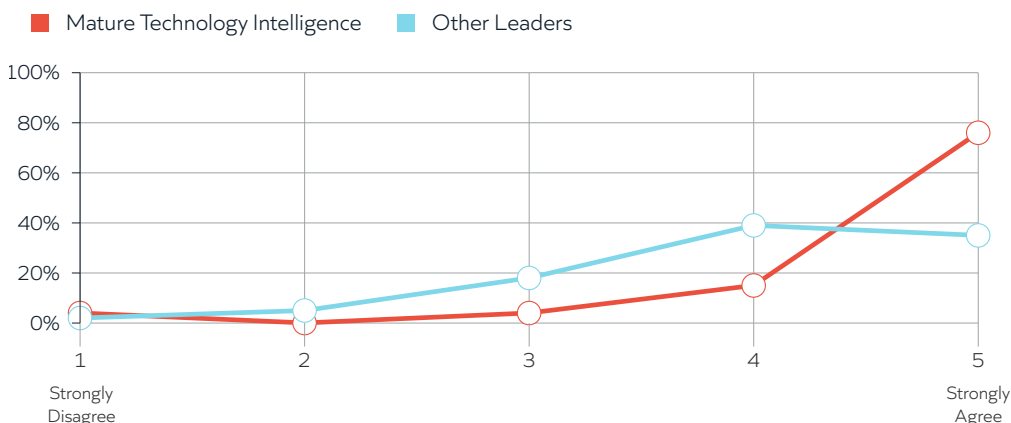
Employees have access to the software, apps and cloud services they need to successfully do their jobs.



Source: Snow Software, 2021 IT Priorities Survey

While not as dramatic, a similar pattern appeared when asked whether or not IT leaders believed employees were just as productive working remotely compared to working in the office. Here, 76% of mature technology intelligence respondents strongly agreed compared to 35% of the rest.

Employees are just as productive working remotely as they are in the office.



Source: Snow Software, 2021 IT Priorities Survey

Reducing IT Spend

The ability to understand and optimize spend is a key component of technology intelligence – since these were among the required capabilities, 100% of IT leaders with mature technology intelligence reported they strongly agreed they could accurately report on spend, identify duplicate and overlapping functionality to optimize that spend and predictably stay on budget when it comes to cloud spend.

Comparatively, 32% of other leaders strongly agreed that they could accurately report on spend and 32% strongly agreed they had clear visibility into cloud spend and could predictably stay on budget. Just 28% said they strongly agreed they could identify duplicate and overlapping functionality to optimize spend. Out of all six criteria, spend optimization had the lowest mean score for leaders without strong technology intelligence, indicating it is the most difficult step to achieve without comprehensive visibility and manageability in place.



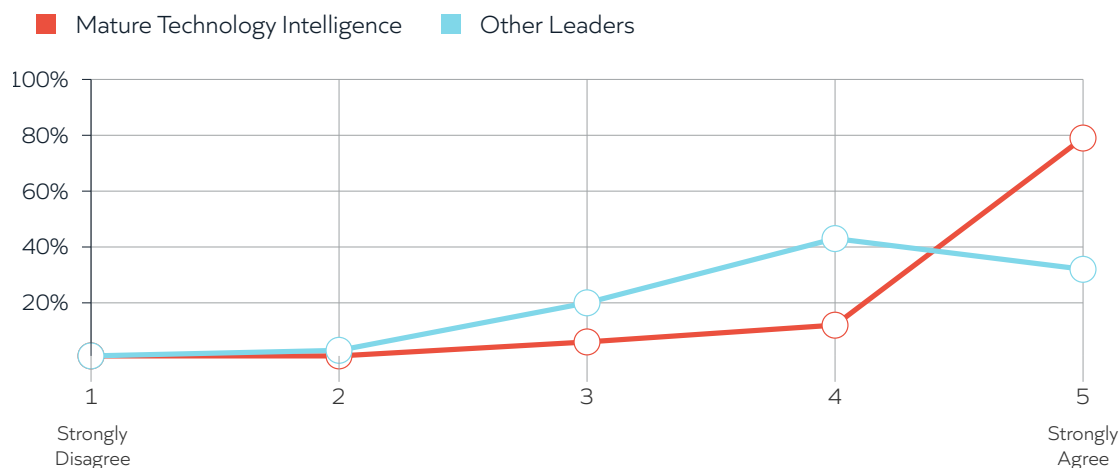
Chapter VII

Technology Intelligence & The New Normal

Mature technology intelligence is not just about how IT leaders will embrace innovation and new technologies, it also impacts daily operations and overall business strategy. When asked if their organization was prepared to weather current global events, 79% of IT leaders with mature

technology intelligence strongly agreed compared to just 32% of their counterparts. Additionally, 81% of those with mature technology intelligence strongly agreed that the IT department has become a more important resource compared to 12 months ago, versus 33% of other respondents.

My organization is prepared to weather current global events.

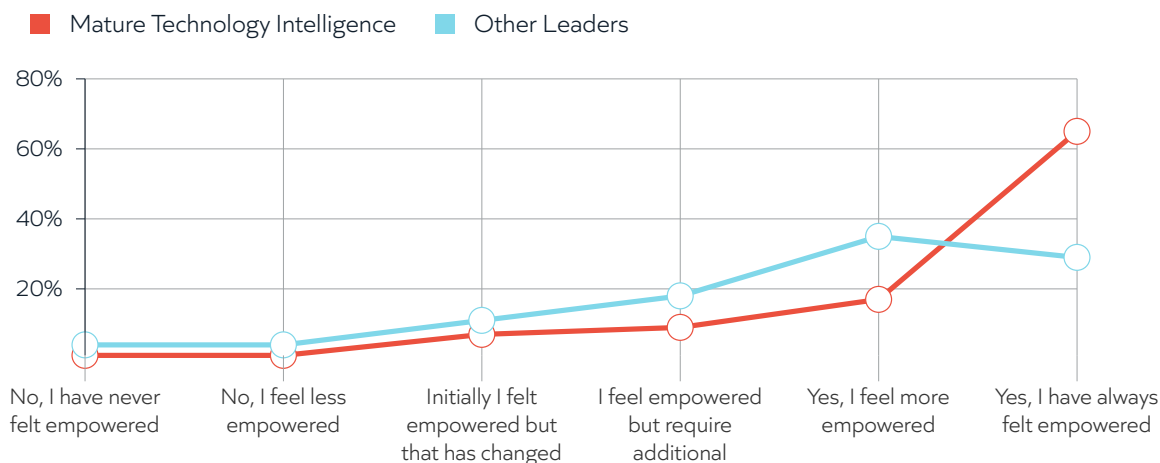


Source: Snow Software, 2021 IT Priorities Survey

For many organizations, Covid-19 has created an environment where any challenge, opportunity, threat or weakness has to be considered through a “new normal” lens. When asked if they felt empowered during this pandemic, IT leaders with mature technology intelligence felt they were more empowered to make the appropriate decisions or take the required action – 65% noted that they

have always felt empowered and 17% said they feel more empowered than before. Compare that to IT leaders without strong technology intelligence, where only 29% have always felt empowered to make strategic technology decisions and 35% indicating that they feel more empowered now than before.

During the Covid-19 pandemic, have you felt empowered to make strategic technology decisions to support your organization?



Source: Snow Software, 2021 IT Priorities Survey

The outcome of this empowerment may also be reflected in how technology usage increased over the past 12 months. IT leaders with mature technology intelligence programs in place reported greater increases in the use of software, applications and services that enable remote work compared to other respondents. Interestingly, their use of enterprise software like SAP and Oracle increased more as well. While these legacy vendors may not be associated with a shift to

remote work, they do form the digital backbone of many organizations and have also been embracing cloud in their own offerings. Regardless of whether this reflects an increase in on-prem or cloud-based usage, an overall acceleration in digital transformation would likely drive increased usage of these enterprise apps as well. Ultimately, it is all about feeling empowered to bring in the right technology to meet the needs of the business, in whatever form that may take.

	Mature Technology Intelligence	Other Leaders	Difference
Communications software (i.e. Slack, Microsoft Teams, Google Chat)	59%	49%	+10
Video conferencing (i.e. Zoom, Cisco WebEx, GoToMeeting)	55%	46%	+9
Collaboration tools (i.e. Asana, Trello, Jira)	37%	28%	+10
Cloud services (i.e. Amazon Web Services, Microsoft Azure, Google Cloud Platform)	62%	51%	+11
Specialty software (i.e. Autodesk, Adobe, Workday, Salesforce)	40%	32%	+8
Enterprise software (i.e. IBM, SAP, Oracle)	51%	38%	+13

Source: Snow Software, 2021 IT Priorities Survey

These complicated dependencies were at the forefront when we asked IT leaders to consider their single biggest challenge in the last 12 months and explain why it was so difficult. Many answers highlighted just how intertwined Covid-19 has become with IT's standard challenges, and how emmeshed those challenges have become with one another. For example, those who listed enabling remote work as the biggest issue often referenced security or implementing new technology as part of the problem. At the same time, those who listed security often referenced the difficulties of maintaining a secure environment with so many

remote workers. When it came to budget, issues included both the unexpected costs of enabling a remote workforce during the pandemic as well as unexpected cuts resulting from economic hardship.

Below are quotes directly from these IT leaders that highlight the complexities of the new normal. While technology intelligence did not eliminate these challenges, it does provide the insights needed to successfully navigate them, highlighting the benefits of a holistic approach to technology asset management.

Biggest Challenge: Remote Work

"Supporting employees to work remotely is the biggest challenge over the past 12 months because of the unprecedented demand due to Covid-19 and concerns about security at staff homes. We made sure the IT department was trained to handle this situation as smoothly as possible and required the staff to have up-to-date antivirus at home."

"Nobody had expected a pandemic and we were therefore not prepared for the majority of employees to work in the home office. We had to invest heavily in telephony as well as IT security, especially endpoint security, at short notice."

"The biggest challenge my company has faced in the last 12 months was dealing with this whole Covid-19 situation, and how we had to keep our employees motivated and productive even when they aren't at the work site. At the start, it was a disaster. But as the months went on and the situation became more and more understood, my employees have adapted. Webex has made the whole situation much easier."

"Having to shift a portion of our workforce to remote work. It was sudden and unexpected, and incurred a lot of change, which cost money of course."

"Change of working habits due to the pandemic, which required new technology plus faster and more seamless use of cloud."

Biggest Challenge: Security

“Data protection and security are a big concern when everyone is working from home. Whilst IT has a level of control on what people can install on work supplied laptops, there are issues when we aren’t able to exactly see what people are doing at home – who knows exactly what they are using their laptop for. We have the measures and training in place but it’s up to the individual to abide by them.”

“Security and business continuity issues arising from risk of malware was our greatest challenge. Especially ransomware, possibly increased as a result of greater homeworking. We have given all employees training on this and have increased our defenses too.”

“Cybersecurity was our biggest challenge. The transition to remote work facilities has caused security headaches and exposed some vulnerabilities. These have been costly to deal with, but the security systems in place seem to have thwarted the attacks. The main threat was denial of service, closely followed by ransomware.”

“Our biggest challenge over the past 12 months was with cyber threats because our cybersecurity budget was not sufficient to deal with the attacks we’ve suffered recently. I have been asking for more funds to make our company more secure during this time.”

“Security and data privacy. Cloud technologies have become more important resource for my organization, and we have needed to move to private and hybrid cloud more than before. Yet the issue of cybersecurity has been a constant hinderance with handling these new technologies.”

Biggest Challenge: New Technology

“Our biggest challenge is to implement new technologies across the company in the coming months to adapt to the volatile environment and training the staff according to that.”

“Migrating between a range of collaboration tools mandated by a range of managers each wanting to do their own thing with their workforce operating remotely.”

“We had to invest heavily in IT security tools at short notice, especially endpoint security, in order to be able to continue to guarantee the protection of the company network. Nobody expected a pandemic and we were therefore not prepared for the majority of employees to work from home.”

“Moving systems to the cloud while simultaneously supporting all users working remotely was especially challenging.”

“Implementing new technology was the most challenging one. That is because the technologies are changing day by day, and everyone is looking for the fastest and most securable applications. Now everyone is wanting cloud-based applications to work from mobile as well. But due to Covid-19 budget is very low, so it is even more difficult to upgrade and improve our technologies.”

Biggest Challenge: IT Budget

“The biggest challenge has definitely been underfunding in the IT department due to Covid-19. Having employees working remotely has taken a toll on our productivity as a company and our business has had to cut aspects of our work to allow our company to continue existing.”

“Biggest issue will be a significant reduction in IT budgets due to reduced company revenues due to Covid. We are trying to save as much money as possible and are looking to make as much use of hosted solutions as we can, moving away from on premise solutions that require additional infrastructure.”

“The biggest challenge is budget cuts to keep operating cost and financial pressure down. This is challenging as it is hard to keep maintaining the momentum needed to provide a sufficient level of support. In order to mitigate this issue, I am automating most of the activities that can be automated to optimize resources.”

“The budgeted money for the year wasn’t enough for the technology we really needed. This was a great shock to everyone, and we had to use emergency funds to sort it out.”

“Budget cuts. This is especially challenging due to the pandemic and could have detrimental repercussions in the long run.”



Conclusion

It is clear that many of the IT challenges from 2020 will persist into next year. But when the calendar turns over, many CIOs and IT leaders will have the advantage of planning and budgeting with these challenges in mind. So, while difficult issues around digital transformation, employee enablement, risk management and cost cutting won't disappear, you will be able to draw on the lessons learned over the past year to better prepare for what is ahead.

When considering your own 2021 plan, it will be critical to look at the convergence of four influential factors:

- **Your organization's needs and priorities for IT**
- **Your IT department's biggest challenges**
- **Your employees' expectations of IT**
- **Larger trends in technology spend, usage and risk**

As you map out these factors, hot spots will emerge that help guide your planning. Beyond setting priorities, it is important to understand how you will achieve them. Given the current landscape and lingering uncertainty, gaining better visibility and governance over your technology will be a foundational part of delivering impactful IT in 2021.

That lingering uncertainty may be the most critical consideration of all. The most impactful takeaway from 2020 isn't necessarily the importance of enabling remote work or accelerating cloud adoption – it is that IT leaders must always expect the unexpected. Delivering the toolset to pivot, adapt and thrive is where technology intelligence can truly help your organization moving forward.

To get a customized report on the maturity of your own technology intelligence, take our Technology Intelligence Assessment.

[Start Now](#)

To see how the Snow platform can provide complete insight and governance over all your technology, request a demo.

[Let's Talk](#)

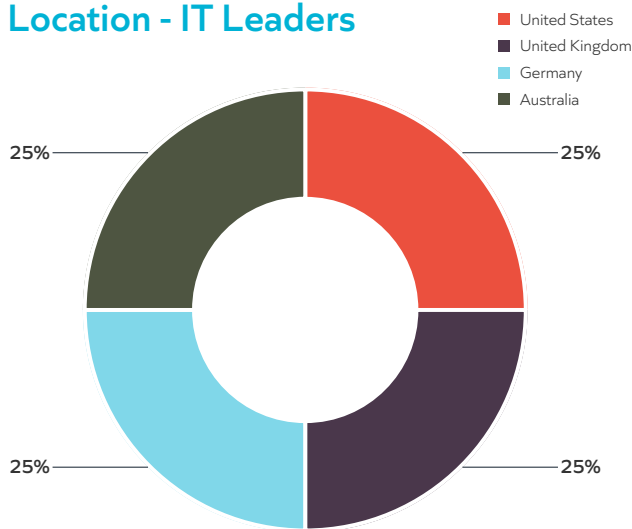
Appendix

Methodology

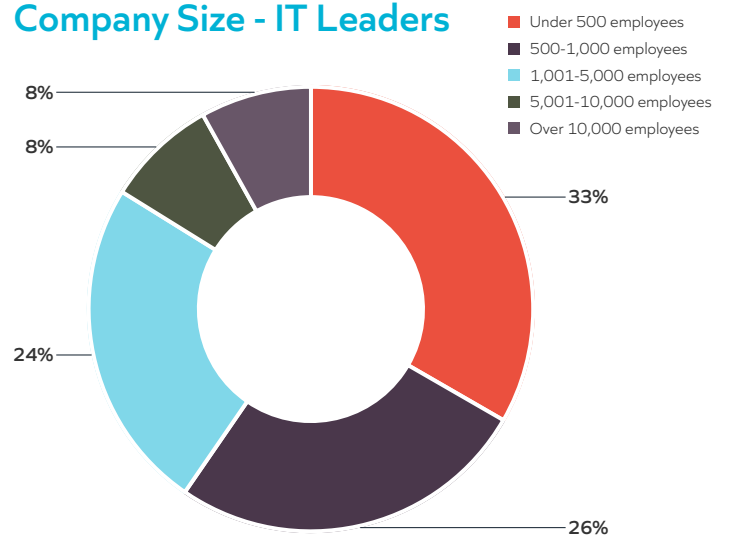
A total of 4,000 surveys were completed online. The research was split evenly between four countries – the US, UK, Germany and Australia. Two groups were surveyed in each country: 250 IT leaders who are a critical part of the IT decision making process and 750 employees who use technology as part of their job.

IT Leader Demographics

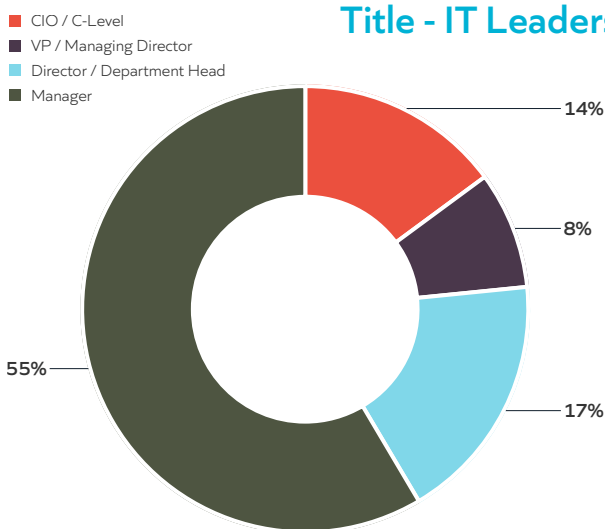
Location - IT Leaders



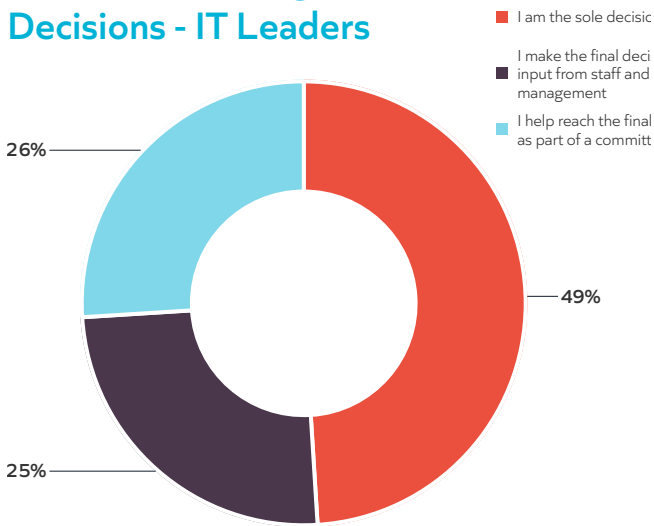
Company Size - IT Leaders



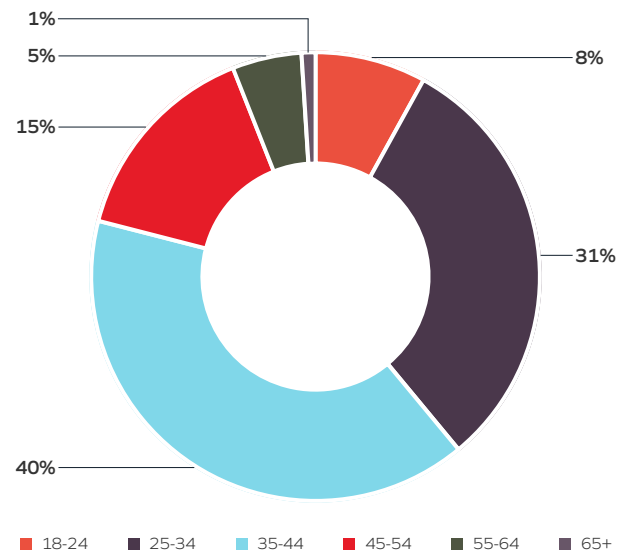
Title - IT Leaders



Role in Purchasing Decisions - IT Leaders

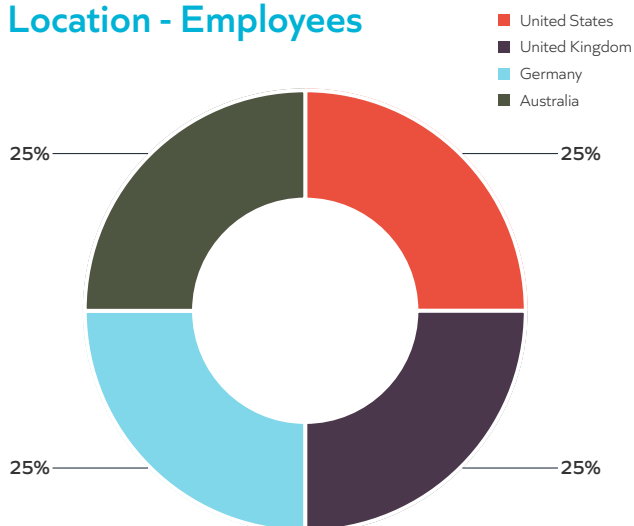


Age - IT Leaders

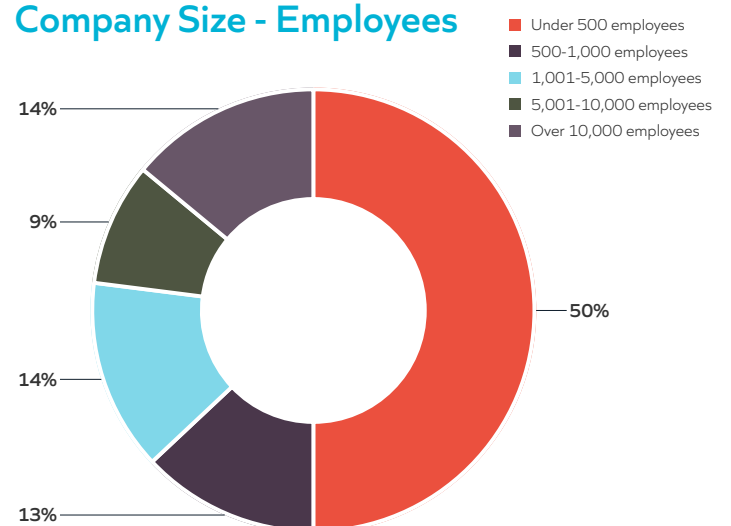


Employee Demographics

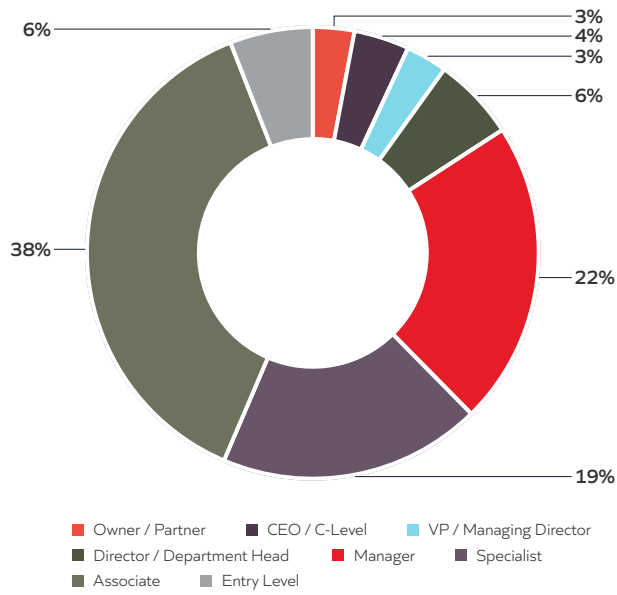
Location - Employees



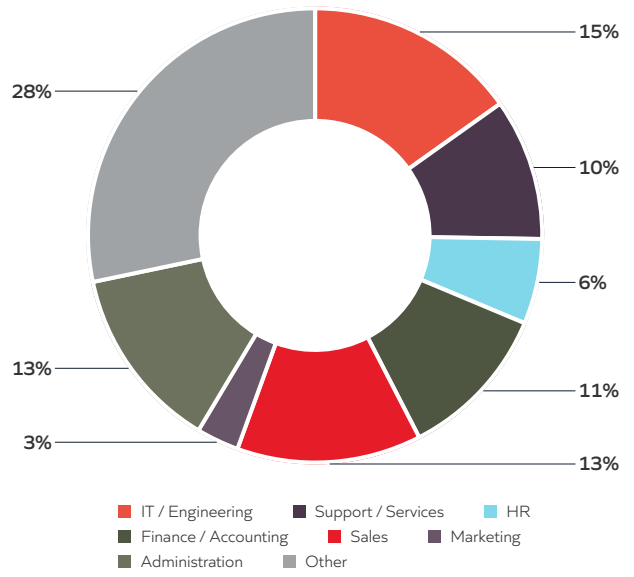
Company Size - Employees



Title - Employees



Department - Employees



Age - Employees

