The Cloud Infrastructure Report 2020

How to Improve IT Visibility and PaaS Return on Investment with Public and Hybrid Cloud Management
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<td>Gain total visibility of your cloud infrastructure</td>
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Introduction

The dramatic growth of cloud technology in recent years makes a clear statement about the benefits of public cloud infrastructure. Today, most organizations have a strategic approach to cloud adoption, even going so far as adopting “cloud-first” philosophies that prioritize cloud infrastructure over on-premise options whenever they can.

While broad cloud adoption across enterprises and public agencies can solve many business challenges, like scaling compute resources to meet demand, it can also end up creating organizational hurdles. Large-scale cloud adoption affects a variety of roles, from the technologists in IT that determine architecture and day-to-day administration, to the line of business stakeholders that rely on the technology to deliver results, and even the finance, legal, and procurement teams that deal with the “paperwork.” There is a need for all roles involved in cloud decisions to understand and maximize their contributions to cloud investments and understand the related business outcomes.

This research investigates the current status of cloud management. The following data is based on an online survey conducted by Dimensional Research in late 2019. A total of 332 qualified individuals in IT or business operations roles completed the study. All had decision-making responsibility for infrastructure as a service (IaaS) such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud. Questions were asked on a wide range of subjects including current state of cloud adoption, integration with on-prem environments, maturity, roles in decision-making and success, and more. Certain questions were repeated from a similar 2017 study to enable trend analysis.
Key Findings

Hybrid cloud management is complex, but is reality

98% have both cloud and on-prem infrastructure

96% face specific challenges related to managing their hybrid infrastructure

87% report integration between on-prem and cloud environments, but levels of integration vary widely

Today’s C-Suite has limited impact on cloud success

21% characterize their C-Suite as involved in the success of cloud investments

The C-Suite is the role with the lowest level of cloud visibility

Only 3% say their C-Suite can effectively track, manage, and optimize cloud costs
A Cloud Center of Excellence (CCoE) benefits a cloud investment

85% have a CCoE, a group that has CCoE responsibilities, or a plan to create one—up from 75% in 2017.

99% of those with a CCoE say they have benefited.

59% report better overall operational efficiency.

30% say they do a good job managing cloud usage and costs.

100% agree tools are important to the success of a CCoE.

64% of companies track or manage their cloud usage but still do not feel confident that they are effectively using these measurements.
Detailed Findings
Hybrid cloud management is complex, but is reality

Today’s infrastructure is a mix of cloud and on-prem

Despite the rapid growth of cloud infrastructure adoption, it is rare to find any large company that has completely abandoned on-premises infrastructure. When asked about the percentage of infrastructure that was on-prem today, only a tiny number of cloud stakeholders (2%) indicate that they are fully in the cloud. This state of affairs is not expected to change any time in the foreseeable future. When asked the same question about what they expected their infrastructure to look like in two years, the answer was similar (3%).

The reality is that cloud infrastructure is existing side-by-side with on-prem systems. While researchers agree we can expect to see an increase in the overall share of cloud infrastructure in the coming years, the shift from fully on-premises to fully cloud will be incremental. For example, just over half (53%) of cloud stakeholders report that more than 50% of their infrastructure is on-prem today, this will drop slightly to just under half (47%) by the end of 2021.

It should be noted that all survey participants must have decision-making responsibility for cloud infrastructure at their company. As a result, none of our participants indicated that they had all infrastructure on-prem. This research does not draw any conclusions about the number of companies with entirely on-prem infrastructure as they were not part of our study.
Approximately what percentage of your infrastructure is on-prem today?

- 2% of respondents chose 0%-25%
- 16% chose 25%-50%
- 29% chose 50%-75%
- 27% chose 75%-90%
- 19% chose More than 90%
- 7% chose None of it

Approximately what percentage of your infrastructure will be on-prem in 2021?

- 3% of respondents chose 0%-25%
- 26% chose 25%-50%
- 24% chose 50%-75%
- 29% chose 75%-90%
- 15% chose More than 90%
- 3% chose None of it
There are a wide range of reasons for continuing to keep infrastructure on-prem. The most frequently reported motivations for maintaining on-prem infrastructure are **compliance and regulation needs (54%) as well as security concerns (54%)**, followed closely by the need for business applications that are not supported in cloud infrastructure (49%). Other common reasons for staying with on-prem infrastructure include **on-prem systems that continue to work well and provide value (41%), lack of a compelling ROI model for moving to the cloud (38%), and bandwidth concerns (36%)**. Only a few cloud stakeholders cited vendor lock-in (25%) or lack of cloud expertise (19%) as their reason for maintaining on-prem infrastructure.

Many participants took the time to write in “Other” reasons that they continue to maintain on-prem infrastructure. This included customer requirements, local services, sunk costs, and complexity of on-prem infrastructure that can’t be easily duplicated in the cloud. Many participants cited time as a key factor—they have plans to move away from their on-prem environment, but it takes work and they simply haven’t gotten to it yet.

### Why does your company continue to maintain on-prem infrastructure?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compliance or regulations</td>
<td>54%</td>
</tr>
<tr>
<td>Security concerns about cloud</td>
<td>54%</td>
</tr>
<tr>
<td>Applications that aren’t supported on cloud</td>
<td>49%</td>
</tr>
<tr>
<td>It still works - don’t fix what isn’t broken</td>
<td>41%</td>
</tr>
<tr>
<td>Cost / ROI of cloud doesn’t make sense</td>
<td>38%</td>
</tr>
<tr>
<td>Bandwidth concerns</td>
<td>36%</td>
</tr>
<tr>
<td>Vendor lock-in</td>
<td>25%</td>
</tr>
<tr>
<td>Lack of adequate cloud expertise</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>
Managing hybrid infrastructure is challenging

It is not a walk in the park to manage any type of enterprise technology infrastructure. There are always potential issues related to security, performance, availability, cost and much more. However, hybrid cloud environments add an additional layer of complexity that makes managing IT even more challenging.

The vast majority of cloud stakeholders (96%) face challenges managing both on-prem and cloud infrastructure. The most frequently reported issue was a need for additional expertise (50%). Other challenges reported included lack of a single management console (45%), increased risk at integration points (44%), higher costs (41%), figuring out the best distribution of workloads (40%), and dealing with the complexity of IAM (27%). “Other” issues reported included lack of access to back compute space, existing employees being dedicated to on-prem systems, need for a completely different skill set, and ongoing reliability issues.

What challenges does your company face in managing both on-prem and cloud infrastructure?

- Requires more expertise: 50%
- No single management console: 45%
- Integration points increase risk: 44%
- Costs are higher: 41%
- Deciding where and/or how to distribute workloads: 40%
- AM is more complex: 27%
- Difficult to scale: 18%
- There are no challenges: 4%
- Other: 2%
Hybrid cloud environments have widely varying levels of integration

Anytime there is an integration point between systems there is a possible point of failure. Maintaining both cloud and on-prem infrastructure adds an additional layer of complexity to interoperability needs.

Today, most companies are simplifying these issues by avoiding complex integration. Only a few (7%) companies have completely integrated their cloud and on-prem systems by fully syncing data and ensuring workflows move between systems. On the flip side, simply not integrating hybrid infrastructure is also relatively uncommon (13%).

Most companies (80%) are operating in the middle when it comes to integrating cloud and on-prem systems—they are integrated, but not completely. This includes 41% that characterize themselves as having a significant level of integration including synced data repositories and use of APIs to pass status updates. A similar number (39%) characterize their integration as minimal with some passed data or emails to trigger a workflow.

What level of integration or interoperability does your cloud infrastructure have with related on-prem systems?

- Complete integration (i.e. fully sync data and workflows between systems) - 7%
- Significant integration (i.e. backup/sync data repositories or pass status updates via APIs) - 41%
- Minimal integration (i.e. pass some data or send email to trigger a workflow) - 39%
- Our on-prem systems are completely separate from our cloud systems - 13%
Cost management in the cloud has improved but remains unacceptably low

Cost management is particularly important in cloud environments. The benefit of immediate scalability in the cloud comes with a dark side—potential to incur significant unexpected costs. Visibility into your usage before costs are incurred, combined with analysis of overall usage to optimize spend, is key to achieving value and return on investment of cloud infrastructure.

Lack of cloud management expertise was identified as a significant issue in our prior 2017 cloud management study. At that time, less than 1 in 5 (19%) characterized themselves as doing a very good job at managing cloud use and costs. While this situation has gotten better, cost management in cloud environments is still unacceptably low. Two years later, there is still less than a third (30%) who say they do this well. While that is an increase, this number needs to be much higher for companies to get the full value of their cloud investments.

How would you describe your company’s ability to track, manage, and optimize public cloud related costs?

<table>
<thead>
<tr>
<th>2017</th>
<th>2019</th>
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<tr>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>34%</td>
<td>33%</td>
</tr>
<tr>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>19%</td>
<td>30%</td>
</tr>
</tbody>
</table>

- Our public cloud usage is not tracked or managed
- We can track usage, but it is not managed
- We manage our use, but can’t justify or optimize costs
- We manage use and costs very well
Cloud Centers of Excellence (CCoEs) benefit cloud investments

As public cloud infrastructure increases in importance, enterprises have adapted in a number of ways. This may involve increasing headcount, educating existing personnel, investing in additional tools, reorganizing responsibilities, and much more. These investments are made across the organization by a range of roles and can have a range of impacts.

**DEFINITION:** A Cloud Center of Excellence (CCoE) is a cross-functional team of people responsible for developing and managing the cloud strategy, governance, and best practices that the rest of the organization can leverage to transform your business using the cloud. The CCoE leads the organization as a whole in cloud adoption, migration, and operations. It may also be called a Cloud Competency Center, Cloud Capability Center, or Cloud Knowledge Center.

CCoE adoption is increasing

CCoEs can take on many forms. For some companies it is an official team with a formal reporting structure and clear responsibilities for decision making. Other companies have teams that manage aspects of cloud strategy, but with limited responsibilities. Many companies, especially those early in their adoption of cloud, have an informal approach to CCoE. A typical approach includes team members who have not been assigned specific responsibilities. However, within the group,
there may be experts that are generally acknowledged as owning the functions.

In the past two years, there has been little change in the number of companies who have embraced a formal CCoE (17% in 2019 compared to 16% in 2017). This result is disappointing as it is an area where companies can improve with relative ease.

However, the trend in adopting less mature approaches to CCoEs has seen significant progress. There has been a significant drop in the number of cloud stakeholders that say they don’t have any interest in a CCoE (15% in 2019, down from 25% in 2017). At the same time, the number of companies that have plans to create a CCoE has almost doubled (12% in 2019, up from only 7% in 2017), and the number of organizations that has a team doing some CCoE functions has increased notably (36% in 2019, up from 31% in 2017).

How would you describe your company’s ability to track, manage, and optimize public cloud related costs?

- **2017**
  - Yes, we have a CCoE: 16%
  - We have a team that does some of the functions of a CCoE but not all: 31%
  - We have individuals that everybody knows are experts, but no official team: 21%
  - We do not have a CCoE, but we plan to create one: 12%
  - We do not have any kind of CCoE and do not have plans for one: 25%

- **2018**
  - Yes, we have a CCoE: 17%
  - We have a team that does some of the functions of a CCoE but not all: 36%
  - We have individuals that everybody knows are experts, but no official team: 20%
  - We do not have a CCoE, but we plan to create one: 12%
  - We do not have any kind of CCoE and do not have plans for one: 15%
CCoEs deliver a wide range of business benefits

Most organizations that have a CCoE say it is well worth the investment. Both companies that have a formal approach to a CCoE, as well as those that report having a team that does some CCoE functions, overwhelmingly (99%) agree that they have benefited. 59% of companies with a CCoE report improved overall operational efficiency. Improved governance (51%), increased confidence in cloud security (49%), more accountability (45%), simplified auditing process (39%), and a better understanding of cloud bills (39%) were also widely cited as benefits of their CCoE.

How has your organization benefited by having a CCoE?

- Better overall operational efficiency: 59%
- Improved governance: 51%
- Increased confidence in cloud security: 49%
- Increased accountability: 45%
- Easier auditing process: 39%
- Better understanding of cloud bills: 39%
- Accurately charging departments for their cloud use: 30%
- Minimize or eliminate error-prone manual process (i.e., reporting, data collection, etc.): 27%
- Easier to attract and hire experienced cloud professionals: 24%
- We have not benefited from our CCoE: 1%
Tools are important to the success of a CCoE

One of the clear factors in the success of a CCoE are the tools that are used for cloud management. There is complete agreement (100%) that cloud tools matter. This includes almost two thirds (60%) that characterize cloud management tools as “critically” important to the success of a CCoE.

How important are cloud management tools to the success of your CCoE?

Business and IT stakeholders are in complete agreement on the question of importance of cloud management tools and CCoE success. These two groups are equally likely to say tools are “critically” important - 61% for IT cloud decision makers and 58% for business cloud decision makers.

How important are cloud management tools to the success of your CCoE? (By role)

- Business Stakeholders:
  - Critically important: 58%
  - Somewhat important: 41%
  - Not important: 1%

- IT Stakeholders:
  - Critically important: 61%
  - Somewhat important: 39%
Roles across the enterprise impact cloud success

A wide range of roles are important to the success of cloud implementation

When cloud decision makers discuss the importance of roles across the organization in the success of their IaaS investments, they refer to functions throughout the enterprise. It is not surprising that technical roles—traditionally responsible for infrastructure—top the list, including IT operations and infrastructure (79%) and security (73%). Other roles cited as being significantly involved in cloud success include compliance (57%), application and development teams (56%), finance (49%), and governance (39%).

However, in a surprising display of lack of influence, only 1 in 5 (21%) cloud decision makers characterized the C-Suite as being involved in the success of their public cloud infrastructure.

Which of the following roles in your organization are involved in the success of your public cloud infrastructure investment?

- IT operations and infrastructure: 79%
- Security: 73%
- Compliance: 57%
- Applications and development: 56%
- Finance: 49%
- Governance: 39%
- C-Suite: 21%
IT and business cloud stakeholders have some widely different views on the impact of different roles on the success of public cloud infrastructure investment. For example, business cloud stakeholders are much more likely to recognize the impact of finance on cloud success (68%) than their IT counterparts (40%). On the flip side, IT is much more likely to see a role for the governance team (50%) than business stakeholders are (17%).

Unfortunately, both groups are in agreement that the C-Suite is rarely involved in the success of their cloud initiatives (22% for business stakeholders and 21% of IT.)

Which of the following roles in your organization are involved in the success of your public cloud infrastructure investment? (By role)

- Finance: 40% (68% Business, 40% IT)
- IT operations and infrastructure: 58% (89% Business, 45% IT)
- Security: 49% (86% Business, 44% IT)
- Applications and development: 45% (62% Business, 49% IT)
- Compliance: 44% (63% Business, 44% IT)
- C-Suite: 22% (22% Business, 21% IT)
- Governance: 17% (50% Business, 17% IT)
The C-Suite struggles with cloud visibility and cost management

While visibility into a given organization’s overall public cloud environment has increased for cloud decision makers in 2019, it remains notably low given how important total visibility is to successful cloud management. In 2017, only about a quarter (26%) reported that they were very confident in the level of visibility they had into their company’s public cloud environment. This number is going the right direction—it is up significantly in the 2019 study. However, well under half (43%) of cloud decision makers feel very confident in their cloud visibility, so this remains an area of significant concern.

As we saw above, the C-Suite is perceived as having very little involvement in the success of their public cloud infrastructure investments. The data indicates that one of the causes for this shortcoming may be lack of visibility. Stakeholders report that their C-Suite has the lowest cloud visibility—lower than any other role.
How would you characterize the level of visibility that each of the following roles has into necessary aspects of your company’s public cloud environment?

IT operations and infrastructure
- Excellent: 42%
- Could be better: 46%
- Limited: 11%
- Non-existent: 1%

Security
- Excellent: 39%
- Could be better: 52%
- Limited: 9%
- Non-existent: 1%

Applications and development
- Excellent: 34%
- Could be better: 48%
- Limited: 14%
- Non-existent: 3%

Compliance
- Excellent: 31%
- Could be better: 49%
- Limited: 17%
- Non-existent: 3%

Finance
- Excellent: 30%
- Could be better: 41%
- Limited: 23%
- Non-existent: 6%

Governance
- Excellent: 26%
- Could be better: 50%
- Limited: 19%
- Non-existent: 5%

C-Suite
- Excellent: 25%
- Could be better: 40%
- Limited: 24%
- Non-existent: 11%

Every executive knows the adage that you can’t manage what you can’t measure. Given the low levels of visibility among C-Suite executives, it comes as no surprise that stakeholders don’t think that C-Suite leadership is very effective at cloud management. The power of the C-Suite should make this the most effective role for decisions to be made to manage and optimize cloud costs, but only a very small number of cloud stakeholders (3%) say that their leadership is able to be effective in this area.
What role within your company has that best ability to track, manage, and optimize public cloud related costs?

<table>
<thead>
<tr>
<th>Role</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT operations and infrastructure</td>
<td>68%</td>
</tr>
<tr>
<td>Finance</td>
<td>29%</td>
</tr>
<tr>
<td>Security</td>
<td>24%</td>
</tr>
<tr>
<td>Applications and development</td>
<td>13%</td>
</tr>
<tr>
<td>Compliance</td>
<td>13%</td>
</tr>
<tr>
<td>Governance</td>
<td>8%</td>
</tr>
<tr>
<td>C-Suite</td>
<td>3%</td>
</tr>
<tr>
<td>There is no difference between roles</td>
<td>2%</td>
</tr>
</tbody>
</table>

Departmental coordination continues to increase for most companies

Although distinct roles within a CCoE experience a range of visibility into cloud infrastructure, research shows an overall increase in coordination between departments. Cloud providers often use a pay-as-you-go pricing model. Usage-based pricing can be a huge benefit of cloud adoption. No company wants to pay for something they don’t use. However, there is significantly more complexity in financial and vendor processes when you compare it to the more predictable pricing of traditional on-prem hardware. Therefore, excellent communication and coordination between finance, IT, and other departments is critical to the success of cloud investments. Fortunately, the data shows significant progress in this area.

In 2017, half (50%) of the surveyed companies said their departments had increased coordination related to public cloud. Since then, coordination has increased even more with nearly two-thirds (62%) reporting that their departments have done a better job of working together within the past two years.
How has your company’s coordination of public cloud usage between departments (i.e. IT and Finance) changed in the past two years?

Still, one area of concern is that not all job levels are reporting similar levels of increased coordination between departments. Executives are much more likely to say that their departments are more coordinated (72%) than frontline staff (49%). This disparity in responses between job levels may mean that the coordination is being done primarily at a higher level, which has a limited impact compared to when all levels are working together between departments.
Survey Methodology and Participant Demographics

Dimensional Research, an independent market research firm that specializes in enterprise technology, conducted this study. An online survey was fielded late in 2019. A total of 332 qualified individuals from independent sources of IT and business operation professionals completed the survey. All had direct decision making responsibility for infrastructure-as-a-service (IaaS) investments. Participants represented a wide range of roles, company sizes, industries, and job levels. Certain questions were repeated from a similar study conducted in 2017 to enable trend analysis.

Company Size

- **26%** 500-1,000 employees
- **38%** More than 5,000 employees
- **36%** 1,000-5,000 employees

Role

- **33%** Business
- **67%** IT
### Job Level

- **32%** Executive
- **22%** Individual Contributor
- **46%** Team Manager

### Industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>18%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>18%</td>
</tr>
<tr>
<td>Services</td>
<td>11%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>9%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>8%</td>
</tr>
<tr>
<td>Education</td>
<td>8%</td>
</tr>
<tr>
<td>Government</td>
<td>7%</td>
</tr>
<tr>
<td>Retail</td>
<td>6%</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>3%</td>
</tr>
<tr>
<td>Media</td>
<td>3%</td>
</tr>
<tr>
<td>Non-profit</td>
<td>2%</td>
</tr>
<tr>
<td>Transportation or logistics</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
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Gain total visibility of your cloud infrastructure

Research tells us Cloud Centers of Excellence (CCoE) are well worth the investment, but there are still organizations that stick solely with on-premise. They cite compliance and security along with a lack of compelling ROI for avoiding the cloud. So how do you dispel common IT misperceptions holding your company back and start moving forward to achieve profitable outcomes with the public cloud—while supporting the best of both worlds?

Modern enterprises are adding cloud management platforms (CMPs) to grow profit margins while shrinking expenses and securing the most sensitive environments. For managed service providers, CMPs are enhancing existing IT offerings and forming the foundation of successful cloud practices. The best CMPs open a window to your entire cloud IT infrastructure—taking the complexity out of managing public and on-prem.

**See how easy it is to secure and manage your entire cloud infrastructure—with immediate results.**

cloudcheckr.com
About CloudCheckr

We deliver total visibility—from public cloud to hybrid workloads—making the most complex cloud infrastructures easy to manage. CloudCheckr customers deploy our SaaS-based platform to secure, manage, and govern the most sensitive environments in the world, from government agencies to large enterprise and Managed Service Providers. Our industry-leading solutions include Cost Management, FinanceManager, Cloud Security, Total Compliance, Inventory & Utilization, and Cloud Automation.