Forrester Opportunity Snapshot: A Custom Study Commissioned By Tanium | May 2018

Quantifying The Point Solution Nightmare

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Overview

Organizations have more solutions than ever that are designed to protect and maintain technology. It turns out, however, that point-tool sprawl may actually be the biggest threat to the enterprise's health. The combined complexity and difficulty of integrating endpoint tools used today limits the effectiveness of the teams who use them. This complexity also causes significant challenges related to visibility and speed to action. Despite organizational efforts to align security and operations teams and create better technical integration between tools, the solution may instead depend on: 1) rethinking how endpoint solutions are organized and 2) reducing the complexity of the endpoint environment.

In March 2018, Tanium commissioned Forrester to conduct a study that analyzes the current state of security and operations tools and how security and operations teams are aligned to manage and support those tools. The study surveyed 200 IT security and operations decision makers in North America responsible for endpoint solutions at their organization.

Countries
› US: 96%
› CA: 4%

Company size (employees)
› 20,000 or more: 22%
› 5,000 to 19,999: 32%
› 1,000 to 4,999: 46%

IT job function
› Infrastructure and ops: 32%
› Security: 37%
› Office of CIO/CTO: 32%

Title
› C-level executive: 28%
› Vice president: 20%
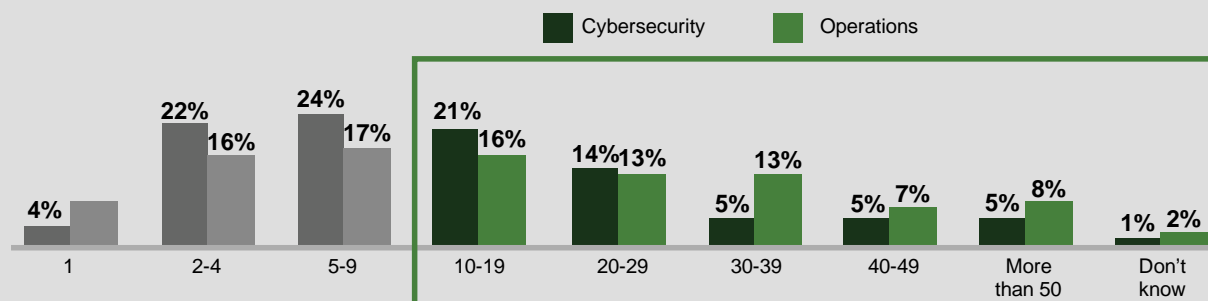› Director: 31%
› Manager: 21%

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Point Solution Purchasing Has Created A Vicious Cycle

The technology footprint of enterprises has expanded rapidly, from relatively simple to exponentially more complex in a short amount of time. And as the footprint has grown, the number of solutions required to protect and maintain the environment has grown in kind. Years of purchasing endpoint solutions to fill business requirement gaps and mitigate evolving security threats have left enterprises with a plethora of point solutions that have been purchased from different vendors at different times that must be stitched together and accessed by different teams. Our survey shows that:

60% of respondents say their tools come from five or more vendors, and 38% say they come from 10 or more vendors.

› The majority of enterprises have 20 or more endpoint solutions today, from multiple vendors.

"How many of the following tools are in use at your organization today?"

■ Cybersecurity   ■ Operations

	1	2-4	5-9	10-19	20-29	30-39	40-49	More than 50	Don't know
Cybersecurity	4%	22%	24%	21%	14%	5%	5%	5%	1%
Operations		16%	17%	16%	13%	13%	7%	8%	2%

55% of respondents say they have **20 or more** tools between security and operations

Base: 200 North American IT security and operations decision makers responsible for endpoint solutions
Source: A study conducted by Forrester Consulting on behalf of Tanium, March 2018

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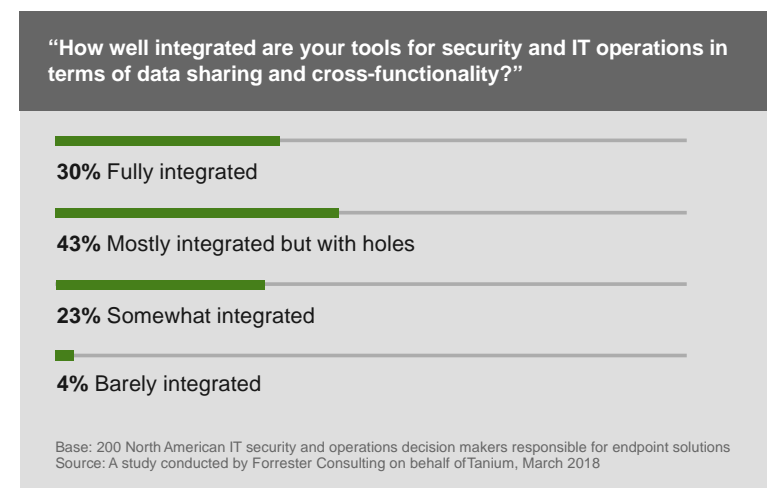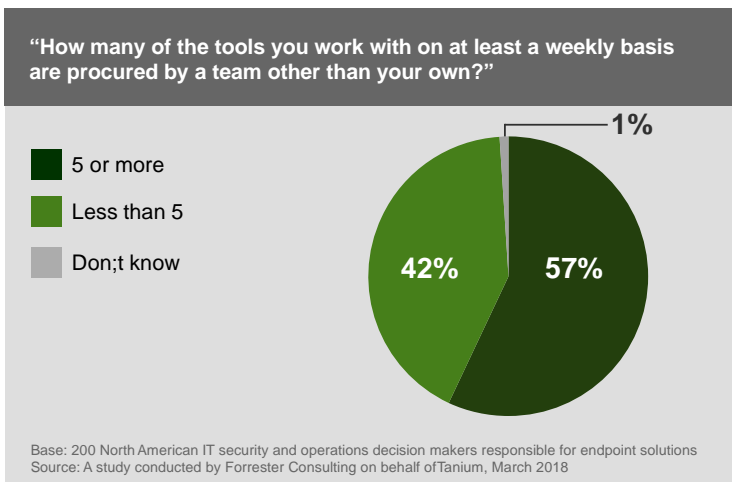OVERVIEW   SITUATION   APPROACH   OPPORTUNITY   CONCLUSIONS

1 2

Cross-Functional Tooling Has Changed How IT Is Organized

The endpoint solution sprawl challenge has grown in complexity and changed the way IT is organized in the process. As point solutions are added, teams are formed to manage those solutions. Today these teams all need to work together, using multiple tools managed by different teams to protect their environments. Firms are doing all that they can to make this easier through integration, but this is proving to be a challenge — most enterprises have not been able to fully integrate their security and operations tools together.

70% of firms say their security and operations tools lack full integration

› A majority of organizations say that they use five or more tools that were not purchased by their team on a weekly basis.

"How many of the tools you work with on at least a weekly basis are procured by a team other than your own?"

1%

- 5 or more
- Less than 5
- Don;t know

42%   57%

Base: 200 North American IT security and operations decision makers responsible for endpoint solutions
Source: A study conducted by Forrester Consulting on behalf of Tanium, March 2018

"How well integrated are your tools for security and IT operations in terms of data sharing and cross-functionality?"

30% Fully integrated

43% Mostly integrated but with holes

23% Somewhat integrated

4% Barely integrated

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## Security And Operations Teams Share Alignment

With many teams using many tools (often with integration gaps) it would be easy to blame a disconnect between security and operations for challenges in protecting endpoints. However, most teams are aware of these challenges, and have created strong organizational alignment in order to help mitigate them.

› Two-thirds of survey respondents say that security and ops teams are "aligned" or "very aligned."

› By a considerable amount, the top operational priority for maintaining their technology environment health is endpoint security.

"How aligned are security and IT operations teams within your organization in supporting each other's initiatives/priorities?"

■ Very aligned
■ Aligned
■ Somewhat aligned
■ Slightly aligned
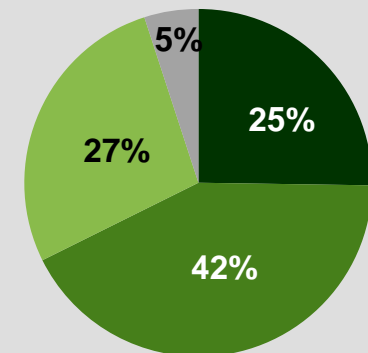
5%
25%
27%
42%

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Source: A study conducted by Forrester Consulting on behalf of Tanium, March 2018

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But Current Endpoint Environments Limit Effectiveness Of Security And Operations Teams

Despite teams being well aligned with integrated tools, the plethora of endpoint tools leads to serious challenges for IT professionals trying to protect and maintain their technology environment — challenges that threaten the health of the environment the tools were actually bought to protect.

71% agree that it is challenging to complete workflows that involve multiple tools.

› 74% of survey respondents agree that the number of endpoint solutions they have limit the effectiveness of their security and operations teams.

"How much do you agree or disagree that the number of tools in use within your organization limits the effectiveness of security and IT operations?"

33% Strongly agree

41% Somewhat agree

17% Neither agree nor disagree

9% Somewhat disagree

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"How challenging is it to complete workflows that require data from multiple tools?"

29% Very challenging

42% Challenging

23% Somewhat challenging

5% Slightly challenging

2% Not at all challenging

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To Maintain Environment Health, Firms Must Reduce Endpoint Complexity

Tool sprawl has made protecting and maintaining technology environments more complicated and time-consuming than ever before. The fragmented nature of endpoint solutions today means that:
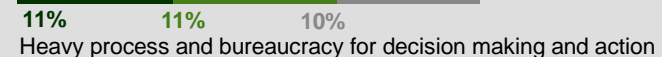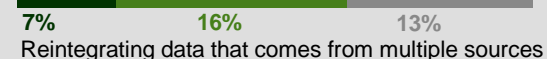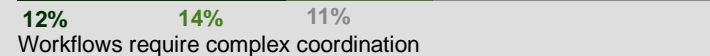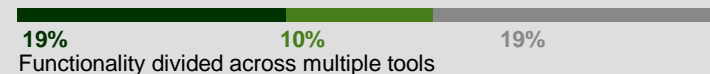
› Functionality and data required to maintain the resilience of the technology environment is divided between tools and teams, requiring complex coordination and slowing time to action.

› Organizations lack visibility into what is going on across all endpoint solutions.

In order to overcome the severe challenges of fragmentation today, organizations need to assess how their endpoint solutions are organized today, and try to reduce the complexity of the environment.

"What are the top challenges you face from using multiple tools to manage and secure your IT?" (Top 5 shown)

■ Rank 1   ■ Rank 2   ■ Rank 3

19%   10%   19%
Functionality divided across multiple tools

12%   14%   11%
Workflows require complex coordination

7%   16%   13%
Reintegrating data that comes from multiple sources

11%   12%   10%
No single source of record of the full environment

11%   11%   10%
Heavy process and bureaucracy for decision making and action

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It's Time For Firms To Examine The Viability Of Their Current Endpoint Configuration

Years of purchasing new solutions targeted at specific threats or business requirements have left firms today with a tangled web of point solutions to protect their technology environments. Endpoint solution sprawl has made maintaining resilience more complex, and reduced the efficiency of the teams charged with the task. Even when operations and security teams are well aligned and tools are integrated, these challenges persist, due to the current, untenable nature of their solutions. It's time for firms to step back and take in the entirety of their endpoint solution footprint, and look for ways to simplify and consolidate solutions to solve the challenges presented by today's point solution nightmare.

METHODOLOGY

› This Opportunity Snapshot was commissioned by Tanium. To create this profile, we surveyed 200 North American IT security and operations decision makers responsible for endpoint solutions at organizations with 1,000 or more employees. The custom survey was completed March 2018. For more information on Forrester's data panel and Tech Industry Consulting services, visit forrester.com

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