

## Thanks for viewing my\_portfolio!

This case study for BetterCloud tells the story of how IT helped rebrand a fast-growing SaaS company. As lead writer, I interviewed the IT lead, shaped the narrative, and turned a complex rollout into a clear, credible story. The goal: give sales a real-world example that shows how BetterCloud helps teams manage domain changes, keep systems running, and stay consistent under pressure.

Read more

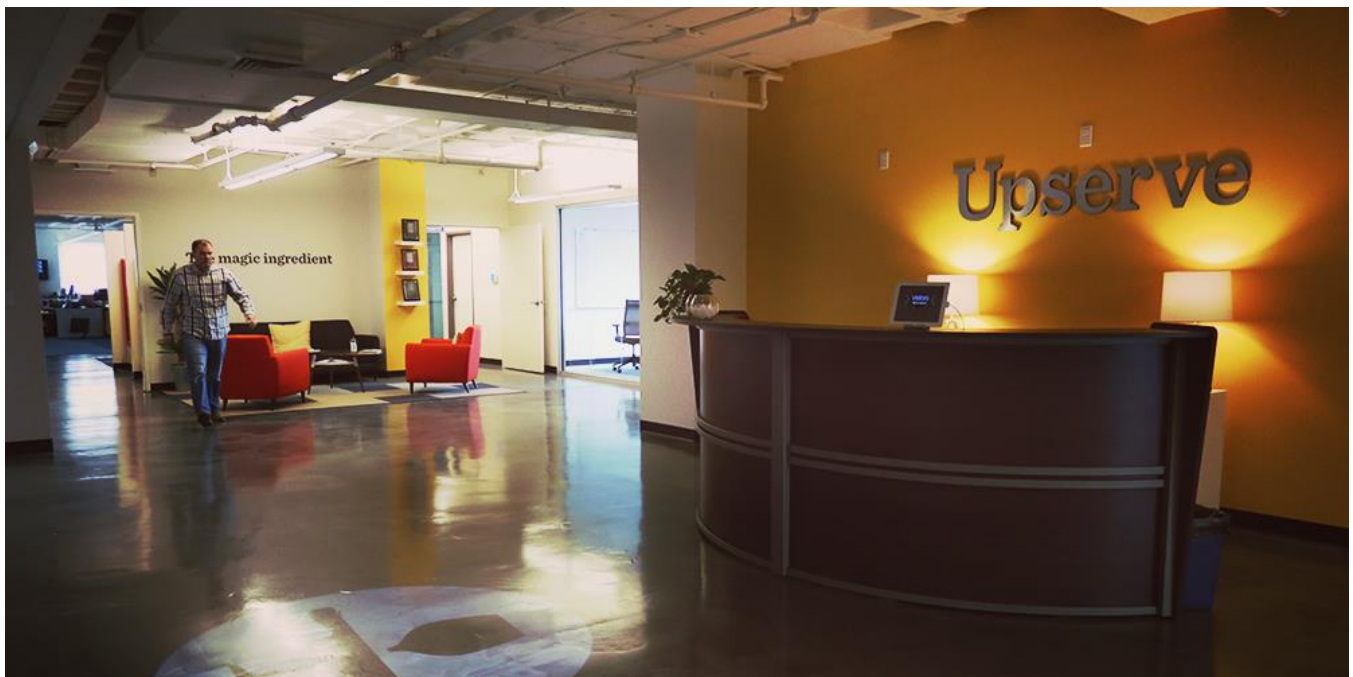


copy  
craft  
CONSULTING

# Here's How IT Helped Reinvent the Brand Behind This Growing Company

BETTERCLOUD | MAY 4, 2016

7 MINUTE READ



**From an outside perspective, it appears so seamless. A simple flip of the switch.**

The truth isn't as glamorous. In fact, a company rebrand is about as unglamorous as it gets. It's grueling. Organization-wide coordination can be confusing and complex, and like most business-altering projects, a rebrand requires a skilled IT department.

Behind all the shiny new messaging and graphics is an enormous amount of IT work. A new name requires a domain and website to match—not to mention new email addresses for every employee. A new logo means updated graphics across all applications and revamped email signatures.

To make rebranding even more difficult, everything must go live at the same time, and for Adam Codega, IT Operations Leader at [Upserve](#) (formerly Swipely), that meant 5:30 AM sharp on March 7.

## A New Identity

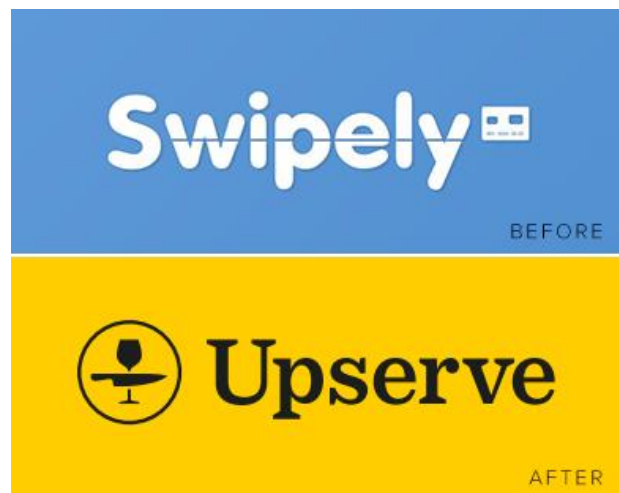
Upserve wasn't reinventing its brand overnight; the company was evolving it to catch up with where it is today. Like many other startups, the company had transformed during its first six years. What started as a business whose product turned credit cards into loyalty cards had morphed into a much more industry-focused platform.

The company's previous name, Swipely, came from its ability to help a restaurant understand its customers by acting as a credit card processor. Today, Upserve provides more sophisticated and specialized products. By connecting the dots between point of sale, online reviews, payments, reservations, and more, Upserve delivers in-depth insights into restaurant menus, staff, and customers. "We wanted our brand to catch up with where we've been," says Codega. "It was time."

But where do you start? What do you do as an IT professional when you're told your company is rebranding?

## Get Everything Out of Your Head

First, you need to identify everywhere your old logo is used. Get it out of your head and onto a whiteboard, says Codega.



With all of your tasks laid out in one place, you need to take a look at each one and ask yourself two simple questions.

- How risky will this change be?
- How visible is this change?

“I think that’s something really good to draw out. Before you freak out, lay everything out and group your tasks into four quadrants.”

By dividing up your rebrand tasks by risk and visibility, you can prioritize more effectively. Some rebrand elements, like email addresses, are both high visibility and high risk. Still, email addresses need to be prioritized because they are primary communication method and email serves as the authentication method for many SaaS applications.

Rebrand Project Prioritization Matrix		
	HIGH RISK	LOW RISK
HIGH EXTERNAL VISIBILITY	<b>HIGH RISK &amp; HIGH EXTERNAL VISIBILITY</b> <ul style="list-style-type: none"><li>• Email Addresses</li><li>• Email Signatures</li><li>• Office Employee Wi-Fi</li></ul>	<b>LOW RISK &amp; HIGH EXTERNAL VISIBILITY</b> <ul style="list-style-type: none"><li>• Office Visitor Wi-Fi</li></ul>
LOW EXTERNAL VISIBILITY	<b>HIGH RISK &amp; LOW EXTERNAL VISIBILITY</b> <ul style="list-style-type: none"><li>• Slack SSO</li><li>• Trello SSO</li></ul>	<b>LOW RISK &amp; LOW EXTERNAL VISIBILITY</b> <ul style="list-style-type: none"><li>• Employee Help Desk</li><li>• Google/Slack Branding</li></ul>

BetterCloud  
Powering Cloud IT

Changes that are low visibility but high risk should drop to the very bottom of your to-do list. For example, the team name attributed to [Slack](#) fell into the low visibility, high-risk category. The domain was only visible to employees, and taking the unnecessary chance of losing internal communication on launch day wasn’t worth the sweat.

Codega did change the display name and logo in Slack; that was simple, but moving the company’s account to the new Upserve domain wasn’t a priority. “If somebody at Upserve is chatting on Slack, they’re actually chatting on the Swipely Slack from their Swipely Google for Work account,” he says.

After dividing tasks by risk and visibility, Codega met with the marketing department to create [Trello](#) cards its rebranding board for each task that needed to be completed. Using Trello, the teams stayed up to date on each other’s progress.

# Keep it Simple

After purchasing upserve.com, Codega configured it as a secondary domain in the Google Apps Admin console. (Google recommends that you [only change your primary domain in some very specific scenarios.](#))

“The main thing for IT operations was to keep email running,” says Codega.

For single sign on (SSO) purposes, which we’ll explain later, Codega decided to only change the default “send as,” which keeps employees logging in to Google Apps (and other SaaS applications) with their old Swipely email addresses.

“Once the domain was in the Google Apps Admin console, we ran a sync in



BetterCloud and it automatically picked up that we had a secondary domain,” says Codega. Because both domains were configured, he was able to test changing the default “send as” to upserve.com internally before the rebrand launch.

Codega also took the time to test email on Google’s native mobile apps. Mobile-related issues are just another hurdle that can get lost in the shuffle during a huge rebrand.

Email is the primary method for communicating with external parties, so making sure email signatures matched Upserve’s new brand identity was crucial. After all, a brand only gains authority through consistency.

Codega used BetterCloud to [ensure all employees had the same email signature.](#)



# Communicate with Vendors

You don't have to figure everything out yourself, says Codega. Speaking with vendors before a rebrand is crucial. Think about it: Your vendors frequently deal with clients undergoing rebrands. As an IT professional, rebrands are few and far between.

Through testing, Codega discovered that moving a user from one domain to another is simple when it comes to Google; however, the change has a ripple effect that complicates the authentication process for other SaaS applications. "Even though moving Google accounts from Swipely to Upserve was extremely simple and seamless, in terms of Google services, it would break SSO for apps like Slack and Trello."



The SSO challenge was the primary reason Codega decided to only change the default "send as" address.

"By working with each [Slack and Trello's] support teams, I was able to develop a plan for how we would transition employee accounts after the rebrand." In the coming months, Codega plans to move employees Google accounts from Swipely to Upserve by using [BetterCloud's bulk user create and update feature](#).

## Try to Over-Communicate

It's inevitable: you're going to get questions during a rebrand. But how extensive and exhausting those questions become depends entirely on communication.

"You just can't over-communicate. We had a multi-department document that we made in Google Docs and shared via Slack to our employees." But still you need to go further, Codega says. "Give additional details to managers and make sure they review the FAQs and answers with their team. We also had a company 'all hands' meeting a few days before the rebrand to make sure everyone was on the same page."

The Upserve team even had Slack channels dedicated to rebrand-only discussion.

And because a rebrand is heavily driven by marketing and public relations, alignment between IT and these departments is critical. “It just becomes a fluid conversation, and you really never stop communicating,” says Pamela Cotter, Upserve’s senior manager of communications and PR. “It’s easy to lose track of how much needs to be redirected or changed to the new brand, so checking in frequently to make sure no stone was left unturned was important.”

## Remember Shadow IT



Most organizations have SaaS applications that aren’t under IT’s control and are managed by non-IT employees (known as shadow IT). These applications need to be given the same treatment as IT-managed applications, especially during a rebrand.

Remind departments to fill you in on the applications they manage themselves or use a tool like [BetterCloud’s Apps Audit](#) on your domain to uncover

unmanaged SaaS applications. Codega recommends using a rebrand as an opportunity to say, “Hey, why don’t I take over managing that application for you now?”

If shadowed applications are customer-facing (like a survey tool for instance), having co-workers come to you on launch day saying, “Oh, I totally forgot about this service, can you update the logo?” isn’t ideal.

## Launch Day

At 5:30 AM on launch day, Codega and others across the IT, product, and marketing operations teams flipped the figurative switch and turned Swipely to Upserve. Everything, from the website, social media accounts, outgoing email, and Upserve’s web application itself, went live at the same time.

“5:30 AM was when we used [BetterCloud to run the ‘send as’ defaults for everybody at once](#),” says Codega, who also noted that this feature isn’t available in the Google Apps Admin console. “When employees compose an email, it automatically has them sending from their new upserve.com address.”



Without BetterCloud, Codega would have resorted to sending out PDFs with screenshots on how to change the default “send as.”

“I would have sent that out after spending two hours configuring ‘send as’ in the Google Apps console one user at a time. I’d be creating aliases one user at a time. It would have been really sloppy stuff,” he says.

For email signatures, the challenge would have been equally, if not more, difficult. “I’d be telling people what to make their signature, or even worse, we wouldn’t have even had a company-wide signature.” With BetterCloud, employees didn’t have to do anything, the new email signatures just appeared after Codega pushed them live to all employees.

“Once I did the original domain ownership in the Google Apps Admin console, I really did everything else in BetterCloud, and on top of that, their support team was AWESOME. I spent 20-30 minutes on one call with Chris Fadell where he helped me create a upserve.com alias for over 300 Swipely Google Groups via a Google Sheets script. BetterCloud saved my sanity.”

## After the Rebrand

Employees at Upserve are still logging into SaaS applications with their Swipely email addresses, which Codega admits is only a temporary solution. In the coming months, he plans to start switching departments over one at a time to upserve.com. This will enable Upserve employees to log in to SaaS applications with their new email address.



# Don't Forget

- **Email Aliases:** If you change the default “send as” like Upserve did, you need to make sure that going forward any newly requested email aliases are created on both domains or else email deliverability could be affected.
- **Phone Number:** Dealing with telecom providers isn't easy; if you need to change your number to something brand related, you should do so early, says Codega. (Upserve got 1-855-66-GetUp, which took about two weeks to obtain after the initial request.)
- **Phone Greetings:** You don't want your touch-tone menu saying the wrong company name, so don't forget to update that! Also, don't forget to remind employees to change their voicemail greeting if they use the company name.

----

Rachel Wilson was the lead writer on this B2B SaaS case study. She conducted interviews with Codega, developed the structure, wrote initial drafts, and finalized the piece based on stakeholder feedback.

Originally published at <https://www.bettercloud.com/monitor/it-role-during-rebrand/>