



UPGRADE GUIDE

# Four criteria to look for in a modern Customer Identity and Access Management solution

Upgrading to a reliable Customer Identity and Access Management (CIAM) platform can be costly and stressful. First, you have to justify forgoing your current system. And then there's the added pressure of assessing the right criteria to identify an ideal solution for your organization. While your specific needs will vary, we've found that these four categories can work to guide the conversation for any company:



Security



Customer experience



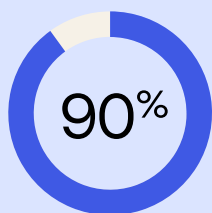
Scalability



Operational costs

This resource walks you through the process of choosing the right solution so your business can:

- 1 Reduce risk, stop fraud, and keep customer data safe
- 2 Drive growth by signing up new customers
- 3 Remove complexity that's hampering velocity
- 4 Focus on building vs. simply maintaining



90% of developers say third-party SaaS solutions increase their business' competitive advantage <sup>1</sup>

[1] [Okta How Dev Teams Purchase SaaS 2023](#)



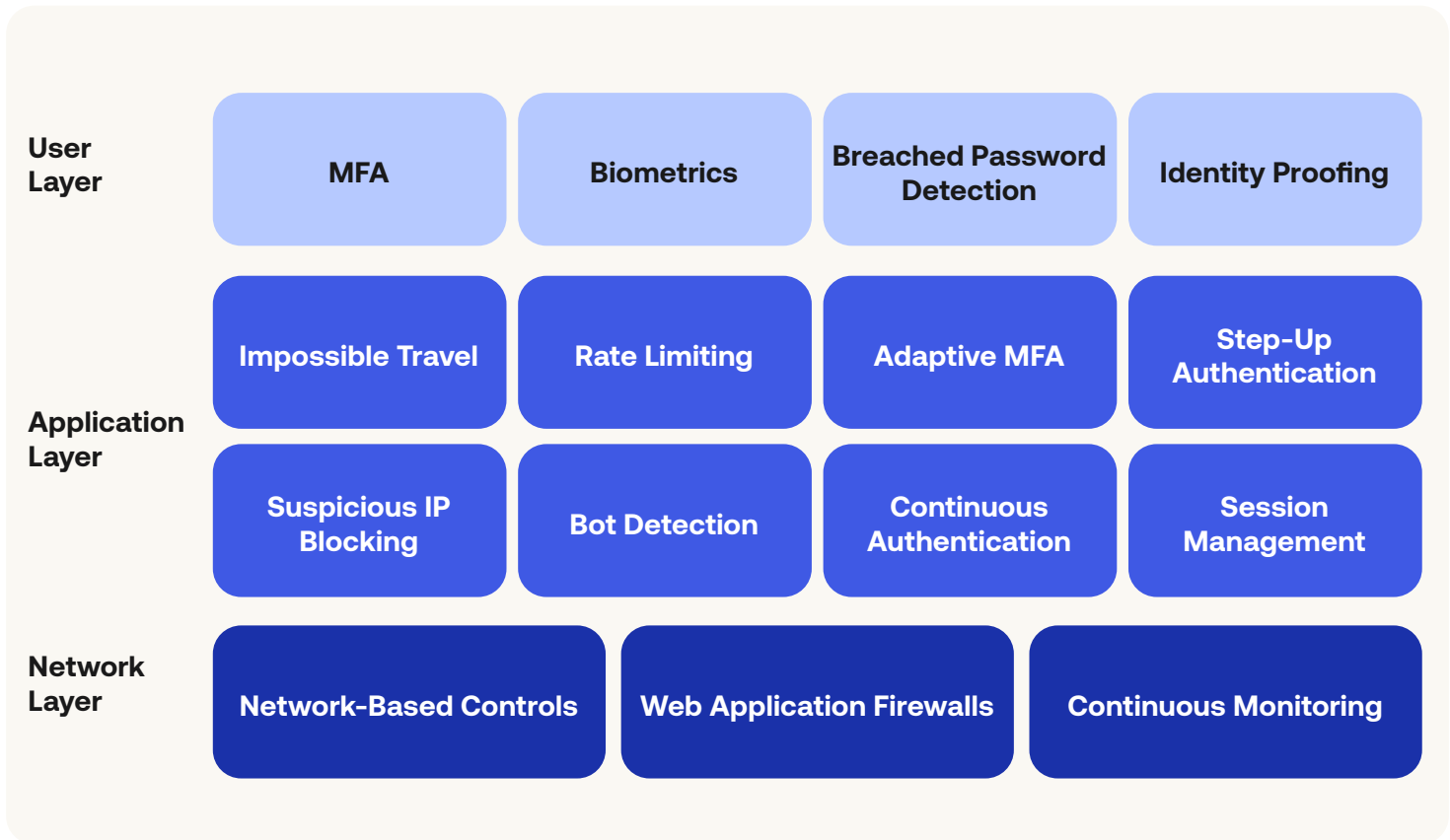
### CRITERIA #1: Security

You're no stranger to the threat of cyberattacks. It's essential to choose an Identity provider that can:

- Implement defense-in-depth tools that work in parallel across user, application, and network layers
- Continually monitor applications for signs of attacks and changes in threat actor tactics
- Make adjustments when needed; e.g., tune parameters, tighten restrictions, introduce new tools, etc.

The good news: Greater security doesn't have to translate into greater friction. Customer-facing Identity systems bear a unique responsibility to balance security and CX and accordingly can't afford the same level of friction as Workforce Identity management. Modern authentication methods such as adaptive multi-factor authentication (MFA) and continuous authentication effectively limit risk without diminishing your CX. Make sure your Customer Identity solution offers these options.

Stolen credentials are the No. 1 entry point in breaches<sup>2</sup>



**TIP:** A strong security posture establishes a solid balance between privacy and convenience while also building trust with your customer at all stages in the customer journey.



## CRITERIA #2: Customer Experience

Speed, convenience, and helpful customer service are paramount in building trust with your customers. Instances of friction during registration or login can erode trust in your brand and have a direct, negative impact on conversion and growth.

### Keep an eye out for critical tools you'll need to convert and retain customers:

**Social login** offers users speed, ease, and an increased sense of security grounded in the ability to choose what they share. Your customers are tired of creating new usernames and passwords —this allows you to remove them from the equation securely.

- Google / Gmail** (SOCIAL CONNECTIONS) - Allow your users to login with their Google Account
- Facebook** (SOCIAL CONNECTIONS) - A fast and convenient way for users to log into your app with Facebook
- Apple** (SOCIAL CONNECTIONS) - The easy way to add Sign in with Apple to your app or website
- Microsoft** (SOCIAL CONNECTIONS) - Enable your users via their trusted Microsoft Account
- LinkedIn** (SOCIAL CONNECTIONS) - Leverage the largest professional social network to enhance your sign-in...
- GitHub** (SOCIAL CONNECTIONS) - Enable the GitHub login option for your Auth0 applications

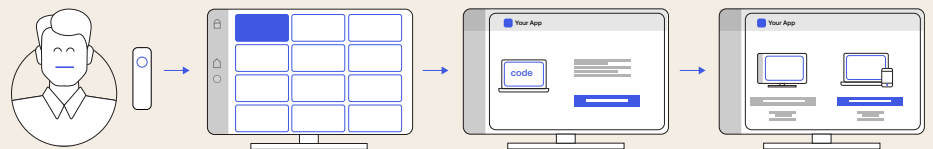
### Progressive profiling

encourages your customers to build out their profiles at key interaction points (registration, purchase, 10th login, etc.), as opposed to inundating them with a long, unpleasant form at signup. Get the customer data you want without hampering engagement.



### Omnichannel

keeps user experiences consistent across devices, whether web, mobile, TV, or tablet. Choose a solution that streamlines the login process and doesn't require repeatedly entering credentials on a secondary device.



**TIP:** Gathering information over time builds trust. Over time, as customers see that providing more information comes with benefits (promotions, discounts, etc.), they will be more eager to share their data.



### CRITERIA #3: Scalability

No matter what your user count is today, scaling to millions (or even billions) of users should be the gold standard. Ask yourself: Can your Customer Identity system handle significant traffic surges like selling tickets to a popular concert or streaming the most popular movie of the year?

Every organization we talk to wants to avoid reputation damage that can come from even one catastrophic point-in-time failure.

**TIP:** Don't tackle scale by yourself. Choose a reliable third-party Identity provider that can help you plan where your business will be in five years.



### CRITERIA #4: Operational Costs

There's a major opportunity cost when Identity maintenance pulls your product and development teams away from focusing on revenue-generating innovation activities.

Keep this in mind when choosing a Customer Identity solution, particularly regarding updates. Grinding business to a halt for every update should be an instant "no deal." Choose a solution that presents minimal to no downtime to keep your employees and customers happy.

**TIP:** Don't forget about certification costs. If you're doing business with global companies, you'll need certifications like SOC 2, ISO 27001, and HIPAA that require upfront investment and incur yearly costs. Choose a Customer Identity platform that provides its own certifications and third-party auditing and internal compliance tools.

**Want to see Okta's Customer Identity Cloud in action? Check out one of our upcoming webinars: <https://www.okta.com/webinars/unboxing-identity-demo/>**

#### About Okta

Okta is the World's Identity Company. As the leading independent Identity partner, we free everyone to safely use any technology — anywhere, on any device or app. The most trusted brands trust Okta to enable secure access, authentication, and automation. With flexibility and neutrality at the core of our Okta Workforce Identity and Customer Identity Clouds, business leaders and developers can focus on innovation and accelerate digital transformation, thanks to customizable solutions and more than 7,000 pre-built integrations. We're building a world where Identity belongs to you. Learn more at [okta.com](https://www.okta.com).