



Lifting the lid on identity

Checklist

# Customer Identity Solution Checklist



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## What to look for when looking to implement CIAM

When searching for the right customer identity and access management (CIAM) solution for your business, it can be easy to get lost in the weeds. This handy checklist sets out only those things which are vital to ensure you get the perfect fit for your needs.

### Out-of-the-box features

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In short, you should look to automate as much CIAM as you can to maximize your return through the lowest use of your teams' time and resources. Examples of out-of-the-box features you should look for that can be automated include:

#### **Authentication**

To ensure users are who they say they are. Look for advanced features including single sign-on to third-party applications, passwordless authentication, risk-based authentication, and a prebuilt sign-in widget.

#### **Authorization**

So you can confirm a user has the right level of access. This is best done through API access management built on top of OAuth 2.0 (open authorization), that integrates with API gateways, and provides role-based access control to applications.

#### **User Management**

In order for your teams to update access permissions and implement security policies. For ease of use and scalability, a cloud-based solution is the way to go.

#### **Predefined and customizable user flows**

So you can easily offer self-service registration, password reset, and account/username recovery.

#### **An intuitive centralized administration interface**

This allows your admin teams to manage security policies centrally and consistently.

#### **Multi-factor authentication (MFA) and adaptive MFA**

Okta's adaptive MFA built into Customer Identity Cloud, for example, adds an intelligent layer of risk-based authentication leveraging context information, like location and device, to enforce MFA only when it's necessary.

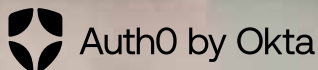
## Choosing the right platform

Every business's needs and wants from Customer Identity are different, and no doubt yours will change and evolve shortly after you implement a CIAM solution. It's just the nature of the beast.

So be sure to look for a solution built on an open, independent, and neutral platform so you can securely build upon it to solve any identity use case, or any end-user interacting with your business, while leveraging any technology you want.

### An open and adaptable solution should:

- Support a broad range of end-users, including consumers, partners, and even your employees.
- Collate and access user data via a centralized hub, giving you cost savings and operational efficiencies thanks to easier administration and simplified workflows.
- Leverage best-of-breed solutions across your different use cases and tech stack needs, on premises or in the cloud.
- Supply a large catalog of prebuilt integrations with core applications and services in your tech stack such as:
  - ◆ API gateways
  - ◆ Bot detection
  - ◆ Customer data integrators
  - ◆ Identity proofing
  - ◆ Infrastructure-as-a-service
  - ◆ Privileged access management
  - ◆ Security analytics
- Provide no-code connectors so your teams can build automated workflows to key technologies without having to write custom code.



## Don't forget your developers!

Important to note, Customer Identity isn't a 'once and done' thing. It needs regular updating, for security, functional, and aesthetic purposes. That means you need developers supporting it, so look for a solution that offers an extensive set of application programming interfaces (APIs), software development kits (SDKs), and hooks for the languages your development teams use.

It will make their lives easier and help keep your platform more agile and responsive to your changing needs.

The Auth0 Marketplace that supports Okta Customer Identity Cloud is a vast repository of no-code solutions, for example, that offer developers drag and drop integrations. Trust us, they'll thank you for it.

# Establishing an infrastructure you can depend on

A key advantage of a modern Customer Identity solution like Okta's is that it's delivered 'as a service'. That frees you from having to buy and maintain the infrastructure necessary to provide its scalability, reliability, and security.

## What do we mean by scalability, reliability, and security in CIAM? Let's break it down.

**Scalability:** Think along the lines of a solution that supports hundreds of thousands of authentications per minute. After all, who knows how well your business is going to take off!

**Reliability:** Downtime results in lost revenue, brand damage, and potential loss of customers, so make sure your solution provider offers the highest uptime available. Okta delivers 99.99% uptime to every customer, whether using our free developer edition or as a full enterprise customer. Why settle for less?

**Security:** Simply put, as threats evolve, so too must your security. Choose a Customer Identity solution that protects against the widest ranges of attacks and threats, while continually updating to improve its (and therefore your) defenses.

## How to spot a genuine CIAM leader

There are many accreditations and acronyms in the CIAM space. Here are the key ones you should be looking out for in a provider:

- **Service Organization Control (SOC) 2 Type I and Type II** – These ensure the security, availability, processing integrity, confidentiality, and privacy of both company and customer data.
- **Cloud Security Alliance (CSA) Security, Trust, & Assurance Registry (STAR) Level 2 attestation** – A rigorous third-party independent assessment of a provider's cloud security.
- **International Organization for Standardization (ISO) 27001:2013 and ISO 27018:2014** – These govern the continually improving information security of an organization and its protection of personally identifiable information.
- Your provider should also offer current and ongoing compliance with regulatory requirements such as the General Data Protection Regulation (GDPR) and the Health Insurance Portability and Accountability Act.

At Okta, regulatory compliance and data security is paramount, and our solutions adhere to all the above legislation as a minimum.

# Ultimately, your CIAM is your reputation

Your customers won't hold your Customer Identity provider responsible for issues when they access your services — they'll hold you responsible and take their business elsewhere. So, work with a provider that has a proven track record of a solution that's highly scalable, reliable, and secure, and can accommodate as many of the above items in this checklist as possible.

That will give your business the greatest chance of deriving the greatest benefit from CIAM. While your customers gain a great CX, your business benefits far more widely:



**Developers given back time for new projects**



**Cost and resource savings**



**Data security with regular updates**



**Easily accessed data unlocking new insights into your customer base**



**The ability to serve more users**



**Unparalleled uptime**

**To see for yourself how much implementing Okta CIAM solutions has to offer your business, book a free demo.**

**Or, to learn more, view our catalogue of Customer Identity resources providing insights on a range of topics.**

Note: need links



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## 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://okta.com).