



# Untangling Five Intricate Identity Challenges



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# Meet Your Okta Identity Experts

Security. Efficiency. Reliability. These are all hallmarks of modern enterprise IT with an integrated identity management service like the Okta Identity Cloud. Since 2009, Okta has helped thousands of businesses securely and reliably connect with their customers, employees, partners, and contractors—anytime, anywhere.

Through our experience, we've learned that the process of designing and implementing a complete identity solution can pose some common challenges, including:

- Multiple, cross-organizational stakeholders and project participants
- Entrenched on-premise infrastructures
- A lack of knowledge or experience in cloud-based identity and access management
- Compressed timelines

At Okta, we know that overcoming these challenges, while designing a customized approach that perfectly fits the structure of the business, is critical. That's why we've developed a Professional Services (PS) team that is uniquely equipped to tackle even the most complex Identity projects and situations. Our Professional Services experts:

- Have an average of 8 years of industry experience in identity
- Are Okta Certified experts in Okta solutions and third-party integrations
- Have extensive backgrounds from across the globe with legacy identity vendors
- Include PMP-certified project managers
- Are tied into an extensive network of certified global delivery partners



With thousands of successful Okta deployments completed, our Professional Services team solves complex, unique problems every day—and they enjoy every minute of it. Our experts thrive on solving complex use cases and delivering quality results for our customers.

Given the unique nature of identity, no two projects are ever exactly alike. Thanks to Okta’s full range of customizable solutions, combined with years of specialized identity experience, Okta’s Professional Services team is ready and able to help. You don’t need to reinvent the wheel: Okta’s prescriptive experts will guide you.

In this eBook, we’ve highlighted just a few of the ways our Professional Services experts have taken the complexity out of implementations and designed personalized approaches that work for our customers.

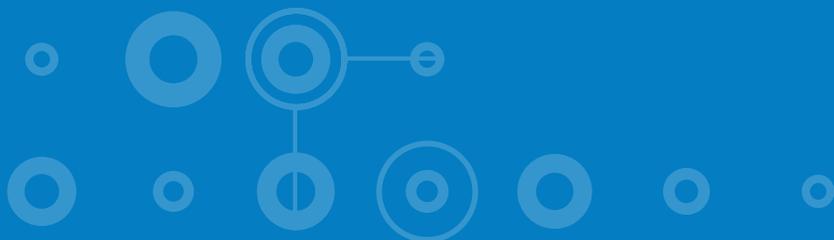
## Hear from Your Okta Identity Experts

“As an architect, I’m able to speak to the customer to understand their requirements and then design solutions based on the possibilities offered by the product and my understanding of identitymanagement.”

—Matt Undy

“Most of our enterprise customers hire Professional Services because Okta has a lot of plug-and-play. But a lot of them also have more complex solutions that require the expertise that we bring. They hire us for our expertise in technically and efficiently integrating with Okta.” —Kirby Frank

“I really enjoy my role here because it allows me to understand the business impact of what we’re delivering, while meeting those technical challenges as well.” —Pragya Seth





## Challenge One

# A Business that Securely Scales: Simplifying the Complexity of Mergers and Acquisitions

When a large holding company decided to sell one of its businesses, most of the group's IT infrastructure went with it. The group needed to adopt greenfield solutions, and took the opportunity to modernize its on-prem infrastructure by adding significant cloud capabilities. Enter Okta Professional Services.

### Company Profile

A massive South African media and internet technology holding company with hundreds of legal entities—and a net worth of about \$130 billion.

### A High-Growth Organization with Limited Bandwidth

Mergers and acquisitions (M&A) are business as usual for a major holding company like this one. However, sometimes the sale of an asset has a major impact on the group as a whole. When one specific sale went through, the holding company was going to lose all of its existing Active Directories, a lot of its network infrastructure, and even its computers. In terms of IT, the group was practically starting from scratch.

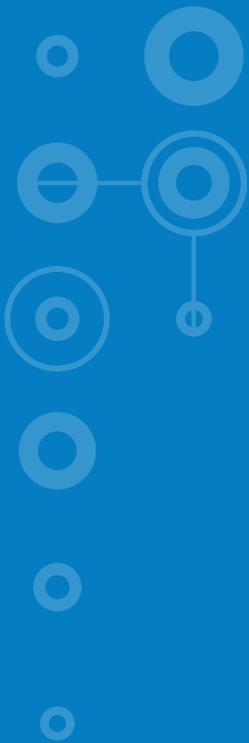
The group had to move quickly—if the lost infrastructure wasn't replaced by the time the sale went through, there would be heavy financial penalties. Since one of the businesses in the group had already seen success

with Okta, the holding company decided to adopt the [Okta Identity Cloud](#), including [Single Sign-On](#), [Lifecycle Management](#), and some on-prem provisioning solutions.

IT infrastructure wasn't the holding company's only loss. The sale also meant they were forfeiting a lot of technical expertise. The pressing deadlines meant they needed outside help to get the greenfield solution in place before the sale was finalized.

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“It's not very often you see that greenfield scenario where an organization is buying applications for everything, they're building their directories from scratch. That was the most unusual thing. It created a unique opportunity for them to work with Okta's experts to plan, execute, and deliver a solution that met their requirements.” —**Matt Undy**



## The Solution to Fit their Needs

That's where Okta's Professional Services came in. Okta assigned an expert team that included a project manager, an enterprise architect, and a senior technical consultant. After an initial discovery process, Professional Services took the holding company through a number of design workshops, and then produced a high-level design for configuration and implementation.

Before anything else could be done, four new Active Directories were needed, with 300+ assets sorted into each one. Okta facilitated the build, and allowed Oracle HCM to drive provisioning policies via their API gateway, Dell Boomi, and Okta APIs that fed them into the correct Active Directory.

The organization was already using Boomi, so it made sense to incorporate it into the new workflow—and according to Matt Undy, the app turned out to be quite useful. “Rather than just writing custom API code, Boomi can monitor Oracle and run that code when it needs to,” he says. “The user would get added to HR, which is monitored by Dell Boomi. Boomi would add them into Okta, and Okta would put them into the correct AD.”

The workflow required some custom code—and Professional Services was able to help make that happen. Okta's technical consultants developed a global address list solution, as well as a solution that generated usernames for the different identities.

Okta's cloud-based solutions are more agile than on-prem solutions. As a result, the company needed the custom code to bring the on-prem solutions up to speed—and maximize the agility and flexibility of its new hybrid architecture.

In this case, the situation was complicated by the fact that there were approximately 300 legal entities involved, many using different domains. They had to apply logic that would recognize the company a user worked for, and assign both a unique username and the correct domain for that specific organization.



Luckily, Okta's Professional Services team is well versed in on-prem, cloud, and hybrid solutions. They're also able to write custom code that accommodated these unique challenges. Okta was even able to customize the solution so that each Active Directory can see the contacts that are in the other Active Directories.

The company also worked closely with an Okta technical consultant—Undy describes the consultant as being embedded in the company's team. Having an Okta expert on board has helped fill the gaps in the holding company's IT resources, and meet their strict deadlines.

Professional Services was also there to help roll out the solutions by prescribing tailored training courses designed with the holding company's unique infrastructure in mind. These included a help desk course, an [Okta Essentials Course](#), and even some hands-on training.

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“By nature, holding companies—who undergo frequent M&A—have of the most complex Identity and access management puzzles to solve. I've seen that specific use-case many times, so I knew the challenges my customer was facing and designed an Okta solution that is future-proof.” —**Matt Undy**

### **Moving Forward Without Disrupting the Business**

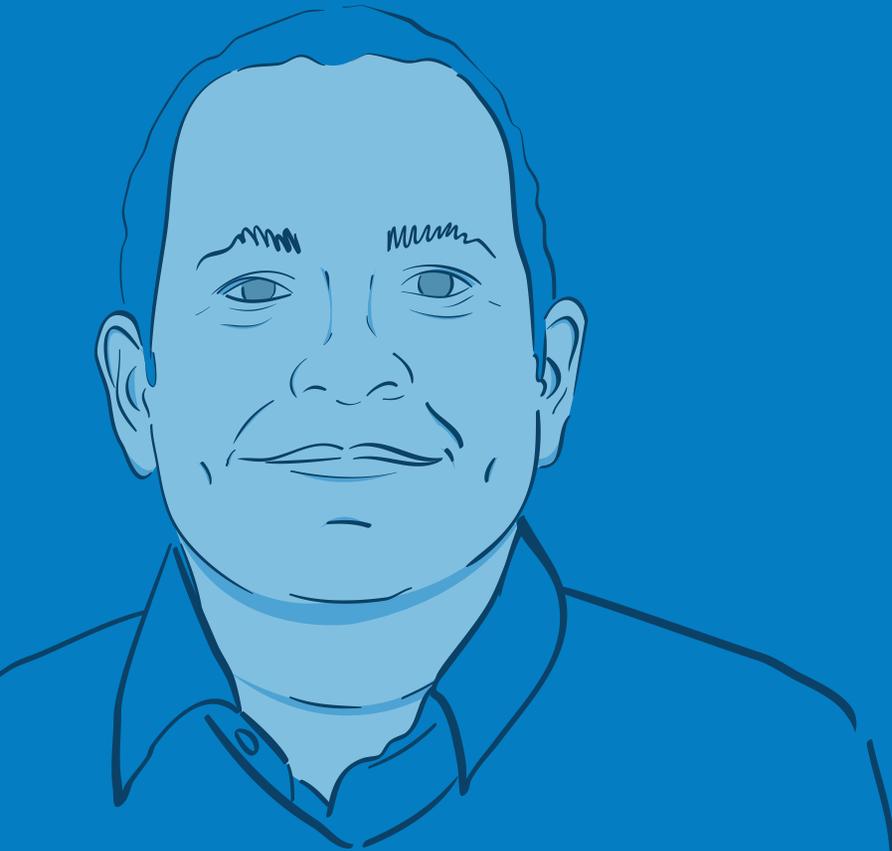
With Okta's Professional Services involved from the very beginning, the holding company was able to address the problems with its original IT infrastructure, and design their system with the future in mind.

Next time the organization wants to divest or target an acquisition, the IT transition will be a smooth one—because each entity has its own information management system to support future changes.

With the Okta Identity Cloud in place, members of the holding company can breathe a sigh of relief. Not only has Okta enabled them to meet the goal of delivering their new IT and applications by the deadline, the Okta apps they've adopted have streamlined their workload and increased their overall productivity. Better still, the holding company has agility and flexibility they've never had before—which means they'll never need to start from scratch again.

# Meet Matt Undy,

Okta Identity and  
Access Management  
Senior Architect



Two and a half years ago, after almost a decade in Professional Services, Matt Undy realized the world of identity management was about to change dramatically. Specifically, he saw that cloud-based IT infrastructure was on track to eclipse on-prem, and he decided it was time to make a move.

After discovering Okta's approach to building identity solutions designed specifically for the cloud, Undy left his position at IBM to join the Okta Professional Services team. Now, he's the lead architect for Okta's European projects; if the customer's infrastructure is complex, Undy has a hand in simplifying it with Okta.

Undy and Okta are a perfect match. With his wealth of identity expertise, Undy uses his in-depth experience in on-prem and cloud-based infrastructure to tackle some of the most intricate projects. Working at Okta allows him to put all that knowledge and experience to good use—he's constantly delighting our customers by providing efficient and valuable solutions.

"I've invested my entire career in identity and access management, starting with my first job out of university. As an architect, I'm able to speak to the customer to understand their requirements. Then, I'm able to design and prescribe solutions based on experience, best practices, and the product's capabilities. My real passion is finding solutions to client challenges."



## Challenge Two

# Building a Streamlined IT Process: Implementing Workday Across All Institutional Entities

Workday-Driven IT Provisioning makes it easy to streamline processes and reduce unwieldy onboarding and offboarding workloads. When the governing body for a number of educational institutions decided to modernize its infrastructure with Workday and Okta, it found a simple way to roll out a complex solution—thanks to the expertise provided by Okta’s Professional Services team.

### Company Profile

A governing body that manages state-wide higher education institutions. There are nine institutions that fall under the umbrella of this larger body, and each has its own separate needs, mandates, and infrastructure.

### Streamlining IT Processes with Workday

When the organization reached out to Okta, it was in the middle of a Workday HRIS adoption project. The goal was to set up **Workday-driven IT provisioning** to streamline its HR processes. Additionally, it wanted to achieve a cloud-level security posture and amp up its identity management. But each college had its own HR processes; some had identity solutions, while others were struggling to do this work manually. Ultimately, the desire was to get all of the colleges following the same standards. But the organization was faced with a unique challenge: it needed to establish a standard, while giving each college the flexibility to integrate its own directories and manage its own users.

To do this, the organization needed a strong, cloud-based identity solution that would help centralize the colleges, maintain high security standards, and automate onboarding and offboarding. Many of the colleges chose to set up Workday-driven IT provisioning, with **Okta SSO** and **Okta Lifecycle Management**, while others added Okta for Workday SSO and Multi-Factor Authentication (MFA) to their existing identity management solutions.

These integrations meant that the organization could use out-of-the-box functionality to achieve most of its goals, but the organization’s already-lean IT team knew the project would take some time. It also recognized that getting the right identity experts involved from the beginning would streamline the process significantly. Luckily, Okta was able to offer a simple solution: Pragma Seth’s **Professional Services** team—which was fully equipped to fill expertise gaps, ease the process, and help the group get the most out of Okta and Workday.



## Filling the Gaps

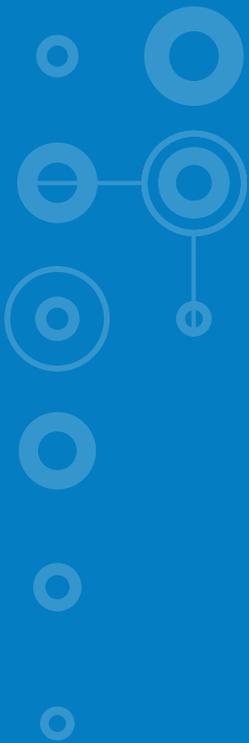
Seth and her team spent the first couple of months meeting with the organization to get a full understanding of requirements and design a strategy that would meet them. In addition to onsite meetings, Seth led architecture workshops that helped her get a firm grasp of each college's requirements and pain points. Then she worked with the governing body to identify gaps, align the team, and develop a global process that would meet everyone's needs. This was key, as there were several stakeholders, and goals that needed to be met by each college.

Seth supplemented out-of-box solutions with a number of small customizations to ensure the global solution would accommodate the unique needs of each college. Each institution was given its own Okta instance, and Seth's team set up a single portal so that everyone could sign into the same dashboard before being routed to the appropriate Workday page for their group. This was the main customization, but Seth also wrote some scripts that helped streamline the user management process.

In terms of provisioning, Seth set up the workflow so that new users are initially added to Workday, which then sends the information to the appropriate Okta org and Active Directory. That step completes the local provisioning process. Global provisioning kicks in when the user first logs in. Now, the governing organization is able to manage user access to Workday, and it plans to extend the same capabilities to some of its other central apps.

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“The goal was to set up Workday-driven IT provisioning and achieve cloud-level security. This implementation was a very diversified environment—something I get excited about! As we engaged with the customer, I was able to find a simple way to roll out a complex solution that met everyone's objectives.” —**Pragya Seth**



## A Personal Approach

Throughout the process, Seth worked with a client-side project manager and a lead architect. The lead architect was particularly helpful because he also happened to manage a college—which meant he could see the big picture as well as the smaller college-level challenges. Each institution also had its own Okta administrator, and Seth established relationships with them as well.

The governing body and the individual institutions quickly came to trust and rely on Seth's expertise. Her years of experience with user directories, complex environments, and of course, Workday and Okta integrations, helped a lot—but her focused attention helped even more.

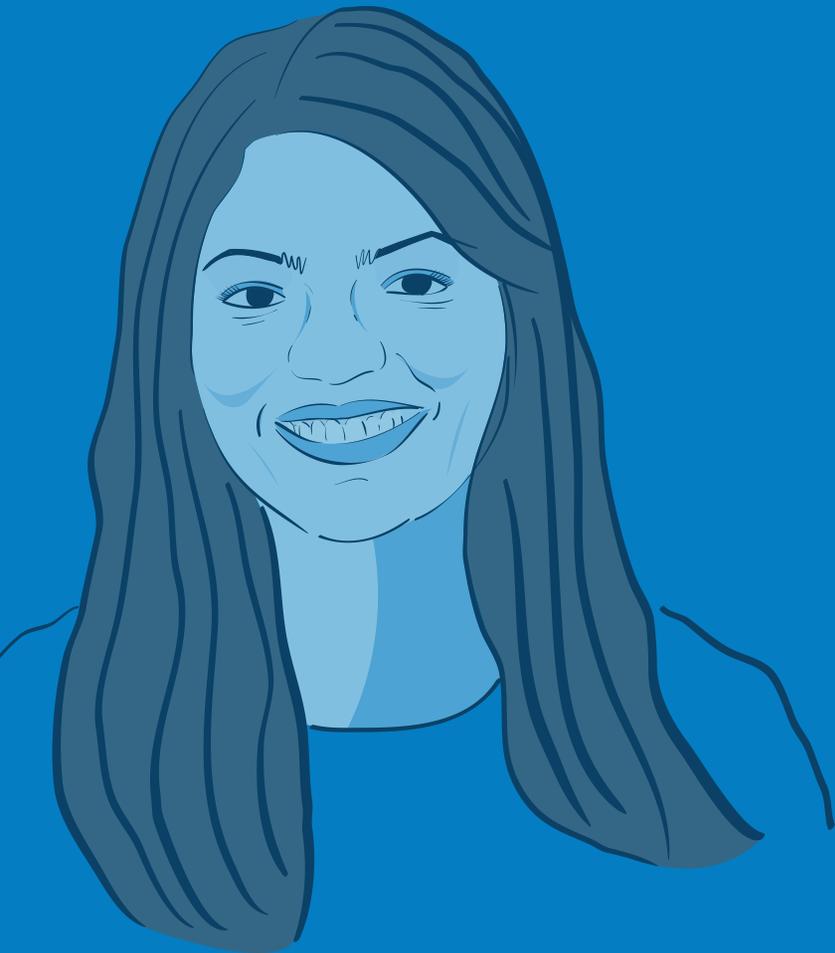
She invested time in understanding the needs and pain points of each institution—and she took them seriously. Ultimately, she just tried to make the process as easy as possible for the governing body and the individual colleges. This required her to track all of their different issues and risks at each point, and to provide them with the right documentation at each stage. Sometimes she was able to help one institution solve a challenge by sharing a solution that had worked for another institution.

In the end, the **Single Sign-On** and Workday-Drive IT Provisioning deployments went very smoothly. 90% of the Workday use cases were met with the out-of-box features, and the rest were achieved with minor customizations.

Now that the overall project is complete, each of the existing institutions are starting to look at the other possibilities Okta has to offer. When they're ready, Professional Services will be there to help them meet their goals, by taking the most efficient approach possible.

# Meet Pragya Seth,

## Okta Senior Technical Consultant



The two-and-a-half years Pragya Seth has been with Okta are just the most recent in an extensive professional services career. Seth specializes in identity, and her long-term commitment to this line of work is driven by her customers. She loves learning about their IT challenges and using her technical acumen to make their work days easier.

Seth kicked off her career as an application developer with a keen interest in every aspect of enterprise technology, from understanding the unique requirements involved in developing enterprise-grade architecture, to seeing the direct impact of enterprise-grade products in terms of scalability and performance. Her more recent interest in identity assets grew out of a fascination with enterprise infrastructure, when she saw the effect identity could have on security, user experience, and deployment.

At Okta, she's able to apply her expertise in all of these areas. It helps that she's enthusiastic about the product, which she discovered while working at Deloitte. That's also when she realized Okta's capacity for simplifying identity challenges, especially where the cloud is involved. She was impressed by how Okta's products were transforming the identity space. More than anything though, she understood the potential for these products to improve the customer experience—and to make customers' lives better.

“Understanding how a product fits into a customer environment and then designing that architecture so that the product integrates seamlessly is really exciting for me. That's why I really enjoy my role here. It allows me to understand the business impact of what we're delivering, while also meeting those technical challenges.”



## Challenge Three

# Okta Multi-Factor Authentication + Identity: The New Standard for Security

When you're one of the largest commercial banks in North America, with more than a million identities to protect, securing customer identity and setting up strong access management infrastructure is critical. For one bank, Okta Professional Services provided the expertise to make a complex transition to the cloud as quick and secure as possible.

### Company Profile

One of the largest commercial banks in North America, with more than 2 million personal clients and over 1 million users, with 10,000 users logging in each minute.

### A Massive Modernization Project

When one of the largest commercial banks decided to increase security and streamline customer access to its online banking, it quickly discovered that moving from on-prem to the cloud would be a lengthy process unless it found a way to speed things up.

Specifically, the company's external customer-facing infrastructure was built with on-prem Microsoft products and the team wanted to harness the power of OAuth, allowing identity and security to underpin their tools. This would simplify the process significantly, since the infrastructure would be fully integrated, and they wouldn't need to build connections.

At first, there didn't seem to be an obvious solution, since none of the bank's existing providers offered 100% cloud-based apps. The bank looked at teaming with Microsoft to take their existing on-prem Active Directories and create a hybrid infrastructure.

However, the bank knew that going cloud-first would make the infrastructure much more scalable, and Microsoft couldn't offer a cloud-first solution. With Microsoft, it would have taken at least a year just to finish building the environments.

Instead, the bank looked into the [Okta Identity Cloud](#) and quickly realized that Okta's 100% cloud-based identity solutions were exactly what it needed. Okta was able to offer a full stack of solutions (including Universal Directory, Adaptive Multi-Factor Authentication, and OAuth APIs) that work together seamlessly, protecting data and streamlining processes. Plus, with the [Okta Integration Network's](#) thousands of integrations, the bank knew there would be enough extensibility in the platform to keep them agile.



Although the Okta Identity Cloud itself would solve most of the bank’s initial concerns, the project was still destined to be complex. The bank had a strong app development team, but moving from on-prem to the cloud always takes some finessing—and it’s certainly not a process most IT teams have experience with. So it approached Okta for assistance and that’s when **Professional Services** got involved.

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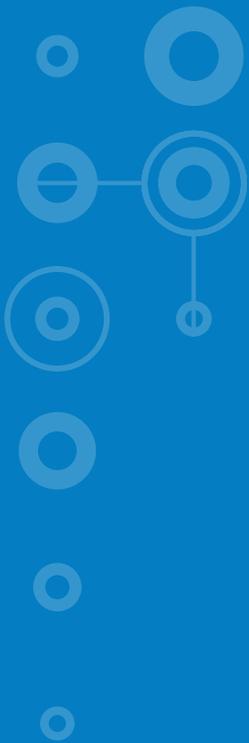
“Moving from on-prem to the cloud can take a while—the app dev team needed my cloud-first experience to speed things up and I was able to get them to a fully integrated customer-facing infrastructure. We’ve been able to offer strategy, and act as a sounding board for their team.” —**Daniel Marma**

### **A Proactive Approach**

The relationship with Professional Services began with a series of conversations about the bank’s goals and requirements. Armed with this information, Daniel Marma and his team met with the bank for three days, discussing everything from provisioning (including progressive migration throttling strategies, new account onboarding, and SCIM directory synchronization) to the real-time fraud detection services you would expect from a bank.

Next, Marma conducted a number of workshops. Between five and 30 people attended each session and by time they were done, Marma was able to produce a design document that would ultimately guide the entire process of modernizing the bank’s customer-facing infrastructure—essentially, its online banking services.

These initial discovery sessions also exposed a few gaps. Before the project began, Marma recommended building a few critical features, including geolocation protection, a custom solution that would allow the bank to see who’s requesting access and deny or grant access based on location and behavior. The feature turned out to be so effective that it’s now included as a basic feature of Okta’s Adaptive Multi-Factor Authorization (AMFA).



Marma also recommended some enrollment components, like SMS and emails-as-a-factor, and helped the bank sync credentials into an on-prem directory for disaster recovery, using an LDAP API connector. Finally, Marma was able to incorporate vanity URLs, which not only keep Okta working reliably behind the scenes, but also creates a consistent branding experience for the bank's customers.

Marma's team worked onsite, helping the bank's team get up and running with IBM's API gateway, Data Power. This was a critical integration since Data Power uses APIs protected with OAuth to push data from the on-prem solutions at the company to the cloud applications. This integration also allowed Marma to set up a single-page access point that lets customers view their account balances, transfer money, and apply for loans.

Adaptive Multi-Factor Authentication is the layer that keeps it all secure. For extra protection, Marma also made sure that Okta wouldn't retain any identifiable information, other than the customer's email address and phone number (which are there for recovery purposes).

Having Professional Services onsite—available to train, document, and augment the organization's team—was key to helping the bank reach its goals quickly and with minimal complications. The entire design process significantly reduced the bank's anticipated development times.

Throughout the process, Marma and his team worked closely with two of the bank's architects. The bank sees Marma as a trusted advisor, and discussions flow freely because they've built a sense of camaraderie. Combined with Okta's performance monitoring, this positive relationship gave Marma the opportunity to identify inefficiencies during the development phases so that the bank could make adjustments that optimize the new infrastructure.

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“The speed to delivery was critical. Getting them something that was functional much earlier on gave them a platform to build and test against, so they could identify some of the potential issues sooner rather than later. With some of these systems, you can design to your heart's content, but you don't get anything to work with until many weeks later. With Okta, we can turn things on, start configuring immediately and flesh it out.” —**Daniel Marma**



## Moving Forward

Now that the online banking component has been completed, the bank has asked Marma to help with next steps, starting with third-party integrations. Ultimately, the bank wants its identity infrastructure to be able to integrate with these other third-party systems as needed. These applications will be able to mint tokens for web and mobile applications, setting up a trust between the user, application, and the bank.

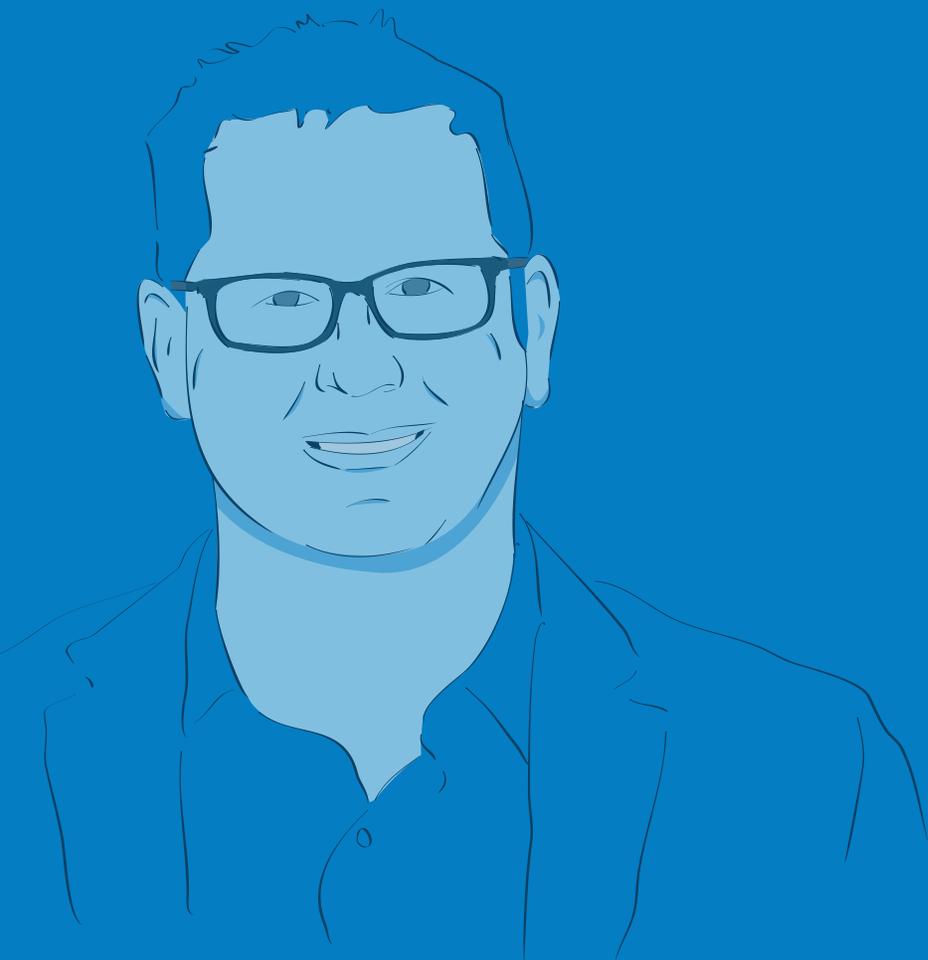
Marma's job begins with helping figure out the logistics. Verified.me, an application that allows people to authenticate into their bank accounts, is the first third-party app they're working on. Marma says it's an interesting project because there's restricted access to a third party, and they need to determine a way to validate all the transactions. Once they have a plan in place, they'll be able to use the same format to integrate additional third parties.

Marma has also begun working with the bank's wealth management team which, by necessity, is granted direct access to a lot of extremely sensitive client information. The requirements for this project have expanded to include additional audit detail and a method to quickly and securely revoke this access when a particular wealth manager is no longer tied to an account. With Okta involved, the process is simplified, because the bank won't need a separate interface for the wealth managers and their clients.

Okta's API Products and Adaptive Multi-Factor Authentication allow the bank's customers to rest assured that their data—and their money—is safe and secure, while they enjoy the seamless experience made possible by Okta. Meanwhile, the bank benefits from a speedy deployment, strong security, and a high level of expertise. With Okta, everyone wins.

# Meet Daniel Marma,

## Okta Cloud Enterprise Architect



Over the last 20 years, Daniel Marma has worked in almost every aspect of IT. He's held positions in both product management and product design, and he's also been involved in marketing and sales. All this experience has made Marma a remarkably well-rounded expert, so when it looked like cloud-based technology was about to reach its tipping point, he jumped at the opportunity to add to his expansive knowledge base.

He accepted a position with Okta in the summer of 2015, and since then, has focused his attention on offering high quality professional services. Marma loves it because, as he says, working in professional services is like tackling a new puzzle every day. And with Okta, he has all the right pieces—whether that means developing a strategy for using **Okta's API Products** to create a **Seamless Customer Experience** modernizing a customer's infrastructure, or helping an organization roll out **Adaptive Multi-Factor Authentication** within a tight deadline.

Marma also enjoys becoming a temporary part of a customer's IT team and using his skills to help the customer get up and running.

“I went to work with Okta because it was a great opportunity to grow. I was getting involved with a company that I felt good about, with a product that worked. I saw the need it was addressing, and I knew it was going to go big—and I could get in early and grow with them.”



## Challenge Four

# An Integrated Identity Approach: A Single Point of Access in a Multi-Tenant Infrastructure

A major recruitment agency had a dream—to release an AI-driven product that would make better matches between candidates and recruiters. When the partnership with its identity provider fell apart just a couple of months before the release date, the company needed a new partner that could step in, streamline the identity architecture, and beat the clock.

### Company Profile

A major recruitment agency that connects skilled and talented people with the employers who need them, this organization partners with more than 100,000 employers around the world.

### Race Against Time

Not long ago, a recruitment agency decided to set up a SaaS multi-tenant application that employers could use to recruit new talent using artificial intelligence.

It was a greenfield project, so the company needed an identity partner from the very beginning. Specifically, it needed a solution that could automate the provisioning process for its customers, provide a single point of access, and set up Single Sign-On between the various tenants. The company also needed to make sure that the identity provider was invisible; it wanted consistent branding and a smooth user experience.

This seamlessness was important for other reasons as well—the company planned to roll out the same infrastructure to multiple, and sometimes competing, customers. This was a daunting challenge because it didn't want a candidate to apply for a job at one company through their site, and then be visible to another organization.

Initially, the company considered working with Centrify, but the solution wasn't comprehensive enough to meet the organization's needs. Instead, the company decided to partner with Okta, after discovering that the [Okta Identity Cloud](#) could do everything they needed it to do, including:

- Providing a single source of truth
- Automating employee onboarding and offboarding
- Creating a seamless user experience across a range of apps, thanks to a wide variety of pre-built SSO integrations
- Offering API products that could power the new platform



They also needed to speed up their time-to-market, so they quickly signed on with Okta's **Professional Services** team.

Okta's Dave Fend became the Senior Services Architect for the project, and he was charged with the task of helping set up **Single Sign-On (SSO)** and **provisioning**. But he also had the unique job of finding a way to hide all the seams between the various tenants.

Fend needed to make sure that candidates would be able to use SSO to log into all apps related to one employer, while triggering a separate SSO experience when signing into apps for other employers. And the organization wanted a minimal viable product it could launch when they were ready to go live.

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“Time to market was critical. They had already spent time looking at another vendor and had a looming deadline that they wanted to go live by. They wanted to bring in experts to make sure it was done right and that everything was rolled out seamlessly.” —

### **A Winning Strategy**

Fend and his team launched the partnership by meeting with the company to talk about its project criteria, breaking down tasks and creating a timeline so that all the necessary goals could be achieved within a very short period of time.

They settled on an architecture with a single master org, a hub, that would house all the information for all the candidates. Branching off from the hub would be a number of smaller orgs, spokes, one for each of the company's customers.



By the end of the entire project, the company would be able to automatically provision each of the spokes with the appropriate identities. Meanwhile, the hub would provide them with the visibility they needed to support their customers from a single dashboard. The alternative was to set up individual help desk accounts for each customer, and this solution turned out to be a far more efficient option.

The candidates would log into the hub too, but SSO would route them into the appropriate spoke. This was the feature that would achieve the company's goal of keeping its customers separate.

By the end of the consultation, Fend had broken the project down into a prescriptive methodology of three phases, with the primary goal of launching the minimal viable product for a single customer. Phase 1 would focus on getting candidates set up with the apps. Phase 2 would address recruiter and employee access. And Phase 3 would automate the steps necessary to onboard another customer, including building out the architecture using [Okta APIs](#). The product was designed to scale, with three test customers incorporated into the architecture.

Once the planning phase was done, the Professional Services team, along with the company's technical consultant and project manager, jumped into the development phase. Fend's team configured the setup, trained the company's administration on how to do it, provided written directions, and then walked the company through the test cases.

Phase 1 was a true team effort. The project manager helped orchestrate all the resources on the company's side, and Professional Services worked very closely with the lead architect on the client side to ensure that the Okta API integrations went smoothly. Fend also worked with the company's Okta admin, making sure that he understood how the architecture worked. The whole project was monitored by one of the company's VPs.

In the end, Professional Services was able to help the company get the minimum viable product out to the public within two months.

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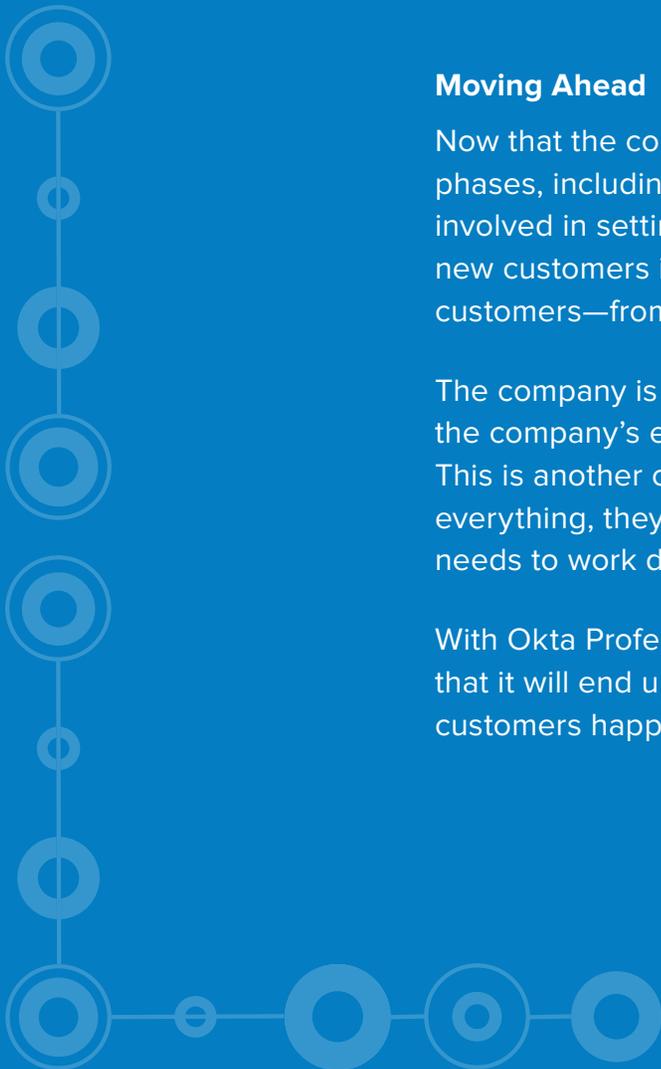
“They were very pleased with how Professional Services engaged. We put our best foot forward and brought a strong architecture that would scale. We understood the issues that they were having initially and we reconciled them. We were extremely responsive, very prescriptive, and designed a path forward so they could be successful.” —**Dave Fend**

### **Moving Ahead**

Now that the company has achieved the first goal, the team has started working on the next phases, including building out the Okta APIs. This will allow the company to trigger all of the steps involved in setting up the environment for new customers, simply by entering information about new customers into the hub. Ultimately, this feature reduces the time required to set up new customers—from weeks to a single day.

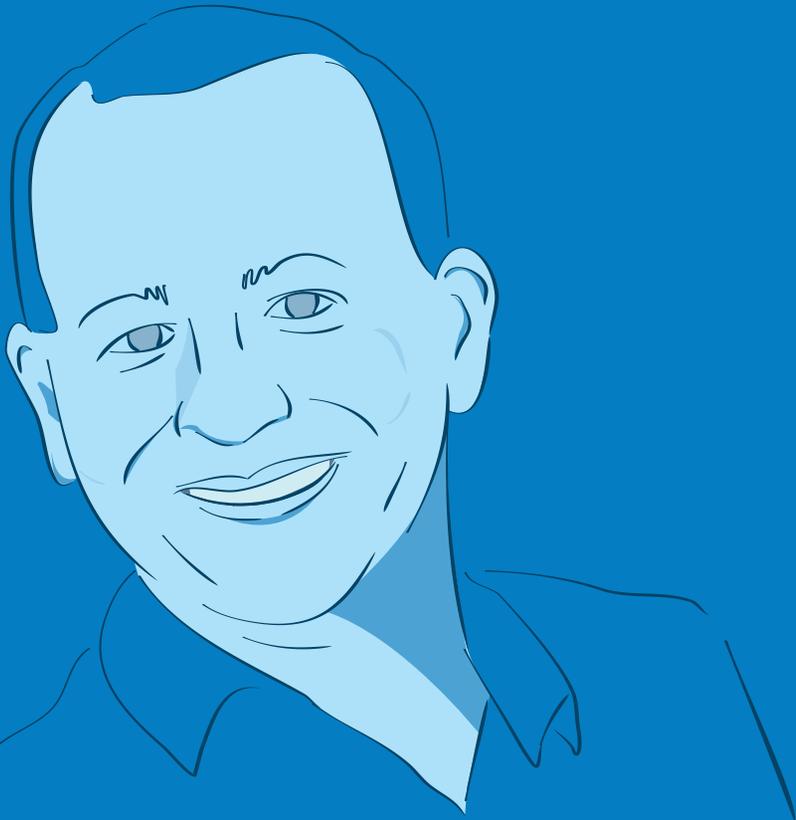
The company is also working with another Okta Professional Services team to set up access for the company’s employees. In this case, they’re rolling out SSO to another Okta org for internal use. This is another complex project because, while the employees will be able to use the same ID for everything, they need to be able to access the individual customer orgs too. That means the SSO needs to work differently for employees than it does for candidates, and even customer recruiters.

With Okta Professional Services to help with the strategy and the build, the company is confident that it will end up with a scalable, user-friendly product that will keep employees, candidates, and customers happy.



# Meet Dave Fend,

## Okta Senior Services Architect



Dave Fend has been working in identity and access management space for 17 years. He has a strong background in engineering and product management, with special expertise in SaaS. Fend also wrote the code for an IDaaS product that's been heavily used by a number of large corporations.

When Okta started expanding into large enterprise, platform, and API products, his credentials were exactly what the company needed. The feeling was mutual; for Fend, Okta seemed like the next logical step in his career path. It helped that he'd already talked to a number of people at Gartner—and all of them had emphasized Okta's commitment to its customers. That was two years ago.

Before working at Okta, Fend had never worked in a Professional Services capacity before. However, with his product knowledge, engineering background, personal interest in IoT, and desire to help customers get the most out of their products, he's a natural fit for his role.

Fend has been responsible for helping implement millions of identities around the world and over 20 deployments of Okta.

“I talked to a lot of different people at Gartner in my last job, and the one thing that I always heard about Okta was how great it was with its customers. It sounded like a good fit for me.”



## Challenge Five

# Securing Loyalty + eCommerce Apps for Millions of High Touch Customers

When a large retail organization decided to use Okta as the centralized identity layer for its customer-facing loyalty and e-commerce web and mobile apps, it needed a team of Okta experts to guide and manage their implementation. Engaging Okta Professional Services allowed their teams to focus on what they do best—building and securing the apps, while relying on PS to help design the approach and keep the project on track.

### Company Profile

A large retail organization with more than 15 brands and 15 million frequently active users.

### From the Ground Up

When you have over 15 brands, and 15 million active customers, replacing your identity solution for your customer-facing apps can be a challenging process, especially when it comes to security and identity. So when a large retail organization wanted to redesign the security for its loyalty and e-commerce apps, it also started looking for a reliable identity partner that would not only provide security, but also streamline identity processes—all while staying invisible.

A new identity solution was necessary because their previous solution, a legacy OpenSSO stack with LDAP for external identity management, was too complex, expensive, and time-consuming to maintain as well as being EOL-ed by the vendor. The old stack was also not scaling very well and

was the bottleneck in the multi-channel marketing strategy the customer had devised to stay competitive.

Okta was the perfect fit, and its 99% uptime was one of the main benefits. With Okta involved, there's no hardware to maintain, support for modern standards like OpenID Connect is built in, and much of the identity management workload can be automated. Resources are saved in other areas too, like help desk, where Okta typically results in fewer password reset tickets.

Okta's out-of-box solutions are far easier to deploy than traditional on-prem solutions, but building a centralized identity layer for 15 brands does not come without its challenges. So the company decided to hire **Okta's Professional Services** team. It wanted to be able to focus on building and adapting the new apps, while relying on the PS team for design and implementation guidance. This helped them deliver the solution as effectively and efficiently as possible.



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“We highly recommend that our customers hire the expertise needed to deploy complex use cases. Whether it’s Okta PS or one of our partners, we think it’s smarter for them to invest \$10 to do it right up-front than spend \$50 later to fix everything.” —Kirby Frank

### **Taking the Pressure Off**

The project began like most of Okta’s implementations: Kirby Frank, the senior technical project manager assigned to the project, brought his team to meet with the customer, and they talked about requirements, gathered information, and came up with a reference architecture design that centered on [Okta’s Platform APIs](#) and [API Access Management capabilities](#).

When APIs are involved, this process is often even more collaborative and interactive than usual because both parties are responsible for different sides of the same coin. Professional Services handles the Okta side, providing information and making sure that the Okta APIs and features are ready to be integrated seamlessly, while the customer adapts its products to integrate with Okta.

The collective team was fairly large. Okta Professional Services brought three experts to the table, while the customer brought about 20, including project managers, architects, customer experience experts, developers, and quality assurance experts. Frank’s team was embedded in the customer’s team, and interacted most with the customer’s architect and lead developers. Eight months later, design, development and testing were complete and the customer had deployed the solution to the first brand.

The project was successful for a couple of reasons. Some of that success is owed to Okta’s products, which offer the agility, cost-savings, and reliability the customer needed. But Professional Services also made a major impact. Because Frank and his team are Okta specialists, they’re better equipped to help customers deploy or integrate with Okta.

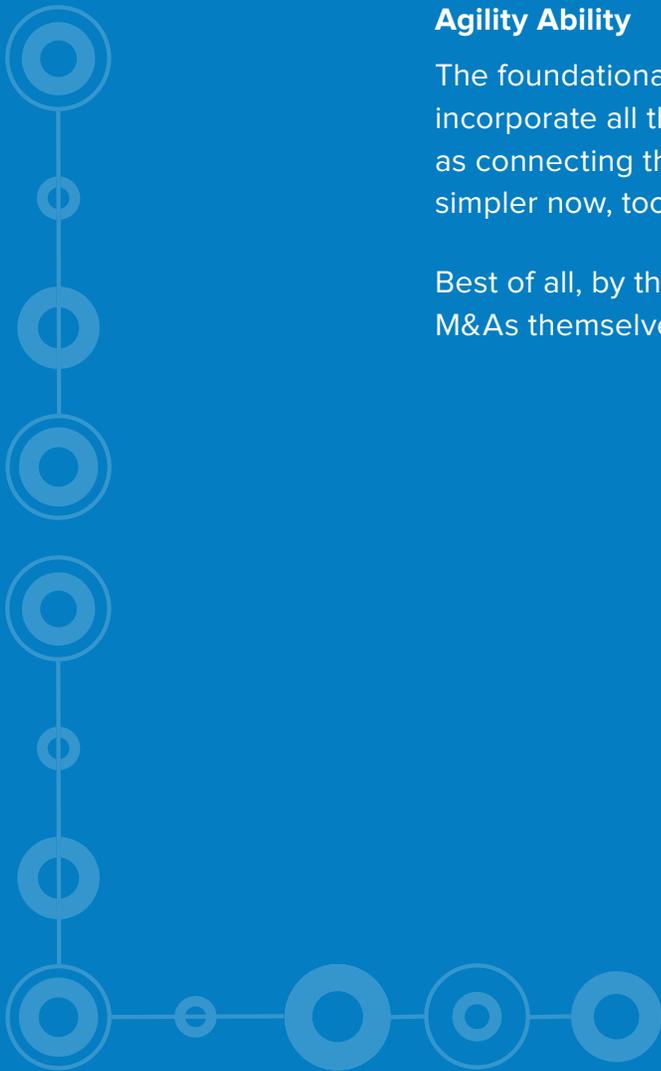
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“We built a tailored solution as the foundation, scalable to meet their future expansion goals. For example, in this case, they have multiple brands. But because we built a central identity layer, they can reuse the integration for all of them.” —Kirby Frank

### **Agility Ability**

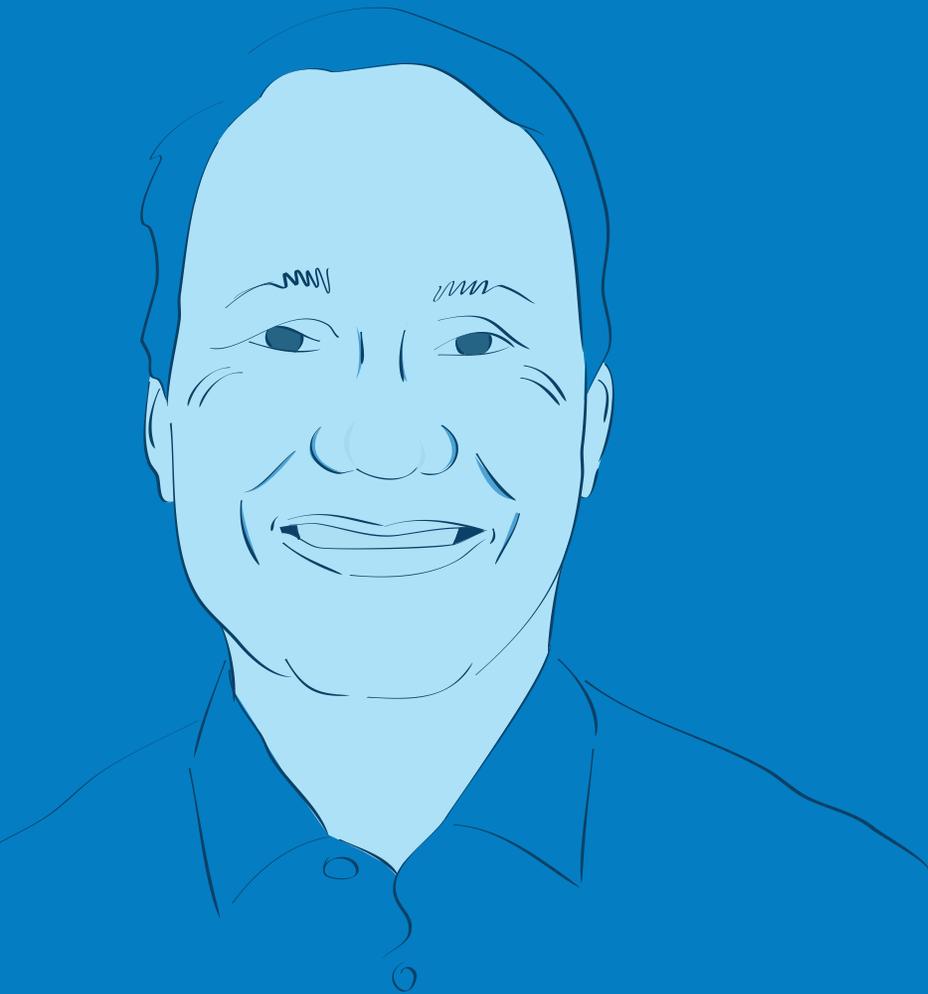
The foundational solution the customer has adopted provides them with the flexibility to incorporate all the other brands. Now that the first brand is set up, the process will be as simple as connecting the code bases to the foundation. Mergers and acquisitions (M&As) will be much simpler now, too—the company will just need to do some customization to integrate new apps.

Best of all, by the time this project is finished, the customer will have the expertise to manage M&As themselves—thanks to the on-the-job training provided by Okta Professional Services.



# Meet Kirby Frank,

## Okta Senior Technical Project Manager



Kirby Frank has been working as a project manager for 19 years. Consequently, he has developed an innate ability to spot project risks and proactively tackle small issues before they cause bigger problems. Two and a half years ago, he decided to bring those years of experience to Okta. The draw? He saw the inefficiencies of on-prem solutions and wanted to help other organizations move to best-of-breed cloud solutions.

Working for Okta gives Frank the opportunity to do just that. With more than 50 large enterprise Okta projects under his belt, he's developed a high level of expertise in security and identity management, complimenting his already-strong project management skills.

Frank says the most rewarding part of his position at Okta is working with his dedicated and experienced team. Some of them have been working in the identity space for over 15 years and helped shape Okta's product offerings and capabilities.

“A lot of very bright and interesting people work at Okta. They all believe in the vision of connecting everything and take an open-minded and collaborative approach to solving our customers' unique problems.”

# Conclusion

## Smooth Deployments

The world is moving to the cloud, and identity management is clearing the way. Whether you want to increase your agility or set up greenfield infrastructure to support a brand new loyalty app, it can be challenging. That's why you need an expert with the expertise in identity, the cloud, and much more—someone who is dedicated to business objectives and success.

We know that every situation is different. But whether you're dealing with outdated legacy infrastructure, tight timelines, or limited internal expertise, these obstacles shouldn't affect your bottom line. That's why Okta Professional Services is here to help.



## How it Works

Every Professional Services experience begins the same way: with a series of discovery sessions designed to identify your business and technical requirements—as well as any possible risks. After we've outlined your needs, we'll work with you to design a customized solution that fits your exact specifications.

Our delivery team is flexible enough to fill a technical gap in your IT team or oversee a implementation. No matter what you need, we'll help you configure and build your solution, and ensure a successful deployment.

It doesn't stop there, Okta's Professional Services will also make sure everyone understands how to use the new technology.

Contact us today and get started

### Additional resources to learn more:

- [See more customer stories from your Okta Identity experts](#)
- [Meet your Okta Identity experts webinar](#)
- [Identity, untangled—we've got this](#)

## About Okta

Okta is the leading provider of identity for the enterprise. The Okta Identity Cloud connects and protects employees of many of the world's largest enterprises. It also securely connects enterprises to their partners, suppliers and customers. With deep integrations to over 5,000 apps, the Okta Identity Cloud enables simple and secure access from any device. Thousands of customers, including Experian, 20th Century Fox, LinkedIn, Flex, News Corp, Dish Networks and Adobe trust Okta to work faster, boost revenue and stay secure. Okta helps customers fulfill their missions faster by making it safe and easy to use the technologies they need to do their most significant work.



Learn more from our team, meet the experts at [okta.com/experts](https://okta.com/experts)

