



# HOW TO BALANCE SECURITY & CX FOR A FRICTIONLESS CUSTOMER JOURNEY

Improving CX with Customer Identity  
& Access Management (CIAM)

**ebook.**



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# 1.

**BALANCING SECURITY  
AND CUSTOMER EXPERIENCE  
FOR A FRICTIONLESS  
CUSTOMER JOURNEY.**

3.



# INTRODUCTION

The way people buy goods and services online is changing all the time. Competition is stronger than ever in saturated marketplaces, and customer loyalty is at an all-time low. Consumers have never found it easier to shop around to meet their various buying needs.

## WHAT'S MOST IMPORTANT TO CUSTOMERS ISN'T ALWAYS THE LOWEST PRICE.

The experience they get through the buying journey is just as important, and online businesses who aren't delivering on speed, convenience and accessibility are suffering from high rates of abandonment.



The statistics tell a compelling story:

30%

Of customers loyal to a brand would stop doing business with them after just one bad experience. (PwC)

# 70%

Of all shopping carts are abandoned before they reach the checkout.

# 90%

Of consumers say they'd rather leave a site than go through a 'traditional' registration system (Crazy Egg)

# IT'S ABOUT SPEED & SIMPLICITY

That last statistic underlines the important role that the registration process has to play. Consumers expect registration to be fast, simple and seamless.

However consumers want sufficient levels of security to reassure them that their personal data is safe.

## DATA PRIVACY IS MUCH MORE OF A CONCERN FOR CONSUMERS

Even compared to a couple of years ago recent high profile data breaches have raised general awareness of unethical digital practices.

As a result of these data privacy concerns, customers who find an experience falling short in any of these fundamentals are likely to ditch their journey in favour of a direct competitor – even if, in some cases, that means they have to pay more.

This demonstrates just how significant the registration process is to your entire online customer journey. In this guide, we'll look at the most common problems consumers encounter, the technology and analytics that can help solve those problems, and provide you with an eight-step framework for its successful implementation.



# 2.

THE IMPORTANCE OF A  
SECURE, FRICTIONLESS  
CUSTOMER EXPERIENCE.



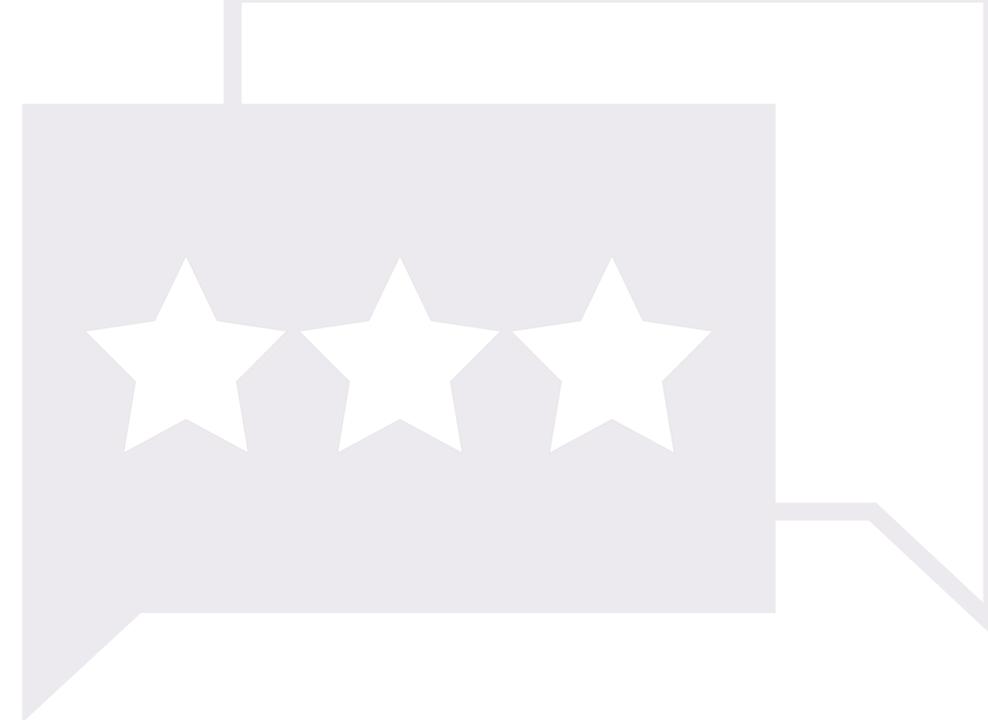
# THE IMPORTANCE OF A FRICTIONLESS, YET SECURE CUSTOMER EXPERIENCE (CX)

One of the best ways of attracting new customers and retaining them in the long-term is to consistently make their experiences of dealing with you as easy as possible. That applies everywhere – whether they buy from you in store, whether they call customer service or whether they buy from you online.

In the latter case, ‘easy’ doesn’t just mean being able to complete transactions quickly at the shopping cart or equivalent stage.

It also means being able to navigate forms within the registration process, and not having to share any more personal data than customers feel is absolutely necessary.

Naturally CMOs want to make the registration process as easy and convenient as possible, whereas security and identity teams need to ensure any risks are minimised.



If the registration process is too easy, it may be vulnerable to exploitation by malicious actors seeking unauthorised access. If it’s too clunky, consumers will normally abandon the process.

If you can strike the right balance, and give customers the seamless experience they want and expect, then you’ll boost user numbers and revenue.

Not only will customer attraction and retention be more straight-forward, you’ll be able to gain detailed insights into their preferences – enabling you to personalise experiences and target them with more relevant offerings.

# REGISTRATION: THE FRONT DOOR TO YOUR CUSTOMER JOURNEY

The process of customer registration and verification arguably represents the first major step in your customer experience. Yet, even though it's typically the stage where more abandonments occur than anywhere else, CMOs and CX teams generally don't have control or management over it.

Registration may be 10-15% of the overall customer journey online, but it's the interaction that a prospect has to make a real commitment to - by sharing their personal details.

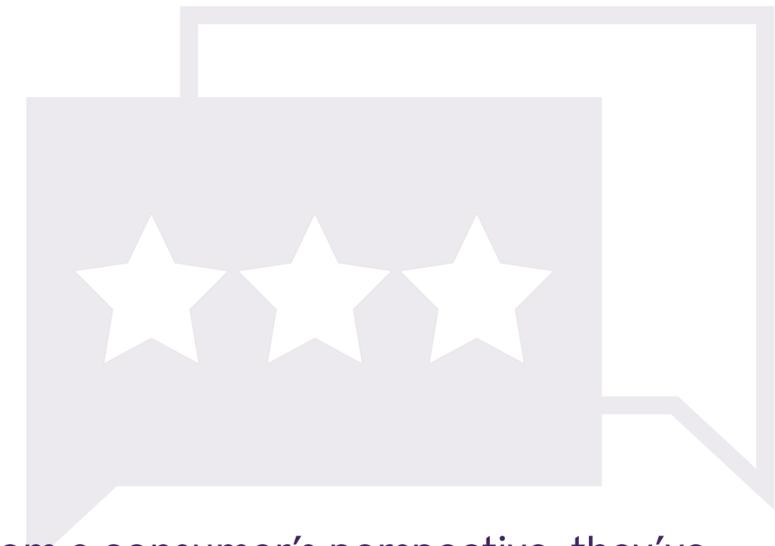
Even the slightest thing can put consumers off from submitting a form in this pivotal moment.

The problem is that registration is often approached with an emphasis on security, rather than CX. Registration still tends to consider data protection paramount, regardless of how irritating or time-consuming the process is for the user.

## CYBERATTACKS ON PERSONAL DATA ROSE BY 400% IN 2020

To a degree this is understandable. [Cyberattacks on personal data rose by 400% in 2020 alone](#), and this in part has led to consumers becoming increasingly wary of handing over their data. Nevertheless, an onerous security-driven process is still a major barrier to customer registration.

Another consideration is the number of times consumers interact with you before making a purchase and the different devices they use to do so.



From a consumer's perspective, they've got one single identity that they're known by, so they don't expect to have to duplicate form fills on a desktop and then on a mobile device. Instead, they want every interaction with you to be conducted in a quick, joined-up and seamless way.

Ultimately, excessive security design can lead customers to abandon their buying journey or to complete it, but still be left with a much lower regard for a brand as a result. Either way, it means losing out on potential new customers and revenue, and often sending lost buyers into the waiting arms of direct competitors.

# COMMON REASONS FOR ABANDONMENT AT REGISTRATION

The focus on security is a major reason why consumers abandon buying journeys at the point of registration, but there are several more practical factors at play, too.

A form that is just too long is one of them: [Finance Online research](#) has found that 60% of abandonments are caused by either form length or security concerns.



# IDENTIFYING REGISTRATION ISSUES

Other common reasons consumers abandon buying journeys include and are not necessarily limited to:

- Forms that are poorly designed, that keep malfunctioning or that are translated badly
- More layers of authentication and verification than customers feel are necessary
- Multiple requests for the same information to be entered by the customer
- Inconsistent experiences across different types of device e.g different modes of authentication for mobile compared to desktop

Basic customer conversion metrics can highlight the existence of one of the above problems.

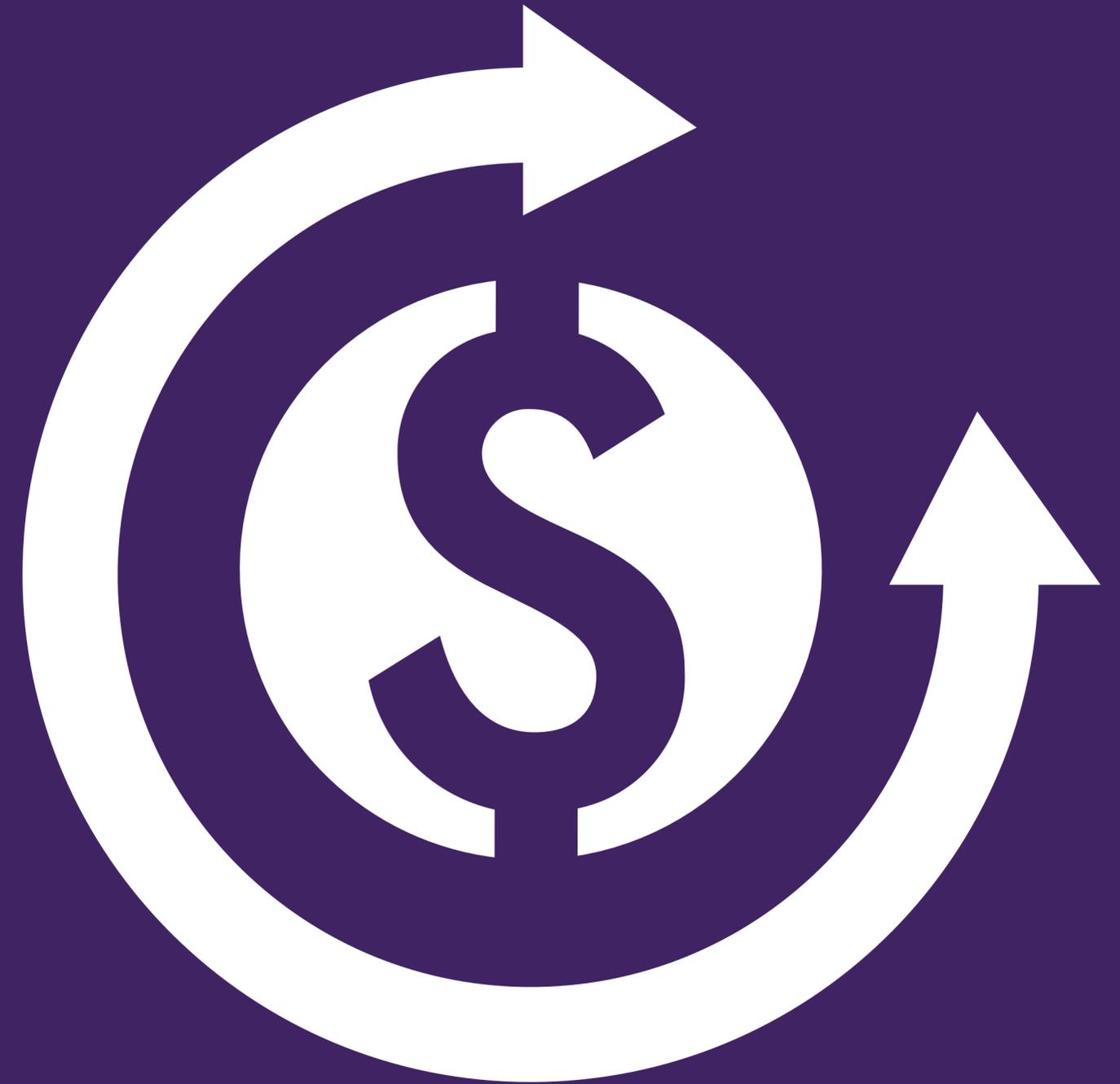
If, for example, registrations or take-up of a service fall short of expectations; or there is a high rate of incomplete registration; or there are large numbers of orphaned and dormant accounts – then there is an issue.

**THE PROBLEM, HOWEVER,  
IS IDENTIFYING EXACTLY WHAT  
THE ISSUE IS - AND THAT IS  
WHERE CIAM COMES IN.**



# 3.

HOW CIAM CAN IMPROVE  
CUSTOMER EXPERIENCE  
ROI AND BOOST REVENUE



# WHAT IS CIAM?

Customer Identity and Access Management (CIAM) is an invaluable tool for CX professionals, providing secure customer authentication with minimal disruption to the customer journey. CIAM solutions allow businesses to analyse each session and trustworthiness of the customer's identity in order to decide the authentication level that seems necessary – making security visible only when absolutely essential. This helps keep the user experience secure, yet as smooth and friction-free as possible. CIAM can also be used to streamline end-to-end customer journeys by helping reduce login times through single sign-on (SSO) across all digital channels, prompt customers for multi-factor authentication (MFA) for additional security only when necessary and ultimately move towards a secure, convenient and passwordless authentication experience.



# HOW CIAM CAN IMPROVE CUSTOMER EXPERIENCE ROI AND BOOST REVENUE

As mentioned in the previous section, when it comes to registration processes there's a delicate balance to be struck between security and customer experience.

Many businesses that have been struggling in this area are now coming to the realisation that registration should be both frictionless and secure.

CIAM (Customer Identity & Access Management) is the most effective way to achieve this.

CIAM allows you to deploy a user-friendly and fully secure registration process that combines a number of different technologies.

The best and most streamlined solutions tend to encompass commonly recognised single sign-on (SSO) technologies (such as signing in through social media), with accessible and effective multi-factor authentication (MFA) processes.

From a customer perspective, CIAM is a win-win situation. Buyers can save time (and potentially a lot of stress) by using a registration process that's quick, simple, intuitive and closer to the experiences they're used to from other leading retail and social media platforms.

They can also feel confident that they aren't sharing more personal data than they need to.

A strong CIAM platform can also be hugely beneficial for the business deploying it, too. CIAM gives you more flexibility to design a registration process that makes sense for you and for the customer.

Such a platform allows you to gain real-time, actionable insights as to how users are engaging with forms and screens, and to continuously improve their experience over time.

# THE INTRODUCTION OF ADVANCED CIAM ANALYTICS

While CIAM has always made it possible to make changes to registration processes and then see the impact on results, businesses have not been able to perform in-depth root-cause analysis.

CIAM hasn't previously encompassed the advanced analytical tools that help businesses understand exactly where problems in user registration are truly happening.

This is partly because CIAM has historically been approached as a security enabler, rather than a CX one, and partly because it has been relatively difficult to embed detailed analytics into CIAM.

Yet today, leading CIAM platforms can now capture and visualise user journey metrics, specifically through the CIAM processes of registration, verification and authentication.

They can provide real time analytical information as to how long the processes are taking, which screens or processes are facing the highest abandonment rates or are taking multiple times to complete.

This tooling enables CMOs to identify friction in their CIAM system, with the use of A/B testing allowing for these hypotheses to be proven or disproved.

CIAM will enable you to design the best journeys and best flows through these important stages in the customer journey. There's never a one size fits all approach.

There are many trade-offs to balance in terms of speed & convenience vs security, information required vs perceived value of the exchange i.e. what does the customer get in return for sharing their personal information?



**“There’s never a one size fits all approach.”**

# IT'S IMPOSSIBLE TO DESIGN THESE PROCESSES BASED ON LIMITED INFORMATION AND GUESSWORK.

You need to get granular with the user data for each stage and then you need to continually iterate, fail fast, fail quickly and move on – A/B testing with a small percentage of the population and see what makes the difference to conversion and abandonment.

These insights can help you gain a clear understanding of the impact that a good (or bad) registration process has on revenue – ensuring you can minimise abandonment and maximise conversion.

It also becomes much more practical to learn from the changes to key metrics, or to test different solutions to problems simultaneously, and make improvements far more quickly than they've been able to before.

In the next section, we provide a framework for implementing CIAM analytics to help your businesses go from feeling that you've created a balanced registration process, to knowing that you have – and identify what you might still need to improve.



# 4.

## A FRAMEWORK FOR STARTING WITH CIAM ANALYTICS



# A FRAMEWORK FOR STARTING WITH CIAM ANALYTICS

The main reason that registration has been absent from customer experience analytics is because it's been very difficult to implement. Registration has tended to require large volumes of custom code, meaning that embedding analytics into it has been complex, time-consuming and therefore very expensive.

However, CIAM technology has now developed to the point that the leading solutions on the market are low-code compared to what has gone before. This means it's now possible to capture data every time a prospect interacts with a form, and put the information in context with the rest of the journey.

Every time a prospect goes into a form, you're capturing it. When they come out of the form, you're capturing it. Then you can reconcile that back to each individual user journey.

**CMOs AND CX MANAGERS CAN SEE WHERE A USER'S JOURNEY HAS STARTED, AND PERHAPS MORE IMPORTANTLY, WHERE IT'S ENDED.**

You can break it down by screen, assessing which screens are taking multiple times to complete – and which screens are users not able to complete. You'll also be able to determine where the logins are coming from and what devices are being used.

This information can be easily visualised through the CIAM solution's integrated dashboard, so you can see what is happening end-to-end. Not only do the dashboards present the information elegantly, they enable you to perform a deep dive to find correlations.

# AN 8-STEP FRAMEWORK FOR IMPLEMENTING ADVANCED CIAM ANALYTICS

Registration is now ripe for the same level of analytics and insights as most other stages of the customer journey.

However, getting CIAM analytics up and running still requires careful planning and implementation. As a guide to what success should look like, this eight-step framework represents what most would consider best practice:

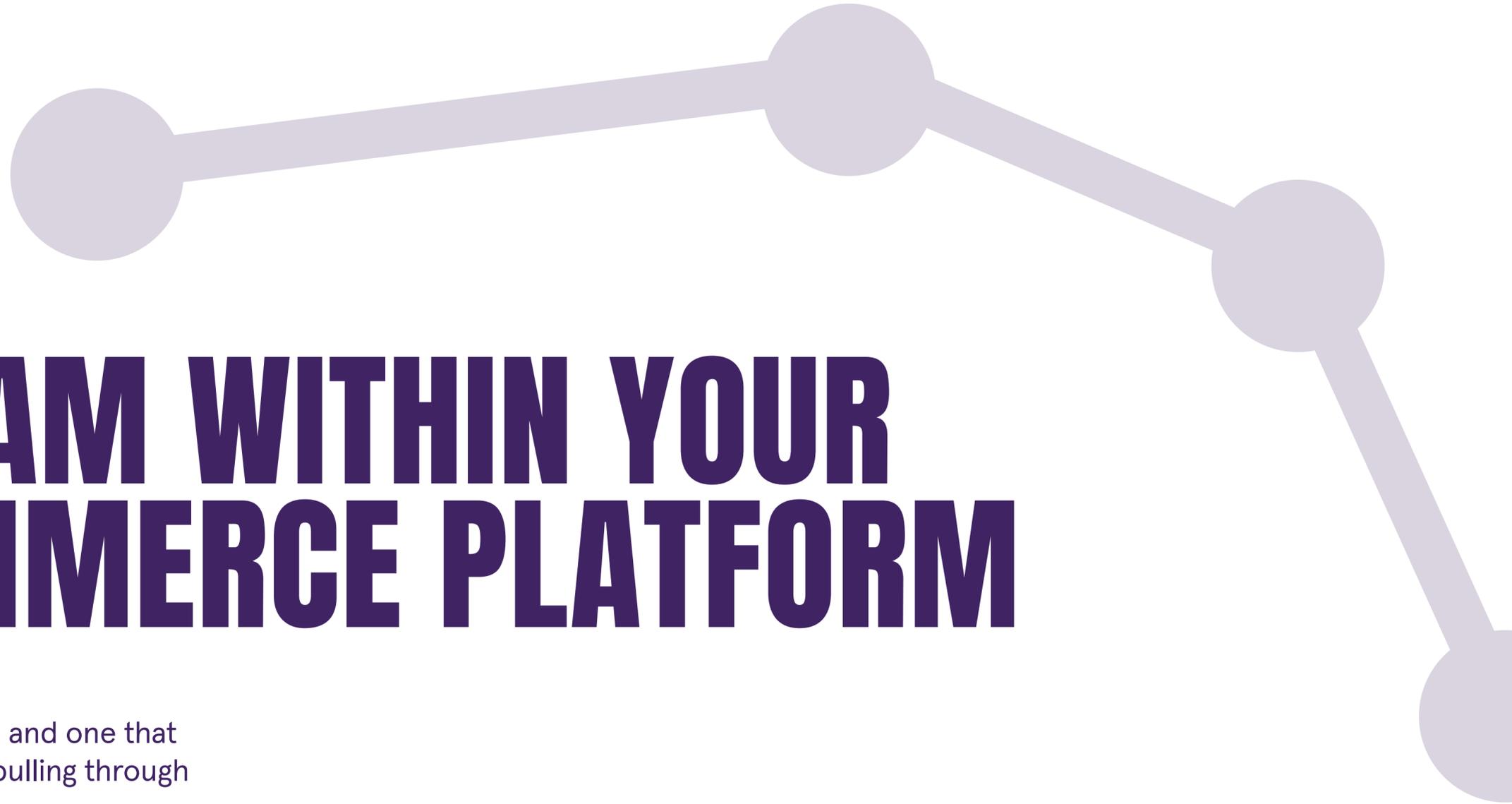


# 1.

## MAP OUT YOUR CURRENT REGISTRATION PROCESS FLOW

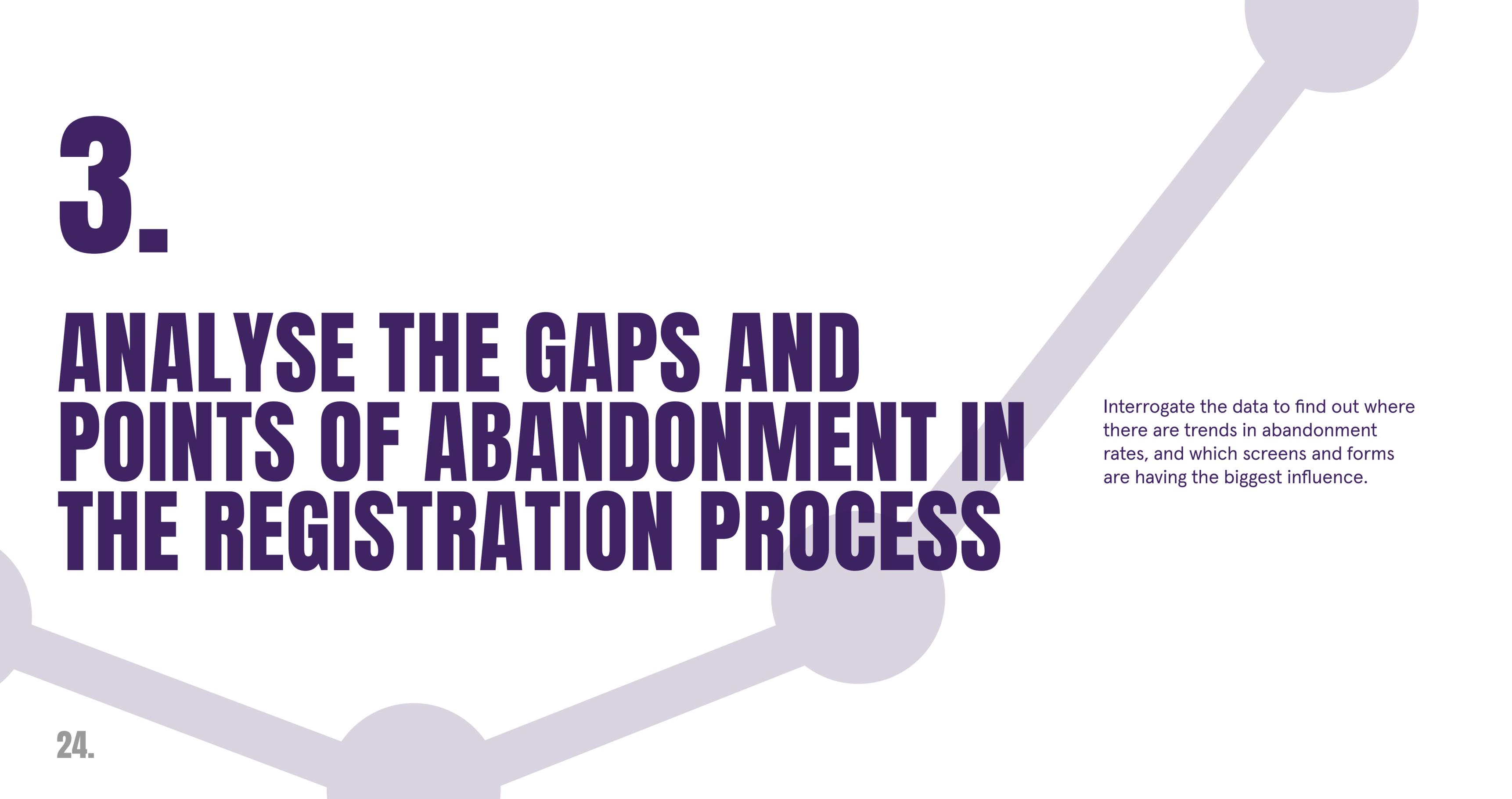
First of all, it's important to map out your current key process flows within your registration process, so that you understand what goes where. This mapping should be as granular as possible, so that you can gain a detailed understanding.

# 2.



## **IMPLEMENT CIAM WITHIN YOUR WEBSITE/ECOMMERCE PLATFORM**

Ideally, this should be a low-code or even a no-code solution, and one that incorporates a user-friendly dashboard so that you can start pulling through data and visualising insights.



**3.**

**ANALYSE THE GAPS AND  
POINTS OF ABANDONMENT IN  
THE REGISTRATION PROCESS**

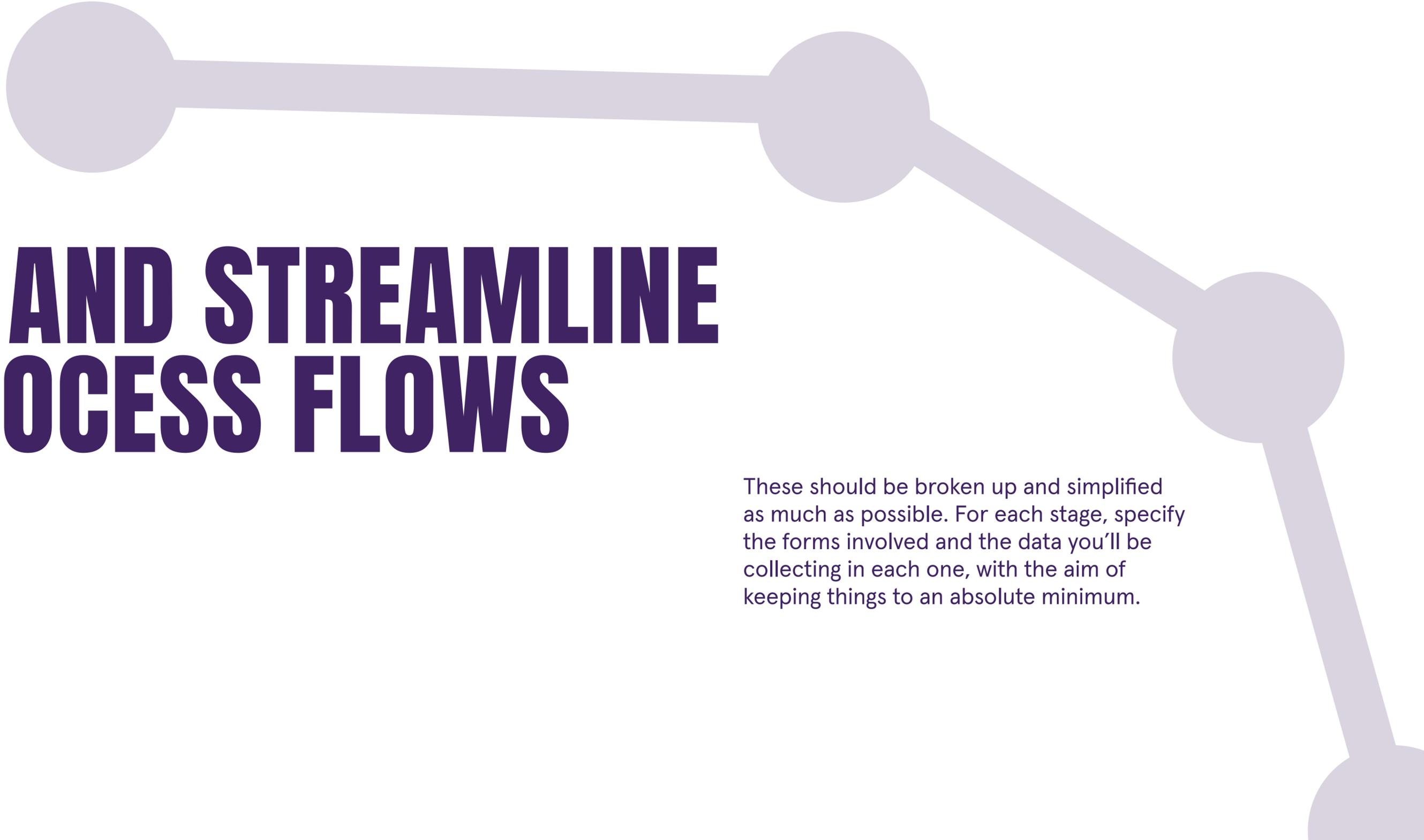
Interrogate the data to find out where there are trends in abandonment rates, and which screens and forms are having the biggest influence.

# 4.

## RE-EVALUATE YOUR CUSTOMER DATA REQUIREMENTS

Start by working out which data you need to collect, and which data would be nice to collect. This can then be balanced against how easy or difficult it will be to collect that data, and whether the level of complexity will frustrate the customer and lead to higher abandonment rates.

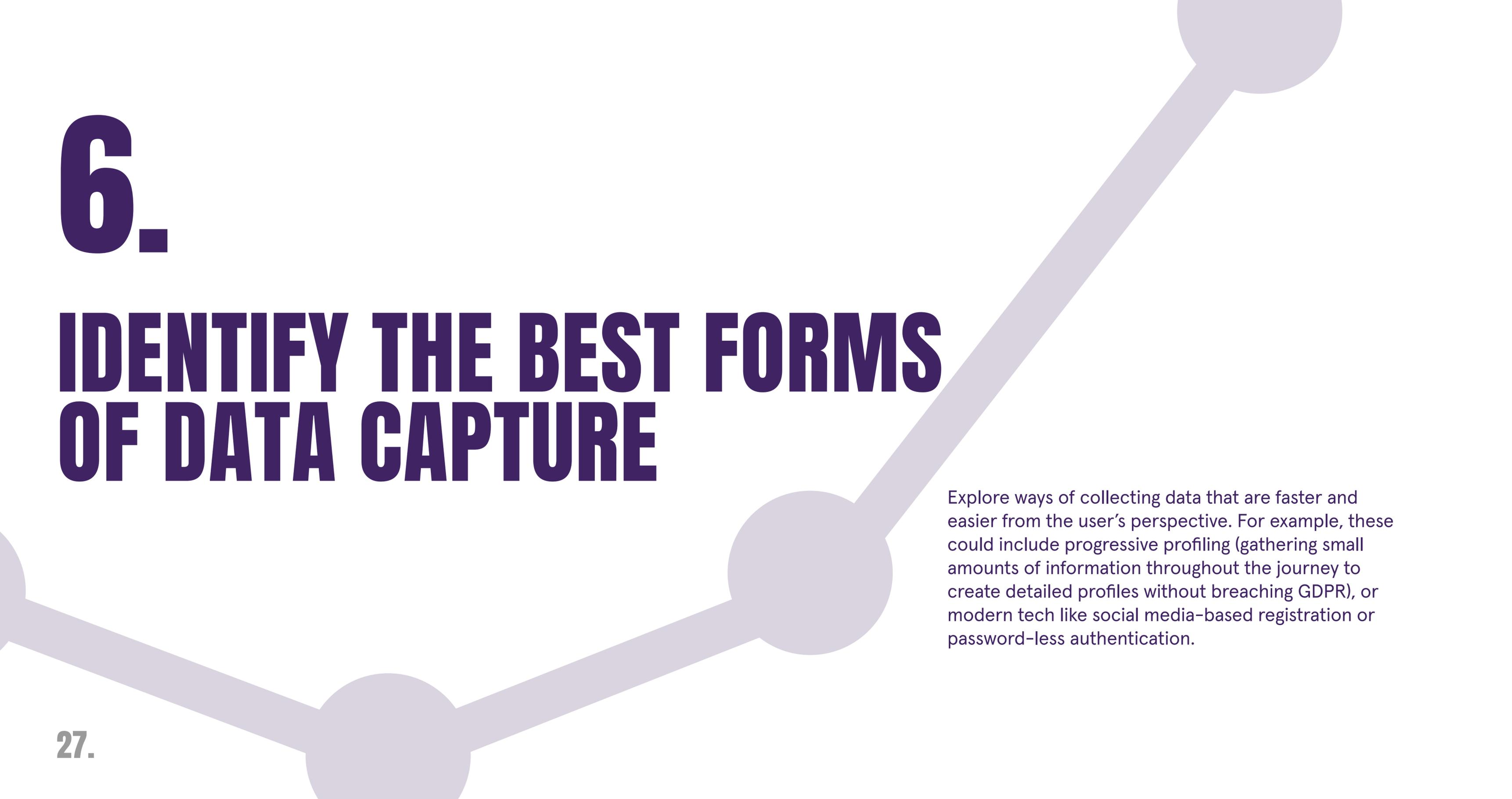




# 5.

## RE-MAP AND STREAMLINE YOUR PROCESS FLOWS

These should be broken up and simplified as much as possible. For each stage, specify the forms involved and the data you'll be collecting in each one, with the aim of keeping things to an absolute minimum.



**6.**

# **IDENTIFY THE BEST FORMS OF DATA CAPTURE**

Explore ways of collecting data that are faster and easier from the user's perspective. For example, these could include progressive profiling (gathering small amounts of information throughout the journey to create detailed profiles without breaching GDPR), or modern tech like social media-based registration or password-less authentication.

# 7.

## TEST AND LEARN

Trial new solutions on particular screens and forms to solve individual problems, and use A/B testing to compare different solutions and quantify which is the best to go forward with.





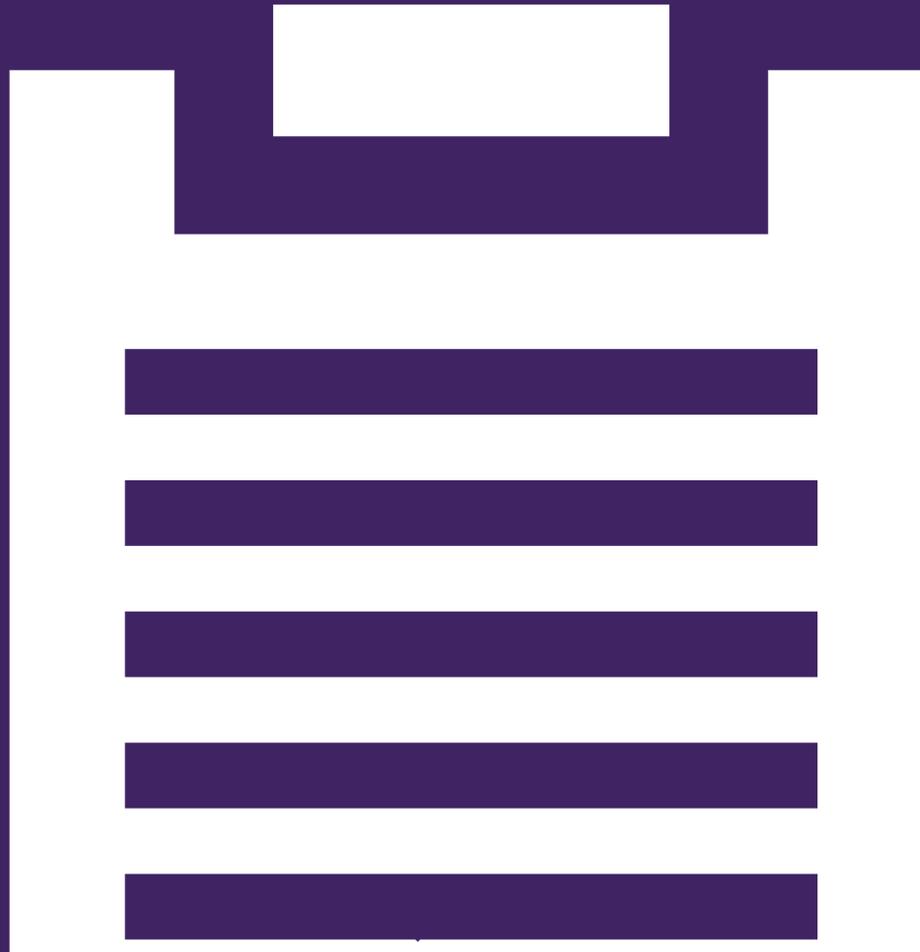
**8.**

# **IMPLEMENT, REVIEW AND REPORT**

You can then embed the new solution in the journey, although this should be complemented by ongoing analysis of success, and how the abandonment rates reduce over time. Additionally, measuring and reporting on customer experience KPIs can chart the wider impact on sign-ups and customer conversions.

# 5.

## SUMMARY AND KEY TAKEAWAYS



# SUMMARY AND KEY TAKEAWAYS

It's clear that the importance of a simple, stress-free registration process is vital from a customer experience perspective. It's the front door to the whole customer journey, and an area where CMOs and CX teams are rightly collaborating more with identity and security teams – with the understanding that they'll be missing out on customers and revenue if they don't.

CIAM brings everything together for CX, security and customers alike, and CIAM analytics can deliver the actionable insights needed to perfect your registration processes. As you explore a CIAM deployment in your organisation, ensure you consider what you want to achieve from it and how the technology can contribute to reaching your goals.

**IN PARTICULAR, YOU SHOULD EMBRACE CIAM IF YOU'RE SUFFERING FROM A PARTICULARLY HIGH RATE OF REGISTRATION ABANDONMENTS, OR IF YOU KNOW THAT THERE IS A PROBLEM WITHIN YOUR REGISTRATION PROCESS BUT HAVEN'T BEEN ABLE TO PINPOINT EXACTLY WHAT IT IS.**

In either case, we recommend following our eight-step framework to get started, and move towards a user registration process that's as frictionless as the rest of your buying journey.

1. Map out your current registration process flow
2. Implement CIAM within your website/ecommerce platform
3. Analyse the gaps and points of abandonment in the registration process
4. Re-evaluate your customer data requirements
5. Re-map and streamline your process flows
6. Identity the best forms of data capture
7. Test and learn
8. Implement, review and report



## WHAT NEXT?

If you need help you to kickstart a streamlined registration process with ease. Tap into our 8-step framework for a new insight and strategies to improve CX.

[Check in](#) with the CX identity experts.

**ProofID.com**

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