

Customer Stories





A Leading Financial Services Company with \$1.9T in Assets

PlainID powers secure access to the organization's 300 internal workforce applications. The organization made the strategic decision to externalize their authorization policies from a legacy homegrown authorization engine to PlainID. This has enabled their organization to optimize developer and engineering workloads while increasing business agility by streamlining access entitlement decisions for the business.

CHALLENGE

The legacy, homegrown authorization solution didn't meet modern business requirements to achieve scale and flexibility.

With 300 workforce applications and over 90 enforcement points, the organization needed central, policy lifecycle management and reporting to provide their employees with secure and frictionless access for productivity and employee satisfaction.

SOLUTION

- PlainID Authorization Platform
- Custom SDK for Applications
- Centralized Policy Management and Reporting

BENEFITS

- Increased efficiency and productivity of employees with a streamlined access
- Reduced risk with dynamic authorization in real-time and enhanced visibility of access control
- Reduced developer workload by moving to externalized, modern AuthZ platform
- Enabled business agility and flexibility by allowing business owners the ability to determine access based on PBAC



A Global Leader in Tax Services

The organization selected PlainID to secure access to its Global Tax Platform. GTP is a customer-facing and revenue generating data platform which provides the organization's customers with real-time market leading tax information and advice. GTP also supports data collection and re-use for end to end delivery of tax services. The organization's tax services is an \$11B revenue business unit, and its GTP serves over 29k clients across 6,000 firms with a +60% YoY growth rate.

CHALLENGE

The company struggled with a legacy system that was fraught with manual processes, costly to manage and had high potential for security risk.

The organization needed a way to provide secure access to a revenue generating and mission critical platform. In addition, they needed to ensure that access to sensitive proprietary financial data was accomplished in a secure, flexible and agile way.

SOLUTION

- PlainID Authorization Platform
- Custom SDK for Applications

BENEFITS

- Seamless customer experience for users of the Global Tax platform
- Faster time to market as new applications and data are integrated with the platform
- Tighter security and control with externalized and standardized authorization, and the ability to managed all things policies centrally



A blurred background image of a financial market chart, likely a candlestick chart, with various data points and lines. The chart is displayed on a screen, and the overall tone is dark with some highlights from the chart's colors.

A Private Investment Firm

The organization is a 41 year old Investment firm with over \$584B in Assets. One of their core offerings is a 360 Platform, which draws upon decades of experience working closely with all types of financial professionals—from institutions to financial advisors. The organization provides comprehensive investment education, tools, and resources tailored to their specific needs of their financial clients, both individual and institutional investors.

CHALLENGE

The organization had a number of obsolete systems to maintain and control fine grained access to applications and power access control to their 360 Platform.

The organization required a modern approach that would allow them the flexibility and functionality to retire legacy Authorization solutions and improve business agility.

SOLUTION

- PlainID Authorization Platform

BENEFITS

- Protected 360 Platform and its revenue by providing a secure, frictionless user experience
- Reduced operating costs and increase operational efficiency
- Secured access to investment portfolio analytics and data models with dynamic access control





A Global Financial Services Group with over \$64T in Assets under Management

\$1 billion worth of transactions move through the this trading platform every week. The platform is used by large companies to purchase a mass of currencies for global expansion of their business. With such a large amount of money moving through the platform, it's understandable that it's under constant scrutiny for compliance. As a result, the organization looked at PlainID to replace their complex, homegrown Authorization model. The goal of the project was primarily to ensure compliance and secondarily to 1) reduce to the time of lengthy re-certifications from yearly to quarterly and 2) reduce the burdensome job of testing compliance every time a change needed to be made.

CHALLENGE

The homegrown, legacy Authorization solution was overburdened with security and compliance risks. 942 role sets needed to be checked against for access.

When a change was made in any field, compliance needed to be confirmed. The process was resource-intensive and the team felt constant pressure from the compliance team.

SOLUTION

- PlainID Authorization Platform
- Automation of re-certification through an Authorizer for Active Directory

BENEFITS

- Allowing customers from both companies to access their Account claims information after the merger
- It will allow non-technical users to test their rules and ensure complete coverage.
- Faster time to market as changes are integrated with the platform



Speciality Insurer for High Risk Property

A high-risk property insurer, with \$4.8 billion in annual revenue partnered, with PlainID to modernize access control for their DCE portal.

The company successfully implemented a modern access control system that ensures individuals have appropriate permissions to customer data based on their roles and responsibilities. The Platform's fine-grained authorization supports the organization's digital initiatives and enhances the overall customer experience.

CHALLENGE

The company faced challenges with their legacy Authorization system, which depended solely on Role-Based Access Control (RBAC). The limitations of RBAC prevented the system from meeting the business's needs in controlling access for both internal (employees) and external (brokers) users. Additionally, the company required fine-grained control and the ability to support their microservices without requiring extensive coding efforts.

The legacy system was resource-intensive when it came to registering changes. They needed a more flexible and dynamic authorization efficient and adaptable to rapid changes required for the business and user experience.

SOLUTION

- PlainID Authorization Platform
- 3rd Party Delegated Access

BENEFITS

- Gained business agility and flexibility by empowering business owners with the ability to define access using PBAC
- Centralized policy management and secured access with dynamic authorization
- Tighter security and control with an enterprise-wide authorization standard





Canadian Financial Services Cooperative

The company is a Canadian Financial Services cooperative. With 20.32B CAD in revenue and almost 54k employees, it is the largest federation of credit unions in North America. The company was looking for a dynamic authorization solution that would add a layer of security to their data virtualization tool.

PlainID's centralized Platform was integrated as the Policy Decision Point (PDP) and extended the virtualization tool as the Policy Enforcement Point (PEP). This helps to protect and control access to the company's data while providing visibility into who/what can access what and from where.

CHALLENGE

The company uses a data virtualization tool that connects distributed data assets. While it consolidates data sources, it does not focus on security. The tool offered Role-based access control (RBAC), but lacked the capability to provide granular access at the column and row level.

The organization had no visibility of access control and lacked central management for access policies, leaving them vulnerable for potential data breaches.

SOLUTION

- PlainID Authorization platform with Dynamic Authorization through a Policy-Based Access Control (PBAC) strategy.
- Denodo Authorizer as PEP

BENEFITS

- Protect and control access to data with policies to apply row-level filtering based on user attributes and context.
- Ensure data privacy and compliance by the ability to present users with only the rows of data they are authorized to access.
- Reduce risk with dynamic authorization in realtime and enhance visibility of access control
- Enable business agility and reduce operational costs





Global Consulting & Technology Services Company with over \$64.5B in Revenue

A leading global professional services company that operates in over 120 countries, serving most of the Fortune Global 500.

They chose PlainID for its robust PBAC framework to centralize and streamline authorization, ensuring real-time data access control, improved business agility, and enhanced governance and compliance.

CHALLENGE

The organization recognized the importance of unified and efficient process for cross-application data access control that enables users to access the same datasets across different applications.

However, the risks posed by fragmented authorization, where authorization logic resides within each application separately, lead to inconsistencies in policies. Scalability was another concern, as several applications could not integrate with their RBAC platform, which reduced their ability to control and audit user access effectively. compliance and maintain security.

SOLUTION

- The PlainID Platform for Centralized Management and Policy-Based Access Control (PBAC)
- PlainID Authorizer™ for PowerBI
- PlainID Authorizer™ for Google BigQuery
- PlainID Authorizer™ for PostgreSQL

BENEFITS

- Gained consistency, auditability and visibility of teams/clients of the Global Service Integrator and their access to data sets
- The ability to run 250,000 queries per hour through Google BigQuery with decisions and enforcement provided by PlainID in real-time





Top 4 US Financial Services Company with \$1.68T in Assets

A US bank operating in over 160 countries recognized Zero Trust as an essential organizational and cultural shift. They sought a PBAC solution to automate access control, reduce operational overhead, and simplify Global IAM Operations.

They chose PlainID to achieve a zero-trust architecture, emphasizing the platform's capability to support collaboration across architecture, engineering, and operations teams.

CHALLENGE

The financial services company embarked on a journey to implement a Zero Trust Architecture, recognizing the necessity of PBAC at key layers of their architecture, such as Zero Trust Network Access (ZTNA) and the Application layers.

To support their Zero Trust journey and reduce risk, the company is focused on laying down a robust foundation for PBAC in order to automate access control processes, reduce operational overhead, and mitigate key risk indicators while aligning with existing business logic. This required an integrated and identity-first approach to policy enforcement, factoring in identity, device, network, application, and data into the control plane.

SOLUTION

- The PlainID Platform for Centralized Management and PBAC framework
- Policy Orchestration and Enforcement via Authorizer for Zscaler Private Access
- Token Enrichment for applications managed by Ping Identity
- Dynamic Authorization for conditional access

BENEFITS

- Consistent access control for application security resiliency for the workforce
- Extended secure access control policies from Ping-managed applications down to the data layer
- Constructed a flexible Identity-centric framework to achieve a Zero Trust Architecture





Israel's Largest Banking Group with over \$574 Billion in Managed Assets

A leading bank in Israel recognized the critical need for secure and compliant access control as it transitioned for Open Banking and cloud modernization.

They chose PlainID to centralize the management of policies across their API and microservices environment, and enable collaboration between technical and business users.

CHALLENGE

A leading Israeli banking and financial institution, embarked on a digital transformation journey, to transition from monolithic systems to a microservices architecture and address Open Banking. The shift required a robust and scalable authorization solution to manage access control across a rapidly expanding ecosystem of services. The bank recognized the necessity of implementing a centralized authorization framework to automate access controls, reduce developer overhead, and ensure compliance with Open Banking. This called for an integrated approach to policy management that aligned with their existing architecture and operational processes between security, business, and developer teams.

SOLUTION

- The PlainID Platform for Centralized Authorization Management
- PlainID Authorizer for Microservices (sidecar for servicemesh)
- PlainID Authorizers for Apigee and AWS API Gateway (plugins)

BENEFITS

- Addressed Open Banking regulatory requirements and ensured consistent and secure access control across APIs and microservices
- Improved time-to-market with faster deployment of new digital services by decoupling authorization from application code, allowing developers to focus on business logic
- Established a flexible and scalable authorization framework to support the bank's ongoing cloud and digital modernization initiatives





US Health Insurance Provider with over \$100 Billion in Revenue

A Fortune 50 U.S. health insurance provider recognized the need to replace legacy authorization and modernize their access controls for enhanced security and operational efficiency.

They chose PlainID to centralize authorization across their applications and standardize access control for employees, customers, and third-party partners.

CHALLENGE

The leading US health insurance provider faced significant challenges in managing access control for over 50 million identities, including employees, customers, and third-party partners. The company needed to replace outdated data access technologies with a more advanced, scalable solution. Additionally, they sought to modernize a legacy workforce application that had been overdue for an upgrade for over 15 years. This modernization was critical for enhancing security, and optimizing user experiences across its vast ecosystem.

SOLUTION

- The PlainID Platform for Centralized Authorization Management
- PlainID Authorizer for EntraID
- PlainID Authorizer for ForgeRock
- PlainID Authorizer for SQL Databases

BENEFITS

- Improved the overall security posture by replacing legacy data access controls, ensuring compliance with data regulations and reducing risks associated with outdated systems.
- Achieved cost savings by displacing multiple legacy solutions, lowering operational overhead, and streamlining authorization processes.
- Ensured the provider could easily manage and scale secure access for its expanding user base, without additional complexity.

