

# Customer Stories



## 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 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.



## 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 a \$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 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

