

Modern onboarding

Some ideas, lessons learned & examples

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About me

Andreas Faltin

- Lead Cloud Architect
- With Cloudworks since 2019
 - Former Consultant, Architect & Trainer for
 - Microsoft Exchange & Office 365
 - Active Directory & Azure AD
 - PowerShell
- Based in Oslo, Norway
 - Originally from Nürnberg, Germany



Agenda

- What do we mean with modern onboarding?
- Ingredients
- Lessons learned
- Examples

Onboarding 101

“The action or process of integrating a new employee into an organization”

- Organizational Process

Often controlled by central departments, like HR, IT, Security.

Different requirements for most parts of the organization.

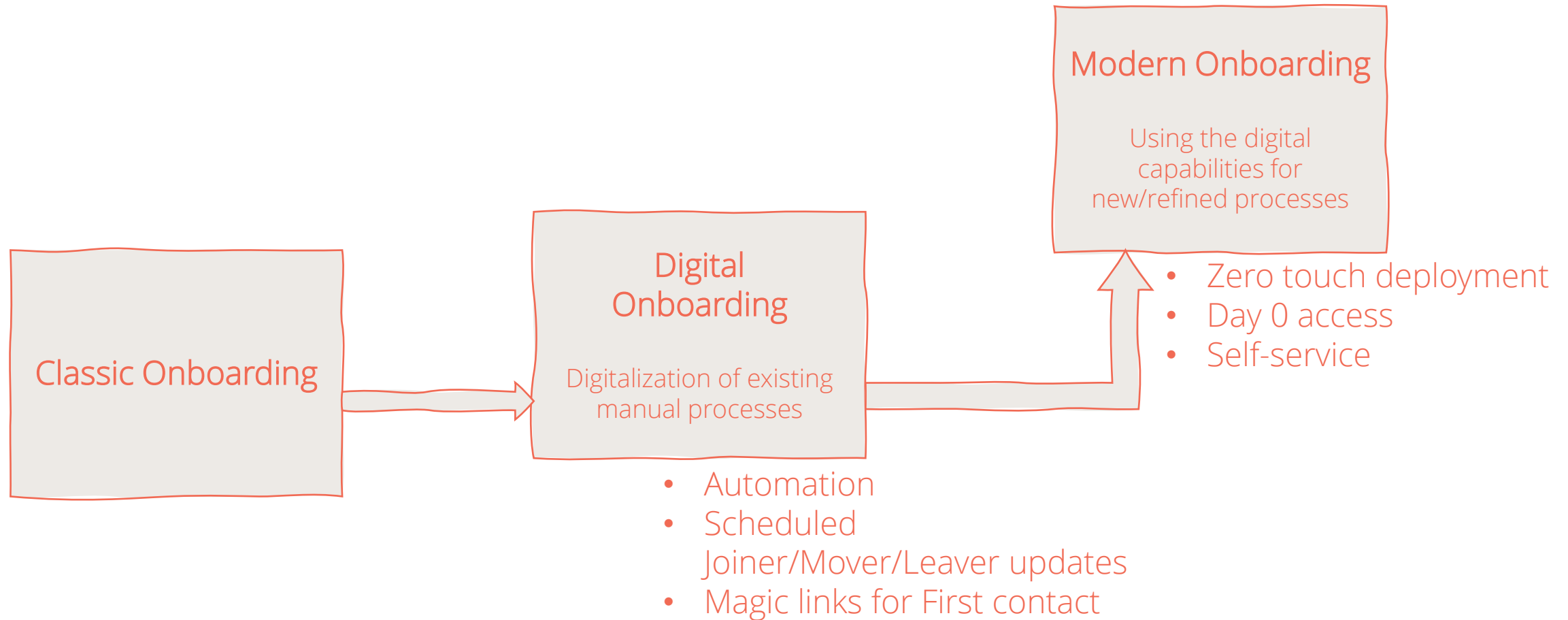
- Where IAM can help

Supporting the technical & operational activities.

IAM can be the central automation, notification & security entity in this process.

Overall goal is to achieve an efficient, secure, & enjoyable onboarding experience for everyone involved.

Digital Onboarding = Modern Onboarding?



Where to start?

Prepare the organization

- If you're not a brand-new company, you're not there yet.
 - Start with what you have & enhance where necessary and possible.
- Establish a continuous & open exchange with key participants & end users.
 - Regular meetings between HR & IT
 - Surveys to recent hires / department managers

Ingredients

Prepare the IT environment

- **IAM/IGA solution**
 - Central Identity Management
 - HR Mastering
 - Access Management
 - Provisioning/Lifecycle Management
- Automation
 - Powerful & integrated Workflow engine
- Modern applications
- Device Management
 - With Zero-Touch Deployment, like Windows Autopilot or Apple Business Manager
- Third party tools for enhanced digitalization
 - Identity proofing

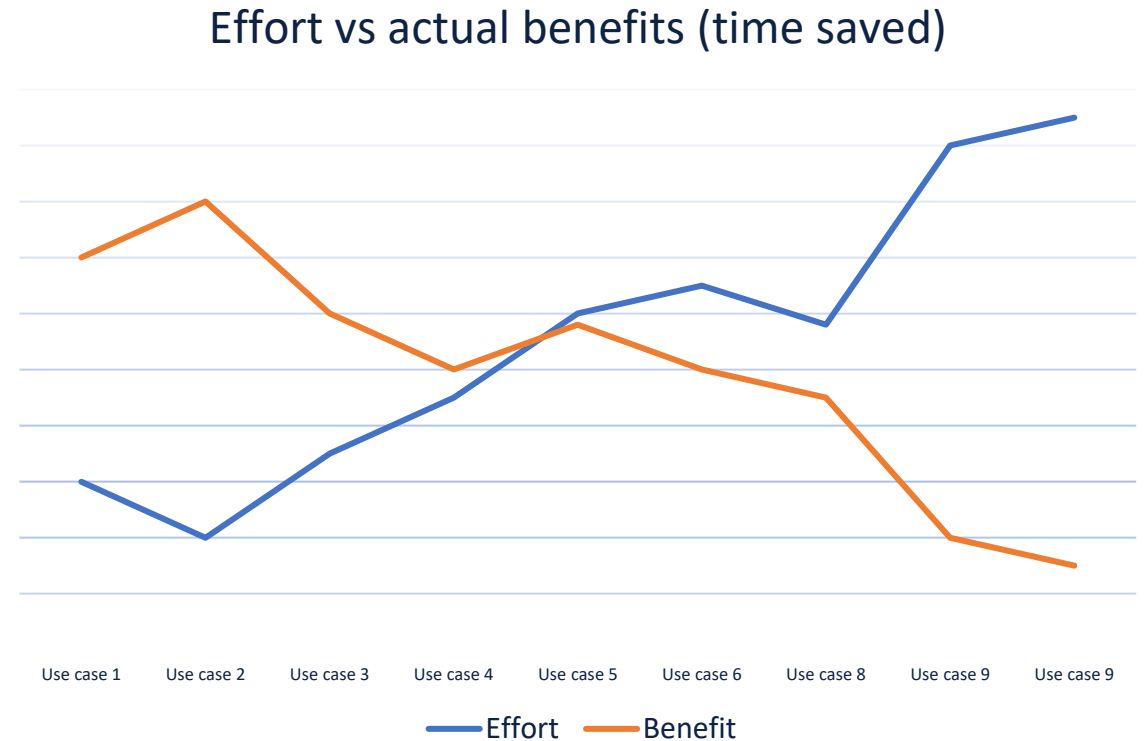
Where to start?

Prepare the IT environment

- If you're not a brand-new company, you're not there yet.
 - Start with what you have & enhance where necessary and possible.
- Define a strategy & guidelines.
 - All IT enhancements need to include (Modern) Onboarding as a goal.
- Communicate to the business.
 - Support business decisions with IAM input.
 - Questionnaire for App vendors during procurement.
 - "No new applications without support for SAML/OIDC and SCIM."

A few thoughts on automation

- Always consider cost-benefit
 - Include maintenance!
- Define and use standard step-out options for use cases that are not covered by automation.
 - Create ticket / Post message in a channel
- Divide the automation into building blocks.

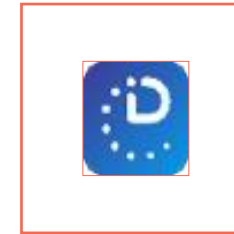


A few examples - 01

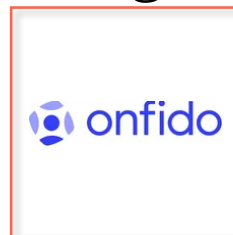
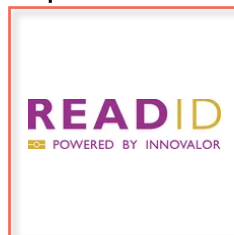
Identity Proofing

Identity Proofing

- Classic onboarding: “Security” by presence
- No presence in modern onboarding
- Take an example from webshops & customer solutions:

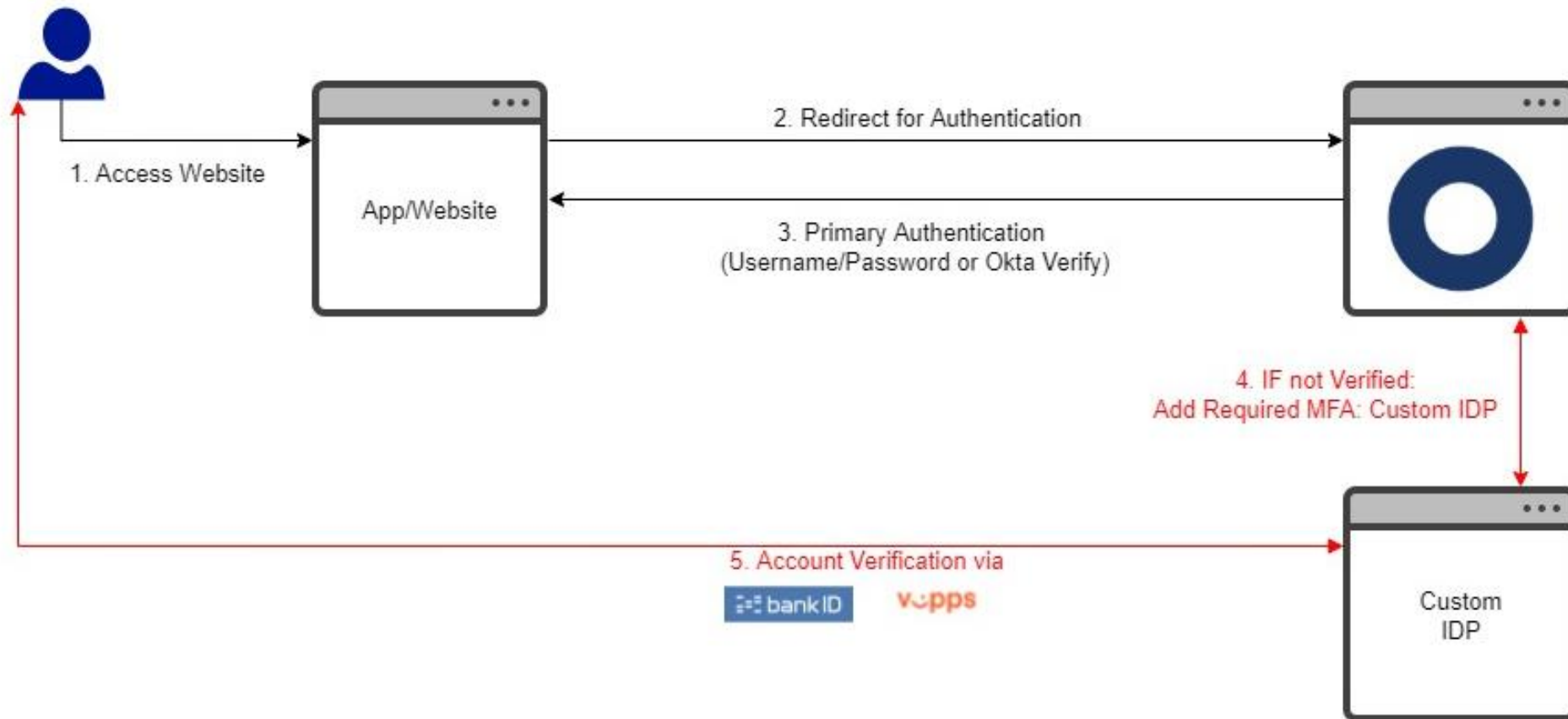


- Additional options: Passport scanning



Identity Proofing - Example

How to integrate Identity Proofing into Access Management



A few examples - 02

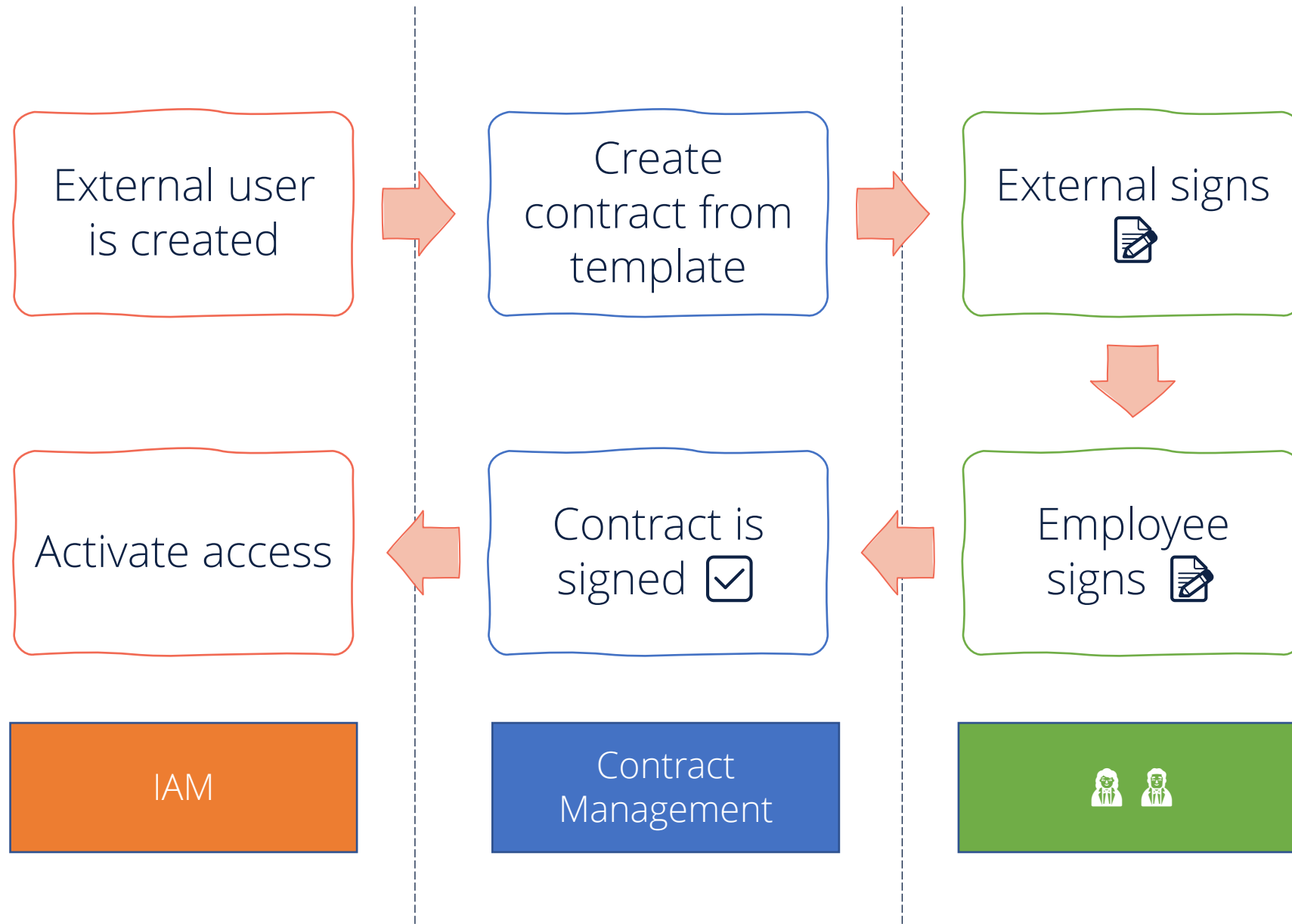
Include NDA / Contract Management for externals

NDA for externals

Adding contract requirements to onboarding

- Externals receive access via self-service registration
- Before accessing any applications, they need to sign an NDA
- The NDA needs to be countersigned by an internal responsible for contractors
- Modern contract tools provide APIs for communication
 - Create a contract agreement
 - Inform the identity system when the contract is signed

Basic workflow



A few examples - 03

Power to the people! Email selector

Examples

The “good” old days?

Dear Helpdesk,
Thank you for creating my account so fast.
Though it is very funny, but how could I sell our products
with an email address as bitch@accorhotel.com?
Please change it ASAP.

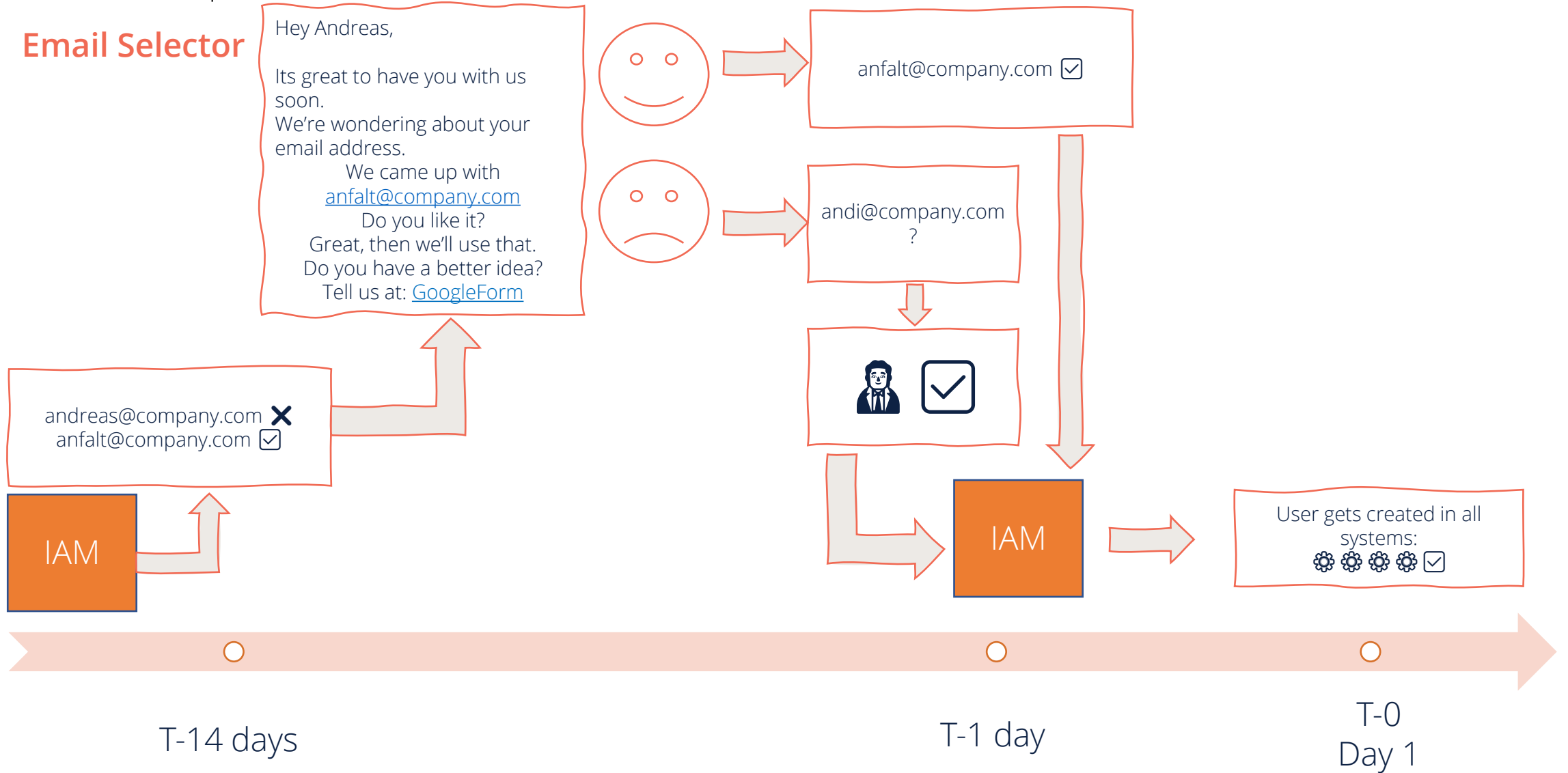
Thank you in advance.
Bill Tchavlovsky

Dear Mr Tchavlovsky
Unfortunately account names are generated from your
initials, we cannot change it.
You can believe me.

Regards,
Ajani Erkson ajerk@accorhotel.com

Examples

Email Selector



Any questions?

LUNCH!