



Identity and Access Management (IAM) Implementation Best Practices

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ORACLE

Recommendation on Identity Management (IAM)

- IAM is not about technology alone, but rather a strategic solution which increases your competitive advantage
- IAM is an organization-wide strategy to address regulatory, security, efficiency, and emerging business needs
- Different organizations will find that different drivers justify their IAM strategy

Agenda

- Identity and Access Management Definition
- IAM Solution
- How to Plan, Coordinate, Execute, and Measure
- Key Take Aways
- Lessons Learned
- Q & A

Identity and Access Management (IAM) Definition

A set of processes and a supporting infrastructure for the creation, maintenance, and use of digital identity.

-Burton Group

IAM Business Drivers – The Complete Picture

- Trusted and reliable security
- Efficient regulatory compliance
- Lower administrative
- Lower development costs
- Enable online business networks
- Better end-user experience

Identity Management: Key Concepts



(Strong) Authentication



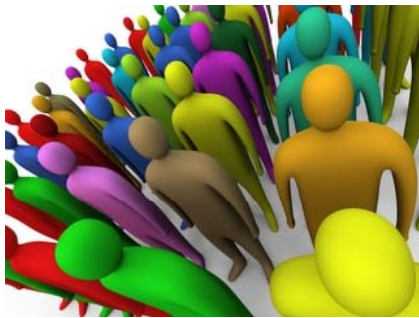
Authorization



Identity Admin



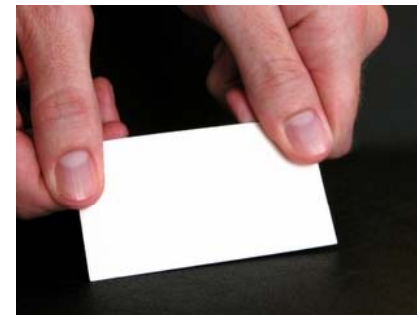
Delegated Admin



User Provisioning

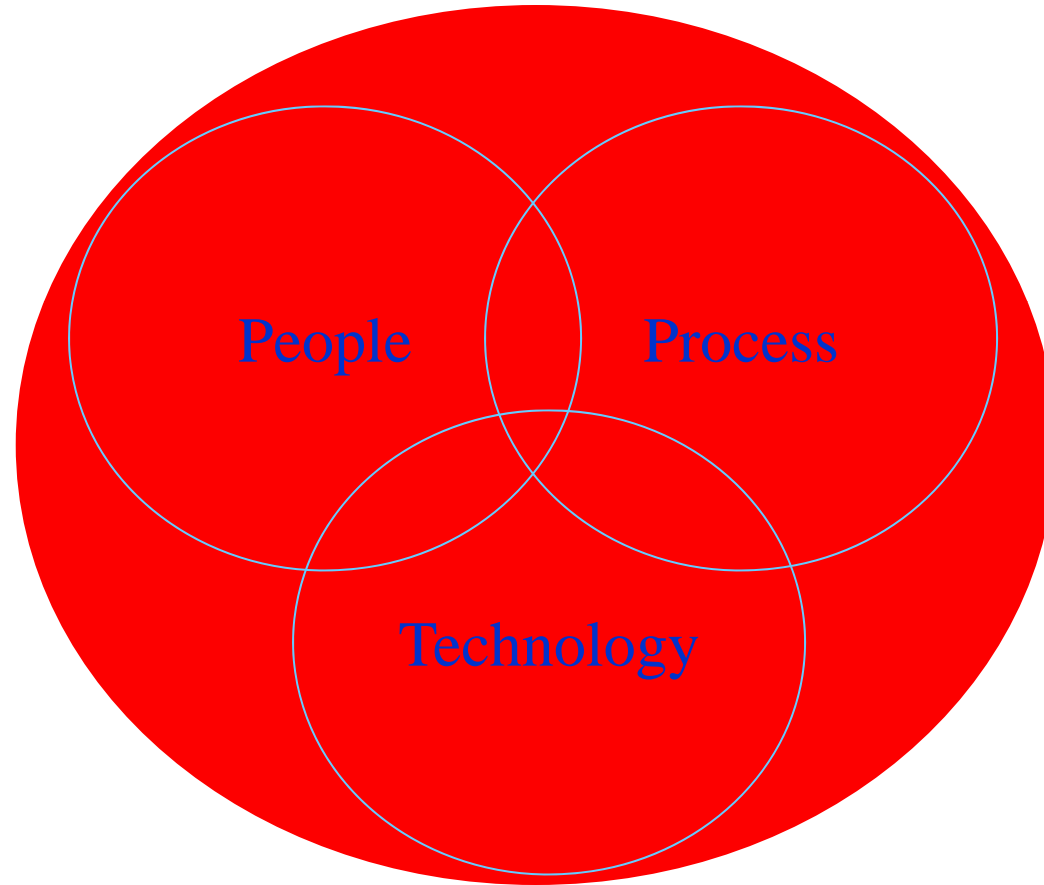


Directory

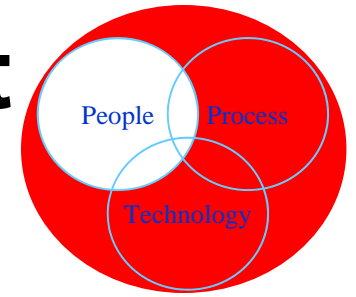


Federation

Identity Management Solution

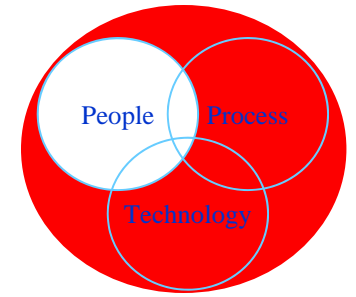


Delivering IAM is all about People Management



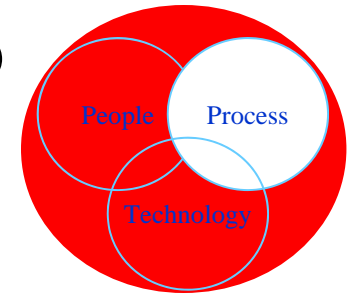
- Sponsors
- Stakeholders
- IdM Team Structure
 - Core Team – Developers, Testers
 - Extended Team – EA, PMO, Infrastructure, Security, SME
- Project Management
- Roles and Responsibilities
 - Reviewers, Approvers, Administrators
-and the Politics

The Key to People Management



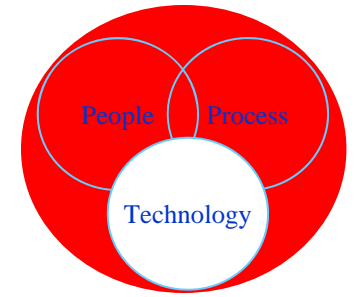
- Soft Skills
 - Leadership
 - Confidence
 - Project Management
 - Effective Communication
 - Teamwork
- Technical Knowledge
 - Product Features and Shortcomings
- Domain Knowledge
 - Best Practices around IdM
-Consulting Hat

IdM – Processes and Technology go Hand-in-Hand



- Review and Approval Process
 - Architecture Compliance
 - Process Overheads
 - Policies and Standards (Identity, User Name Change etc)
- Operation and Support Model
- Administration Model
 - Delegated Administration
 - Central Administration
 - User Self Service
- Organization Change Management and Governance Framework
 - Training
 - Communication Management
 - Change Management
- Integration with other In-Flight initiatives that may impact IdM implementation
- Deployment and Environment Migration Processes

IAM – Technology Apart



- Technologies should be mature and proven solutions that will scale to meet new requirements and capacity increases.
 - Enterprise Directory, Virtual, or Meta-directories
 - Users Management
 - Access Control
 - Applications/Data Security
 - Monitoring and Reporting
 - Auditing and Attestation

How to Plan - The IAM Program

- Identify Needs and Requirements
- Engage Security Experts
- Obtain Enterprise Level Sponsorship
- Invoke Steering Committee (Multi-disciplinary team - HR, Management, Security, Architecture, and IT)
- Establish Roadmaps (Strategic and Tactical)
- Qualify Solutions (people, process and technology)
- Establish Metrics/Criteria for success
- Acquire Technology and Implement Solutions
- Communication, Awareness, and Training for People

Solution requires software life cycle methodology

- Build a strategic IAM Project Roadmap (12-18) months
- Break it down into tactical projects – pain points/quick wins, short-term, long-term
- Address at least one business pain in each phase to show business value
- Gauge success through quantifiable numbers

This will be an iterative process for global IAM deployment

Key Take Aways

- Treat IAM as a **strategic nature** with **executive support**
- Focus on **processes** and **people**, technology is only an enabler
- Develop **overall business requirements** and a **starting point** – directory, access management or provisioning
- Select software based on requirements of **today** and the **future**
- Follow a **phased approach** for integration of applications and different types of users
- Address **data quality** issues upfront
- Create skills based **work team** and consolidate **IAM core team**
- Put in place a comprehensive **change management** and **communication/awareness** plan

Risk Mitigation – More Business than Technical

- Don't set unachievable goals.
- Don't try to “boil the ocean”
- Don't reduce cost through reducing business workflow analysis
- Don't look at IAM as an IT type project.
- Don't expect to operate IAM without organizational changes and commitments
- Don't expect to operate IAM without reengineering some business process
- Don't exclude any organizational stakeholder or those with conflicting agendas

Oracle Consulting – Lessons Learned

- All security projects fail without proper **internal** sponsorship, commitment and support
- There is no solution that meets all your **requirements**
- Security solutions should be **iterative** and **continuous**
- Security solutions must be **aligned** with business needs and requirements
- Timelines, objectives and milestones need to be **realistic**
- Security solutions require **investment** in time and resources
- Influencing and **affecting change** is difficult
- While fundamental similarities exist, every specific organization is **different**

Q&A

Conclusion

- IAM is an enterprise-wide solution - Impacts multiple stakeholders
- Common mistake of organizations –
 - View IAM as an IT project versus strategic initiative
 - Narrow view can exclude critical stakeholders key to success
- It is about Business Process Re-engineering – HR, IT, Users Administration, Access/Authorization, Approvals, B2B
- It is about Change Management

Engage All Stakeholders and Build Consensus

Top Ten IAM Implementation Take Aways

- Set Realistic Targets
- Choose the Right Technology
- Focus on Business Value
- Support Your Customer – Business/Application owner
- Understand the Scale of Investment
- Address Data Quality/Global UID Up Front
- Monitor and Protect the Health of Your IAM Solution
- Create Skills Based Work Teams
- Consolidate Ownership of IAM
- Provide Strong Program Management and Architecture Resources

Success Checklist

- Map stakeholders and their respective agendas
- Prioritize stakeholders based on strategic importance
- Address political issues based on prioritization
- Create consensus, support, ownership and commitment within the organization
- Estimate cost of service, maintenance, future needs and changes
- Develop a clear ROI commitment, if needed
- Conduct selling activities, not just application training

Where and how do we start?

- Put together an IAM program to iteratively and incrementally introduce identity-related service capabilities to the organization over a period of time

Getting Started

- ✓ Assign Program Coordinator (CSO or Enterprise Architect)
- ✓ Select core team (IT, Operations, Security, Business Units)
- ✓ Captured, prioritized requirements
- ✓ Select software
- ✓ Developed initial year to year roadmap
- ✓ Established business case to proceed

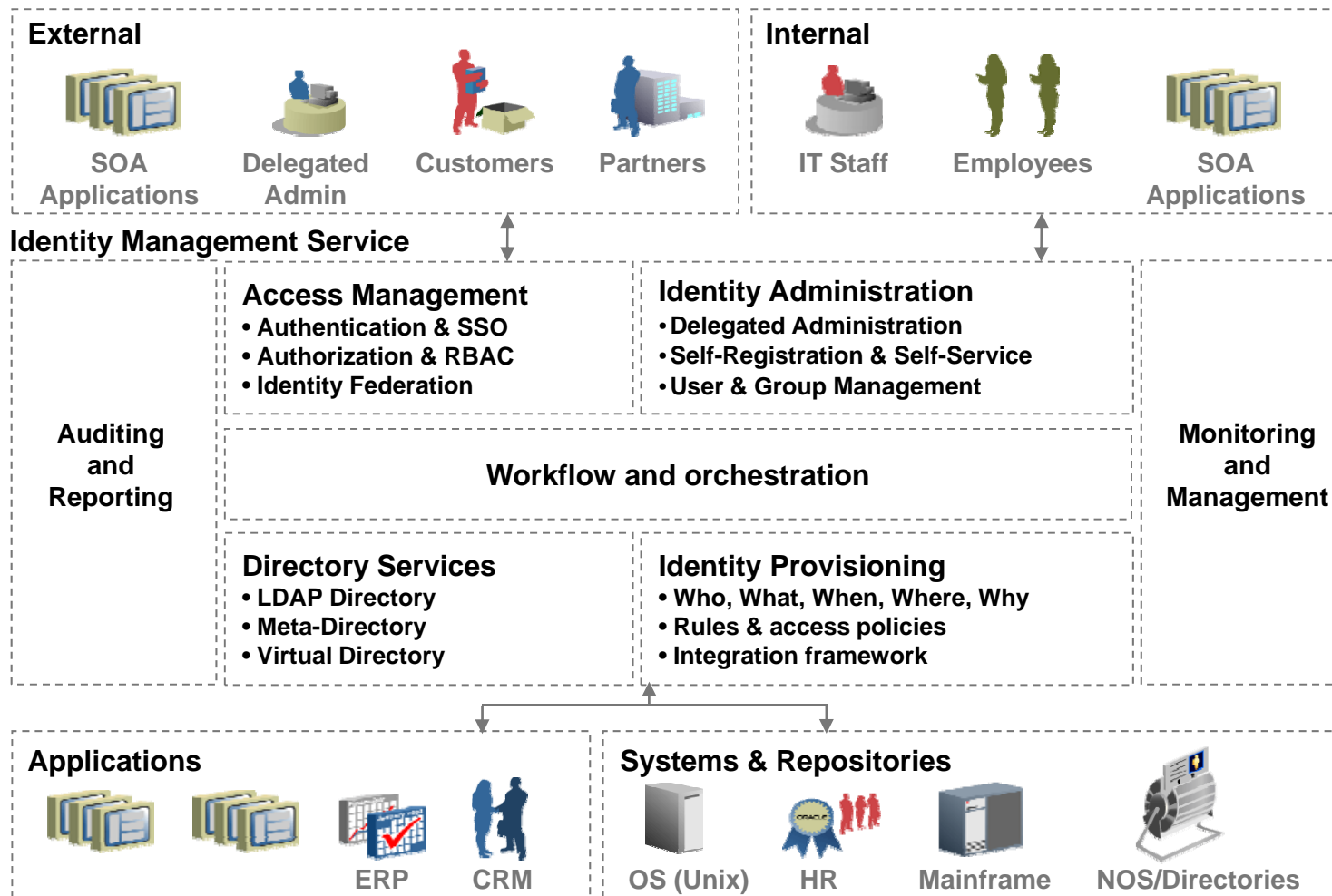
Year 1 Goals

- ❑ Finalize prioritization of projects
- ❑ Obtain funding to proceed
- ❑ Acquire resources; mobilize team
- ❑ Initiate planned projects
- ❑ ***Project #1 = Quick Wins/Address immediate pain points ...***

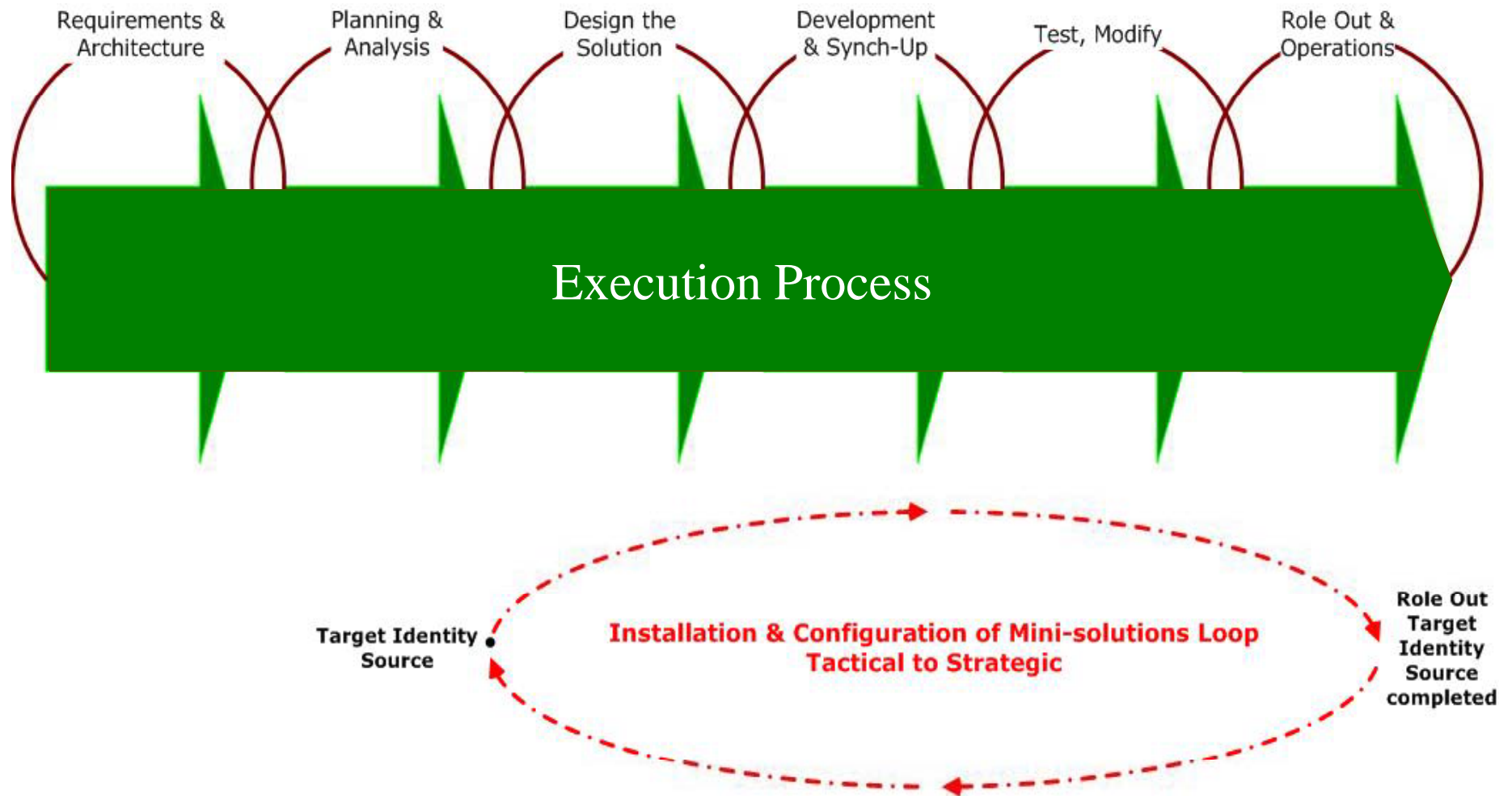
Appendix - Stakeholders Tasks

- Executive Tasks
 - Identify top business objectives
 - Put together team - analyze current security infrastructure in place - engage IT/Security team or seek help from outside (Consulting)
 - Build Business Case and ROI – if needed
 - Define and champion strategic direction/roadmap - seek help from outside (Consulting), if needed
 - Promote and Report success
- IT/Security Groups –
 - Build Consensus - Consult standards committee or Enterprise Group
 - Analyze current security infrastructure - pain points/gaps - seek help
 - Do vendor evaluation - if necessary
 - Focus on business issues with vendor solutions - not features vs.. functionality
 - Identify security roadmap - Prioritize Projects -
 - Lay IDM foundation -
 - Promote solution/analyze success

What is Identity and Access (IAM) Management Framework



Solution is Unachievable without Methodology



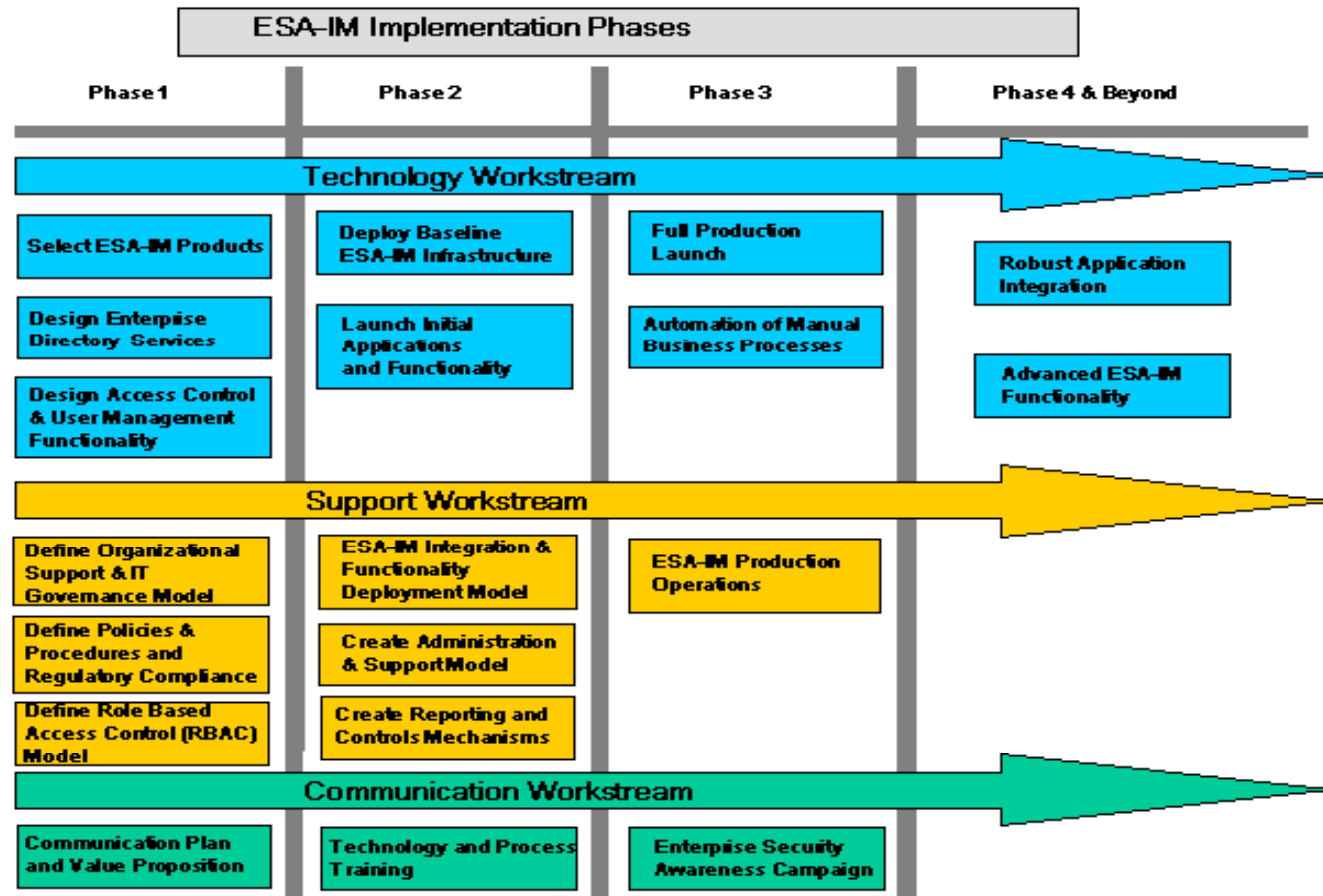
Coordinating IAM Program

Example Identity and Access Management Roadmap

√- Build a strategic IAM Project Roadmap (12-18) months

√- Break it down into tactical projects – quick wins, short-term, long-term

√- Gauge success through quantifiable numbers



... this will be an iterative process for global IAM deployment