

# Seamless Identity Transformation:

A Global Asset Management Group's Journey from AD/Azure to Okta with Enhanced ID Proofing and MFA Rollout

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# Seamless Identity Transformation

## Case Study

A global asset management group partnered with Active Cyber to modernize its identity management by migrating from on-prem AD and Azure to Okta. The solution integrated Okta with SailPoint for improved lifecycle and access management, and used TransmitSecurity for enhanced ID proofing. Phased SSO and MFA rollouts boosted security with minimal disruption.

Active Cyber's change management support ensured a smooth transition, resulting in improved security, simplified governance, and a scalable, flexible identity management system.

## THE CHALLENGE

The global asset management group needed to modernize its identity management infrastructure, transitioning from on-prem AD and Azure systems to a scalable, secure, cloud-based solution. Key challenges included integrating Okta for access and lifecycle management while retaining SailPoint for governance, enhancing security with identity proofing, SSO, and MFA, and ensuring a seamless migration with minimal user disruption.

## THE APPROACH

Active Cyber implemented Okta for lifecycle and access management while retaining SailPoint for governance. They integrated TransmitSecurity for identity proofing and rolled out SSO and MFA, ensuring enhanced security and a seamless migration with minimal disruption.

## KEY ARCHITECTURAL IMPROVEMENTS IMPLEMENTED

1

### Migration to Okta Universal Directory (UD)

Active Cyber transitioned user management from AD and Azure to Okta UD, creating a scalable, cloud-based identity solution.

2

### Integrated Governance and Lifecycle Management

Okta managed lifecycle and access, while SailPoint governed access requests and certifications, leveraging both platforms' strengths.

3

### Enhanced Identity Proofing

TransmitSecurity integration optimized ID proofing, ensuring secure and efficient user verification.

4

### Phased SSO and MFA Deployment

SSO and MFA were rolled out gradually to enhance security while minimizing user disruptions.

5

### Improved Governance Features

Streamlined access requests and certifications boosted compliance and security visibility.

6

### Scalable Architecture

The new system was built for scalability and flexibility to support growth and evolving security needs.



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### CLIENT PORTFOLIO OVERVIEW

This global asset management group's key clients typically include individual investors, financial advisors, and institutional investors such as pension funds, endowments, and sovereign wealth funds. They are known for providing mutual funds, ETFs, brokerage services, financial planning, asset management, and trust services.

As for the number of customers, the asset management group serves a massive global client base. As of recent reports, they manage over 30 million investors worldwide. This includes both individual retail investors and large institutional clients who rely on their low-cost investment solutions and advisory services.

### MAIN CLIENT CHALLENGE

The main client challenge for this global asset management group revolves around managing and securing the identity of its vast, diverse client base, which includes millions of individual investors, financial advisors, and institutional clients. As one of the largest global asset management firms, they needed a modernized identity management solution to handle the complexity and scale of its operations.

### KEY CHALLENGES INCLUDE

1

#### Migration from Legacy Systems:

They relied on traditional on-premises Active Directory (AD) and Azure systems, which were becoming inadequate for the company's growing needs. Transitioning to a scalable cloud-based identity solution was essential.

2

#### Identity Proofing and Security

With millions of clients accessing sensitive financial data, they required a more robust identity proofing process and enhanced security measures, such as Multi-Factor Authentication (MFA), to protect against unauthorized access.

3

#### User Provisioning and Governance

Managing access requests, certifications, and provisioning for such a large user base was challenging. They needed an efficient way to automate lifecycle management (LCM) and enforce governance across its systems.

4

#### Seamless User Experience

With such a wide range of users, including institutional clients, retail investors, and internal employees, they needed to ensure a seamless user experience during the transition to new identity management systems, without disrupting services or negatively impacting its clients.



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### THE RESULTS

The asset management group modernized its identity system with Okta and SailPoint, enhancing security, governance, and user experience.

- Seamless migration from on-prem Active Directory/Azure to Okta Universal Directory.
- Enhanced security through phased rollout of Multi-Factor Authentication (MFA) and Single Sign-On (SSO).
- Streamlined ID proofing via integration with TransmitSecurity, improving user verification processes.
- Strengthened governance capabilities for access requests and certification campaigns, ensuring compliance and security.

### ACTIVE CYBER

Active Cyber is a strategic global boutique specializing in comprehensive cloud-based solutions that cater to the unique needs of dynamic organizations.

We prioritize regulatory adherence, growth adaptability, and process optimization, equipping clients to excel in an ever-changing digital environment.

We specialize in critical business domains—Identity & Access Management, Cybersecurity, Service Management, and Advanced Analytics with AI.

Through strategic partnerships with industry-leading technology providers, we deliver innovative solutions that enhance security, equipping organizations with the tools to adapt- enabling organizations to stay secure, agile, and data-driven.

### CONCLUSION

Active Cyber partnered with a global asset management group to modernize its identity management infrastructure, migrating from on-premises systems to Okta Universal Directory. The integration of Okta and SailPoint, along with phased MFA and SSO implementation, enhanced security and streamlined user access across the organization.

For more information on how Active Cyber can help your business, visit [www.activecyber.com](http://www.activecyber.com) or contact us at [info@activecyber.com](mailto:info@activecyber.com).

