

Delivering a B2C IAM Project

An Auth0 planning guide to
business-to-consumer identity and
access management

Introduction

This document provides guidance for integrating Auth0 within a business-to-consumer (B2C) identity and access management (IAM) project.

Based on our experience working with customers who've implemented Auth0 for this type of project, we've developed a set of goals and milestones that will help you plan your solution efficiently and deliver it effectively.

Before you begin, consider the following items:

1. Identify your primary objectives and determine the requirements to achieve them.
2. Use a phased approach across multiple workstreams.
3. Adopt an iterative release process.

Identify your primary objectives

If you determine the key goals of your project early on, it helps your teams focus on the specifics when building out your solution.

For example, if your primary objectives are to avoid disruption for end users and provide continuity of service, then you consider adopting an iterative release process instead of a “big-bang” approach when integrating with Auth0.

Use a phased approach

A phased approach across multiple workstreams will help your teams divide and conquer. Many implementation tasks can be completed in parallel, which allows your team to reach milestones faster and present your project to stakeholders sooner.

This is also a good time to check if other groups within your organization have been working with Auth0. There may be opportunities to share first-hand experience with the product, consolidate resources, and inform the structure of your implementation.

We may be able to help you identify these teams and provide guidance for collaboration.

Adopt an iterative release process

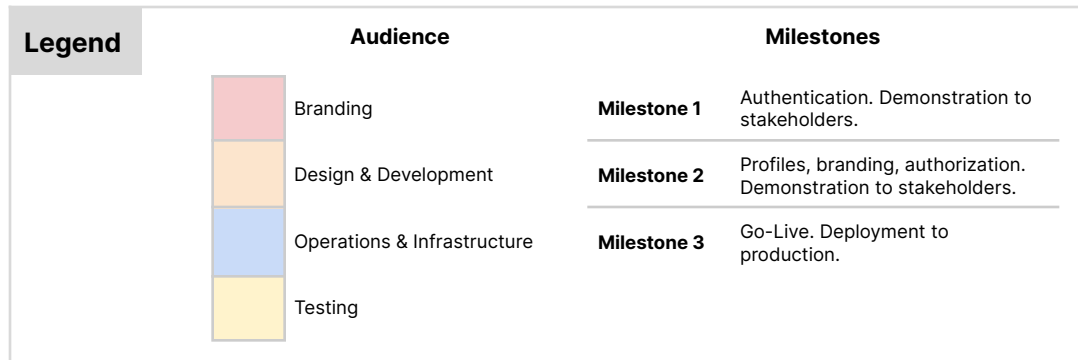
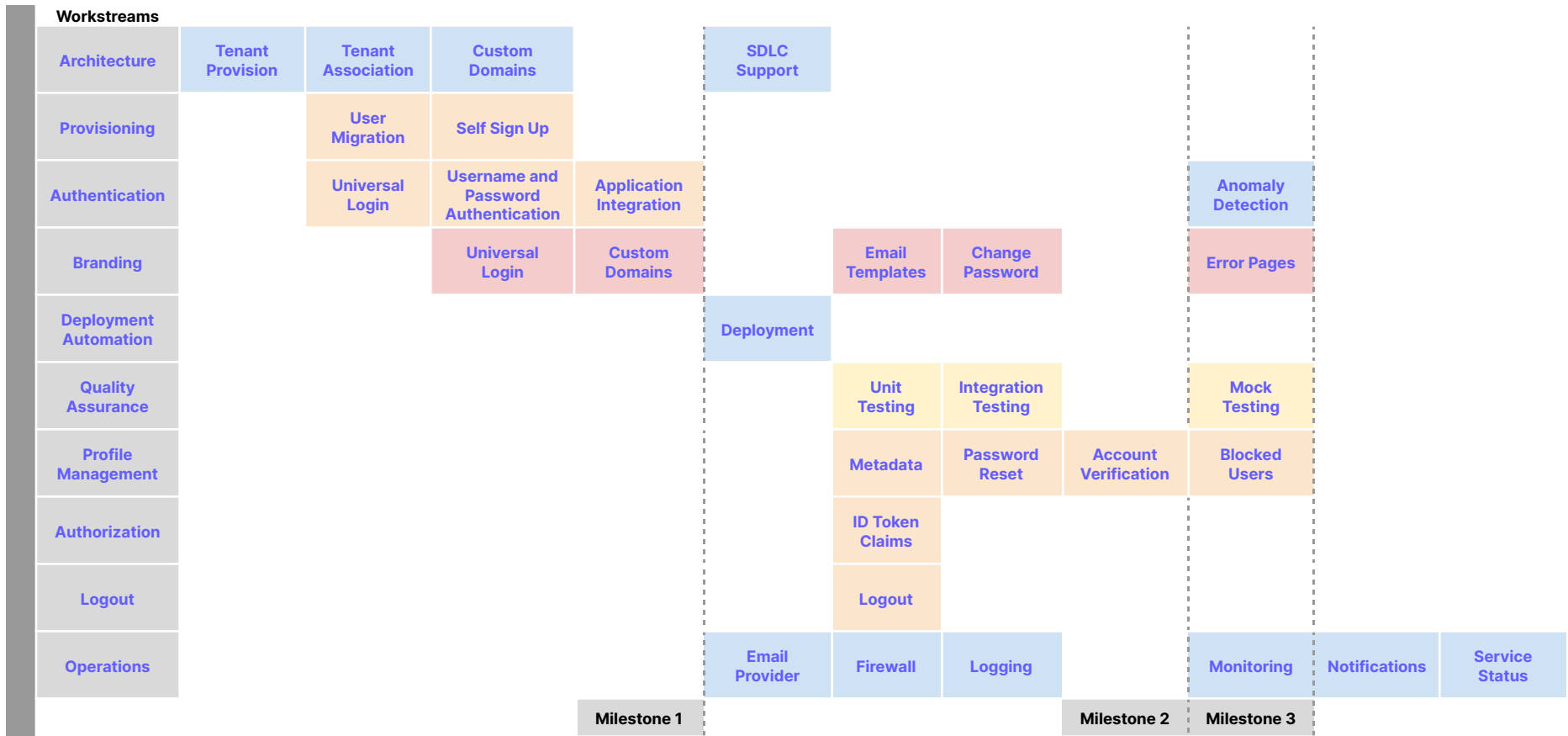
An iterative release process will help your teams reduce cognitive overload and improve velocity of development.

For example, if you have three or four applications you want to integrate with Auth0, consider working on one application at a time. This way, your teams can take what they learned from the previous iteration into the next one.



If you have multiple applications and you want Single Sign On (SSO) support, read [Architecture](#) to help you understand what you need to consider when using an iterative release process.

Phase 1: Application integration and User Authentication



Phase 1

The first phase focuses on integrating your application(s) with Auth0 to provide user authentication. You'll address the ten key stages to go-live across three key milestones, and conclude with a production-ready implementation that integrates with Auth0 to provide user authentication across your application(s).

The workstreams, the topics they address, and the order you complete them in is important, so we recommend you follow these guides closely.

Some topics can be worked on by different teams in parallel, such as [Provisioning](#), [Authentication](#), and [Branding](#). If you assign a topic to the team that has the most experience with it (such as your design team to [Branding](#)), you can accelerate implementation with minimal overlap.

Architecture

The [Architecture](#) workstream must consider how your application(s) fits in your organization, what the user base looks like, how to structure your Auth0 assets, and whether there are opportunities for cross-integration.

Topics include:

- [Tenant Provision](#)
- [Custom Domains](#)
- [Tenant Association](#)
- [Software Development Life Cycle \(SDLC\) Support](#)

Provisioning

The [Provisioning](#) workstream must consider how users sign up with your application(s), which identity providers you will support, and how and what user data will be stored.

The [Provisioning](#) workstream can complete their work in parallel with the [Authentication](#) and [Branding](#) workstreams.

Topics include:

- [User Migration](#)
- [Self Sign Up](#)



The Auth0 [Dashboard](#) (along with the [Delegated Administration](#) extension) can be used out-of-box to perform user provisioning and [deprovisioning](#).

If you require more comprehensive deprovisioning functionality - say for compliance reasons - then refer to the Provisioning guidance provided in [Phase 2](#).

Authentication

The [Authentication](#) workstream must consider how users will prove their identity, how you'll balance user experience and security, and what levels of additional authentication are necessary (such as [Multi-factor authentication](#) or [Step-up authentication](#)).

The [Authentication](#) workstream can complete their work in parallel with the [Provisioning](#) and [Branding](#) workstreams.

Topics include:

- [Universal Login](#)
- [Username and Password Authentication](#)
- [Application Integration](#)
- [Anomaly Detection](#)

Branding

The [Branding](#) workstream must consider how to customize the look and feel of Auth0 to align with your organization's requirements, and provide a consistent user experience to instill trust in your brand.

The [Branding](#) workstream can complete their work in parallel with the [Provisioning](#) and [Authentication](#) workstreams.

Topics include:

- [Universal Login Customization](#)
- [Custom Domain](#)
- [Change Password Customization](#)
- [Error Page Customization](#)
- [Email Template Customization](#) (read [Operations](#) guidance before doing so)

Deployment Automation

The [Deployment Automation](#) workstream must consider how to manage the development and release cycle for Auth0 assets, how to ensure a dynamic development environment, and how to guarantee a stable production environment.

Topics include:

- [Software Development Life Cycle \(SDLC\) Support](#)
- [Tenant-Specific Variables](#)

Quality Assurance

The [Quality Assurance](#) workstream must consider how to detect breakages in your Auth0 integration and how to mitigate the resulting impact to users.

Topics include:

- [Unit Testing](#)
- [Mock Testing](#)
- [Integration Testing](#)

Profile Management

The [Profile Management](#) workstream must consider how to manage user profile data, user account verification and recovery, and user account restriction.

Topics include:

- [Metadata Management](#)
- [Password Reset](#)
- [Account Verification](#)
- [Blocked Users](#)

Authorization

The [Authorization](#) workstream must consider how and what user data is passed between the authorization server and the application(s).

Topics include:

- [ID Token Claims](#)

Logout

The [Logout](#) workstream must consider how users terminate their application, Auth0, and identity provider sessions.

Topics include:

- [Session Layers](#)
- [Session Lifetime Limits](#)
- [Log Users Out of Applications](#)
- [Log Users Out of Identity Providers](#)

Operations

The [Operations](#) workstream must consider how emails and notifications are sent to users, how to monitor Auth0 user activity, and how to process Auth0 log data.

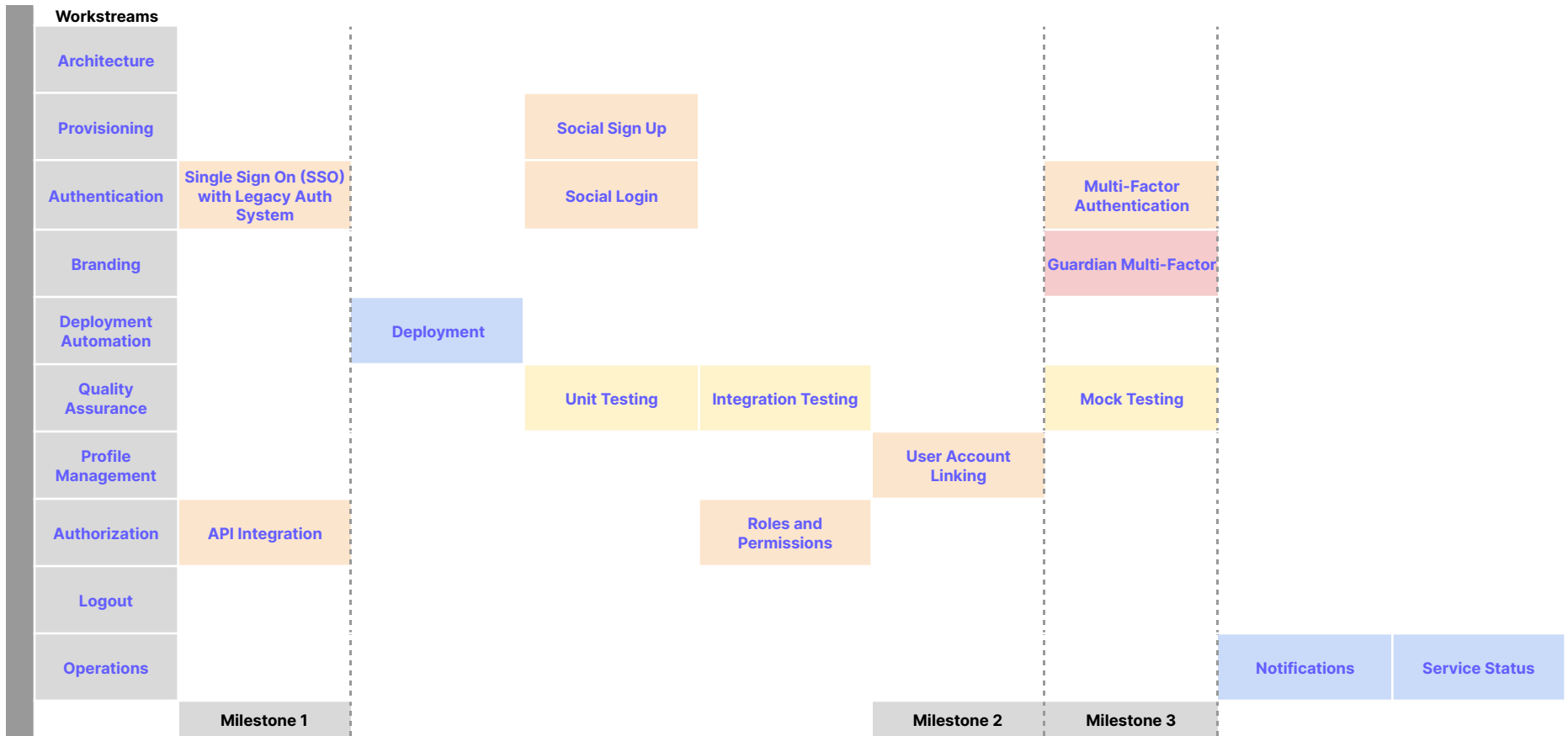
Topics include:

- [Email Provider Setup](#)
- [Monitoring](#)
- [Logging](#)
- [Firewall Configuration](#)
- [Notifications](#)

Next steps

At this point, you've integrated your application(s) with Auth0, configured user authentication, and are ready for production.

Phase 2: API Authorization, Advanced Authentication, Provisioning, and Profile Management



Legend	Audience	Milestones
	Branding	Milestone 1 API integration. Demonstration to stakeholders, deployment to production.
	Design & Development	Milestone 2 Advanced features. Demonstration to stakeholders, deployment to production.
	Operations & Infrastructure	Milestone 3 Go-Live. Deployment to production.
	Testing	

Phase 2

The second phase focuses on integrating your API(s) with Auth0 to provide authorization functionality, and configuring social connections.

Additionally, the [Authentication](#), [Deployment Automation](#), [Provisioning](#), and [Logout](#) workstreams address topics that allow for advanced functionality.

The workstreams, the topics they address, and the order you complete them in is important, so we recommend you follow this guide closely.

Authorization

The [Authorization](#) workstream must consider how your API(s) will be integrated with Auth0, and how access management will be handled (policy and method).

The [Authorization](#) workstream can complete their work in parallel with the [Authentication](#) and [Deployment Automation](#) workstreams.

Topics include:

- [API Integration](#)
- [Roles and Permissions](#)

Authentication

The [Authentication](#) workstream must consider how users log in to your applications and if there are areas for improvement.

The [Authentication](#) workstream can complete their work in parallel with the [Authorization](#) and [Deployment Automation](#) workstreams.

Topics include:

- [SSO with the Legacy Authentication System](#)
- [Social Login](#)
- [Multi-Factor Authentication](#)

Deployment Automation

The [Deployment Automation](#) workstream must consider how to integrate Auth0 with your continuous integration/continuous deployment (CI/CD) pipeline.

The Deployment Automation workstream can complete their work in parallel with the [Authorization](#) and [Authentication](#) and workstreams.

Topics include:

- [Deploy CLI Tool](#)
- [Auth0 Terraform Provider](#)

Quality Assurance

The [Quality Assurance](#) workstream must consider how to detect breakages in your Auth0 integration and how to mitigate the resulting impact to users.

Topics include:

- [Unit Testing](#)
- [Mock Testing](#)
- [Integration Testing](#)

Provisioning

The [Provisioning](#) workstream must consider how Enterprise connections will be supported.

Topics include:

- [Social Sign-Up](#)

Branding

The [Branding](#) workstream must consider how to customize the look and feel of Auth0 to align with your organization's requirements and provide a consistent user experience to instill trust in your brand.

Topics include:

- [Customize Multi-Factor Authentication Pages](#)

- [Auth0 Guardian](#)

Logout

The [Logout](#) workstream must consider how users terminate their application, Auth0, and identity provider sessions.

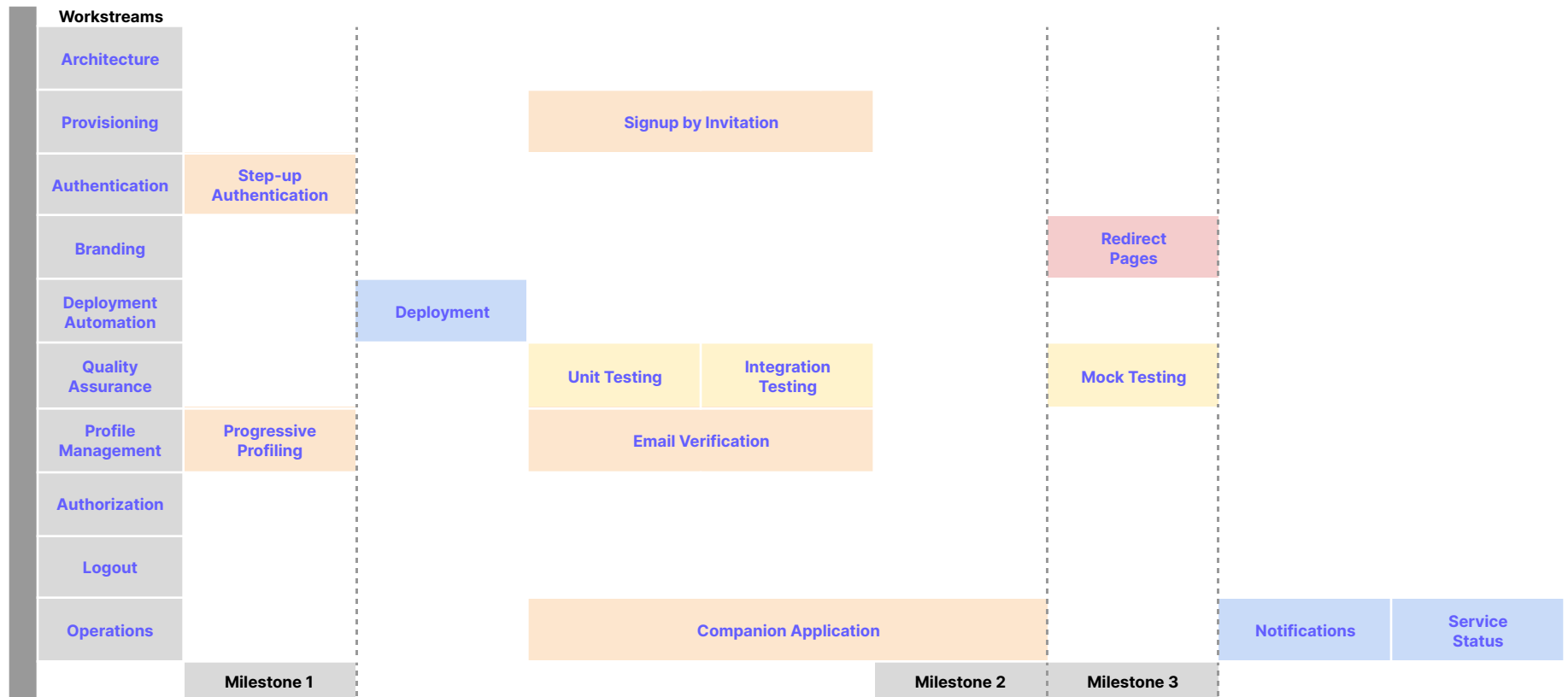
Topics include:

- [User Redirect](#)
- [Session Termination](#)

Next steps

You've now integrated your API(s) with Auth0, configured API authorization policies, and introduced advanced functionality in several workstreams.

Phase 3: Extended Use Cases for Authentication, Profile Management, and Operations



Phase 3

The third phase addresses complex use cases, including support for additional authentication and specialized customization.

Additionally, the [Authentication](#), [Profile Management](#), [Branding](#), [Provisioning](#), and [Operations](#) workstreams address topics that allow for advanced functionality.

The workstreams, the topics they address, and the order you complete them in is important, so we recommend you follow this guide closely.

Authentication

The [Authentication](#) workstream must consider how to handle use cases that require additional user verification.

Topics include:

- [Step-up Authentication](#)

Profile Management

The [Profile Management](#) workstream must consider how to enrich user profile data and verify user email addresses.

Topics include:

- [Progressive Profiling](#)
- [Email Verification](#)

Branding

The [Branding](#) workstream must consider how to maintain a consistent user experience across all user journeys.

Topics include:

- [Redirect Pages](#)

Provisioning

The [Provisioning](#) workstream must consider how to manage alternative signup scenarios.

Topics include:

- [Signup by Invitation](#)

Operations

The [Operations](#) workstream must consider whether development of a companion application is necessary.

A companion application allows your organization's internal members (such as a customer support team) to perform actions on behalf of your users. For more information, ask your Technical Account Manager for details.

Conclusion

Thank you for reading this guide on Auth0 integration in a business-to-consumer (B2C) identity and access management (IAM) project.

This guide and its contents are occasionally updated based on our continuing experiences with customers. We recommend you check with our [scenario guidance](#) as you progress.

For more detailed information regarding certain functionality or would like to discuss a specific use case, please contact our [Professional Services](#) team.