

SCORECARD

20 ways to test your customer sign-in experience

Ease of registration



Customer-friendly sign-in



Account maintenance
and password policies



Consent management



What a “good” sign-in experience looks like has changed a lot over the last few years. Wondering what “good” looks like and how you stack up?

To help you guard against a login experience faux pas, we’ve pulled together a checklist of questions so you can see how your website stacks up against modern sign-in processes.



Instructions:

- 1 First, use the scoring sheet to rate all 20 criteria
- 2 Then add up your scores for each section and average them
- 3 Finally, transfer your scores to the “Interpreting your score” table at the end of this checklist



Ease of registration

What to look for	How to score yourself	Your score
Registration opens On your website, how many buttons or drop-down menu options are there to sign in and/or create an account?	1 – Multiple, because we have different services or brands 5 – Only one	
Branding, look and feel Does the branding on your sign-up forms have a consistent visual identity with the rest of your site?	1 – No, it feels like a different site 3 – Kind of, but it could be better 5 – It's a 100% unified experience	
Social login options Do you offer social login alternatives like Google, Apple, and Facebook?	1 – No, none 3 – Yes, we offer 1 5 – We offer 2 or more (or we're a bank)	
Simple registration forms How much information do you ask for when a new user signs up (vs. after they create their account)?	1 – We have 5+ fields on the 1st screen 3 – Less than 5 fields but 2+ screens 5 – We use progressive profiling	
Password manager support How easy is it for customers to use password managers to register?	1 – What are password managers? 3 – Hassle-free copy/paste of info 5 – Form fields are auto-populated with saved info from password managers	
Dead ends and circular loops Can the entire new account creation process be completed online and/or what happens if not?	1 – No, new users have to call or visit us 3 – Kind of, we create limited-access accounts when users run into problems 5 – Everything (including troubleshooting) can be done online	
Sub-total (add up your 6 scores)		
Average (divide your sub-total by 6)		



Customer-friendly sign-in

What to look for

How to score yourself

Your score

Username and password screens

Does your sign-in page have both username and password fields on the same screen?

1 – Yes, both are on the same screen

5 – No, only username is on the first screen

First-time signing in

When a new customer registers do they have to sign-in with their username and password at the end of the registration process?

1 – Yes, new users sign-in

5 – No, we leave them signed-in at the end of the new account creation process

Challenge questions

Do you ask customers to create challenge questions such as “What was your first pet’s name?”

1 – Yes

5 – No, we’ve moved beyond that

Multi-factor authentication (MFA)

Do you allow customers to set up MFA on their accounts as an optional security measure?

1 – No

3 – Yes with email or SMS one-time codes

5 – Yes, in addition to SMS/email one-time codes we support magic links and/or authenticator apps

Biometric sign-in options

Do you support “passwordless” sign-in options like Face ID and Touch ID?

1 – No

3 – Yes, but only on the mobile app

5 – Yes, both on the website and our app

Sub-total (add up your 5 scores)

Average (divide your sub-total by 5)



Account maintenance and password policies

What to look for

How to score yourself

Your score

Self-service account management

Can users update their own information online in their account profile?

1 – No, not at all

3 – Yes, but only a couple fields

5 – Yes, most of the fields

Automated data sync with CRM/CDP

When customers update account info online does it sync with the CRM, and vice versa?

1 – No, they are not connected

3 – Yes, if we get really lucky

5 – Yes, perfectly every time

Customer alerts for updated info

When customers' account info is updated do they get an email/text update to ensure the change was correct?

1 – No, we don't do that

5 – Yes, for important updates

Unique usernames

Can customers create unique usernames or do you require them to use email address or phone numbers?

1 – Yes, we allow unique usernames

5 – No, usernames must be an email address or phone number

Password policies

When do you require users to change their password?

1 – Every few weeks or months

5 – Only when we identify it as a known-stolen password

Sub-total (add up your 5 scores)

Average (divide your sub-total by 5)



Consent management





What to look for	How to score yourself	Your score
Clear and explicit consents Is it clear when and why customers are asked to consent to different policies and requirements?	1 – We don't offer consents online 3 – Kind of 5 – Yes, all consents have links to full text and are explicit (not pre-checked)	
Self-service consent management Can customers view, revoke or alter consents online?	1 – No, customers can't view or change consents 3 – Customers can view consents but not alter or revoke them 5 – Yes, customers can view and revoke consents	
Request to be forgotten Can customers request to be forgotten and/or delete all of their account info?	1 – No 5 – Yes	
Download personal information Can customers download all of the personal information you have stored about them	1 – No 5 – Yes	
Sub-total (add up your 4 scores)		
Average (divide your sub-total by 4)		

Summing it all up

Next step:

To make it easier to see where you stand let's get all of your scores together in one place. Take your total and average scores from each of the four sections above and copy them into the table at the top of the next page.

Summary of scores from checklist

Category	Sub-total	Average
 Ease of registration	/30	<input type="text"/>
 Customer-friendly sign-in	/25	<input type="text"/>
 Account maintenance and password policies	/25	<input type="text"/>
 Consent management	/20	<input type="text"/>
Average:		<input type="text"/>

Interpreting your average score



Once you've got your average scores – both for each category and overall – you can zoom out and see where your time is best spent to up-level your customer sign-in experience. Below are some guidelines for how to think about where you stand, based on your average scores.

If your overall score is:

4.4 - 5.0

Your customer sign-in experience is best in class. You're well beyond most of your competitors. Pat yourself on the back and put a reminder on your calendar to check back in six months from now.



3.9 - 4.3

You're in really good shape. While there are a few small things that could use a tune-up, overall things are looking good.



2.1 - 3.8

You've got several significant areas to work on across multiple categories, which you probably know – either from customer complaints or requirements that internal stakeholders are asking you for. While things may not be on fire, there's a good chance that your sub-par customer experience could start impacting revenue over the next 6-12 months.



1.0 - 2.0

You've got significant areas of improvement across multiple – if not all five – categories. If you don't have a formal project to improve your customer experience, now would be a good time to pull together the key stakeholders and put it at the top of the priority list. A few straightforward improvements could have a material impact on new customer acquisition and revenue.





Ready to level up your customer login journey?

Contact us today to schedule a call and receive a personalized evaluation of your customer login process. Our team will provide you with expert recommendations tailored specifically to your business.

Don't miss out on this opportunity to optimize your customer sign-in experience.

strivacity.com/contact



ABOUT US

Strivacity lets brands add secure log-in and identity management capabilities to their customer-facing applications without tying up a crew of developers or consultants. We offer a unified customer identity and access management (CIAM) solution that uses clicks (not custom coding) so organizations can get going fast and don't have to choose between creating great customer experiences, securing their customers' data and staying compliant with fast-changing privacy regulations like GDPR and CCPA. To learn more about Strivacity, visit www.strivacity.com.

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