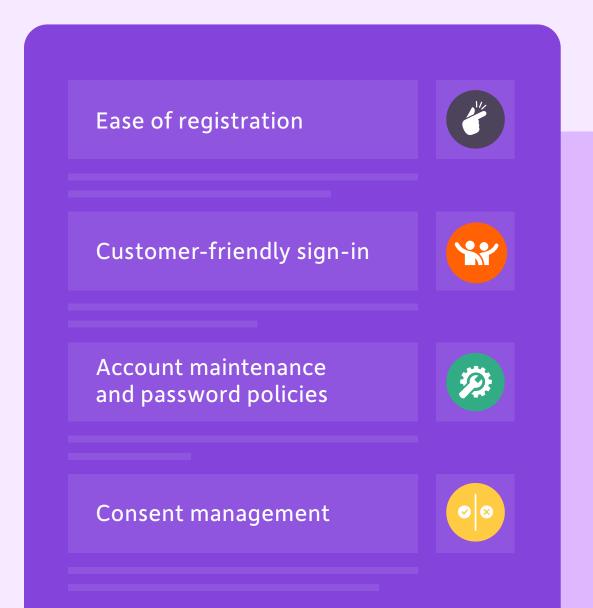


SCORECARD

20 ways to test your customer sign-in experience



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:

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



 1 – Multiple, because we have different services or brands 5 – Only one
 1 – No, it feels like a different site 3 – Kind of, but it could be better 5 – It's a 100% unified experience
 1 – No, none 3 – Yes, we offer 1 5 – We offer 2 or more (or we're a bank)
 1 – We have 5+ fields on the 1st screen 3 – Less than 5 fields but 2+ screens 5 – We use progressive profiling
 1 – What are password managers? 3 – Hassle-free copy/paste of info 5 – Form fields are auto-populated with saved info from password managers
 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)



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	1 – No, not at all	
Can users update their own information online in their account profile?	3 – Yes, but only a couple fields	
	5 – Yes, most of the fields	
Automated data sync with CRM/CDP	1 – No, they are not connected	
When customers update account info online does it sync with the CRM, and	3 – Yes, if we get really lucky	
vice versa?	5 – Yes, perfectly every time	
Customer alerts for updated info		
When customers' account info is updated do	1 – No, we don't do that	
they get an email/text update to ensure the change was correct?	5 – Yes, for important updates	
Unique usernames	1 – Yes, we allow unique usernames	
Can customers create unique usernames or	5 – No, usernames must be an email address	
do you require them to use email address of phone numbers?	or phone number	
Password policies	1 – Every few weeks or months	
When do you require users to change their password?	5 – Only when we identify it as a known- stolen password	
·		
	Sub-total (add up your 5 score	s)
	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 of 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	
Customer-friendly sign-in	/25	
Account maintenance and password policies	/25	
Consent management	/20	
	Average:	

Interpreting your average score

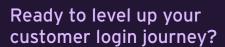


Once you've got your average scores – both for each category and overall – you can zoom out and see where your time is best spent to up-level your customer sign-in experience. Below are some guidelines for how to think about where you stand, based on your average scores.

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.	10
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	43

acquisition and revenue.



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.