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**TRANSFORMATIONAL  
INNOVATION LEADER**

*Accelerating Innovation to Zero Across the  
Global Ecosystem*

RECOGNIZED FOR BEST PRACTICES IN THE  
GLOBAL CIAM INDUSTRY

F R O S T & S U L L I V A N

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## Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Descope excels in many of the criteria in the CIAM space.

AWARD CRITERIA	
<i>Transformational Innovation</i>	<i>Customer Impact</i>
Market Disruption	Price/Performance Value
Competitive Differentiation	Customer Purchase Experience
Market Gaps	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Passionate Persistence	Brand Equity

### *The Transformation of the CIAM Industry*

Identity security is complex, comprising numerous components such as identity and access management (IAM) for the workforce, customers (B2B), consumers (B2C), citizens (G2C), and non-human identities, identity governance administration (IGA), privileged access management (PAM), and identity threat detection and response (ITDR). Many companies adopt a piecemeal approach to manage the growing need for identity-based solutions in the enterprise security stack. However, this approach can lead to a patchworked identity security system replete with silos and gaps.

The adoption of customer IAM (CIAM) solutions has been slower than workforce IAM. Companies want to avoid adding friction, often prioritizing user experience (UX) over security. Many organizations develop customized CIAM solutions in-house and are reluctant to replace them for fear of disrupting customer experience (CX). Often, these solutions are unable to integrate with advanced solutions provided by identity security solution providers. They also fail to maintain pace with the continuously evolving threat landscape, increasing vulnerabilities in the system. The focus on CIAM is increasing because organizations are required to assume responsibility for securing consumer data. CIAM vendors must offer easy-to-implement and easy-to-use solutions, harnessing advanced technologies to manage evolving and sophisticated threats. Vendors are also approaching CIAM with a greater focus on enabling companies to find the right balance of security and CX.

## Disrupting the market with customizable workflows to enable easier CIAM upgrades

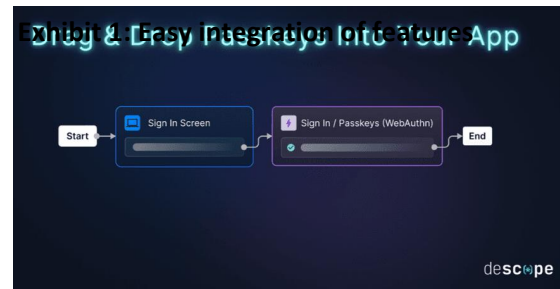
*“For a vendor that emerged out of stealth only recently, Descope offers an extremely robust set of offerings. Its sophisticated and customizable visual workflows set it apart from most other CIAM providers. Customers can use these workflows to create user journeys that fit their strategy with a simple drag-and-drop that includes both backend and frontend design capabilities.”*

**- Deepali Sathe**  
Senior Industry Analyst

Descope emerged from stealth in February 2023, with a \$53 million seed fund led by Lightspeed Venture Partners and GGV Capital; this initial investment also involved participation by individual investors such as George Kurtz (Co-Founder and CEO of CrowdStrike), John W. Thompson (Lead Independent Director at Microsoft), Bipul Sinha (Co-Founder and CEO of Rubrik), and Assaf Rappaport (Co-Founder and CEO of Wiz). Led by a strong team of founders with two very successful past ventures, Descope’s investors have expressed immense confidence in the team and their vision. Since launch, Descope has grown rapidly; it has over 600 customers, including some very large customers, and manages millions of identities across verticals and regions.

Descope’s CIAM platform offers multiple drag-and-drop

authentication methods, including passwords and passwordless methods such as magic links, passkeys, social logins, and one-time passwords (OTP) over SMS. Descope’s access control capabilities include single sign-on (SSO) over SAML and OpenID Connect (OIDC), with role-based access control (RBAC), relationship-based access control (ReBAC), and attribute-based access control (ABAC) options. The platform also enables risk-based authentication (RBA), session and



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token management, bot protection, and audit capabilities.

For a vendor that emerged out of stealth only recently, Descope offers an extremely robust set of offerings. Its sophisticated and customizable visual workflows set it apart from most other CIAM providers. Customers can use these workflows to create user journeys that fit their strategy with a simple drag-and-drop that includes both backend and frontend design capabilities. Developers can build user-facing screens, authentication flows, MFA and step-up controls, error handling, A/B testing, and journey analytics. Access to more than 60 third-party connectors enables greater flexibility, another important factor that will drive the adoption of CIAM. Descope offers plug-and-play connectors enabling customers to easily update their

existing workflows. The drag-and-drop facility is also available for modifying the user journey and can be done within existing workflows without additional coding. The modular nature of Descope's platform and strong affiliation to OIDC allows customers to augment their existing capabilities and enhance CIAM outcomes with use cases such as risk-based phishing-resistant MFA, identity federation, or granular authorization permissions.

### ***Descope leadership team's vision to position CIAM as a business enabler***

The founding team's first company was Sentrigo, a database security provider in 2006, which was acquired in 2011 by McAfee. This was followed by the building and scaling of Demisto, a SOAR provider that was acquired by Palo Alto Networks in 2019. Having founded Descope in 2022, the team is looking to position CIAM as an important business enabler by going beyond passwords for authentication. This vision translates into a CIAM solution that enables quick time to value, low cost of ownership, and futureproofing with easy solution upgrades for customers. A large part of the extended team, such as the sales and marketing leaders, also come from Demisto. In addition to their experience of building authentication for solutions at Demisto, the team has taken note of market requirements to ensure the Descope platform meets customer needs. It provides a seamless and secure experience to consumers, focuses on the growing importance of identity security, enables developer teams to focus on core business, and goes beyond password-based authentication.

Moving away from the legacy CIAM and homegrown solutions that typically inhibit scalability and modernization, Descope allows its customers greater flexibility. Its modular platform enables companies to select and implement features sequentially based on their needs and integrate them into their existing systems.

### ***Accessibility, scalability, and flexibility of the platform enhance CX and customer satisfaction***

The recently launched Descope partner program aims to enroll more value-added resellers (VARs), service providers, and systems integrators (SIs) to make it easier for customers to access the platform. As part of its partner-first strategy, Descope offers deal registration, joint go-to-market initiatives, training and enablement, developer relations, and sales and marketing collaboration. This launch enables access across regions and verticals. Similarly, with a wide range of capabilities, Descope can cater to varying requirements from organizations of all sizes, from start-ups to large enterprises.

### **Exhibit 2: Sample workflows provided by Descope**

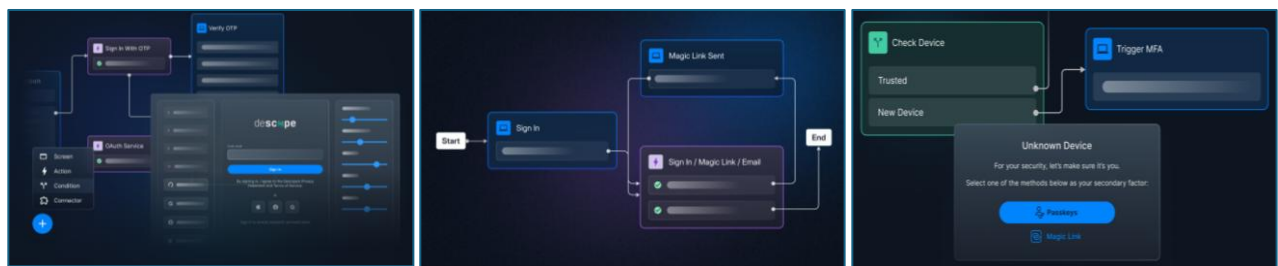


Exhibit 2 highlights three different workflows that can be used to integrate different features of frictionless authentication, magic links, and MFA into a user journey. Descope's customizable workflows

enhance developer and user experience, which are important criteria for customers when they are selecting a CIAM platform. The no/ low code workflow interface, ability to augment existing authentication systems, and an ecosystem of third-party connectors reduce the TCO for companies. The platform can cater to both B2C and B2B use cases. For instance, B2C use cases may require scalability while B2B use cases may need multi-tenant architecture to meet enterprise customer requirements. SDKs and API-based options are also available for developers. To test changes before implementing them, companies can run trials within the same workflow without affecting the experience of the entire consumer base.

To enhance customer experience, Descope focuses on ensuring a seamless transition from pre- to post-sales. The developer relations team, which is its second-largest team, continues to work with customers to avoid any loss of knowledge after the sale is complete. They are joined by customer success engineers who can help to maintain and update the solution to ensure the relevance of the CIAM environment. Regular and proactive meetings enable expansion within the client environment as they progress toward adding more modern features to CIAM.

### ***Building brand recognition with a client portfolio across verticals***

Descope has built a very strong customer portfolio within a short timeframe. Databricks (a cloud data platform), GoFundMe (an online funding platform with millions of users), and Navan (a travel expense company) are some of its satisfied customers. Companies select the Descope platform for its range of authentication options, implementation speed, and because it can augment existing systems rather than completely replacing them. Another important input into building the brand is the partner-first strategy that will improve access across regions and verticals.

## **Conclusion**

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Descope emerged from stealth in February 2023 and is led by a well-known and successful team of founders. With seed funding of \$53 million, the company is poised for rapid growth globally, with its marquee clients enabling it to gain the confidence of other customers. The Descope platform is modular and is capable of catering to a wide range of requirements for a variety of customers – from start-ups to large enterprises. The workflow-based, low/ no code CIAM enables easy integration and rapid deployment. With its strong overall performance, Descope earns Frost & Sullivan's 2025 Global Transformational Innovation Leadership Recognition in the CIAM industry.

## What You Need to Know about the Transformational Innovation Leadership Recognition

Frost & Sullivan's Transformational Innovation Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

### Best Practices Recognition Analysis

For the Transformational Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### *Transformational Innovation*

**Market Disruption:** Innovative new solutions have a genuine potential to disrupt the market, render current solutions obsolete, and shake up competition

**Competitive Differentiation:** Solutions or products articulate and display unique competitive advantages

**Market Gaps:** Solution satisfies the needs and opportunities that exist between customers' desired outcomes and their current market solutions

**Leadership Focus:** Companies' focuses are on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

**Passionate Persistence:** Tenacity enables the pursuit and achievement of seemingly insurmountable industry obstacles

#### *Customer Impact*

**Price/Performance Value:** Products or services offer the best ROI and superior value compared to similar market offerings

**Customer Purchase Experience:** Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

**Customer Ownership Excellence:** Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

**Customer Service Experience:** Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

**Brand Equity:** Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®



## Best Practices Recognition Analytics Methodology

### Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

VALUE IMPACT			
STEP		WHAT	WHY
1	<b>Opportunity Universe</b>	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	<b>Transformational Model</b>	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	<b>Ecosystem</b>	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	<b>Growth Generator</b>	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	<b>Growth Opportunities</b>	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	<b>Frost Radar</b>	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	<b>Best Practices</b>	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	<b>Companies to Action</b>	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

\*Board of Directors, Investors, Customers, Employees, Partners



## About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

# The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

### Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



# The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

### ***Analytical Perspectives:***

- Mega Trend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)

