# PROCESSUNITY GOLD VRM QUICK START

Experience the fast track to third-party risk management program success

ProcessUnity Gold VRM Quick Start is a package of 100 Professional Services hours designed to accelerate your time to value and lay the foundation for ongoing third-party risk management success. This implementation engagement, which includes consulting, project management, configuration, enablement, and data loading services, employs a structured approach that gets your program up and running quickly and seamlessly.

Our proven implementation methodology — developed and refined through hundreds of successful customer engagements — puts your third-party risk management strategy into action with optimal speed and efficiency. Bringing extensive experience implementing risk and compliance solutions to each engagement, our expert consultants and project managers work closely with your team to understand your unique business challenges, build a plan, execute on that plan and implement the most effective solution.

The ProcessUnity Team leverages an Agile approach and proven best practices to ensure a fast and predictable implementation experience that focuses on making your organization self-sufficient. That way, you'll be well prepared to configure and use your third-party risk management solution for maximum business impact.

> ProcessUnity Gold VRM Quick Start takes you through a phased implementation process that sets you up for success.

## PLANNING

As a new customer, you'll receive a letter welcoming your organization to the ProcessUnity family and introducing your key contacts that will lead your engagement. We will also provide materials to help your Application Admin be successful in their role and onboarding documentation to get you started. The onboarding document captures key information from your system such as instance name, pilot team members, and an inventory of materials that will help our Customer Success team start the onboarding process.

In a 60-minute Kickoff Meeting with your key stakeholders and pilot team members, we'll introduce our project team, review your subscription, outline the enablement process, and identify next steps. In addition, we'll ask you for an overview of your specific program. This meeting will detail how ProcessUnity will support your success at each phase of the implementation process — and beyond. Following the Kickoff Meeting we will provide materials to help organize your requirements and business process workflow. Finally, we'll turn on your production and sandbox instances, create initial users, distribute login details and schedule future meetings to prepare your organization for the next phase.

## ANALYSIS & DESIGN

A facilitated Discovery session addresses what it takes to move forward with your specific deployment, including scoping business requirements, defining design objectives, and identifying sources for importing data. We'll deliver an overview of your application(s) and work with your team to build a customized project plan for the implementation and deployment of your third-party risk management program.

Once a mutually agreed-upon project plan is in place, we will dive into the first enablement workshop on properties. At this time, ProcessUnity will provide Single Sign-on and Email Gateway information, if applicable.

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## ENABLEMENT & CONFIGURATION

The next step is to build out your implementation and teach you how to configure and use the platform. After setting up user accounts for system access, we'll conduct hands-on workshops to show you how the ProcessUnity solution works, guiding you through key processes and functions including:

- Application Settings & Properties

- Vendor Request/Intake

- Vendors & Services

- Questionnaires & Scoring

- Assessments & Scoping

- Roles & Permissions

- Import Templates

- Notifications & Reporting

Leveraging information from the Discovery session, our experts will mentor your application administrators throughout the configuration phase, empowering them to make the changes necessary to support your third-party risk management program.

## USER ACCEPTANCE TESTING & PRODUCTION PREP

Once the system is properly configured, ProcessUnity will support your team members as they perform user-acceptance testing. Our consultants will coach you through workflows, configuration changes, and issue resolution to ensure that your system is meeting specified requirements. When testing is complete and your application administrator signs off on the system, we'll prepare to go live.

## GO LIVE & TRANSITION TO SUPPORT

Within a week of your ProcessUnity system being launched in production, we'll hold a transition meeting to convert your account from Professional Services to Customer Support. We'll introduce your support team members and explain how to contact them via email and our Customer Support Portal. We'll also review available resources, support policies and software update procedures.

Take advantage of the ProcessUnity Gold VRM Quick Start and get your third-party risk management program off on the right track for rapid time to value and strong business results.

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