VIRTUAL 2021
ProcessUnity
CUSTOMER SUMMIT

Welcome to the ProcessUnity Customer Summit!

Kellie Shea, Senior Marketing Programs Manager, ProcessUnity

Today's Agenda

- Opening Remarks
  - 11:00 AM to 11:30 AM
  - Sean Cronin, CEO
- ProcessUnity Product Roadmap
  - 11:35 AM to 12:05 PM
  - Todd Boehler, SVP Strategy
- Case Study: Idaho Central Credit Union
  - 12:10 PM to 12:55 PM
  - Travis Hulse, Vendor Relationship Risk Analyst
- Break
  - 12:55 PM to 1:10 PM
- Cybersecurity Program Management
  - 1:10 PM to 1:55 PM
  - David Klein, Sr. Dir. Product Strategy
- Case Study: Abercrombie & Fitch
  - 2:00 PM to 2:45 PM
  - Rob Seibel, Director of Legal Compliance
  - Adam Wefler, Sr. Procurement Specialist
  - Ros Morville, Sr. Product Marketing Manager

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Welcome Back!

Sean Cronin, CEO, ProcessUnity

Our **Core Values**

Trust

We are honest. We stand for what is best for our customers, our team and our company.

Team

We are great colleagues. We celebrate diversity and inclusion. We do everything in our power to help our customers, partners and co-workers succeed.

Passion

We are driven. We compete to win and push to exceed customer expectations.

Innovation

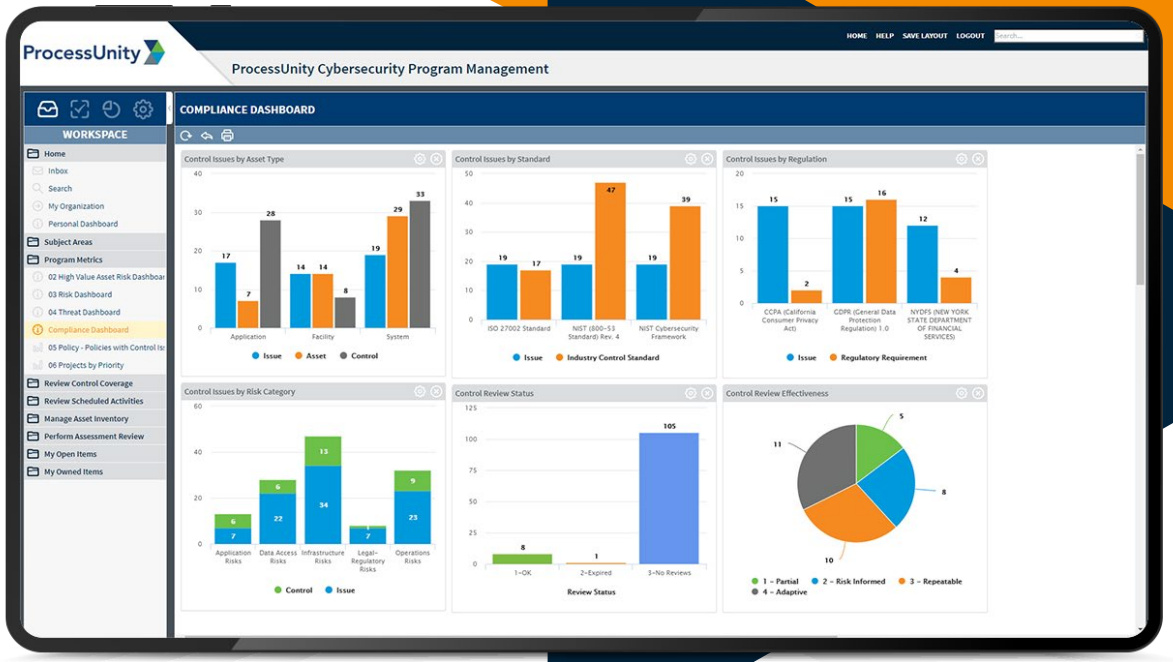
We solve problems. We transform ourselves and our platform to create unique solutions for complex challenges.

ProcessUnity

OUR MISSION

- Advance our customers' most critical risk and compliance programs with **our premier platform and unparalleled expertise.**

ProcessUnity



OUR **STRATEGY**

Our Customers

We will be known for the success of our customers.

- Implement **effective** risk management programs faster.
- Offer best-practice **guidance** from subject-matter experts.
- Incorporate customer **feedback** into our solutions.
- Provide the types of **services customers need** to run their programs.
- Foster a **community** of customers, partners, and industries.

ProcessUnity

ProcessUnity “Admin” Training Options

Public Face-to-Face Training

Multi-day, classroom-style instruction

Virtual Friday Training Series

Dynamic online learning every other week for a year

Private Face-to-Face Training

Remote or in-person, tailored content, flexible logistics

Admin Academy

Self-paced eLearning video modules

Online Help Center

Easily-accessible help content for administrators

Community Learning

Networking events, user groups, advisory board, discussion boards, social learning

Certification Testing

Become a ProcessUnity Certified Professional

Public Face-to-Face Training

- Resumes August 2021
- 3-day immersive events
- Admin 101, Advanced Admin, Reporting, Expressions…
- Concord, San Diego, Miami, London…

www.processunity.com/training

Virtual Friday Training Series

- Every other Friday – 26 total sessions with Replay Library
- 2-hour Zoom™ sessions
- Attendee-voted topics
- Formal training, Live Demos, Open Forum, Interactive!

www.processunity.com/training

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Gartner Reports: We Need Your Help!

- Gartner will use online reviews from its Peer Insights website in lieu of live customer references
- $100 amazon gift card (or charitable donation) for your accepted review

"A great partner for our evolving Vendor Risk Management program."

"Up and managing initial processes within 90 days of 'opening the box.'"

"They are continuously making improvements and adding new features."

"Super easy tool to use and implement."

"The tool was live and performing assessments in 4 to 6 weeks."

"The configuration process is simple and user friendly. The software is intuitive and easy to use."

Gartner peerinsights™

"One of the most flexible tools on the market!"

"ProcessUnity is perfect for organizations looking for an easy way to manage vendor [risk]."

"Implementation went smooth and took less than a month."

"The platform is very slick and easy to navigate."

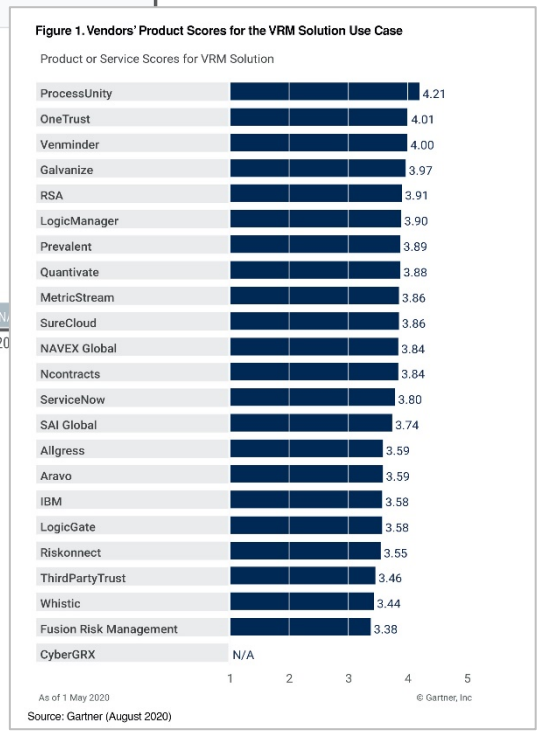
"ProcessUnity was great at accommodating us every step of the process."

"The ProcessUnity personnel with whom we partnered to implement the solution were excellent."

"We can report on anything we want and notify on anything."

"Hands-down the best tool in the market for Third-Party Risk."

Source: Gartner (August 2020)



Source: Gartner (August 2020)

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Submit (or Refresh) Your Review

- NOTE: All reviews are confidential (names/companies are not published)
- Go to www.gartner.com/reviews/home
- Sign In (or Register)
- Click “Write a Review”
- Search for ProcessUnity Vendor Risk Management
- Submit Your Review
- Forward the Review Acceptance Email to Your ProcessUnity Account Manager
  - Include your email for the gift card or tell us to donate it to charity

Thank You in Advance for Your Help!

Enjoy the Conference!

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