CORL TPRM Platform:

Client Getting Started Guide

Agenda

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CORL
TECHNOLOGIES

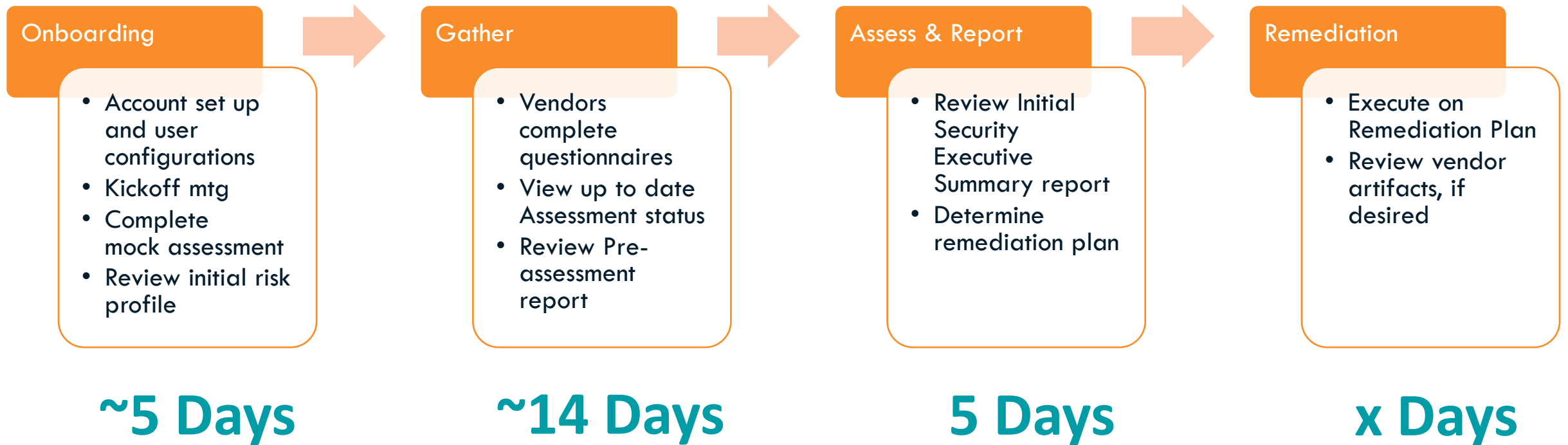# Welcome to CORL

Your CORL Team

- **Customer Experience Manager (CXM)**: your primary point of contact throughout your journey from onboarding to assessment completion.
  - They will hold regular touch points and review the overall state of your assessment portfolio, while assisting vendors to accelerate the assessment process.
  - Your CXM will work with our team of Security Experts to provide detailed TPRM recommendations based on the security findings of an assessment.
- **Enterprise Account Executive** – Sales contact helps with any contract questions

The CORL experience

- The experience is streamlined into four stages: Onboarding, Gather, Assess & Report, and Remediation.

The CORL TPRM Platform

The CORL experience is streamlined into four stages:

Onboarding
- Account set up and user configurations
- Kickoff mtg
- Complete mock assessment
- Review initial risk profile

Gather
- Vendors complete questionnaires
- View up to date Assessment status
- Review Pre-assessment report

Assess & Report
- Review Initial Security Executive Summary report
- Determine remediation plan

Remediation
- Execute on Remediation Plan
- Review vendor artifacts, if desired

~5 Days

~14 Days

5 Days

x Days

What to expect during Onboarding

- **Kick off preparation**
  - We're excited to get started! The welcome email contains a Calendly link for arranging the Kick-off meeting. If you haven't done so yet, please schedule it at your earliest convenience.
  - Gather the list of all vendors you are currently or soon to be working with to start the pre assessment process.
  - Determine list of Stakeholders and what access they need (Ex. Admin, User groups)
  - Login https://client.corltech.com and browse around.

- **Kick off meeting (60 mins)**
  - Set up stakeholder access and review success metrics
  - Customize account configuration (ex. Communication preferences, SSO, GRC integration, Remediation strategy)
  - Review assessment methodology
  - Walk through of the assessment process: request, status, disposition, risk findings
  - Conduct a mock assessment (to understand vendor experience)
  - Discuss risk acceptance

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CORL TPRM Platform Demo

- **Access** – Ensure the right members can access the platform and account settings are accurate.

- **Navigation** – A walkthrough of the most important features and how to track progress.

- **Assessment Request & Status** – A step by step how to submit an assessment request and view its status. Sneak peak of vendor view.

- **Security Executive Summary Report** – How to interpret and action the risk findings.
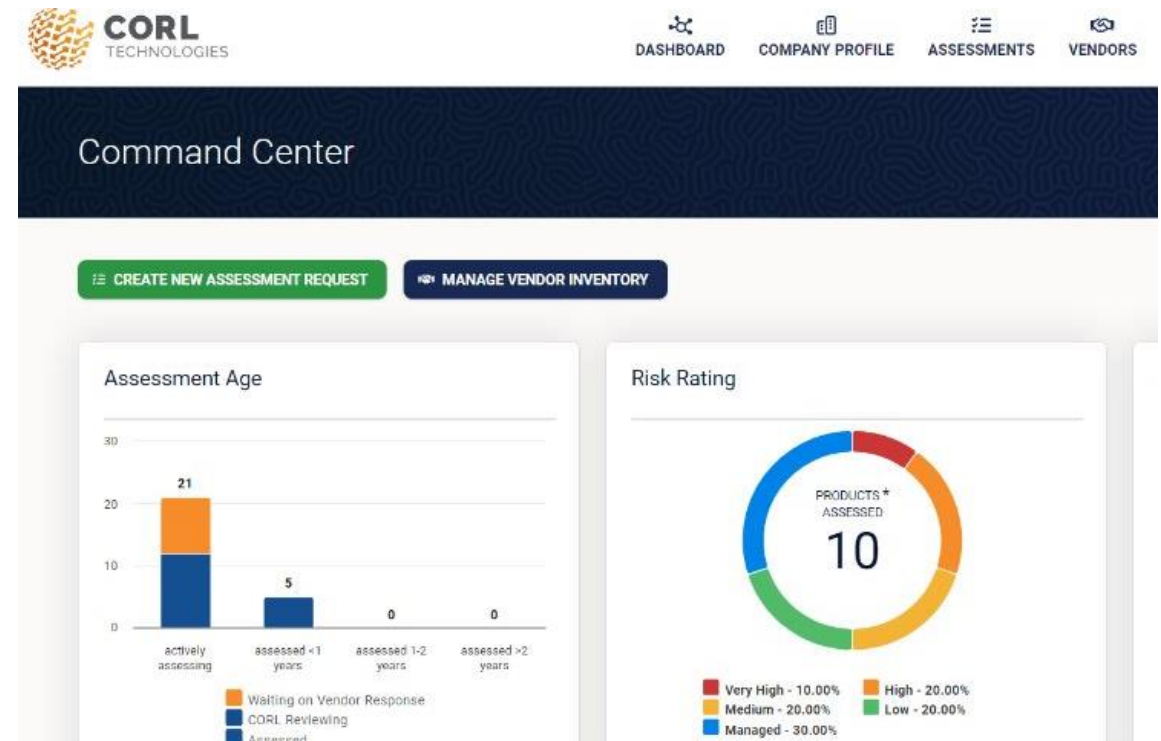
CORL TPRM Platform: Available Resources

Onboarding & Support

- Customer Experience Manager (CXM)
- Customer support via email and chat
- Product enhancement newsletters

Ongoing Training

- Webinar Best Practices series
- In-app guides
- Platform feedback button

On-demand Resources

- Knowledgebase
- Video learning library
- Product release notes

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