CSAT Partner Engagement – Quick Reference Guide

This 1-page guide summarizes how the Compliance & Security Assurance Team (CSAT) engages with partners. It highlights principles, core activities, cadence, and responsibilities so business units know when and how to engage.

# Engagement Principles

✔️ Partnering, not policing – collaboration over enforcement

✔️ Early engagement – involve CSAT at project inception

✔️ Transparency – clear visibility into risks and compliance status

✔️ Accountability – defined ownership and follow-up

# Core Activities

📞 Communication: Quarterly BU check-ins, office hours, dashboards

📋 Projects: Intake reviews, kickoff participation, policy translation

🎓 Training: Workshops, playbooks, CSAT onboarding

🤝 Feedback: Surveys, retrospectives, recognition

📊 Metrics: Coverage, satisfaction, compliance outcomes

# Engagement Cadence

• Weekly – Office hours & intake triage

• Monthly – Dashboards & compliance check-ins

• Quarterly – BU reviews & surveys

• Annually – Executive compliance summary

# Roles & Responsibilities

• CSAT Lead – Strategy, reporting, escalations

• Partner Liaison – Meetings, surveys, communications

• Compliance Analyst – Audit readiness updates

• Security Engineer – Technical remediation support

• BU Owners – Participate in reviews & address compliance tasks