Phases of a vCISO Engagement:

Phase	Goal	Common Tasks	Outcomes	Touch Point	Deliverables
Business Discovery	Understand COMPANY's current situation, goals, and problems/issues	Interview staff and stakeholders Review policies Walk through directorship processes Review Hiring Plan and M&A activity	Level set shared understanding of current posture Validate way forward (Affirm client buy-in)	Brief to CTO or Director of IT	Written 1-page EXSUM of current situation and trajectory (Where you are and where you're going)
Tech Discovery	Understand how COMPANY gets code into production, and secures its production and corporate environments[1]	Walk through or review systems with SMEs Review inventories, documentation, procedures[2], and diagrams Assess SDLC and/or CI/CD	Establish understanding of environment, assets, and information Drive client towards S-SDLC	Brief to CTO or Director of IT[3]	Appendix outlining current corporate and dev/test/prod
Map Services and Renewals (Decisive Phase[4])	Determine what COMPANY is currently paying for and when renewals occur	Review all current service agreements, licenses, and month to month SaaS payments[5]	Determine priorities for gap assessment	Finance Synch on services and payments	Appendix of service renewals (with recommended changes/ potential savings)
Gap analysis and resourcing	Determine gaps in IPDRR and how to fill them	Categorize assets and resources by IPDRR Due diligence to determine real gaps (e.g. configs and management not just tools) Research to identify viable solutions	We have adequate information to initiate IPDRR and Strategic Plans	Brief leads of Finance, Security, and Development	Gap Analysis Matrix using a cyber defense matrix
Timeline and Strategic Planning	Align tasks and resource acquisition in time and space	Review priorities, constraints, and limitations Align tasks and gaps in terms of lines of effort Sequence tasks within the strategic horizon and consider other strategic muscle movements	Major deliverables complete Identify next steps needed for vCISO engagement	Final brief to leads of Finance, Security, and Development	36-month road map

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[1] Pipeline, infrastructure, and environment are all inferred
[2] Drive discovery of what they are really doing
[3] Can be combined with phase 1 back-brief
[4] Determines the runway/duration of the terrain/environment you are operating on and how it changes; Up to this point the client has been spending money to develop awareness and rapport; This is where you start saving them money;
[5] Look at the bill for SaaS to deduce where costs are