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| 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]](#footnote-2) | Walk through or review systems with SMEs  Review inventories, documentation, procedures[[2]](#footnote-3), 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]](#footnote-4) | Appendix outlining current corporate and dev/test/prod |
| Map Services and Renewals (Decisive Phase[[4]](#footnote-5)) | Determine what COMPANY is currently paying for and when renewals occur | Review all current service agreements, licenses, and month to month SaaS payments[[5]](#footnote-6) | 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 |

1. Pipeline, infrastructure, and environment are all inferred [↑](#footnote-ref-2)
2. Drive discovery of what they are really doing [↑](#footnote-ref-3)
3. Can be combined with phase 1 back-brief [↑](#footnote-ref-4)
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; [↑](#footnote-ref-5)
5. Look at the bill for SaaS to deduce where costs are [↑](#footnote-ref-6)