

Accelerated Assurance Checklist

This checklist will help you and your team stay organized and aligned while modernizing your assurance processes.

Build Initial Cross-Team Collaboration

- ☐ Communicate how automating assurance will benefit each team
- ☐ Define roles to ensure all stakeholders clearly recognize their responsibilities
- ☐ Determine who will maintain Knowledge Base content, approve access, and monitor customer engagements
- ☐ Ensure Senior Leadership understands who has access to ROI and productivity metrics
- ☐ Train sales teams to share your Trust Center early in the deal and renewal cycles

Integrate Existing Tools into Your Assurance Program

- ☐ Identify all systems and tools that can create efficiencies and drive productivity, including GRC platforms, ticketing software, messaging applications, and others
- ☐ Ask all subject matter experts across GRC, security, and legal teams to evaluate existing information and ensure data is correct
- ☐ Integrate your Trust Center with essential tools like Salesforce, HubSpot, Teams, and Slack

Optimize and Promote Your Trust Center

- ☐ Ensure your Trust Center reflects your brand's voice, tone, and style
- ☐ Publish your Trust Center on your website with a branded URL
- ☐ Enable access to every stakeholder, customer, or prospect who has signed an NDA
- ☐ Promote your Trust Center as a self-serve resource and encourage stakeholders to subscribe to real-time notifications

Set and Track Performance KPIs

- ☐ Set clear, measurable goals that can be reported to leadership
- ☐ Map goals to specific business outcomes, such as faster deal cycles or improved customer trust
- ☐ Identify metrics to track progress, such as number of Trust Center visits, deal velocity, and influenced revenue
- ☐ Track metrics and report on progress to leadership quarterly to tie trust to relevant business outcomes