Security + Access manager

SECURITY & PERMISSIONS HEALTH CHECK - PACKAGED PROFESSIONAL SERVICES

ApplicationPerfection

Overview

A detailed consultancy package where we engage with your team to review your security & permissions setup. This can either be an 'end to end' review or a subset of your setup. Our team works with you in partnership to review, understand, identify risk areas and document your existing setup, making optimisation recommendations.

Why companies choose to conduct a proactive & independent security & permissions health check

With many different types of users from sales to finance accessing the valuable data in your CRM, permissions can become complex. We have all heard numerous costly horror stories of internal and external data breaches. This is a critical area due to all the new data legislation such as GDPR, PIPEDA etc. Sometimes it's hard to focus on this area when you have multiple stakeholders to please, but security is never a big deal until something goes wrong and then it is a big deal!

Process

We follow a four-step process when conducting your Security & Permissions Health Check.

| Agree Analysis Scope | Initial Findings report & workshop | Agree Action Plan | Action review session |

Agree Analysis Scope

We kick off the process with a fact-finding meeting to understand your current concerns with your security model and agree scope of analysis. We use our predefined checklist of areas and in addition agree any specific challenges you would like us to focus on. Listed are a selection of our standard health check areas of focus.

- Permissions analysis
- Risk points
- Sensitive and confidential data access review
- Object & field level access review
- User and licence usage analysis
- Critical updates review and impact analysis
- System & portal health checks
- Documentation

Initial Findings Report & Workshop

After conducting an independent review of your setup and when the initial analysis is completed, we will provide you with a report of findings and recommendations on areas that could be improved. We review this report together.

Agree Action Plan

We work with you to define an action plan for updating your security & permissions setup, which will be built into your roadmap. For example, this could be implementing changes to your existing model, defining system permissions ownership, documentation etc.

Action Review Session

To keep focus on security & permissions amongst your changing priorities, our final step in the process is to hold one or more action review sessions to track where you are at with completing the actions defined in the plan.