# vCISO Process Requirement Checklist

## Are You Ready to Sell vCISO Services?

Before you launch a vCISO offering, you need more than good intentions and a few tools. Selling security strategy means first getting your house in order.

This checklist helps you pressure-test your readiness across three critical areas:

* **Sell**: Do you have the GTM fundamentals, pricing, and materials to confidently present and sell the service?
* **Onboard**: Can you move a new client from “sold” to “steady state” without confusion, rework, or internal conflict?
* **Deliver**: Are your playbooks ready to guide consistent, high-value vCISO execution?

If even one of these areas is half-baked, your clients will feel it, and your team will pay the price.

## 

## Instructions for Completion

Review each item under the three categories. For each one, mark it as:

⚪️ Not Started – No process or documentation yet

🟡 In Progress – Partially developed, not yet consistent

🟢 Ready – Fully documented and in active use

Once complete, set completion dates and close the gaps before deploying or scaling your vCISO program. A solid foundation is what turns security consulting into a sustainable service.

| vCISO Offering Process Development Tracker | | | | |
| --- | --- | --- | --- | --- |
| Owner | Category | Process | Date | Status |
|  | Sell | GTM Plan | Date | Not Started |
|  | Sell | Packaging and Pricing | Date | Not Started |
|  | Sell | Feature Definitions, Templates, Quote Calculators, SOWs | Date | Not Started |
|  | Sell | Marketing Lead Magnets and Leave-Behinds | Date | Not Started |
|  | Sell | Pitch Deck and Sample Deliverables | Date | Not Started |
|  | Onboard | Sales Hand-Off Process | Date | Not Started |
|  | Onboard | Onboarding Project Process | Date | Not Started |
|  | Onboard | Client Documentation Process | Date | Not Started |
|  | Onboard | Change Management Process | Date | Not Started |
|  | Onboard | Transition to steady-state Process | Date | Not Started |
|  | Onboard | Customer Success Kick-Off Process | Date | Not Started |
|  | Deliver | Risk Assessment Playbook | Date | Not Started |
|  | Deliver | Incident Response Playbook | Date | Not Started |
|  | Deliver | Tabletop Exercise Playbook | Date | Not Started |
|  | Deliver | Client Cadence Call Playbook | Date | Not Started |
|  | Deliver | Performance Management Report Playbook | Date | Not Started |
|  | Deliver | Security Strategy Presentation Playbook | Date | Not Started |
|  | Deliver | Board Reporting Playbook | Date | Not Started |