



Catalog of Services

Core Insights Executive Consulting is intended to provide our clients CIO- and CISO-level strategic consulting services to align internal IT departments with business requirements. These engagements include:

- **Virtual CISO** – Many organizations do not have a full time CISO on staff to provide appropriate security oversight to the business. Even when a CISO is present, it is not unusual for them to be constantly addressing tactical issues and unable to devote enough time to more strategic tasks. Core Insights Virtual CISO services can be billed on a monthly basis providing client defined hours per month to either focus on strategy, roadmap development and management, oversee execution of key initiatives or offload the tactical issues freeing up the team to focus on strategic initiatives.
- **Virtual CIO** – The CIO in an organization is responsible for setting objectives and strategies for the IT department to align with business needs. This includes assessing current processes, current policies, current staff, as well as selecting and implementing technology to streamline all operations and optimize strategic benefits. Many times, there is simply not enough time in the day to manage all these efforts. Core Insights Virtual CIO services can augment the work of the traditional CIO leveraging a resource that has served in the position previously. This can be billed on a monthly basis providing 10 to 120 hours or more per month.
- **Strategy Planning / Roadmap** –IT and security departments are faced frequently with unexpected requests from the business that inflate the IT budget and/or throw their initial plan off course. A Roadmap can serve as a strategic plan that defines the business goal and includes the major milestones needed to achieve it. It can outline the choice of technology and schedule of rollout, but more importantly can serve as a communication tool to articulate the thought process behind the goal and the plan for getting there. Core Insights Advisory Services can interview the various business stakeholders and construct this plan on behalf of our clients to ensure they stay on track.
- **AI Strategy** – AI planning is essential for security and protection of IP. Benefits are vast but risks are very high unless the use cases, controls, LLM and governance are developed and in place before the deployment. AI can help organizations but it can also create high risks for businesses.
- **Decision Support Matrix** – Our clients face having to make strategic decisions that impact the business and have multiple possible solutions. Core Insights Advisory Services can build a Decision Support Matrix to compare and analyze quantitative and qualitative variables to make the tough decisions. We will interview the various business units to ascertain the true business requirements and their relative importance, then map solutions to ensure they (1) meet the business requirement, (2) are solutions the company can easily ingest, and (3) make the most financial sense. Ultimately, we will provide them a business case they can present to the board for final approval.
- **Software Rationalization** - Security software rationalization is the strategic review of the client's selected software with the goals of streamlining the existing software portfolio, improving

efficiency, reducing complexity, aligning strategies, and lowering total cost of ownership (TCO). The rationalization determines what software should be kept, replaced, retired, re-platformed, consolidated and perhaps what should be purchased. Additional benefits to performing a software rationalization are obtaining a detailed understanding of how well the current software aligns with Client's needs and strategy.

Best Practice Frameworks

Core Insights can help standardize business processes for our clients and align those processes to either compliance regulations or accept best practice frameworks. Clients who do not have specific compliance requirements may elect to use a best practice framework such as NIST, ISO, or ITIL. Core Insights can assist in the following areas:

- **Gap Analysis** - This is the process of assessing where a client's existing maturity is within one or multiple compliance types versus where they want to be. Core Insights assist clients in understanding their current state, what is required to mature their posture and clearing defining the end state. Core Insights can advise, execute the work ourselves, or coach our client's teams and oversee the project if they decide to execute the work with internal resources. Either way, we are here to help.
- **Policy / Procedure Planning & Documentation** – Practically all compliance methodologies require that our clients document their policies and procedures that are rolled out to their employees. Clients generally have the best of intentions in completing these, yet day to day tactical items arise and take precedence. Core Insights Advisory Services can leverage their years of experience as well as catalog of templates to create unique policies to meet requirements and provide much needed structure to an organization.
- **Security Playbooks, Governance Planning & Documentation** – Businesses get excited to invest in projects that move the needle and drive growth. Unfortunately, it is not until after the project is completed when few companies will realize they need to document how they manage security practices, how they measure against their policies and procedures within documentation that is easily understood and meets compliance and regulatory requirements. Core Insights can create new or update existing processes and documentation to meet these requirements. This value-add aids clients since engineers, architects and IT staff are usually not fond of becoming a compliance documentation specialist.
- **IT Process Engineering / Re-Engineering** – Transformation is exciting businesses around the globe. Part of this endeavor requires adding, removing, digitizing, and improving IT processes. Core Insights can assist clients define such efforts while identifying increased efficiencies and reducing business and IT risks. We also keep automation opportunities in mind and assist clients with people, process and engineering improvements that better enable IT to meet SLAs, business outcomes and drive cost efficiencies.
- **Data Protection & Lifecycle Management** - Protecting and managing your data and your customers' data is paramount. This includes protective measures from breach, misuse, understanding data flows, risks, and regulatory compliance. With the enforcement in place for CMMC, GDPR and CCPA, data privacy is taking business' accountability to new levels including legal penalties. Core Insights offers services to map your data flows, identify risks, show where exposures may be while we align to your policies and governance.

- **Vendor and Third-Party Risk Management** - This annual service provides businesses the ability to not only measure risk and track third-party risk, but it also monitors third parties on a monthly basis. Our team works with our client's Risk Office and third parties to ensure they are taking reasonable steps to reduce risks based on our monthly assessments. Highly detailed annual assessments are still provided but businesses need to know when a partner or third-party is starting to slide off the rails or fall away from the custodial duties for data protection and privacy. This program ensures that our clients are always informed and enabled to make informed decisions as the Core Insights team partners with third parties and coaches them on how to remediate risks that impact your business.
- **Risk Assessments** – Risk assessments are performed as a requirement for PCI-DSS, HITRUST, and many other frameworks. Core Insights provides risk assessments, risk registers and roadmaps for just almost all acronyms compliance and regulation types.

- | | |
|------------------|-----------|
| ● CCPA | ● FISMA |
| ● CDPA | ● GDPR |
| ● CIS | ● GLBA |
| ● CMMC | ● HIPAA |
| ● COBIT | ● HITRUST |
| ● COPPA | ● ISO |
| ● CPA | ● ITAR |
| ● CPRA | ● NIST |
| ● DFARS | ● NYDFS |
| ● FedRAMP | ● OFAC |
| ● FERPA | ● PCI-DSS |
| ● FFIEC | ● PIA |
| ● FTC Safeguards | ● PIPL |
| | ● SOC |

Project Services and Managed Services

- **Vulnerability Management** - We offer project-based patch management and a managed services offering that enables clients to offload the responsibility and workloads of patch management to Core Insights. Feel free to leverage our services to help your organization “catch up” or provide continuous monitoring and patching for you.
- **Email Migrations** - Core Insights provides full migration services. We can upgrade in place or migrate on-premises email services to the cloud. We also offer migrations for collaboration tools such as MS Teams with O365, Slack and other solutions.
- **MFA and SSO** - We offer several multi-factor authentication and single sign on solutions. Work with our team to integrate your specific needs and obtain increased security with MFA and SSO.
- **Network Engineering** - Core Insights offers support, configuration management, zero-trust solutions, load balancing and more. Contact us for your network engineering, vLAN, network segmentation projects, or to discuss your needs and what options are available that most closely meet those needs.
- **Penetration and Vulnerability Testing** - Talk to us about your specific needs since no two tests are exactly alike. Core Insights can provide automated testing, manual testing and hybrid testing to meet your specific needs and scenarios.
- **Compliance as a Service (CaaS)** - Need assistance planning and preparing for your PCI-DSS audit, HITRUST or other compliance certification? Core Insights helps your team prepare all the required documents so you can work efficiently with your QSA or other Assessors.

CaaS Deliverables:

- PCI enablement - guided assistance to prep to pass PCI-DSS
- Team Training for PCI 4.0 Requirements
- Weekly Meetings with status reports
- Managing annual PCI compliance project plan
- Policy Documents: 31 reviewed and update assistance
- Diagrams: up to 8 reviewed and assistance
- Environment Documents: up to 5 reviewed and update assistance
- Scope Review
- Quarterly Operations Reviews
- ASV scan reviews
- Internal scan reviews

- SDLC ticket reviews
- System change reviews
- Significant change reviews as needed
- Security awareness education reviews
- Network security control review
- Wireless access point detection review
- Annual penetration test review
- Risk assessment review
- Incident response training and testing review
- BCM training and testing review
- PCI DSS Cert Assistance / Guidance
- Assistant in managing evidence and providing to evidence to QSA

This occurs as documentation is updated by us and your teams. Work is reviewed monthly. And loaded into Drata (once we spin it up, after payment) then we leverage Drata to pull some automated evidence collections from your servers and cloud configurations. Then we provide access to Drata for your selected QSA. We also answer any QSA questions in order to assist your team and lighten the QSA load on your teams.

You can find more information by visiting: <https://www.coreinsightsintl.com/solutions>.

Partners and existing Clients can create an account to see even more information via the Log In button on our home page.