



## Industry Membership

*For organizations that outsource critical processes and sensitive information services*

Firms that outsource critical data processes and sensitive information services require operating efficiencies and cost savings. They also must manage their risk, protect their reputations and meet regulatory requirements by carefully evaluating the controls their service provider partners have in place for security, privacy and business continuity.

Under the direction and management of The Santa Fe Group ([www.santa-fe-group.com](http://www.santa-fe-group.com)), the Shared Assessments Program brings industry-leading executives together to streamline and standardize the service provider evaluation process, helping organizations of all sizes realize important efficiencies and cost savings.

The Shared Assessments Program ([www.sharedassessments.org](http://www.sharedassessments.org)) was originally created by six leading financial institutions in conjunction with the Big 4 accounting firms to inject efficiency, consistency, cost savings and common sense into the service provider assessment process. The Santa Fe Group manages Shared Assessments as an independent, industry-driven standard.

## Shared Assessments Adoption

Shared Assessments adoption offers financial institutions, retail companies, healthcare organizations, telecommunication companies, and others faster, more efficient and less costly service provider security assessments processes while introducing more rigorous evaluations to their vendor management programs.

Industry organizations that adopt the Shared Assessments standards gain:

- **Efficiencies and Cost Savings** through faster, more efficient and less costly service provider assessment processes using the Shared Assessments tools: the Standardized Information Gathering (SIG) Questionnaire and Agreed Upon Procedures (AUP)
- **More Comprehensive Assessments** through increased rigor and industry-standard guidelines
- **Better relationships** with service providers and regulators

The value of Shared Assessments is clear: in the first year alone, we significantly reduced our service provider assessment costs. Membership gives our organization a voice in developing a much-needed global standard for vendor management.

— Donald Monks,  
Vice Chairman, The Bank of New York Mellon

## Benefits of Industry Membership

Industry members are our anchor members and, with Service Provider and Assessment Firm members, are the driving force behind the Shared Assessments Program. As participants in a global community of leaders in information security, privacy, business continuity and risk management, Industry members gain opportunities for brand visibility, collaboration and professional development.

In addition, Industry members enjoy these important benefits:

### Community

- Opportunities to shape and refine the industry de-facto security standard tools: the Standardized Information Gathering (SIG) Questionnaire and Agreed Upon Procedures (AUP)
- Access to members-only working group meetings and events with key industry thought leaders and knowledge experts to learn about the latest developments in vendor management and regulatory compliance
- Two complimentary seats at the Shared Assessments Member Roundtable, where members network with peers and discuss strategic outsourcing issues and trends
- Member discounts on registration for the Shared Assessments Summit, an annual day-and-a-half in-person forum providing expertise on the outsourcing landscape, regulator insights and updates on global trends
- Five annual complimentary registrations for webinars by The Santa Fe Group

### Leadership

- Opportunities to develop and demonstrate organizational leadership by serving on or chairing the Shared Assessments Steering Committee, Technical Development Committee and working groups

- Opportunities to foster employee growth and build organizational expertise
- Participation in members-only content development groups that author whitepapers and present webinars

### Visibility

- Reputational and brand visibility as a member of a global community of risk management leaders
- International recognition for making rigorous information security, privacy and business continuity processes integral to your organization's business model
- Your company name and logo prominently displayed on the Shared Assessments website ([www.sharedassessments.org](http://www.sharedassessments.org)), in promotional materials and at Shared Assessments events
- Opportunities to comment on media stories related to outsourcing and vendor risk management
- Member discounts on sponsorships and exhibitorships at the Shared Assessments Summit, an annual day-and-a-half in-person forum providing expertise on the outsourcing landscape, regulator insights and updates on global trends
- Member discounts on sponsorships, exhibitorships and registration for public events presented by The Santa Fe Group
- Online advertising opportunities through the Shared Assessments website ([www.sharedassessments.org](http://www.sharedassessments.org))

### Resources

Industry members gain access to these members-only resources:

- Membership directory
- Training calls
- Marketing Toolkit for members
- Member newsletter
- Member email updates
- Survey results and adoption statistics

### Membership Dues

Industry membership annual dues are based on market capital. Non-public firm membership fees will be based on annual global revenue.

Market Capital	Annual Membership
\$25B +	\$25K
\$5B - 24.9B	\$15K
\$2B - 4.9B	\$10K
Under \$2B	\$5K

To learn more about how your company can benefit from Shared Assessments Program membership, contact **Michele Edson, 831-637-1879** or [michele@santa-fe-group.com](mailto:michele@santa-fe-group.com).

For more information about Shared Assessments, visit our website at [www.sharedassessments.org](http://www.sharedassessments.org).

**We saw membership as an opportunity to join an effort that is helping to raise the bar on information security.**

— Scott Brown, Financial Services Program Manager, Iron Mountain