



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

Licensing the Shared Assessments Tools

For governance risk and compliance software providers building products using the Shared Assessments tools

Many of today's outsourcers use third-party software to evaluate and score service provider risk, incorporating the results into their management dashboards. Software providers wishing to incorporate Shared Assessments Program standards into a software product offered for license or sale must obtain acceptance and a license from BITS (www.bitsinfo.org) and The Santa Fe Group (www.santa-fe-group.com).

The Shared Assessments Program 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 the Shared Assessments Program as an independent, industry-driven standard.

Benefits of Licensing

Shared Assessments Software Solution Licensees gain full rights to use the Shared Assessments standards (the Agreed Upon Procedures and Standardized Information Gathering Questionnaire) in their products. Through their knowledge of the Program, they build and expand customer relationships, helping clients adopt and integrate the Shared Assessments standards.

Note: While licensing the Shared Assessments tools offers substantial benefits, it does not constitute Shared Assessments Program membership.

Software Solution Licensees gain the important benefits outlined below.

Visibility

- Reputational and brand visibility as a software provider offering products built with the Shared Assessments tools
- Use of the Shared Assessments name and logo on your product and in promotions
- Your company name and logo prominently displayed on the Shared Assessments website (www.sharedassessments.org), in promotional materials and at Shared Assessments events
- Online advertising opportunities through the Shared Assessments website (www.sharedassessments.org)

Community

- Opportunities to join the Shared Assessments Technical Development and Technical Standing Committees, which provide leadership in developing the Shared Assessments tools
- 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
- Access to events with key industry thought leaders and knowledge experts to learn about the latest developments in information security, privacy, business continuity and regulatory compliance
- Five annual complimentary registrations at webinars by The Santa Fe Group
- Sponsorship and registration discounts for public events presented by The Santa Fe Group

Resources

Software Solution Licensees gain access to these resources:

- Marketing Toolkit
- Shared Assessments newsletters
- Shared Assessments updates

Licensing Fee

The annual fee to license the Shared Assessments tools is \$15,000.

To learn more about licensing the Shared Assessments Program standards, contact **Michele Edson**, **831-637-1879** or michele@santa-fe-group.com.

For more information about Shared Assessments, visit our website at www.sharedassessments.org.