

REFERRAL GUIDE

Helping AI & SaaS startups
become audit-ready and **win**
enterprise customers.



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IDEAL REFERRAL PARTNERS



Fractional
CTOs



Fractional
CISOs



VC Portfolio
Teams



Audit
Firms



Startup
Consultants



WHO WE HELP

- ✓ AI startups
- ✓ SaaS & B2B software companies
- ✓ Venture-backed & high-growth startups
- ✓ Companies selling to enterprise customers
- ✓ Teams preparing for security and compliance reviews



IDEAL CLIENT PROFILE

- ✓ 10-200 employees
- ✓ Closing larger customers or entering new markets
- ✓ Needs SOC 2, ISO 27001, ISO/IEC 42001
- ✓ Responding to customer security questionnaires
- ✓ Unsure where to start with compliance
- ✓ Needs help before engaging an auditor

SERVICES OFFERED

Audit Readiness

- SOC 2
- ISO 27001
- ISO/IEC 42001

Program Development

- Policies
- Controls
- Risk Assessments

Audit Support

- Evidence Collection
- Vendor Reviews
- Fractional GRC Support

REFER ME WHEN THEY SAY...



"We need SOC 2."



"We're losing enterprise deals."



"We need ISO 27001."



"We're using Drata/Vanta but need help."



"We need someone to prepare us before the audit"

WHY REFERRAL PARTNERS WORK WITH ME

- ✓ Clear communication
- ✓ Startup-friendly approach
- ✓ Practical, right-sized solutions
- ✓ Trusted by founders
- ✓ Long-term partner, not just a project resource

WHAT SETS ME APART

- ✓ Enterprise GRC experience
- ✓ Startup-friendly approach
- ✓ Practical, business-focused solutions
- ✓ Dedicated partner from planning through audit
- ✓ Focus on enabling growth, not creating bureaucracy

THE PROCESS (START TO AUDIT-READY)

1



DISCOVER

Understand your business, goals, & current state



2



BUILD

Create a tailored roadmap with prioritized actions



3



PREPARE

Develop policies, controls, & processes



4



AUDIT READY

Test controls, close gaps, & confidently engage your auditor



**KNOW SOMEONE WHO
SOUNDS LIKE THIS?**

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introductory call



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