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| A close up of a logo  Description automatically generated |  | A picture containing shirt  Description automatically generated |

Agenda

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| --- | --- |
| Client name:Location | vCIO name:Date: |

Attendees:

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| Time | Description |
| 5 min | Check-in |
| 10 min | • Recent updates - Provide client a high-level overview on what major technology they have implemented in the WFH shift - Give bullet points of areas you will be addressing during the meeting (assets, security, risk/exposure assessment) |
| 5 min | Client updates• What organization changes have occurred due to this situation that has impacted:* Staffing
* Technology needs
* Business demand

• Are there any new models (hybrid work from home for example) for the organization that we should address?Asset report (What have we recently put in place and need to inventory?)  |
| 15 min | Review of Exposure and Risk• To Dos:* Policy and Procedures Assessment in light of situation
* Security Exposure Assessment
* Asset and user report
* License/contract review
* Budget report
 |
| 5 min | Wrap-up and Closure• Document new actions items (to become tickets)• Summarize customer deliverables |