



Brandon Hall Group

EXCELLENCE AWARDS 2023

Shared Assessments: Best Customer Training Program

Shared Assessments and Infopro Learning

Best Customer Training Program

December 2023



Company Background



Company-at-a-Glance	
Headquarters	Santa Fe, New Mexico, U.S.A
Year Founded	2006
Revenue	Privately held
Employees	35
Global Scale (Regions that you operate in or provide services to)	North America, UK, Europe, Asia-Pacific
Customers/Output, etc. (Key customers and services offered)	Membership organization with over 335 corporate members that span all industries. Shared Assessments provides thought leadership, products, and education on issues surrounding third-party risk management or vendor management.
Industry	Risk Management
Website	Sharedassessments.org



Company Background



Company-at-a-Glance	
Headquarters	New Jersey, U.S.A.
Year Founded	1989
Revenue	Private
Employees	800
Global Scale (Regions that you operate in or provide services to)	North America, Europe, Asia, Africa, Australia, and South America
Customers/Output, etc. (Key customers and services offered)	Infopro Learning provides a full suite of learning services to organizations. 70% of its clients are Fortune 1000 or global companies, HQ outside of the USA.
Industry	Full-service L&D Solutions provider
Website	http://www.infoprolearning.com/

Budget and Timeframe

Budget and Timeframe	
Overall budget	USD 36,035
Number of (HR, Learning, Talent) employees involved with the implementation?	9
Number of Operations or Subject Matter Expert employees involved with the implementation?	None from Infopro Learning
Number of contractors involved with implementation	2
Timeframe to implement	8 months
Start date of the program	November 2021



Business Conditions and Business Needs

Background:

Shared Assessments is a global membership organization committed to promoting best practices, training, and products for ensuring third-party risk certainty.

Shared Assessments has developed a product called the Shared Assessments Standardized Information Gathering (SIG) Questionnaire. The SIG is a configurable solution that customizes third-party risk assessment questions to assess the risk posed by an organization's vendors. The SIG was developed by leveraging the collective expertise and knowledge of a large and diverse member base. The SIG is updated annually to ensure that it remains relevant in the face of evolving risk environments and priorities. The SIG questionnaire is a third-party risk management product suite component that enables organizations to create, tailor, evaluate, and retain vendor assessments. SIG and the other suite of industry-standard products are employed by over 15,000 organizations globally to manage third-party risks.

Business Needs:

Shared Assessments wanted to address the ongoing issue of providing clear instructions for the SIG without over-complicating it. Most of their clients use the basic functionality and need straightforward training that is easy to follow. It was crucial for them to develop a training program that made it easy to use and allowed users to customize the questionnaire to meet their specific risk assessment needs.

This training program is essential to the SIG as it ensures customers can quickly and easily leverage the most used features. By providing this valuable resource to their customers, Shared Assessments aims to improve the overall effectiveness of their product.

With limited bandwidth to support the need internally, Shared Assessments partnered with Infopro Learning due to their expertise in learner engagement and ability to create diverse forms of digital media that could be embedded within a digital learning program. SIG Fundamentals offers show-me simulations with visual elements to enhance the learning experience as part of this initiative. It provides a practice simulation for learners to reinforce their understanding in a safe environment.

This simulation has been created in Articulate Storyline 360 with the output in HTML5.



Overview

Shared Assessments aims to enhance its customers' experience by providing a value-added service through its SIG Fundamentals Training. While Shared Assessments offers multiple products focused on third-party risk management, the SIG is their premiere product. It was important for Shared Assessments to provide clear, easy-to-use training to ensure that customers could quickly utilize the SIG's main features without following a complicated manual or attending infrequent, live training sessions.

The SIG Training program aims to educate customers on the proper use and functionality of the SIG. Shared Assessments offers this training program to provide customers with the necessary knowledge and skills to assess third-party risk effectively. This program is designed to be accessible and user-friendly, enabling customers to quickly and easily learn how to use the various features of SIG.

Shared Assessments is committed to providing customers with value-added services through the SIG Training program, highlighting its dedication to offering innovative solutions that address its clients' needs. By investing in its customers' success, Shared Assessments ensures they are equipped with the necessary products and resources to effectively manage third-party risks.

To offer a seamless learning experience to its customers, Shared Assessments teamed up with Infopro Learning to build its own content from scratch, allowing them to tailor the content to its learners' requirements. The project aimed to accomplish the following objectives at a high level:

- Showcase the diverse capabilities of the SIG for assessing third-party risks.
- Provide guidance on utilizing the different features of the SIG effectively.
- Equip customers with the skills to select the most appropriate questions from the SIG questionnaire based on their requirements.
- Provide a virtual environment where customers can apply their newfound knowledge and skills in a simulated practice setting.

Design of the Program

The training was designed using specific instructional strategies to meet the learning objectives of SIG Fundamentals for Shared Assessments' customers. This included:

Engaging Interactivities: Succinct, easily consumed, interactive courses increase end users' attentiveness, as well as the overall effectiveness of the training.



Explainer videos: Short videos were created within the training program to increase excitement and improve information retention. This breaks up the monotony of a traditional eLearning course where learners have to flip through pages. The interactivities within the videos keep the learners engaged and interested throughout the training program.

Show-me Simulations: Infopro Learning developed various simulations to guide learners on how to use the SIG questionnaire effectively and customize it according to the customers' needs. These simulations cover different aspects of the SIG to ensure a comprehensive understanding.

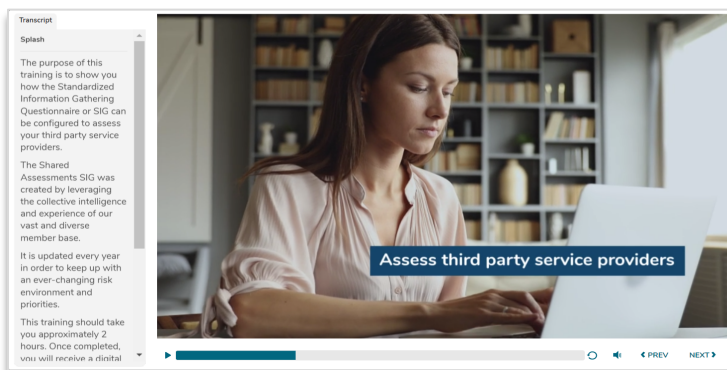
These simulations were designed to provide learners with a realistic and interactive experience that mirrors the SIG. In particular, "Show Me" simulations were designed to demonstrate how to use the SIG when conducting third-party risk assessments. It involved a step-by-step guide that showed learners how to use and modify the SIG questionnaire per their needs. Visual elements were also incorporated to enhance and emphasize the key takeaways of each section. Each step performed in the 'Show Me' simulation was explained.

Practice Simulations: The practice simulations allow learners to respond in a fail-safe environment. These are followed by detailed feedback.

Scenarios: Scenarios create a realistic context for learners to apply their knowledge and skills. Moreover, scenarios present learners with a problem or situation, allowing them to use critical thinking skills to analyze the situation and see the content in a realistic setting.

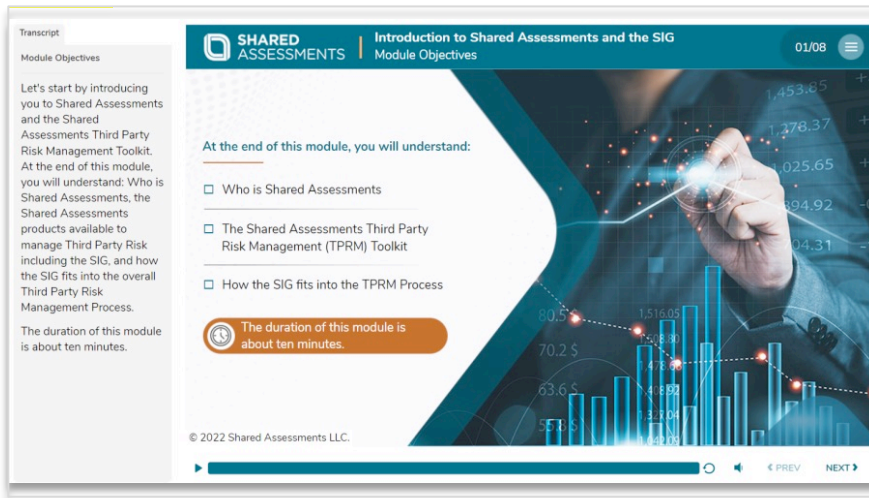
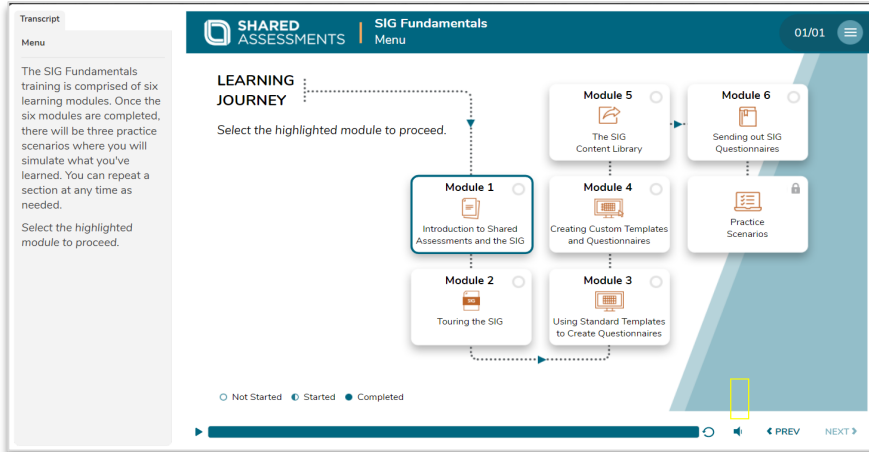
Course Highlights: The training program comprises six modules, each focusing on a specific function of the SIG questionnaire. The training program concludes with the practice simulation, where learners can apply their learnings from the six modules and practice the SIG in a simulated environment.

The SIG Fundamentals program starts with a short introductory video that sets the tone for the training program.

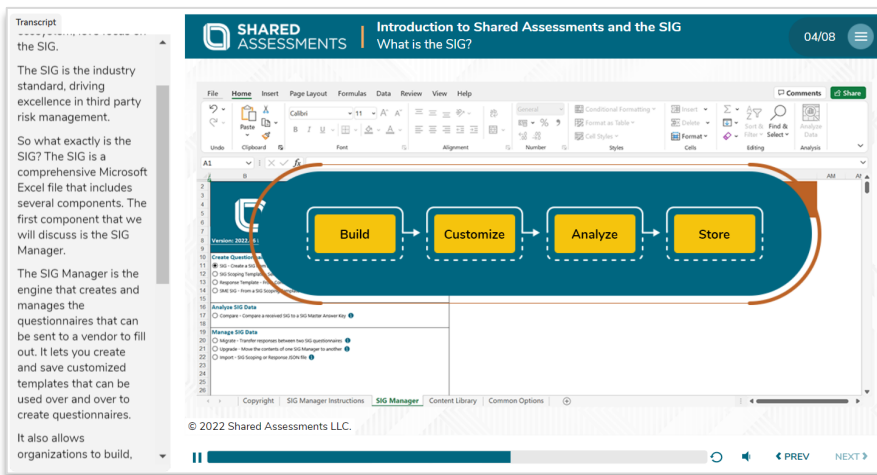




To help learners track their progress, the course starts with a menu screen that provides a comprehensive overview of the entire program.



Impactful and engaging visuals are used throughout the training to emphasize the key points of the training.





Transcript
TPRM Process

Shared Assessments has products that address each step of the Trust But Verify process. We offer VRMMM or Vendor Risk Management Maturity Model, which is a free tool used by organizations to break down third party risk into eight categories. It explores more than 250 program elements that should form the basis of an efficient third party risk management program.

The Standardized Information Gathering Questionnaire or SIG is the 'Trust' Component of the model - a scalable, customizable questionnaire that will be thoroughly covered in

SHARED ASSESSMENTS | Introduction to Shared Assessments and the SIG
TPRM Process 03/08

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Transcript
the SIG.

The SIG is the industry standard, driving excellence in third party risk management.

So what exactly is the SIG? The SIG is a comprehensive Microsoft Excel file that includes several components. The first component that we will discuss is the SIG Manager.

The SIG Manager is the engine that creates and manages the questionnaires that can be sent to a vendor to fill out. It lets you create and save customized templates that can be used over and over to create questionnaires.

It also allows organizations to build,

SHARED ASSESSMENTS | Introduction to Shared Assessments and the SIG
What is the SIG? 04/08

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The 'Show-Me' simulation demonstrates the various functionalities of the SIG tool and makes the learner accustomed to the SIG questionnaire in a virtual setting.

Transcript
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Index	Serial No.	Ques No.	Question/Request	Master Response	Comments/Notes	Master Manual	Category	Attribute
1			Is there a formalized risk governance plan approved by management that defines the Enterprise Risk Management program requirements?				Risk Governance Plan	Executive Sponsorship
2	5643	A1	Does the risk governance plan include risk management policies, procedures, and standards?				Risk Governance Plan	Policy, Standards, and Procedures
3	2187	A.1	Does the risk governance plan include risk management policies, procedures, and standards?				Risk Governance Plan	Policy, Standards, and Procedures
4			Does the risk governance plan include range of internal and external threats to include: malicious, natural, accidental, cyber, business change (transaction reduction)?				Risk Governance Plan	Risk Identification
5	2420	A.3	Does the risk governance plan include range of internal and external threats to include: malicious, natural, accidental, cyber, business change (transaction reduction)?				Risk Governance Plan	Risk Identification

SHARED ASSESSMENTS | Introduction to Shared Assessments and the SIG
What is the SIG? 04/08

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The transcript is structured to enable learners to go through the entire course and ensure accessibility for those with disabilities.

The slide features a yellow sun icon with a hand holding a key. Below the icon, a box lists resources available to learners: SIG User Procedure Guide, SIG Implementation Workbook, SIG Documentation Artifacts Request List, and an Online Glossary link. A note at the bottom says 'Click on the Online Glossary link to download it.'

A scenario-based approach demonstrates how the SIG questionnaire can be used to assess the vendors and the risk associated with them.

The slide shows a central box for Julian (ACME Co. Outsourcer) connected by dashed arrows to four surrounding boxes representing service providers: James (W.K. Industries), Michelin (Wayne Enterprises), Kim (Gekko & Co.), and Lisa (Data Analytics Co.).

The slide illustrates a workflow between Julian (ACME Co. Outsourcer) and Lisa (Data Analytics Co. Service Provider). A solid arrow points from Lisa to Julian labeled 'Sends SIG Questionnaire', and a dashed arrow points from Julian to Lisa labeled 'Returns SIG Questionnaire with Relevant Documentation/Artifacts'.



To increase retention and help learners achieve better learning outcomes, various tips are shared throughout the training program.

Transcript

Scoping is the process of selecting questions to customize an assessment for a specific product or service.


Scoping allows you to customize the questionnaire to suit your requirements. As an outsourcer, you can create questionnaires pertinent to assessing the risks represented by your third party, fourth party, or Nth party service providers.

As a service provider, you can select the questions necessary for the service or services your organization provides to your outsourcers.

The SIG makes it easy to use the


SHARED ASSESSMENTS | Using Standard Templates to Create Questionnaires
What is Scoping? 02/10

Outsourcer



Create questionnaires pertinent to assessing the risks represented by your third party, fourth party, or Nth party service providers.

Service provider



Select the questions necessary for the service or services your organization provides to your outsourcers.

The SIG makes it easy to use the pre-configured templates or create your own custom templates to create questionnaires.

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◀ PREV NEXT ▶

To increase retention and help learners achieve better learning outcomes, various tips are shared throughout the training program.

Transcript

Standard SIG Scoping Templates

The SIG includes two pre-configured templates: the Standard SIG Lite and the Standard SIG Core. These are referred to as the Standard Scoping Templates.

Click each tab to learn more about the types of SIG templates.

The SIG LITE includes 150 questions. It is often used for assessing third party service providers who pose a lower risk to the outsourcer. It is also often used as part of a Request for Information, Request for Offer, or in pre-assessments, merger and acquisitions, or similar situations.

SHARED ASSESSMENTS | Using Standard Templates to Create Questionnaires
Standard SIG Scoping Templates 03/10

Click each tab to learn more about the types of SIG templates.

Standard SIG Lite

→

Types of SIG templates

→

Standard SIG Core

- Often used to assess organizations that store or manage more highly sensitive or regulated information, or services that are critical to a company's business.
- All of the SIG Lite Questions are included in the SIG Core.
- Contains 825 questions at the control definition level.

There is an additional level of questions called Detail. Detail questions are available when you create custom templates. You will learn how to create custom SIG Scoping templates later in this training.

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◀ PREV NEXT ▶

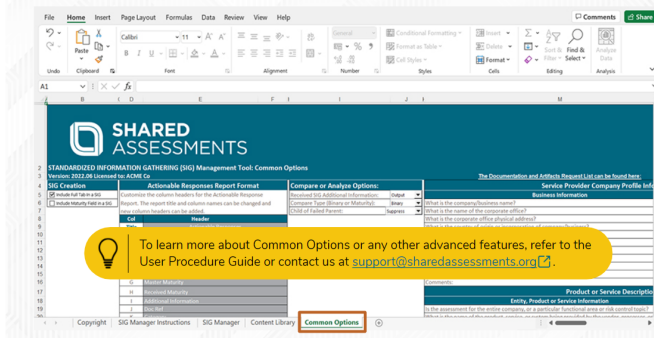
Transcript

We will learn more about the Content Library in Module 5 of this training.

Take a moment to review your SIG to understand the components and organization of the Content Library. It is the foundation for all of the questions and customizations available in the SIG.

The Common Options worksheet is an advanced feature. It will be discussed briefly in this training but not covered in depth. To learn more about Common Options or any other advanced features refer to the User Procedure Guide or contact us at support@sharedassessments.org.

SHARED ASSESSMENTS | Touring the SIG
The SIG Worksheets 03/07



To learn more about Common Options or any other advanced features, refer to the User Procedure Guide or contact us at support@sharedassessments.org.

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◀ PREV NEXT ▶



The learners are provided with additional information to enhance their learning experience, promoting greater engagement and interactivity. Visualizing visually appealing elements and presenting the content, such as "Things to Remember", aids in the learners' comprehension of essential concepts and facilitates retention.

Transcript

SHARED ASSESSMENTS | Touring the SIG Things to Remember 04/07

- No rows, columns, or cells should be added or deleted on the SIG. The SIG runs using Excel macros and adding or deleting a row, column, or cell can disable or cause errors in the file.
- Please do not edit any existing questions, domains, attributes, scope levels, or mapping references in the Content Library. These cells are protected.
- When starting out with the SIG, it is recommended that you turn off AutoSave. If AutoSave is off, you can more easily revert to an earlier version if a mistake is made.

Never store the SIG Manager on Google Drive. This will remove the function buttons.

No rows, columns, or cells should be added or deleted on the SIG. The SIG runs using Excel macros, and adding or deleting a row, column, or cell can disable or cause errors in the file.

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Transcript

SHARED ASSESSMENTS | Using Standard Templates to Create Questionnaires SIG Scoping Template 05/10

A SIG Scoping template table is displayed on the right. The SIG Manager displays the two standard scoping templates: Standard SIG Lite and Standard SIG Core. You can select either the Standard SIG Lite or Standard SIG Core as your template.

We will create a questionnaire from the SIG LITE template. Note that creating a questionnaire from the SIG Core is the same process.

Select Standard SIG Lite to begin.

When you perform an action, such as clicking on the Standard SIG Lite radio button, the SIG

File Home Insert Page Layout Formulas Data Review View Help

10 Create Questionnaire and Template

11 Use Standard SIG Lite as the SIG Scoping Template

12 Use Scoping Template: Select a template to use with Scoping Template

13 Answer Template: Then Content Library

14 Use SIG Lite as the SIG Scoping Template

15 Analyze SIG Data

16 Compare - Compare a selected SIG to a SIG Master Answer Key

17 Manage SIG Data

18 Update - Update questions between two SIG questionnaires

19 Update - Make the content of one SIG Manager to another

20 Export - Export SIG Scoping Template to Excel

21 Import - Import SIG Scoping Template to Excel

22 New/Modify Template

23 Use Scoping Template: Update or change question

24 New Action/Status

25 Click the Create SIG button

26 Create a SIG from a standard or custom SIG Scoping Template

27 to create the SIG

Copyright | SIG Manager Instructions | SIG Manager | Content Library | Common Options

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Reminder: Because the SIG was created with a dynamic user interface, when you take an action, such as clicking the SIG Lite button, the SIG Manager worksheet advises you about the next step you can take and how to take it.

To increase knowledge retention, each module is concluded with a summary screen that briefly summarizes the key takeaways of the module.

Transcript

SHARED ASSESSMENTS | Touring the SIG Summary 05/07

Let us quickly take a look at our learnings so far.

- When opening the SIG for the first time, enable editing and use Save As to save the file with a new file name.
- The SIG Manager is made up of several worksheets. It is important to review and understand the makeup and purpose of each worksheet.
- The SIG Manager is not the questionnaire you send to a vendor, it is the engine that creates the questionnaire.
- The SIG Content Library worksheet is a repository of all the questions. There are

- ✓ When opening the SIG for the first time, enable editing and use Save As to save the file with a new file name.
- ✓ The SIG Manager is made up of several worksheets. It is important to review and understand the makeup and purpose of each worksheet.
- ✓ The SIG Manager is not the questionnaire you send to a vendor, it is the engine that creates the questionnaire.
- ✓ The SIG Content Library worksheet is a repository of all the questions. There are over 1,600 available questions organized by Risk Domain, Control Category, Attribute, and associated third party risk regulations and standards.
- ✓ Although there are other worksheets in the SIG Manager, such as Common Options, these are for performing some advanced features that will not be covered in this training.

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Knowledge checks based on the SIG are incorporated into the training to maintain the learners' interest and involvement throughout the training. Including such interactive elements in training enhances the learners' overall experience and facilitates a deeper understanding and retention of the subject matter.

SHARED ASSESSMENTS | Touring the SIG Knowledge Check 06/07

▶ Which worksheet will you use to create a questionnaire?

👉 Click the correct worksheet and select the Submit button.

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Alongside the tips provided throughout the training, learners also received notes throughout the simulation that offered additional information for each step. These notes act as guides, providing insight into the various options available within each function or tab.

SHARED ASSESSMENTS | Using Standard Templates to Create Questionnaires Create Standard SIG Lite 06/10

Once the template of choice is selected, click on the Create SIG button.

The questionnaire that the SIG Manager just created is located behind the SIG Manager spreadsheet.

To see the questionnaire, you can minimize the SIG Manager file or just move it out of the way temporarily. You will be prompted to save the questionnaire. Click YES to save the questionnaire or click NO if you would like to save it later.

The questionnaire file you create is separate from the SIG Manager file. It is recommended to use a recognizable and

The name of this tab will change based on the version year of the SIG Manager. In this example, the tab is called SIG 2022 because this training was developed using the 2022 version of the SIG.

Question Number	Question/Request	Response	Additional Information	Category	Attributes	Shared Assessments SCA 2022	ISO 27001
A.1	Is there a formalized risk governance plan approved by management that defines the Enterprise Risk Management program requirements?			Risk Governance Plan	Executive Sponsorship	A.1 Enterprise Risk Governance	
A.2	Do fourth parties (e.g., backup vendors, service providers, subcontractors, equipment support maintenance, software maintenance vendors, data recovery vendors, hosting providers, etc.) have access to critical systems and processes?	Select Yes, No or N/A if N/A is chosen an explanation MUST be		Fourth-Party Management	Policy, Standards and Procedures	A.10 Fourth-Party Information Security Risk Calculation Method (A.1 Third-Party Information Security)	

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Minimalistic visuals have been used to focus on essential information and avoid overwhelming the learners with unnecessary details.



Transcript

Custom Scoping

In addition to the SIG Core and SIG Lite templates, you can create custom SIG templates to suit your requirements. Similar to the process for the SIG Core and SIG Lite templates, when you create a custom template, the SIG selects questions from the Content Library and includes them in the created questionnaire. SIG questions can be customized by:

- Risk domain;
- Control Category;
- And external laws, standards, or regulations to which they map, known as Mapping

SHARED ASSESSMENTS | Creating Custom Templates and Questionnaires | Custom Scoping | 02/16

SIG questions can be customized by:

- Risk Domain
- Category
- Mapping References

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PREV NEXT

Transcript

Definition: Scoping

Let's define the three scoping methods in more detail:

Domains are categories or areas of risks that help to guide third party risk management programs. Risk domains are used to scope or frame types of controls that should be evaluated during a vendor risk assessment. The ever-changing risk and regulatory environment define risk domains. As of 2022, the SIG has 18 domains such as security policy, data governance, and resilience. To learn more about Risk Domains download the Guide to Risk Domains for Vendor Management from the Shared

SHARED ASSESSMENTS | Creating Custom Templates and Questionnaires | Definition: Scoping | 04/16

If scoping by categories, any questions aligned with the selected categories, regardless of domain will be included in the template.

Category

Fourth-Nth Party

Domains

- Enterprise Risk Management
- Operational Resilience
- Privacy
- Cloud Hosting Services

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PREV NEXT

Transcript

Demo 2: Create a SIG Questionnaire from a Custom Scoping SIG Template (Domain)

We will now walk through the steps to create a SIG Questionnaire from a custom template scoped by Domain.

SHARED ASSESSMENTS | Creating Custom Templates and Questionnaires | 07/16

Demo 2

Create a SIG Questionnaire from a Custom Scoping SIG Template (Domain)

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PREV NEXT



Learners are guided to perform the correct steps with a specific prompt designed for each step.

Transcript

Create a SIG Questionnaire from a Custom Scoping SIG Template (Domain)

Now that we have created a custom template, let's create a questionnaire using that template. Remember you can only create a questionnaire from an existing template.

The first step is to select 'SIG – Create a SIG from a SIG scoping template' on the SIG Manager.

Notice that the new template we just created is displayed in the scoping Templates list. The first step to create a questionnaire from custom template is to select it from the list. You can now see why using a descriptive and consistent name

SHARED ASSESSMENTS | Creating Custom Templates and Questionnaires | Create a SIG Questionnaire from a Custom Scoping SIG Template (Domain) | 08/16

Select 'SIG – Create a SIG from a SIG scoping template' on the SIG Manager.

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Transcript

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SHARED ASSESSMENTS | Creating Custom Templates and Questionnaires | Create a SIG Questionnaire from a Custom Scoping SIG Template (Domain) | 08/16

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Transcript

What are Mapping References?

Before we move ahead, let's learn more about mapping references.

Standards organizations, industry sectors, and regulatory bodies create formal documents for compliance and best practices.

The questions in the SIG are mapped to specific standards, policies, and regulation line items commonly used in risk management.

By selecting up to two documents (and Lite, Core, or Detail levels for each), you can generate a custom template that selects questions to assess whether an organization meets

SHARED ASSESSMENTS | Creating Custom Templates and Questionnaires | What are Mapping References? | 12/16

By selecting up to two documents (and Lite, Core, or Detail levels for each), you can generate a custom template that selects questions to assess whether an organization meets those standards, policies, or regulations.

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SHARED ASSESSMENTS | Creating Custom Templates and Questionnaires
Create a Custom SIG Scoping Template by Mapping References 13/16

Transcript
Create a Custom SIG Scoping Template by Mapping References

To begin, in the SIG Manager, select the "SIG Scoping Template" - Select options to create a SIG Scoping Template".

From the Scoping Method section, select the Mapping References radio button.

When you select Mapping References, the SIG Manager displays a list of the available Mapping References. Due to the complexity of mapping questions to documents, you can only select up to two references from the list.

You can see that two Mapping References are selected by default: SCA

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SHARED ASSESSMENTS | The SIG Content Library
For a Standard SIG Scoping Template (Lite or Core) 03/07

Transcript
For a Standard SIG Scoping Template (Lite or Core)

One way to use the Content Library is to check which questions will be included in a questionnaire based on the template chosen before the questionnaire is created. For example, if we go to the SIG Manager tab and choose to use the Standard Core Scoping Template, before we click on Create SIG, we can go to the Content Library tab to see which questions will be included in the Core questionnaire.

When you scroll down, you'll see that some of the questions in the Content Library are blue, and some are orange. Blue questions are

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SHARED ASSESSMENTS | The SIG Content Library
For a Standard SIG Scoping Template (Lite or Core) 03/07

Transcript
For a Standard SIG Scoping Template (Lite or Core)

One way to use the Content Library is to check which questions will be included in a questionnaire based on the template chosen before the questionnaire is created. For example, if we go to the SIG Manager tab and choose to use the Standard Core Scoping Template, before we click on Create SIG, we can go to the Content Library tab to see which questions will be included in the Core questionnaire.

When you scroll down, you'll see that some of the questions in the Content Library are blue, and some are orange. Blue questions are

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Transcript

For a Custom SIG Scoped Template

In the previous modules, we created three custom scoping templates as shown here. Just as with the LITE and CORE templates, the Content Library will show which questions will be included in a questionnaire when you use a custom template.

Let's choose Cybersecurity and Operational Resilience at the detail level again so you can see which Content Library questions are included.

Without changing anything else on the SIG Manager worksheet, click the Content Library worksheet.

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Transcript

SIG Questionnaire

When an Outsourcer is ready to assess a third party service provider, they will send a SIG questionnaire. To begin, let's open the previously created questionnaire scoped by Domain on Cybersecurity and Operational Resilience.

The questionnaire will open on the Copyright worksheet because that's the way it was saved previously.

On opening the questionnaire, Microsoft Excel asks you to Enable Content. Click on Enable Content.

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Transcript

Instructions on how to fill

Each questionnaire comes with general instructions for your third parties being assessed.

These general instructions explain how to fill in the questionnaire.

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Transcript

Tracking through Dashboard

The Dashboard keeps track of the percentage of questions your recipient answers. That's convenient for the recipient, but it's also a good way for you, as the sender to review the completeness of the answers when the questionnaire is returned to you.

05/15

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Transcript

Recipient information

The Business Information worksheet displays company profile questions the third party fills out as part of the questionnaire.

Shown here are the Business Information questions, which are the same business information questions copied over from Common Options in the SIG Manager.

Because this is a questionnaire for any number of third party service providers, the responses entered on this worksheet will be specific to the service provider you send it to.

06/15

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Transcript

Filling out responses

The SIG YEAR tab, in this example SIG 2022, displays all the questions that have been scoped, in other words, the questions that were chosen from the Content Library in the template creation process. This is the list of questions to be answered by the third party.

The answer choices are YES, NO, and N/A for Not Applicable. There is also an additional information field for each question if the recipient wants to provide more explanation.

There are two types of questions – parent questions and child questions.

08/15

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Transcript

Best Practices for Outsourcers

Let's take a look at a few best practices to follow when you are sending out questionnaires.

Confirm that the third party being assessed has an updated version of Excel to fill out the questionnaire.

Provide a contact at your organization in case the recipient filling out the questionnaire has any questions.

Give the recipient a reasonable timeline to fill out the responses and gather any required documentation. Often several departments are involved, and time for coordination, gathering responses, and sign off is needed.

SHARED ASSESSMENTS | Sending out SIG Questionnaires | Best Practices for Outsourcers | 12/15

As an outsourcer, follow these best practices when sending out SIG Questionnaires to assess Third Party service providers:

- Confirm that the third party being assessed has an updated version of Excel to fill out the questionnaire.
- Provide a contact at your organization in case the recipient filling out the questionnaire has any questions.
- Give the recipient a reasonable timeline to fill out the responses and gather any required documentation. Often several departments are involved, and time for coordination, gathering responses, and sign off is needed.

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◀ PREV NEXT ▶

The practice scenarios offer a fail-proof simulated environment for learners to practice their learnings. Each practice scenario is explained in detail, and learners are guided through the simulation step-by-step.

Transcript

Practice Scenarios

To ensure you understand the basic functionality of the SIG, we have provided three simulated SIG Scenarios for you to complete. Each activity will allow you to try out what you've learned in this training.

Complete part 1 successfully to move to part 2, then part 3. You may reference the training modules at any time to help complete the scenarios.

The course is marked complete on successfully completing all the SIG Practice Scenarios.

Select the highlighted scenario to explore it.

SHARED ASSESSMENTS | Practice Scenarios | 01/01

To ensure you understand the basic functionality of the SIG, we have provided three simulated SIG Scenarios for you to complete. Each activity will allow you to try out what you've learned in this training.

- Scenario 1: Create a questionnaire using the Standard Core Template.
- Scenario 2: Scope with 3 Categories with Different Scoping Levels.
- Scenario 3: Sort and Filter questions in the Content Library.

The course is marked complete on successfully completing all the SIG Practice Scenarios.

Select the highlighted scenario to explore it.

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◀ PREV NEXT ▶

Transcript

Scenario 1: Create a questionnaire using the Standard Core Template

In this first scenario, you will create a questionnaire using the standard SIG Core Template and name and save that questionnaire. You can click the screen to accomplish the tasks just as you would while working with a real SIG file.

SHARED ASSESSMENTS | Practice Scenarios | 01/10

Scenario 1 Create a questionnaire using the Standard Core Template

In this simulation, you will:

- Use the Standard SIG Core Template to create a questionnaire
- Name and save the questionnaire

Select NEXT to continue.

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◀ PREV NEXT ▶



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If the learner cannot locate the next step, a prompt asking the learner to 'Click here' is displayed on the screen using a swift animation.

Learner experiences the practice scenarios just as they would experience the SIG tool.



On successfully completing the practice scenario, learners are given appropriate feedback that reinforces their learning.

Transcript

Scenario 1: Create a questionnaire using the Standard Core Template

You have successfully created, named, and saved a SIG Core questionnaire.

SHARED ASSESSMENTS | Practice Scenarios | Scenario 1: Create a questionnaire using the Standard Core Template | 10/10

File Home Insert Page Layout Formulas Data Review View Help

SHARED ASSESSMENTS

Great Job. You have successfully created, named, and saved a SIG Core questionnaire.

Select NEXT to continue.

Transcript

Scenario 2: Scope with 3 Categories with Different Scoping Levels

SHARED ASSESSMENTS | Practice Scenarios | Scenario 2: Scope with 3 Categories with Different Scoping Levels | 04/15

The first category is Access Control.

That's right!
Perform the next step.

Transcript

Scenario 2: Scope with 3 Categories with Different Scoping Levels

Now that we've created the template, let's create, save, and re-open a questionnaire. For the purpose of this simulation, assume the template you've previously created is called 'Category Data Access'.

SHARED ASSESSMENTS | Practice Scenarios | Scenario 2: Scope with 3 Categories with Different Scoping Levels | 10/15

Now that we've created the template, let's create, save, and re-open a questionnaire. For the purpose of this simulation, assume the template you've previously created is called 'Category Data Access'.



Transcript

Scenario 3: Sort and Filter questions in the Content Library

In this simulation, you will filter questions based on their color in the Content Library.

Scenario 3 | Sort and Filter questions in the Content Library

In this simulation, you will filter questions based on their color in the Content Library.

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Transcript

Scenario 3: Sort and Filter questions in the Content Library

The questions with blue cell color would now be displayed first in the worksheet.

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Select NEXT to continue.

◀ PREV NEXT ▶

Serial No.	Question/Answer	Master Response	Comments/Notes	Master Marking	Category	Attribute
5441.A.1	Is there a formalized risk governance plan approved by management that defines the Enterprise Risk Management program requirements?				Risk Governance Plan	Executive Sponsorship
2121.A.1.1	Does the risk governance plan include risk management policies, procedures, and external controls?				Risk Governance Plan	Policies, Standards, and Procedures
2121.A.1.2	Does the risk governance plan include range of assets to include: people, processes, data and technology?				Risk Governance Plan	Risk Identification
2421.A.1.3	Does the risk governance plan include range of external and internal threats to include: malicious, natural, accidental, cyber, business changes transaction volume?				Risk Governance Plan	Risk Identification

Transcript

Scenario 3: Sort and Filter questions in the Content Library

Only the orange questions, or those that will not be included in the questionnaire, are displayed.

Choose to filter the questions that will not be included in the questionnaire.

That's right!

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◀ PREV NEXT ▶



Transcript

Scenario 3: Sort and Filter questions in the Content Library

Only the orange questions, or those that will not be included in the questionnaire, are displayed.

SHARED ASSESSMENTS | Practice Scenarios | Scenario 3: Sort and Filter questions in the Content Library | 10/11

Include/Exclude	Serial #	Question/Answer	Master Response	Comments/Notes	Master Status	Category	Attribute
From Scoping	3643A.1	Is there a formalized risk governance plan approved by management that defines the Enterprise Risk Management program requirements?				Risk Governance Plan	Executive Sponsorship
From Scoping	3325A.1.1	Does the risk governance plan include risk management policies, procedures, and internal controls?				Risk Governance Plan	Policies, Standards, and Procedures
From Scoping	3325A.1.2	Does the risk governance plan include range of assets to include: people, processes, data and technology?				Risk Governance Plan	Risk Identification
From Scoping	3420A.1.1	Does the risk governance plan include range of internal and external threats to include: malicious, natural, accidental, cyber, business change, disruptive subject?				Risk Governance Plan	Risk Identification

Now only the orange questions are displayed.


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PREV NEXT

At the end of the training program, Shared Assessments offers all learners a digital certificate of completion.

Transcript

Congratulations!



Congratulations!

You've successfully completed the SIG Fundamentals training.

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A digital certificate of completion will be available for download from your Shared Assessments Academy account within the next two business days. You will receive an email from the Shared Assessments Education team when the certificate is ready.

You will also receive an email with instructions to opt-into receiving a digital badge for your social media. Please contact us at education@sharedassessments.org if you have any questions or issues.

Please take a moment to fill out a quick survey about your experience to help us improve this training.

Thank you!
Shared Assessments Education

Click the Exit button to close this browser window and exit the course. **Exit**

PREV NEXT

Delivery of the Program

Learning is delivered to customers through the learning management system (LMS), Litmos. Shared Assessments has created a new Learning path for SIG Fundamentals within Litmos, which consists of one course with two modules that must be completed in a specific order. The first module includes a comprehensive self-study course with six lessons and one assessment, while the second is a course satisfaction survey. Shared Assessments can gather user feedback through reporting by incorporating the satisfaction survey.



Shared Assessments also incorporated a 90-day learning path expiration period.

Once the SCORM package was complete, it was uploaded into the designated Litmos learning path and course. Shared Assessments then integrated the course link into its member management system and website. This integration offered several benefits, including an automatic certificate of completion and Shared Assessments CPE credits for learners upon completing the learning path.

Shared Assessments promotes this learning on two pages on the organization's website, direct email marketing, social media marketing, and targeted email outreach to existing SIG users. In addition, this product is recommended by the organization's Sales Department to potential new SIG users.

Measurable Benefits

In the last six months, more than 260 individuals have signed up for the SIG Fundamentals, making it the most sought-after educational program. According to the survey results, 87% of the respondents would recommend the training to their peers, indicating its effectiveness. Additionally, an overwhelming majority of 97% of the survey participants found that the training equipped them with the necessary groundwork to utilize the Shared Assessments SIG. Furthermore, the high number of SIG Fundamentals course registers suggests a growing demand for comprehensive education on the Shared Assessments SIG. The positive feedback from the survey respondents reinforces the course material's quality and the training's effectiveness in imparting knowledge.

It is also worth noting that the SIG Fundamentals course is designed to cater to a wide range of learners, from beginners to experienced professionals. Therefore, the popularity of the course indicates that it has successfully met the needs of individuals at different skill levels.

In conclusion, the high number of registrations and the positive feedback from survey respondents highlight the effectiveness of the SIG Fundamentals course in providing a strong foundation for utilizing the Shared Assessments SIG. The course's comprehensive approach and flexibility in catering to diverse learners make it an excellent choice for anyone seeking to enhance their knowledge of SIG.



Overall

The comprehensive eLearning training program on the SIG, developed by Infopro Learning, was designed to:

- Guide the customers in using the various functionalities of the SIG.
- Help the customers practice the steps to modify and select the questions per the SIG questionnaire requirement.

The objective was to offer learners fundamental knowledge with a practical and engaging approach that provides comprehensive and relevant guidance in using the SIG. The positive customer feedback and increasing usage of the content confirm that the course achieved its goal, and that Infopro Learning is on the right track for creating future courses.

What's Next:

After the blockbuster success of the comprehensive training for the SIG, Shared Assessments is planning to launch another course for their customers that would delve deeper into the SIG and provide the customers with advanced knowledge self-study training.

The advanced course will delve deeper into the product's advanced features, enabling users to customize the questionnaire further using more complex functionality. The initiative reflects Shared Assessments' commitment to providing customers with relevant and up-to-date training resources to manage third-party risks effectively.



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About Brandon Hall Group™

With more than 10,000 clients globally and 30 years of delivering world-class research and advisory services, Brandon Hall Group™ is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

Excellence Awards

Three annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

Membership

Individual and Enterprise Membership Options: Includes research assets, advisory support, a client success plan and more.

Advisory Offerings

Custom Research Projects, including surveys, focus group interviews and Organization Needs Assessment for Transformation, Technology Selection and Strategy.

**SOME WAYS
WE CAN HELP**

ORGANIZATIONAL EXCELLENCE CERTIFICATION PROGRAM

recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.

SMARTCHOICE® PREFERRED PROVIDER PROGRAM

uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's twenty-eight-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.