Case study:
Field Safe Solutions

The Organization

Rapidly growing and award winning North American Software as a Service (SaaS) company with a cross-industry safety application that connects workers and enables smarter workflows and instant communication and information sharing helping clients save time, save money, and save lives.

The Project

Provide a practical Service Organization Control (SOC2) readiness assessment of their integration and system testing that included immediately actionable recommendations, action plans and roadmaps.

Key Challenges

- Timeline – the assessment and deliverables had to be completed and actioned in just 4 weeks.
- Operations – ensure no interruptions to the client's fast-paced operations.
- Deliverables – blend and meet the business and SOC2 compliance needs (unlike most assessments that focus on compliance only).

Our Approach

- Make it easy for Field Safe Solutions (FSS) to use the assessment results to:
  ◦ Meet FSS business and client expectations with reliable and consistent software quality.
  ◦ Improve software quality and readiness decision making information.
  ◦ Create a sustainable software quality culture.
- Enhance the business and IT value of the Project Management Office:
  ◦ Focus on FSS value drivers (user safety, ease of use, speed to implement, operational efficiencies, Quality Assurance/software testing due diligence).
- Get the most from what FSS has currently.
- Provide FSS with a state of SOC2 readiness to prepare for proceedings from 3rd party global auditor.

• Key Success Factors:
  ◦ Practical and understandable.
  ◦ Easy to communicate, use and measure outcomes.
  ◦ FSS business and IT driven.
  ◦ SOC2 Type 1 Report criteria readiness.
  ◦ Addresses key concerns and opportunities people want.

Key Outcomes

01 Development of organization-wide change agent network representative of all departments.

02 Development of Change Centre of Excellence staffed with internal experts skilled at triage and central change service.

03 Development of processes for engaging Change resources and ensuring Change Management conversations are part of every project.

04 Integration of Change Management leadership training with existing leadership training modules.

05 Licensing and branding of our change management methodology as their own to reflect company culture.