

SmartSuite Advisory & Implementation Services

From strategy and roadmap to implemented workflows



Overview

SmartSuite Advisory & Implementation Services help you go beyond “getting started” and design SmartSuite around how your organization actually works.

We combine:

- **Advisory services** – Strategy Roadmap and Framework & Regulatory Alignment
- **Implementation services** – domain-specific Solution Launch Packs and Integration & Migration Services

to take you from **program vision** to **live workflows** across GRC, IT, PMO, and enterprise operations.

Where **Onboarding** focuses on configuring your initial Solutions and getting early teams productive, **Advisory & Implementation** focuses on:

- Aligning stakeholders on **what to do first, second, and next**
- Mapping frameworks and regulatory requirements into SmartSuite
- Implementing high-value workflows through structured Launch Packs
- Connecting SmartSuite to your existing systems and data



Who Advisory & Implementation is for

Advisory & Implementation Services are ideal if you:

- Are planning **broader SmartSuite programs** in GRC, IT, PMO, or operations
- Need to coordinate stakeholders across **risk, compliance, audit, IT, and business lines**
- Want a clear, **phased rollout plan** rather than ad-hoc projects
- Have requirements to align to **frameworks and regulations** (SOC 2, NIST CSF, CRI profile, DORA, ISO, etc.)

Need help implementing workflows, dashboards, integrations, and data migrations in a **predictable, repeatable way**



Clear roadmap & priorities

Align stakeholders on where to start and how to phase your rollout, so you're not trying to do everything at once.



Framework & regulatory alignment

Map key frameworks and obligations into SmartSuite so workflows, controls, and reports support audits and exams.



Implemented workflows, not just configured apps

Use Solution Launch Packs to deliver domain-specific workflows that match how your teams actually operate.



Integrated with your ecosystem

Design and implement integrations and migrations so SmartSuite sits cleanly within your existing stack.



Expert, cross-functional delivery

Benefit from Engagement Managers, Solution Architects, Product Consultants, and Integration Engineers who have done this before.

Service pillars

Strategy Roadmap

Advisory workshops that clarify your SmartSuite vision, scope, and priorities, and map them to phased rollout plans and Launch Packs.

Framework & Regulatory Alignment

Advisory work to map frameworks and regulatory requirements (SOC 2, NIST CSF, CRI profile, DORA, etc.) into SmartSuite objects, workflows, and reports.

Solution Launch Packs

Structured implementation programs for specific domains (GRC, ITSM, PMO, operations, and custom workflows) that take you from design to live Solutions.

Integration & Migration Services

Supporting services to move data into SmartSuite and connect the platform to identity, ticketing, CRM, security, collaboration, and other key systems.

Strategy Roadmap

Goal: align stakeholders and define a phased rollout plan.

We work with leaders across **risk, compliance, audit, IT, PMO, and operations** to:

- Clarify your **program vision** and success metrics
- Identify and prioritize **use cases** for SmartSuite
- Decide what to implement **first, second, and next**
- Map phases to specific **Solutions and Solution Launch Packs**
- Highlight dependencies around integrations, data, and change management

You leave with a clear, stakeholder-approved roadmap for how SmartSuite will support your program over the next 6–24 months.

Framework & Regulatory Alignment

Goal: ensure SmartSuite aligns to the frameworks and obligations that drive your program.

We work with your risk, compliance, and audit teams to:

- Identify the frameworks and regulations in scope (e.g., **SOC 2, NIST CSF, CRI profile, DORA, ISO**).
- Map requirements, controls, and evidence into SmartSuite objects, fields, and relationships.
- Design how **issues, remediation, and approvals** are captured and linked across workflows.
- Define the **reports and dashboards** needed for internal stakeholders, auditors, and regulators.
- Connect these designs to relevant **GRC Solution Launch Packs** and any custom workflow work.

The result is an advisory blueprint that ensures implementations are audit-ready from day one.

Solution Launch Packs

Goal: deliver live workflows through structured implementation programs.

Solution Launch Packs combine workflow design and implementation into a single, predictable engagement. Examples include:

01

GRC Core Launch Pack

Risks, controls, compliance, third-party, issues, and basic audit workflows.

02

IT & Service Management Launch Pack

Incidents, requests, changes, basic asset/CMDB, and service reporting.

03

Project & Portfolio Launch Pack

Portfolios, projects, templates, milestones, and dashboards.

04

Enterprise Operations Launch Pack

Operational workflows such as HR intake, approvals, vendor intake, and internal requests.

05

Custom Workflow Launch Pack

Workflows that are unique to your organization, along with their supporting Solutions.

Each Launch Pack typically includes:

- Detailed **workflow and data design**
- Configuration of Solutions, fields, views, dashboards, automations, and permissions
- Domain-specific reporting for key stakeholders
- Light integrations where required
- Targeted training/enablement for admins and program owners

Launch Packs take you from “we know what we want” to “it’s live and our teams are using it.”

Integration & Migration Services

Goal: integrate SmartSuite into your ecosystem and bring your data along.

Integration & Migration Services can be delivered alongside Launch Packs or as focused engagements.

We help you:

- Design **integrations** with identity providers, ticketing tools, CRMs, security platforms, collaboration tools, and data warehouses.
- Implement those integrations using **native connectors, APIs, webhooks, or iPaaS** where appropriate.
- Plan and execute **data migrations** from legacy systems and spreadsheets into SmartSuite.
- Validate imported data and refine mappings with stakeholders.
- Implement **automations and orchestration** around integration events to ensure workflows span systems, not just SmartSuite.

The result is a connected SmartSuite implementation that works with the tools your teams rely on every day.



Your Advisory & Implementation team

Advisory & Implementation engagements bring together a cross-functional team:

- **Engagement Manager** – owns the plan, communication, and delivery, keeping stakeholders aligned.
- **Solution Architect** – designs Solution patterns and workflow structures for your domains.
- **Product Specialist** – configures Solutions, views, dashboards, automations, and permissions.
- **Integration Engineer** – leads integration and migration work.
- **Training & Enablement Lead** – coordinates training so admins and program teams can own the Solutions after go-live.

For larger or industry-specific programs, we can also **co-deliver with certified partners** who bring additional GRC/IT domain expertise.

Quick FAQ Snapshot

Do you help map frameworks like SOC 2, NIST CSF, CRI profile, and DORA into SmartSuite?

Yes. That's the focus of our **Framework & Regulatory Alignment** service. We map frameworks and obligations into SmartSuite objects, workflows, and reports, and connect that design work to relevant Launch Packs.

What's the difference between Onboarding and Advisory & Implementation?

Onboarding is a structured 4-week program that gets your **first Solutions and teams live**. Advisory & Implementation is for **broader programs**—designing your roadmap and implementing multiple workflows using Launch Packs and integration/migration services.

How does Advisory & Implementation relate to Expert on Demand (Managed Services)?

Advisory & Implementation delivers **projects**—roadmap, design, and implementation. **Expert on Demand** provides ongoing capacity after those projects to enhance workflows, add Solutions, maintain integrations, and adopt new features over time.

How Advisory & Implementation fits with other SmartSuite services

- **Onboarding Services** – launch your initial workflows and teams.
- **Advisory & Implementation Services** – design your roadmap, align to frameworks, implement domain and custom workflows, and connect SmartSuite to your ecosystem.
- **Training & Enablement Services** – build skills in admins, builders, and GRC teams.
- **Managed Services (Expert on Demand)** – provide ongoing monthly capacity for evolution.
- **Premium Support** – elevate your support posture with SLAs, TAM, and executive escalation.

Ready to design and deliver your next phase on SmartSuite?

Talk with your SmartSuite account team to:

- Align on your roadmap and frameworks
- Choose the right combination of Strategy Roadmap, Framework & Regulatory Alignment, Launch Packs, and Integration & Migration Services
- Plan how Advisory & Implementation will hand off into Expert on Demand and Training & Enablement for long-term success

Make SmartSuite the backbone of your GRC, IT, PMO, and operations programs—
with a roadmap and implementation approach you can trust.