

EXAMPLE SECURITY PARTNERS

DELIVERY REPORT

Sample Dental Group (made up) · vCISO Standard

Engagement to date, as of Oct 16, 2026 · Started Apr 6, 2026

16

DELIVERED

5

DUE NEXT 90 DAYS

1

OPEN PAST DUE

DELIVERED

Date	What was delivered	Deliverable
Apr 6, 2026	Agreement signed and on file	Signed MSA and SOW, filed in the client folder
Apr 14, 2026	Kickoff meeting: scope, contacts, access and how we will work	Kickoff notes sent to Dr. R. Example and the office manager
Apr 28, 2026	Existing policies, diagrams and prior reports collected	12 documents received from the practice and its IT provider
May 21, 2026	Security assessment completed (NIST CSF 2.0 or CISA CPG)	NIST CSF 2.0 assessment report, reviewed with Dr. R. Example
Jun 4, 2026	Risk register set up, with owners and ratings	Risk register: 11 risks, each with an owner
Jun 19, 2026	Vendor list gathered and sorted into tiers	Vendor list: 9 vendors, 3 in Tier 1 (IT provider, practice software, imaging)
Jun 25, 2026	Documentation plan agreed: which policies are missing	Documentation plan agreed: 6 policies and plans to draft
Jul 2, 2026	Roadmap agreed with leadership, with budget and dates	12-month roadmap approved, budget set for MFA and backups
Jul 8, 2026	First executive readout	First executive readout to the two partner dentists
Aug 6, 2026	Core policies drafted, reviewed and approved	Information security, access control and acceptable use policies approved
Aug 20, 2026	Incident response plan approved and printed	Incident response plan approved; printed copy at the front desk
Aug 24, 2026	Security awareness training launched for all staff	Training launched for all 14 staff; 13 completed by Sep 30
Sep 3, 2026	Tier 1 vendor reviews completed	Tier 1 vendor reviews: 2 accepted, 1 follow-up on the imaging vendor
Sep 3, 2026	First roadmap items delivered (multi-factor sign-in, backups, patching)	MFA on all mailboxes and the practice software; patching set to weekly

Date	What was delivered	Deliverable
Sep 24, 2026	First tabletop exercise held	Ransomware tabletop with the partners and front office; after-action report sent
Oct 2, 2026	Six-month executive readout	Six-month readout: roadmap 40% complete, next quarter's priorities agreed

COMING IN THE NEXT 90 DAYS

Due	Item	Deliverable
Nov 6, 2026	Monthly check-in with the client contact	Check-in notes
Dec 6, 2026	Monthly check-in with the client contact	Check-in notes
Jan 6, 2027	Monthly check-in with the client contact	Check-in notes
Jan 6, 2027	Risk register reviewed and review recorded	Updated risk register
Jan 6, 2027	Quarterly report to leadership or the board	Board report

OPEN AND PAST DUE

Was due	Item	Note
Sep 13, 2026	Backup restore test witnessed	Rescheduled: IT provider's restore window moved to Oct 22

PROGRESS BY PHASE

Phase	Done	Of	What the phase is for
Months 1 to 3	9	9	Assess: find out where the client stands and agree the plan.
Months 4 to 6	7	8	Build: put the missing controls and documents in place.
Steady state	0	5	Govern: keep it current, report, and test.