

EXAMPLE SECURITY PARTNERS · PRACTICE VIEW

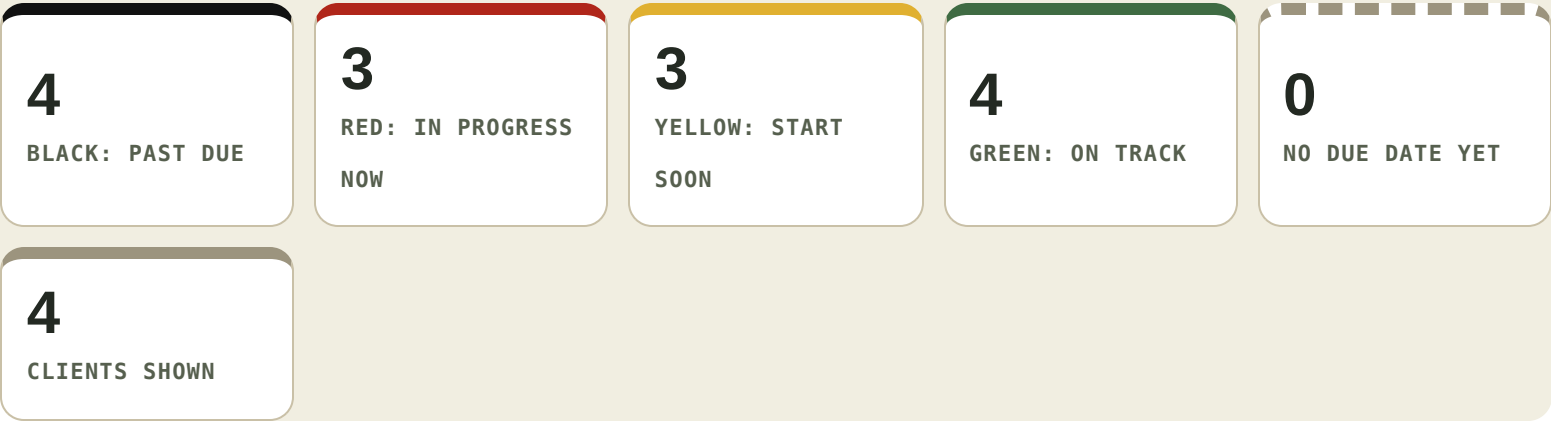
FIRM DASHBOARD

Every client's deliverables and due dates, so you can see that the work is on track: green is on track, yellow means start soon, red means it should be in progress now, and black is past due. Worked out in this browser from each client's services and the dates its files were saved.

Single-consultant view: the 4 clients loaded in the [Client Portfolio](#) in this browser, from the dates of their saved files.

The team view (every consultant's clients, and each consultant's own calendar) needs the shared encrypted workspace, on the Pro and Firm plans at app.mansiosec.com.

WHERE THE WORK STANDS



CLIENTS

Showing 4 of 4 clients, most urgent first

CLIENT AND SERVICES	FILES	NEXT DELIVERABLE	DUE	COLOUR
SAMPLE MACHINE SHOP (MADE UP) Security Baseline Assessment	1 tool file	Leadership readout Board Report · Security Baseline Assessment	Sep 25, 2026 (21 days late) start by Sep 20, 2026	BLACK ● 2
SAMPLE DENTAL GROUP (MADE UP) vCISO Standard	6 tool files	Monthly check-in and summary Engagement Calendar · vCISO Standard	Oct 15, 2026 (1 day late) start by Oct 14, 2026	BLACK ● 1 ● 3 ● 2
SAMPLE LAW OFFICE (MADE UP) NIST CSF 2.0 Risk Assessment	0 tool files	Board briefing Board Report · NIST CSF 2.0 Risk Assessment	Oct 15, 2026 (1 day late) start by Oct 10, 2026	BLACK ● 1 ● 2

CLIENT AND SERVICES

FILES

NEXT DELIVERABLE

SAMPLE · made-up client and firm · MansioSec

SAMPLE PROPERTY MANAGEMENT (MADE UP)

vCISO Essentials

2 tool files

Reassess the current profile

NIST CSF 2.0 Assessment · vCISO Essentials

Nov 12, 2026 (in 27 days)

start by Oct 13, 2026

RED

12

BY CONSULTANT

Who has work behind: each consultant's clients and deliverables by colour, most behind first.

You

4 clients

4334

WHAT TO SELL NEXT

For each of your services, the clients it is recommended for, from each client's gaps (its CSF assessment, and its risk register, HIPAA, insurance readiness and CPG 2.0 files where they link to CSF) and the CSF categories in your Service Catalog. Select a client to open its recommendations.

SERVICE	RECOMMENDED FOR	POTENTIAL MRR	ONE-TIME	12-MONTH VALUE
vCISO Plus vCISO retainer \$8,500/month	Sample Machine Shop (made up) #2, score 1	\$8,500	—	\$102,000
NIST CSF 2.0 Risk Assessment Assessment \$22,500 one-time	Sample Dental Group (made up) #1, score 12 Sample Machine Shop (made up) #1, score 3.5	—	\$45,000	\$45,000
Security Baseline Assessment Assessment \$8,500 one-time	Sample Dental Group (made up) #2, score 12	—	\$8,500	\$8,500
Incident response advisory Advisory \$400/hour	Sample Machine Shop (made up) #4, score 1	hourly	—	—
TOTAL	4 CLIENTS	\$8,500	\$53,500	\$155,500

No CSF assessment loaded for Sample Machine Shop (made up), Sample Law Office (made up), Sample Property Management (made up): their recommendations, if any, come from their other files only. Run a CSF assessment first.

Catalog gaps

Every gap found relates to at least one of your services.

Each client's ranked services, added up per service: potential monthly recurring revenue (MRR), one-time fees, and the value over 12 months (12 × MRR + one-time). Services a client already has, and those you marked Not now, are left out, and of several tiers of one retainer only the best-ranked counts. Score: each CSF gap counts its size (target minus current); each linked risk counts 4 (Very High), 3 (High), 2 (Medium), 1 (Low), 0.5 (Very Low) or 1 (not rated); each HIPAA gap its risk rating, or 2 (Not in place) and 1 (Partly); each insurance answer 1 (No, Not

sure) or 0.5 (Partly); each CPG 2.0 goal 1 (not in place) or 0.5 (in progress). Value: monthly price as MRR; a recurring fixed fee divided by its months; one-time fees and setup fees as one-time. Suggestions for you to review, not a forecast or a promise of any outcome.

FIRM CALENDAR

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30 Risks from t...	1	2	3
4	5	6	7	8	9	10 Start: Boar... Start: Risk ... Start: CSF ...
11	12	13 Start: Reas...	14 Start: Mont...	15 Board briefi... Monthly ch...	16	17
18 Start: Road...	19	20 Roadmap ri... Risk registe...	21	22 Start: Vend...	23 Start: Quar...	24
25	26	27	28 Quarterly e...	29	30	31