

SEAMLESS ONBOARDING. IMMEDIATE IMPACT.

A fully guided launch process—
tailored for credit unions and banks.

We understand that your team doesn't have time for a complicated onboarding process. That's why IRM provides:

- Dedicated onboarding specialists
- Full data import and policy mapping
- Live training sessions
- Automated setup and dashboards
- Minimal internal effort



**Go live in as little as
5–10^x business days.**

WHAT THE ONBOARDING JOURNEY LOOKS LIKE

Phase	Timeline	Details
Kickoff & Planning	Day 1	Define scope, assign contacts, and set milestones
Data Import & Setup	Days 2–4	Import policies, users, device data
Risk & Framework Mapping	Days 4–6	Align to FFIEC, GLBA, NIST, NCUA
Dashboard Customization	Days 6–8	Configure alerts, templates, and reports
Training & Go-Live	Days 8–10	Live sessions and final go-live
Post-Go-Live Support	Days 10–30	Weekly check-ins and performance tuning

Roles, Support, and Resources

Task	IRM Team	Client Team
Document & Data Import	✓	-
Control Mapping & Setup	✓	-
Training & Onboarding Sessions	✓	✓
Dashboard Finalization	✓	✓



Included Resources

- IRM Onboarding Playbook
- Training Videos & Reference Docs
- Live Q&A Access
- Full Audit Readiness Toolkit

Confidence From Day One

What You Get Right Away:

- Preloaded compliance templates
- Active risk dashboards
- Automated reports for Board & Examiners
- Privacy and security controls already mapped
- Alerts for misconfigurations or violations

Typical Client Results:

- 40–60% reduction in compliance workload
- Faster audit response time
- Clear operational visibility across IT, Risk & Privacy
- Higher exam success rates and reduced findings



The onboarding was easier than expected—IRM took care of the details.



Compliance Manager,
Midwestern Credit Union

Let's Get Started

Schedule your kickoff call and get compliant faster—with less effort.



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