Deloitte.   **Optro**

From Implementation to Adoption and Beyond

By the numbers: Since 2019, we have served*

5+ years
Deloitte is Optro's first and longest-running Certified Implementer and Alliance relationship

300+
200+ implementations delivered globally, and 100+ post-implementation enhancement engagements

50%
Our subject matter advisors (SMAs) have worked with half of Optro's Fortune 10 clients

6
Cross-module experience from a team certified to implement seven Optro modules including: SOXHUB, RiskOversight, Sustainability, CrossComply, OpsAudit, and TPRM

*Based on clients served since the inception of the Deloitte and Optro relationship in 2019 to September 2025.

Implementation services

The setup to get you on the path to success:

- Initial setup and go-live
- Cross-module considerations
- Tier upgrade
- Re-implementation

Post-go-live services

Getting you back on the path to success:

- Training for team and stakeholder
- Custom dashboarding
- Data migration and upload
- Hypercare/on-call assistance
- Field reconfiguration
- Permissions refresh
- Inventory management and cross-module considerations
- Module-specific health checks
- Feature demos

Use case: Large publicly traded company with global operations

The client, as a current user of the SOXHUB and OpsAudit modules, was utilizing the tool primarily as a file repository. Its control structure wasn't well thought out during initial implementation and its OpsAudit module was too detailed, which led the client's team to have a low adoption of the tool. The client purchased a tier upgrade from Optro and engaged Deloitte to perform the implementation and upgrade of each module. As part of the project, Deloitte advised the client on the features of Optro, leading practices for workflows, and setup of the site. Along side the implementations, Deloitte's business controls and internal audit teams were brought in to provide internal audit and SOX internal control methodology recommendations to provide expanded benefits to the client.

As a result of the project, Deloitte assisted the client with a refresh of its Optro site to increase company adoption and enhanced functionality and dashboard reporting of audits, controls, risks, and issue status. Deloitte advised on leading practices for Optro setup to allow for less administrative tasks on the client team. With the success of the two implementations, the client subsequently engaged Deloitte to perform its initial RiskOversight implementation, which allowed the client to understand and set up the cross-module capabilities across the platform.

Module-specific services

SOXHUB
- Control Hierarchy Design
- Inventory Mapping
- IPE Configuration Evaluation
- Risk Assessment Configuration
- Certification and Document Management
- Narrative Linking

CrossComply
- Framework Load and Mapping
- Control Instantiation and Mapping
- Evidence Collection Workflow and Recurrence
- Compliance Maturity Assessment Configuration
- Policy Review Management

RiskOversight
- Risk Library Design
- Risk Hierarchy Mapping
- KRI and KPI Advice
- Risk Assessment Template Configuration
- Risk Assessment Results Loading
- Risk Questionaire Configuration
- Inventory Mapping and Hierarchy Configuration

OpsAudit
- Audit Template and Process Design
- Audit Template Configuration
- Document Management
- Audit Universe Setup and Risk Assessment Development

Sustainability
- Framework Load and Mapping
- Framework, Topic, Metric Linking
- Materiality Assessment Template Configuration
- Materiality Assessment Results Loading
- Inventory Mapping
- Report Hashtagging

TPRM
- Vendor Management Process Setup
- Contract Load
- Questionnaire Template Configuration