Privora

PRIVACY OPERATIONS · PRIVORA PRO · WORKBOOK

Client operating baseline workbook

Prepare a compact reviewed baseline that can be entered into the correct Privora Pro client workflow.

Primary action

Complete the working pages, then enter approved records in Privora Pro.

Version
1.0.0

Reviewed
2026-08-12

Guide
Open the Privora guide

CONTROLLED OPERATIONAL RESOURCE

Important legal and use notice

Review these conditions before relying on or sharing this document.

GUIDE
Open the Privora guide

VERSION
1.0.0

REVIEWED
2026-08-12

Purpose

This document is a Privora operational resource designed to help teams organize privacy work, evidence, ownership, review, and reporting.

No guarantee

Use of this document or Privora does not guarantee compliance with any law, regulation, standard, or contractual obligation.

Generated and reviewed material

This document was generated by Privora from the canonical operating kit identified on this page. Human review remains required before the document is relied upon or shared.

Use and intellectual property

Not legal advice

This document provides general operational guidance. It is not legal advice and does not replace advice from qualified legal or regulatory professionals.

Current requirements

Laws, regulatory guidance, product workflows, and organizational obligations may change. Users are responsible for confirming the current requirements that apply to their circumstances before acting.

Data handling

Do not enter personal, sensitive, privileged, or confidential information into uncontrolled copies. Store approved operational records only in authorized systems and follow your organization’s access, retention, and handling policies.

Change notice

This document reflects the version and reviewed sources identified on this page. Product workflows and authoritative guidance may change, and a later release may supersede this document.

Client operating baseline workbook

Use these working pages before and during client onboarding. Complete only the fields needed for the engagement, review the answers with the accountable people, then enter approved records in Privora Pro. This workbook is a preparation aid, not a parallel system of record and not evidence that the client is compliant.

> Operational guidance — not legal advice. This guide does not guarantee compliance.

Keep the blank template appropriately confidential. Do not record passwords, authentication material, complete identity files, raw special-category datasets, or live incident details here. Use safe references and approved systems for sensitive operational records.

Engagement charter

Define the engagement in operational terms. Name the client boundary, sponsor, delivery owner, intended improvement, and first review. Avoid broad promises. The charter should be short enough to read aloud at kickoff and specific enough to guide the first month.

Client or business-unit name

Legal entity, business unit, or operating boundary covered

Accountable client sponsor

Privora delivery owner

Operating improvement expected from onboarding

First operating review date

First workflow definition

Choose one real workflow that will make ownership and evidence visible. Define where it begins, what approved output ends the first cycle, and what is explicitly excluded.

First workflow name

Current workflow problem to improve

Entry condition and required inputs

Completion condition and approved output

Excluded or deferred work

Role and RACI map

Record who prepares, reviews, decides, contributes, and remains informed. If one person holds several roles, keep the responsibilities distinct. Portal participation never creates approval authority.

Work item	Responsible	Accountable	Consulted	Informed
Scope confirmation				
Evidence baseline				
First deliverable				

Person authorized to approve scope

Accountable evidence reviewer

Escalation owner for unresolved decisions

Access checklist

Prepare access decisions only after confirming the organization, client, person, role, and business need. An authorized Owner or Admin applies Team changes. Portal users must remain within the intended client boundary.

Correct Privora organization confirmed

- ☐ Confirmed
- ☐ Not confirmed
- ☐ Escalate

Correct client boundary confirmed

- ☐ Confirmed
- ☐ Not confirmed
- ☐ Escalate

Team access actions

- ☐ Invite approved member
- ☐ Change role
- ☐ Remove access
- ☐ No change

Client portal access actions

- ☐ Enable portal
- ☐ Invite contributor
- ☐ Change portal role
- ☐ Remove portal access
- ☐ No portal access

Owner for later access removal or review

Keep sensitive records in approved systems
Use this page to record access decisions, not credentials. Do not paste invitation tokens, passwords, identity documents, or confidential client datasets into the workbook.

Evidence baseline

List what evidence is expected to demonstrate, not only its file name. Use safe descriptions. Enter the approved document, version, review, and requirement links in Privora Pro Documents.

Evidence purpose	Owner	Period	Current location	Review state	Next action

Evidence categories needed for the first workflow

Baseline states present

- ☐ Current and reviewed
- ☐ Available but unreviewed
- ☐ Outdated
- ☐ Missing
- ☐ Inaccessible
- ☐ Outside scope

Owner for entering approved evidence records in Pro

Priority gaps

Prioritize gaps by the decision or deliverable they block. Distinguish absent evidence from evidence awaiting review. Give every priority gap an owner and a next review date.

Highest-priority gap and blocked outcome

Accountable owner for the next action

Gap review date

Escalation required

- ☐ No
- ☐ Sponsor
- ☐ DPO or privacy lead
- ☐ Owner or Admin
- ☐ Qualified specialist

Deadline register

Record operational dates and their source. Where a date depends on legal or regulatory interpretation, obtain qualified review before treating it as authoritative.

Date	Event or decision	Owner	Source	Reminder or escalation

First contributor due date

First deliverable review date

Owner for entering approved dates in Calendar

First deliverable

Define the first client-facing output. A generated or drafted item remains subject to review and approval.

Deliverable title

Audience, purpose, and decision supported

Reviewed evidence and decisions required

Approval route

- ☐ Sponsor approval
- ☐ DPO approval
- ☐ Engagement-lead approval
- ☐ Specialist review required

Kickoff agenda and decision

Use the agenda to confirm scope, roles, access, evidence, gaps, dates, deliverable, and the next review. Record material decisions explicitly; silence is not approval.

Kickoff agenda

☐ Scope
☐ First workflow
☐ Roles
☐ Access
☐ Evidence baseline
☐ Priority gaps
☐ Deadlines
☐ First deliverable
☐ Escalations

Kickoff decision

☐ Approved
☐ Approved with conditions
☐ Returned for clarification
☐ Deferred to named authority

Conditions, clarification, or deferred decision

30-day plan

Plan a realistic first cycle. Adjust the timing when client complexity, evidence quality, urgent work, or professional review requires a different sequence.

Period	Operating focus	Owner	Expected output	Review point
Days 1–7	Confirm baseline and requests			

Period	Operating focus	Owner	Expected output	Review point
Days 8–14	Review evidence and gaps			
Days 15–21	Prepare first deliverable			
Days 22–30	Review and set next cycle			

Days 1–7 commitments

End-of-cycle operating review

Completion review

Complete the onboarding cycle only when the operating record is usable. Open gaps are acceptable when their authority, owner, next action, and date are visible.

Completion checks

- ☐ Client boundary confirmed
- ☐ Scope approved
- ☐ Roles named
- ☐ Least-privilege access reviewed
- ☐ Evidence baseline recorded
- ☐ Priority gaps owned
- ☐ Dates loaded
- ☐ Deliverable defined
- ☐ Review scheduled

Baseline completion decision

☐ Complete

☐ Complete with tracked exceptions

☐ Not complete

Person who will enter approved records in Privora Pro

Open the client record · Privora Pro console

Lessons for the next cycle

Capture only lessons that can improve the next workflow: which request was unclear, where authority was missing, what access was broader than needed, what evidence context was absent, and which review reduced rework.

Practice to keep

Practice to change in the next cycle

Owner for the improvement

Sources and operating-record handoff

The workbook follows the current implemented Privora Pro routes and the canonical Privora Privacy Operations positioning, reviewed 2026-08-12. It makes no statutory deadline claim. Apply current client agreements, internal policy, verified regulatory sources, and qualified professional judgment to the engagement.

Implemented workflow architecture and current product routes; reviewed 2026-08-12

Privacy Operations category, voice, and claim boundaries; reviewed 2026-08-12

Audience, workflow problems, differentiation, and customer language; reviewed 2026-08-12

After review, enter approved records in Privora Pro across Clients, Team, Portal, Assessments, Calendar, Documents, Deliverables, and Audit History as appropriate. Use safe references rather than duplicating sensitive content. Retain or dispose of the completed workbook according to the organization's approved records practice.