

Purchasing Ontic

A Step-by-Step Guide to Procuring Ontic and Preparing to See Value on Day One

So Where Do We Start?

With a rapidly evolving and expanding threat landscape, your team's ability to see around corners is getting increasingly more challenging. The need for a modern, purpose-built security platform has never been greater. The good news is that Ontic's Protective Intelligence Platform was created to solve physical security challenges head-on.

If you're reading this guide, this comes as no surprise to you, but in order to get Ontic in the hands of the people who need it most, it's important to plan ahead. This guide will help you: -----

The Buying Process

Whether this is your first time buying software (SaaS) or your seventeenth, being familiar with the documents and steps listed below will be important to keep the momentum going. We're sharing best practices and common speed bumps for each step of the buying process, including:

- *Purchasing and Procurement**
- *InfoSec / IT Approval**
- *Master Service Agreement Approval + Signature*
- *License Order Form Approval + Signature*
- *Finalization of Documentation*

* if needed



1

Navigate the buying process

2

Talk to your team about Ontic

3

Prepare for "go live"

4

Understand documents and resources available



Purchasing and Procurement

If your company has a Purchasing and Procurement department, it is common for this team to be involved throughout the process. (If you'll be the purchasing contact, skip to the next step of the buying process on page 3.)

There are a few important elements you'll want to ask about up front:

Procure-to-pay (P2P) system

Does your company have a procure-to-pay (P2P) system in place, such as COUPA, SAP ARIBA, or Ivalua? If so, there is typically a standardized process associated with moving a contract through the system.

Purchasing contact

Will someone be assigned from the Purchasing and Procurement department? What is this individual's role (Contracts Administrator, Procurement Officer/Specialist, etc.) and how do they perform their duties as a liaison between your company and Ontic?

Vendor validation team

Is there a separate Vendor Validation team? It is customary for all new vendors to be verified, which typically requires a unique form to be completed that can include standard items, such as Ontic's W-9 and banking details.



Common Speed Bumps

The Purchasing and Procurement individual is typically juggling multiple administrative duties for incoming vendors in various stages. We will do everything in our power to make things easy and are already an established vendor in the most common P2P platforms. We have all of the documentation bundled up and ready to go for your team.





The Buying Process

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We are in the process of building and strengthening our protective intelligence program, and we consider Ontic to be the foundation of that process. It would be extremely difficult to research, manage, and maintain an effective protective intelligence program without this technology.

Fortune 100
Technology Company



InfoSec / IT Assessment + Approval

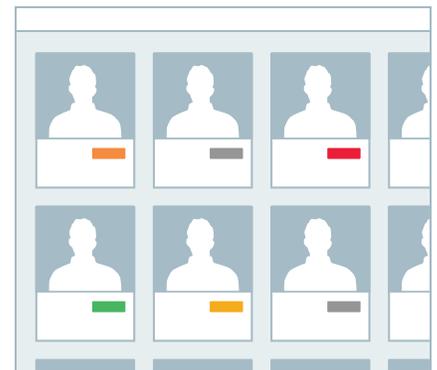
On occasion, clients want a more comprehensive understanding of the technical deployment of the Ontic Platform. Upon request, we provide our InfoSec / IT Assessment Manual which outlines the security policies and processes Ontic has implemented. These policies support Ontic as an enterprise level platform installed across the Fortune 500 and within a variety of industries (technology, financial services, retail, media and entertainment, manufacturing, etc.).

You can have confidence that our platform and deployment process will surpass your IT department's expectations.



Common Speed Bumps

IT departments are often concerned with the storage of personally identifiable information (PII), and it is important to note that Ontic does not store any customer or financial information. Identified threats with activity that needs to be continually monitored are the only data points stored in the platform.



Filter and share searchable, sortable dashboards to focus your threat management activities



Master Service Agreement Approval + Signature

The Master Service Agreement (MSA) is a legal document which details how we agree to do business. There are no financial obligations in this document. Your legal department will likely need to review.

If your company contracts legal counsel for software purchases, it's important to know early on so you can communicate project timeline goals and company-specific information.

Every once in a while, we have clients that want to work off their template MSA. This is not recommended as the document would need to be heavily edited to address the specific nature of our SaaS offering and data provider partners.

We want all teams involved to feel good about what they are signing and have provided some MSA best practices below:

Start early

The MSA is 'the fine print.' It is best to start the review process early.

Intro call

We see the best and most efficient collaboration when we have a quick 15 minute intro call with your team so that your lawyer better understands what they are buying. We've found that this meeting alone typically shaves several turns off redlines. After the call, we'll ask you to provide initial redlines and then we'll schedule a call for our legal teams to review live.

Identify who signs

Be sure to identify who needs to sign the MSA. There are often specific signatories out of department, and you'll need to make sure they're available to review and submit.



Common Speed Bumps

We've outlined a complete list of speed bumps and common questions in our MSA FAQ to prepare you for this document review. Request this document at any time from your Sales contact.



Don't worry!

Our MSA is industry standard and typical of any enterprise SaaS platform.

We will commit to make our legal team available for a live review. Believe it or not, they are actually nice guys and gals (for lawyers).



The Buying Process

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When I have a time sensitive or high visibility case, I rely on Ontic to provide results as quickly as possible so I am providing my leadership with the most accurate and real time updates.

**Fortune 100
Retail Company**



License Order Form Approval + Signature

The License Order Form, or LoF, is a business document that is simple and straightforward by design. It details exactly what you are purchasing and how much you've agreed to pay for it. Although your lawyer is welcome to take a look, there is not much to review from a legal perspective.



Common Speed Bumps

This document is a business document and typically requires little to no legal oversight. The biggest potential speed bump for this step is forgetting to identify the person who will sign. Typically, the signator is in your department and is often the budget owner.

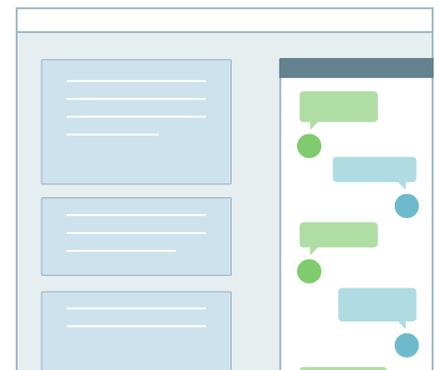
Finalization of Documentation

Once documents are prepared for signature, we want to be sure to comply with your company's requirements to get the deal done. We will provide final documentation for e-signature in DocuSign.

Typically our clients sign the documents first, and Ontic counters, providing final documents for your records. However, we are happy to follow your required procedures and preferences — we even have our own fax machine.



Capture, submit and collaborate on investigations and observations





Communicating the Value of Ontic to Leadership

We know you're convinced, but it's important you're able to convey the value of Ontic to your team. Here are some questions that may come up in water cooler (or these days, Zoom) conversations.



Before Ontic, creating a BOLO report typically takes 2-3 hours to gather information and assemble into a report. With Ontic, a report is generated at the click of a button (once all data is ingested into the platform).

Q **Efficiency:** How does the Ontic Platform address challenges our security team faces when it comes to efficiency and gathering information?

A Ontic covers every stage of the threat management journey, continually collecting and connecting physical threat indicators (from criminal and public records to human observations, social media, and more) to provide a comprehensive view of threats. **We surface the critical knowledge you need to do your job**, freeing up space to be the eyes and ears of the company, versus being buried in data.

Q **Effectiveness:** There are only so many hours in a day. How effective is the Ontic Platform in helping my team actively manage threats?

A In a single platform, your team can actively manage and identify potential threats related to known and unknown threat actors. With automated, real time alerts and notifications, your team can **act on more threats** to better protect your employees, organization, and bottom-line.



On average, our clients typically 3x the number of threats that they actively manage within three months of implementing the Ontic platform.

Q **Know the Unknowns:** There are inevitably many threats that we aren't even aware of yet. How can Ontic help us identify the unknown threats that have potential to cause harm to the company?

A The Ontic Platform is very effective at identifying threats that were previously undiscovered from both common and uncommon sources, such as: social media, Reddit, forums, the dark web, link analysis/connections, and countless other sources.





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I've found Ontic to deliver on our expectations and then some. It has automated, organized or otherwise made our threat management program considerably more robust and agile. Ongoing enhancements and development also makes Ontic a partner in our success as opposed to just a tool that solves a single problem.

Fortune 200
Technology Company



Q What are some relevant data points that highlight the importance of proactive security?

A Threat landscape – The threat landscape is rapidly changing and expanding.

- 1 in 7 Americans do not feel safe at work.^(A)
- There's been a 47% increase of insider threats in the past two years.^(B)

Financial Risk and Business Continuity – This growing complexity in the threat landscape can lead to unfortunate financial and risk related consequences:

- The financial impact of cyber-physical security attacks resulting in fatal casualties will reach over \$50 billion by 2023, and 75% of CEOs will be personally liable for cyber-physical incidents by 2024.^(C)
- The annual cost of workplace violence for employers is \$121B.^(D)
- The average cost of an insider threat incident is over \$11M.^(B)

Q Building for the future – how does Ontic impact long-term growth?

A Companies have an obligation to ensure the workplace is safe and secure. From workplace violence to active shooters and insider threats, the duty of care for employees is ever-increasingly a company challenge. In the coming years, physical security will be the most important issue corporations need to address. The successful business of the future will provide a safe place to work, visit and patronize.

A. Society for Human Resource Management

B. Ponemon Institute

C. Gartner

D. Department of Justice and the National Institute for Occupational Safety and Health





Preparing
for Go Live

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Ontic did a fantastic job getting us onboard. We're really happy with the [platform] and it's adding a lot of value to our security operations.

Client Onboarding Feedback,
Fortune 200
Technology Company



Experiencing Ontic's Value on Day One

Although our goal is to 'make nothing happen,' we do have some work to do first. It's time for Ontic implementation and onboarding! We'll skip right to the fun stuff – the data. While we typically upload data in an Excel CSV format, we'll work with what you have and have seen it all – emails, Google Docs, Post-it Notes – nothing surprises us!

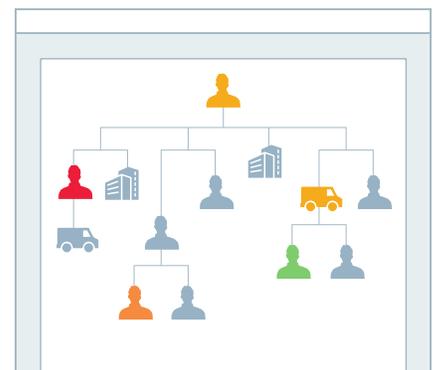
We take pride in not wasting any time in getting started and are known to get clients up-and-running in just four weeks, on average. We've even had clients live in just two weeks!

Ontic works to minimize any burden placed on our clients and we have very simple and straightforward asks to get this process moving. We also provide a detailed purchasing checklist so everyone is on the same page with milestones that need to be addressed. We know there's no better feeling than crossing something off a list.

To prepare to launch Ontic, we'll walk you through a workbook to align on topics, such as:

- Existing threat data – Send initial entity/POI data for Ontic to import into the platform and any existing OSINT keywords you'd like to capture
- Roles and permissions – Document different teams and users with their corresponding use cases
- Your most common risk and safety scenarios
- Expected outcomes from implementing

Connect pre-incident indicators to gain a comprehensive view of threats while surfacing the critical knowledge





Preparing for Go Live

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Our Success Manager has been a phenomenal onboarding partner. We continue to meet on a regular basis and she has done a great job with training and implementation. She's always very responsive and personable. Thanks so much!

Client Onboarding Feedback,
Fortune 1000
Media Company



Platform Resources + Training

The work we do extends far beyond the implementation of technology. From initial kick off and beyond, you will have a dedicated success team member to guide you through every step of the process. Your Success Manager will provide seamless implementation and onboarding, hands-on training and ongoing support.

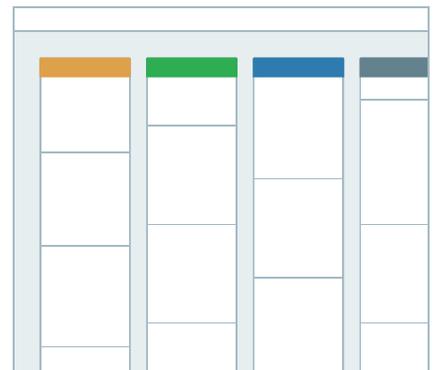
We work closely with your team to determine the most effective training methods for your employees so they can build expertise and comfort with the platform. We all know a threat won't wait until your team is fully trained, so our platform is very intuitive by design and requires little training.



Post onboarding, we survey clients to understand how likely they are to recommend the Ontic onboarding experience to a friend or colleague. Consistently, our clients rate the experience with a Net Promoter Score (NPS) of over 70, or extremely likely to recommend. As a comparison, the NPS industry average for software companies typically hovers around 35.



Shift to a proactive, always-on security mindset by continually gathering and acting on signals





90%
of Ontic clients
login to the
platform daily.

A Partnership Beyond Paperwork

We're confident that we can work together to avoid any speed bumps in the Ontic purchasing process and make sure the platform is in the hands of those who need it most. We're transparent in our approach and take pride in our ability to minimize client burden. We provide the following documents and resources to ensure we're on the same page:

-  **InfoSec Assessment**
If required, we'll have every detail available for your review.
-  **Master Service Agreement**
Your Sales contact will work with you to review the [MSA](#).
-  **Master Service Agreement FAQ**
Reading an FAQ never hurt anyone.
-  **License Order Form**
We'll make sure both sides are aligned on what's being purchased.
-  **Steps to Signature Checklist**
Get a custom list of tasks that will move you through purchasing to final signatures.
-  **Client Workbook**
An asset to record client-specific information, such as: use cases, roles and permissions, etc. so you're ready to go.



While our goal here is to prepare for contracts and documents to be reviewed on schedule, our work extends far beyond the formal contract signing. We are committed to training your team, continually updating our platform with new features and functionality to help you do your job, and making sure you are experiencing the full benefits of the Ontic platform, consistent with the rest of our client base. We are dedicated to getting your team up-and-running quickly with just the right amount of training to see value in the platform as fast as possible.

We're excited to get going, and we are here for you and your team every step of the way. The time for your team to shift to a proactive, always-on security mindset is now.

Reach out to your Ontic Sales contact directly with questions or for more information.



For more information please visit ontic.co