

FICTIONAL SAMPLE DELIVERABLE

Embedded Advisor - Portfolio Security Report

A portfolio-level record of assurance across agreed workstreams, with senior escalation, roadmap ownership and visible use of reserved advisory capacity.

PACKAGE	Embedded Advisor
PREPARED FOR	StrataWorks Technology Sdn. Bhd. (fictional)
SAMPLE PERIOD	July 2026
REFERENCE	MA-SAMPLE-EA-001
CLASSIFICATION	Sample - Public

This sample is fictional. It shows the type of written advisory output a client may receive; the actual contents depend on the agreed scope, information supplied and time used.

DOCUMENT CONTROL

How to read this sample

This is a worked example, not a promise that every month will produce every page shown here. Advisory effort follows the live decisions and artefacts that need attention.

CONTROL	SAMPLE DETAIL
Document reference	MA-SAMPLE-EA-001
Prepared for	StrataWorks Technology Sdn. Bhd. (fictional)
Scenario	Software house and managed services provider supporting three client-facing platforms
Package allocation	From 32 advisory hours per month
Working rhythm	Weekly cadence and agreed office hours
Response target	Initial response within 1 business day
Classification	Sample - Public

What the fee buys

Reserved access to senior technical judgement, preparation, review time and concise written follow-through. Meetings, research, document review, notes and between-session replies all use the monthly allocation.

Consultant provides

- Advice based on the agreed systems and information made available.
- Clear recommendations, assumptions and points requiring a client decision.
- A practical record of priorities, owners and follow-up where the work warrants it.

Client remains responsible for

- Supplying accurate context, access and relevant technical artefacts.
- Business decisions, implementation, change approval and production testing.
- Escalating material changes, incidents or deadlines that affect the advice.

EXECUTIVE PORTFOLIO VIEW

Security position across agreed workstreams

The embedded role gives leadership one senior view across delivery teams. This month, one client platform needs intervention before release; the other workstreams can continue with owned actions.

3 agreed workstreams	11 active decisions or risks	32 hours allocated
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Leadership action

Keep the healthcare portal release on hold until tenant isolation tests and privileged support access are resolved. No portfolio-wide stop is recommended.

Portfolio movement - Retail API threat model accepted - Managed cloud access baseline approved - Two client questionnaire patterns standardised	Watch closely - Healthcare tenant isolation - Privileged vendor support route - Capacity pressure from an unplanned client audit
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OPERATING SCOPE

Named workstreams and decision forums

Embedded does not mean unlimited. The engagement stays useful because systems, forums and escalation routes are agreed in advance.

Embedded advisor attends - Weekly security working session - Agreed delivery forums where a decision is due - Senior escalation when technical owners disagree	Outside normal embedded scope - Unplanned client audits - Hands-on implementation - 24/7 incident response - White-label delivery unless separately agreed
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WORKSTREAM	IN SCOPE THIS QUARTER	PRIMARY FORUM	CLIENT OWNER
Healthcare portal	Release assurance, remediation and architecture	Tuesday delivery review	Program me director
Retail integration API	Threat modelling and partner onboarding	Thursday API forum	Product director
Managed cloud platform	Identity, hardening and client evidence	Friday operations review	Head of managed services

PORTFOLIO DASHBOARD

Current position by workstream

The view separates workstream health from individual findings. A red workstream means leadership has an unresolved release or risk decision.

Portfolio position

Continue routine delivery on the Retail API and Managed Cloud workstreams. Keep the Healthcare Portal release decision separate and evidence-led.

WORKSTREAM	POSITION	CURRENT CONSTRAINT	NEXT ASSURANCE POINT	OWNER
Healthcare portal	RED	Isolation evidence incomplete	Repeat negative tenant tests	Programme director
Retail API	AMBER	Partner revocation process manual	First onboarding review	Product director
Managed cloud	AMBER	Two legacy admin roles remain	Monthly access review	Managed services head

WORKSTREAM 01

Healthcare portal release assurance

The advisor reviewed the release evidence, challenged isolation assumptions and recorded the conditions that remain open.

Advisor's release position

Do not release until the two NOT READY items have evidence. The programme director owns the final decision after reviewing that evidence.

ASSURANCE QUESTION	EVIDENCE REVIEWED	POSITION	REQUIRED ACTION
Can one tenant request another tenant's document?	Positive tests only	NOT READY	Add negative tenant and object tests
Can support impersonate a user?	Feature controlled by broad support role	NOT READY	Require approval and log each use
Are sensitive exports traceable?	Audit event includes user but not tenant	CONDITIONAL	Add tenant and case reference
Can the release be rolled back?	Runbook and named operator reviewed	READY	Exercise in staging

WORKSTREAM 02

Retail integration API assurance

The API can proceed to controlled partner onboarding. The outstanding issue is operational speed when a credential must be revoked.

Partner identity

Context

Each partner has a unique credential and agreed IP range.

Consultant's advice

Keep unique credentials; do not treat IP restriction as primary authentication.

Agreed action

API owner to retain the current design and document rotation.

Revocation

Context

Operations can revoke a key through a manual console process.

Consultant's advice

Accept for the first two partners if the process is tested and a 30-minute internal target is owned.

Agreed action

Operations manager to run a timed exercise.

Abuse monitoring

Context

Rate alerts exist per route but not per partner.

Consultant's advice

Add partner identity to the metric and escalation message before wider onboarding.

Agreed action

Platform team to update the alert template.

WORKSTREAM 03

Managed cloud access and hardening

The embedded review concentrated on controls that apply across managed client environments without assuming every client has the same risk appetite.

Two legacy roles - Role A: remove direct user membership - Role B: restrict to agreed client accounts - Both due before the August review	Senior escalation used - Operations wanted one shared emergency account - Advisor challenged auditability and client impact - Leadership approved named break-glass identities instead
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CONTROL	COMMON BASELINE	APPROVED EXCEPTION PATH	EVIDENCE OWNER
Human admin access	Named identity and MFA	Client-approved time-bound exception	Operations manager
Vendor support	Ticketed, approved and logged	Emergency access recorded next business day	Service owner
Privileged review	Monthly membership export	None for in-scope production roles	Managed services head
Client evidence	Control export plus exception record	Alternative agreed in client contract	Account owner

DECISION AND RISK REGISTER

Portfolio decisions kept visible

The embedded advisor maintains the cross-workstream view; each client owner still owns the business decision and treatment.

ID	DECISION OR RISK	WORKSTREAM	POSITION	OWNER	TRIGGER
EA-01	Healthcare release held for isolation evidence	Health	OPEN	Programme director	Evidence complete
EA-02	Manual partner revocation accepted	Retail	TIME - BOUND	Product director	Third partner
EA-03	Named break-glass identities	Cloud	APPROVED	Managed services head	Quarterly test
EA-04	Vendor support exception	Cloud	EXPIRES	Service owner	31 Aug
EA-05	Client audit request exceeds allocation	Portfolio	SCOPE	Account director	Separate quote

CLIENT ASSURANCE SUPPORT

Questionnaires and customer evidence

The advisor helped the account teams answer technical questions consistently without making commitments the delivery teams could not support.

Boundary

The advisor may review a response and supporting evidence. The client owns the representation made to its customer and the contractual commitment that follows.

QUESTION PATTERN	APPROVED ANSWERING POSITION	EVIDENCE SOURCE	CAUTION
Is all privileged access protected by MFA?	Yes for named human administrators; exceptions are time-bound	Identity policy and exception register	Do not include service identities in the same statement
Are logs monitored 24/7?	No blanket claim; state the contracted monitoring hours per service	Operations schedule and client contract	Advisory retainer is not MDR
Is penetration testing annual?	Answer per product and current test date	Test report register	Do not imply continuous assurance

CAPACITY AND ACTIVITY

How embedded time was used

The monthly allocation is visible by workstream and type of work. This helps stop one client request from quietly consuming the capacity reserved for the whole scope.

Unplanned audit request

A requested five-day client audit support exercise does not fit the remaining allocation. It should be reduced, deferred or separately scoped before work begins.

WORKSTREAM OR ACTIVITY	TIME	OUTPUT
Healthcare portal	9.0 h	Release challenge and remediation positions
Retail integration API	6.0 h	Threat model follow-up and onboarding advice
Managed cloud platform	7.0 h	Access baseline and escalation
Portfolio forums and office hours	4.0 h	Decisions and rapid guidance
Client assurance responses	2.0 h	Approved answer patterns
Preparation and reporting	4.0 h	Portfolio report and roadmap

QUARTERLY ROADMAP

August to October advisory priorities

The roadmap is owned jointly: the advisor keeps the technical sequence coherent while client leadership decides priority, budget and delivery capacity.

Senior escalation route - Technical disagreement first goes to system owners - Material client or release impact goes to the programme director - Accepted risk requires a named business owner and review trigger	Scope review trigger - A fourth workstream enters the portfolio - Client audit support becomes recurring - Monthly demand remains above 32 hours - White-label delivery is requested
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PERIOD	PORTFOLIO OBJECTIVE	ADVISOR CONTRIBUTION	CLIENT COMMITMENT
August	Close healthcare release conditions	Review evidence and state release position	Implement and test controls
September	Standardise managed cloud access proof	Define evidence pack and sample one account	Operate the review across accounts
October	Improve partner onboarding assurance	Challenge first two onboarding records	Adopt the agreed checklist

WORKING CONDITIONS

Responsibilities, assumptions and next period

Embedded advisory works best when the advisor has access to the right forums and artefacts, but remains independent enough to challenge the delivery plan.

Availability and contracting

Subject to consultants' availability. White-label work, additional entities, new workstreams, testing, implementation and incident response require written agreement. The signed engagement letter takes precedence.

Next period starts with

- Healthcare isolation and support-access evidence
- Retail partner revocation exercise
- Managed cloud legacy role closure
- Decision on the unplanned client audit request

Advisor	Client
- Attend agreed forums and office hours - Review named systems and workstreams - Escalate material technical concerns - Maintain the portfolio decision and risk view	- Provide timely artefacts and accurate context - Name decision and implementation owners - Approve changes and test in production - Control customer commitments and contractual statements

End of fictional sample report. No client data, test evidence or assurance opinion is contained in this document.