



Opsfolio CaaS for SOC 2[®] Type I & Type II

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Simplifying SOC 2[®] Compliance with Human
Expertise and AI Automation in a white glove
“Done for You” model.

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Overview



Challenges in SOC 2®
Compliance Today



What is Opsfolio CaaS
for SOC 2®?



Key Challenges
we solve



How Opsfolio CaaS
Transforms
SOC 2® Compliance



Key Features
& Capabilities

Challenges in SOC 2[®] Compliance Today



SOC 2[®] compliance is complex, manual, and resource-intensive.



Disconnected tools and spreadsheets hinder a unified compliance view.



Evolving Trust Services Criteria require constant updates and monitoring.



Evidence collection is often scattered and time-consuming.



Lack of continuous monitoring leads to last-minute audit surprises.

“ Your biggest challenge is likely a lack of staff to manage all the tasks necessary to pass an AICPA SOC 2[®] audit. We offer a white glove 'Done for You' model, with expert human support and AI-powered automation, handling every aspect of your SOC 2[®] journey. ”

What is Opsfolio CaaS for SOC 2®?



Managed, end-to-end compliance readiness platform tailored for SOC 2® Type I & II.



Combines expert human advisory with AI-driven automation for speed and accuracy.



Centralizes controls mapping, automates compliance workflows, and continuously monitors control effectiveness.



Delivers a single platform for evidence management, audit tracking, and real-time reporting.

“

Our biggest asset to your initiatives isn't just our software and AI, but the real humans we provide, who, through a white glove 'Done for You' model, will ensure you achieve SOC 2® certification.

”

Key Challenges We Solve



Manual compliance workflows that waste time and resources.



Fragmented evidence collection and documentation.



Delays in identifying and remediating control gaps.



Limited visibility into compliance posture and risks.



Difficulty maintaining continuous compliance between audits.

“

We take full accountability and responsibility for delivering your SOC 2[®] certification through our expert white glove “Done for You” model.

”



How Opsfolio CaaS Transforms SOC 2[®] Compliance

- Centralized Control Framework: All SOC 2[®] Trust Services Criteria mapped and monitored in one place.
- AI-Driven Task Automation: Automated identification and prioritization of remediation tasks integrated into client workflows.
- Human Expertise: Compliance consultants guide audit preparation, evidence validation, and ongoing support.
- Continuous Monitoring: Real-time risk insights and alerts keep your controls audit-ready at all times.
- Seamless Integrations: Connects with security tools, ticketing, and CI/CD pipelines for live data ingestion.

Key Features & Capabilities

Security & Trust Services Criteria Mapping

Full mapping of SOC 2® Trust Services Criteria (Security, Availability, Processing Integrity, Confidentiality, Privacy)

Automated Task Generation & Prioritization

AI generates prioritized remediation and audit tasks based on gaps, scans, and risk

Evidence Management & Documentation

Centralized, searchable repository for evidence and audit artifacts — making compliance proof effortless and transparent.

Continuous Monitoring & Alerts

AI-powered continuous monitoring of security posture and control effectiveness

Human Advisory & Support

Dedicated compliance consultants providing tailored guidance, audit preparation, and review

Seamless Integration with Client Ecosystem

Seamless sync with client tools like Jira, GitHub, Security Scanners for continuous data

Security & Trust Services Criteria Mapping

- Exhaustive catalog of SOC 2® Trust Services Criteria (Security, Availability, Processing Integrity, Confidentiality, Privacy).
- Continuous tracking of applicable controls, policies, and assessment procedures.
- Ensures no control is overlooked or under-monitored throughout the compliance cycle.

“We take full accountability and responsibility for delivering your SOC 2® certification through our expert white glove “Done for You” model.”

OpsFolio

Controls Policies and Evidence Portfolio Audit Observability

Alim

Alim Hub

Domain

Security & Privacy Governance

Artificial and Autonomous Technology

Asset Management

Business Continuity & Disaster Recovery

Capacity & Performance Planning

Change Management

Cloud Security

Compliance

Configuration Management

Continuous Monitoring

Cryptographic Protections

Data Classification & Handling

Embedded Technology

Endpoint Security

Human Resources Security

Identification & Authentication

Controls > Domain > Security & Privacy Governance

Security & Privacy Governance

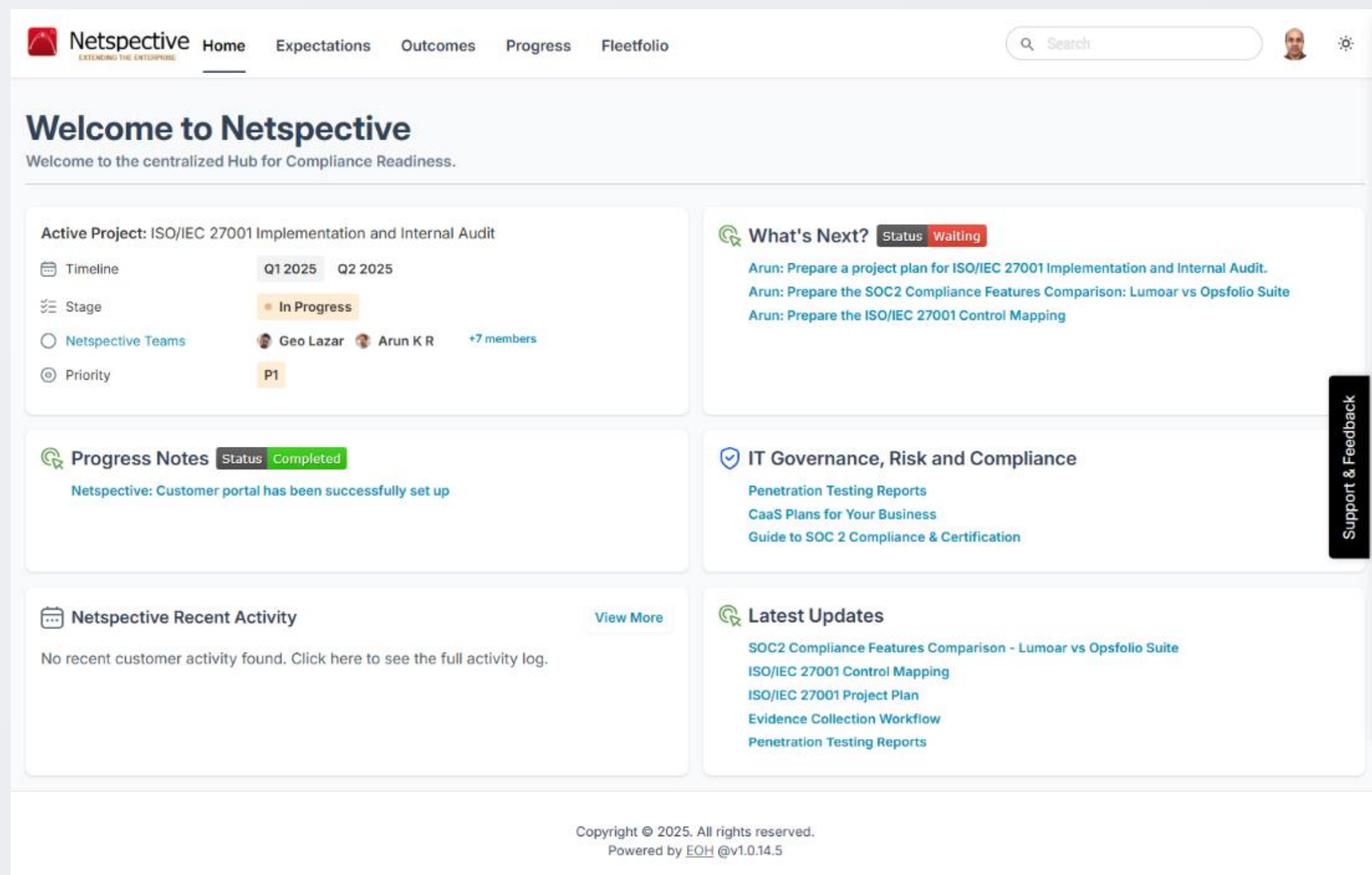
Control	Domain	Control Code	SCF Controls Question	Secure Controls Framework
Cybersecurity & Data Protection Governance Program	Cybersecurity & Data Protection Governance	FII-SCF-GOV-0001	Does the organization facilitate the implementation of cybersecurity & data protection governance controls?	Mechanisms exist to facilitate the implementation of cybersecurity & data protection governance controls.
Steering Committee & Program Oversight	Cybersecurity & Data Protection Governance	FII-SCF-GOV-0001.1	Does the organization coordinate cybersecurity, data protection and business alignment through a steering committee or advisory board, comprised of key cybersecurity, data privacy and business executives, which meets formally and on a regular basis?	Mechanisms exist to coordinate cybersecurity, data protection and business alignment through a steering committee or advisory board, comprised of key cybersecurity, data privacy and business executives, which meets formally and on a regular basis.
Status Reporting To Governing Body	Cybersecurity & Data Protection Governance	FII-SCF-GOV-0001.2	Does the organization provide governance oversight reporting and recommendations to those entrusted to make executive decisions about matters considered material to the organization's cybersecurity & data protection program?	Mechanisms exist to provide governance oversight reporting and recommendations to those entrusted to make executive decisions about matters considered material to the organization's cybersecurity & data protection program.
Publishing Cybersecurity & Data Protection Documentation	Cybersecurity & Data Protection Governance	FII-SCF-GOV-0002	Does the organization establish, maintain and disseminate cybersecurity & data protection policies, standards and procedures?	Mechanisms exist to establish, maintain and disseminate cybersecurity & data protection policies, standards and procedures.
	Cybersecurity		Does the organization prohibit exceptions to	Mechanisms exist to prohibit exceptions to

Support & Feedback



Automated Task Generation & Prioritization

- AI analyzes gaps, scan results, and audit feedback to generate prioritized compliance tasks.
- Tasks are automatically pushed to existing workflows (e.g., Jira, GitHub) for fast action.
- Reduces manual coordination and accelerates remediation cycles.

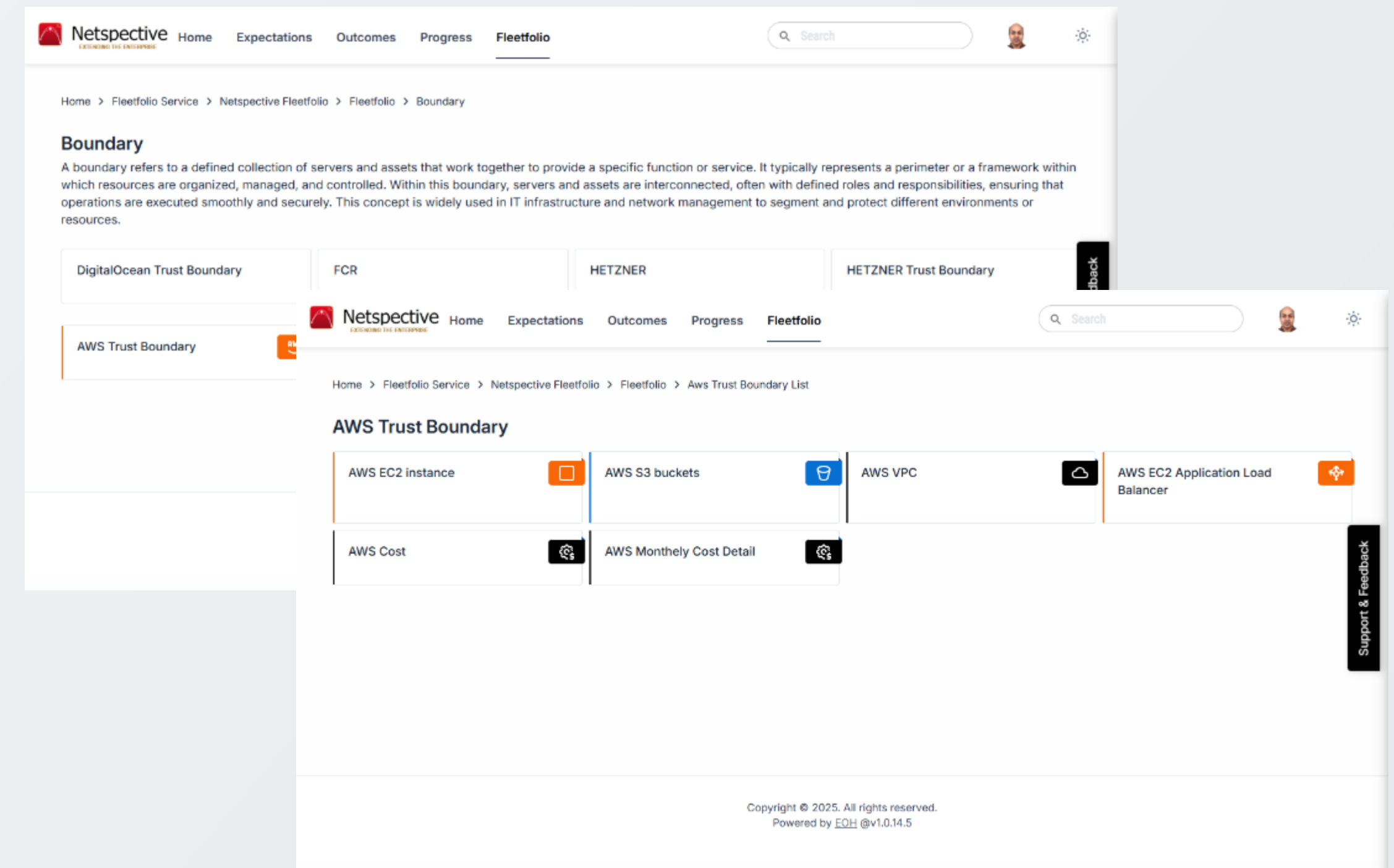


“ With our white glove "Done for You" model, if your team is unavailable, we take full responsibility for keeping your tasks on track and meeting deadlines.

”

Evidence Management & Documentation

- Centralized, searchable repository for all audit artifacts, policies, procedures, and evidence.
- Simplifies proof of compliance during audits with instant access to relevant documents.
- Supports versioning, access controls, and audit trails for transparency.



“If your staff would like to do it themselves, they can just use our software, but if staff are unavailable, we do the mapping and documentation for you.”



OpsFolio

Controls Policies and Evidence Portfolio Audit Observability

Netspective

Netspective Hub

Audit > AICPA > SOC2 Type I

AICPA SOC

SOC2 Type I

Report on Controls as a Service Organization. Relevant to Security, Availability, Processing Integrity, Confidentiality, or Privacy.

Find a session...

Create New Session

Session Name	Audit Type	Tenant	Overall Progress	Due Date	Action	Edit	Delete
Netspective SOC2 Type 1 Internal Audit	SOC2 Type I	Netspective	100%	01-17-2025	View		
Netspective SOC2 Type 1 Internal Audit -v2	SOC2 Type I	Netspective	0%	04-25-2025	View		
Netspective SOC2 Type 1 Internal Audit-v1	SOC2 Type I	Netspective	99%	03-29-2025	View		
Qa Internal Audit SOC2 TYPE1	SOC2 Type I	Netspective	0%	05-24-2025	View		
SOC2 Type I Audit - Dathan	SOC2 Type I	Netspective	100%	11-29-2024	View		
SOC2 Type I Audit Session - Internal	SOC2 Type I	Netspective	0%	05-28-2025	View		

Support & Feedback

Continuous Monitoring & Alerts

- AI-powered monitoring of control performance and risk factors 24/7.
- Real-time alerts on deviations or emerging risks tied to SOC 2[®] criteria.
- Enables proactive remediation to avoid audit surprises and maintain compliance posture.



“If your staff would like to do it themselves, they can just use our software, but if staff are unavailable, we will take care of the continuous monitoring and alerts for you.”

Human Advisory & Support

- Dedicated compliance experts work closely with your teams for tailored guidance.
- Assistance with audit readiness reviews, gap analysis, and evidence validation.
- Support for auditor engagement and remediation planning.

“ We provide a white glove "Done for You" service, offering expert human advisory support to guide you through every stage of the SOC 2[®] process.

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Seamless Integration with Client Ecosystem

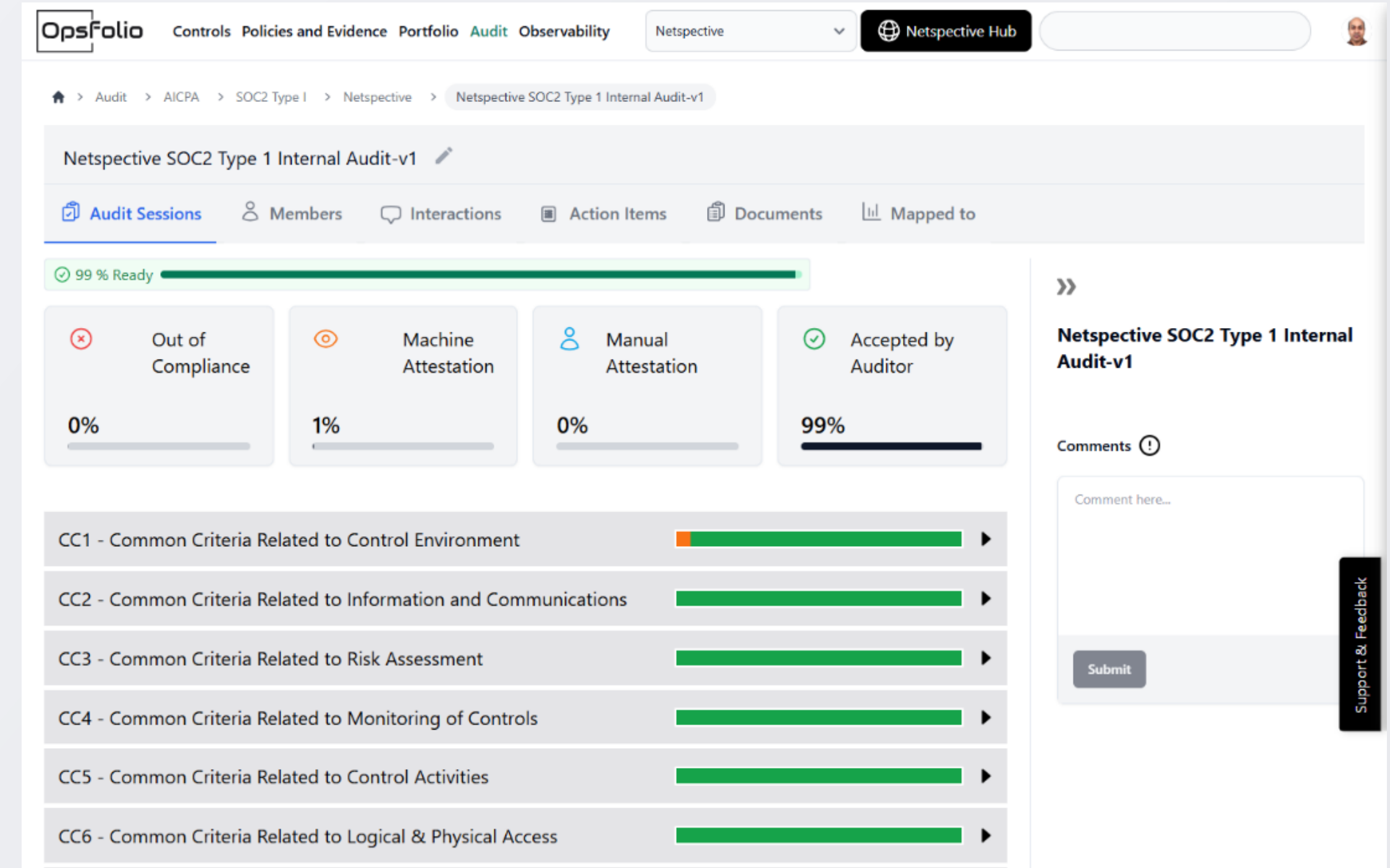
- Connects with tools like Jira, GitHub, security scanners, ticketing systems.
- Continuous ingestion of vulnerability scan data and operational metrics.
- Integrates evidence and task updates to maintain a real-time compliance status.

“Our white glove "Done for You" model means we will manage all integrations, ensuring seamless synchronization with your existing tools and minimal effort required from your team.

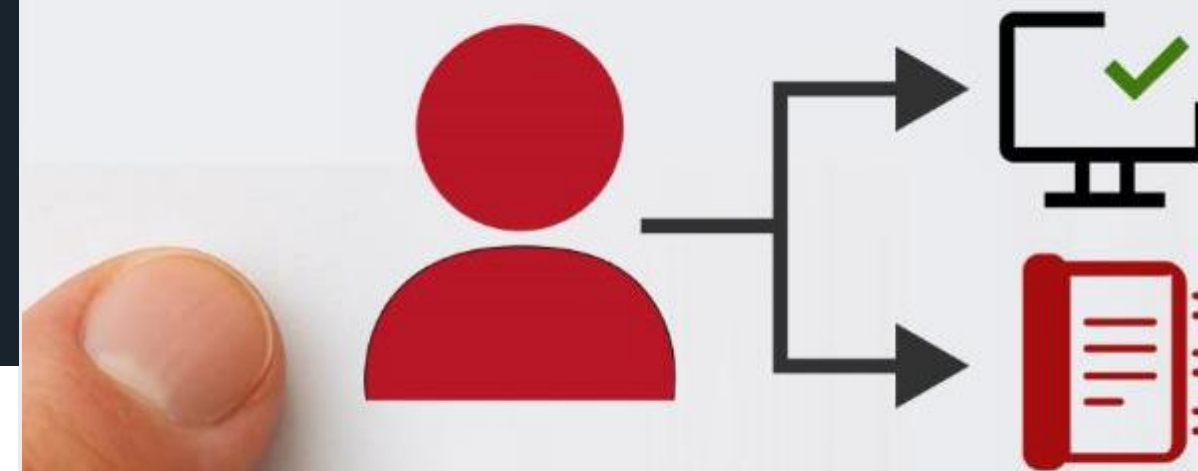
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How It Works

- Dedicated compliance experts work closely with your teams for tailored guidance.
- Assistance with audit readiness reviews, gap analysis, and evidence validation.
- Support for auditor engagement and remediation planning.



“With our white glove "Done for You" model, we handle every step of the process, ensuring smooth and hassle-free SOC 2[®] certification.”





The Opsfolio Advantage: Human + AI Collaboration

- AI automates repetitive, data-heavy tasks such as scan ingestion and risk scoring.
- Human experts interpret complex requirements, provide context, and validate findings.
- This collaboration reduces manual overhead and accelerates audit readiness while ensuring accuracy and compliance quality.

“

Our white glove "Done for You" service offers the best of both worlds—AI-powered automation and expert human guidance at every step of your SOC 2[®] journey.

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Customer Journey / How It Works



Why Choose Opsfolio CaaS for SOC 2®?

- Proven compliance platform trusted for federal and industry standards.
- End-to-end hybrid service combining AI efficiency and human expertise.
- Reduces time to audit readiness and ongoing compliance maintenance effort.
- Provides transparency, centralized control, and continuous risk management.

“ Experience the difference with our white glove "Done for You" service—we take full responsibility for your SOC 2® compliance journey.”



Thank you

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CONTACT US

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