Opsfolio

Lead Magnets Tour

Netspective Communications
May 21, 2026

Table of Contents

Opsfolio Lead Magnets Tour

This document is intended for marketing agencies, channel partners, prospective partners, sales enablement teams, and external GTM collaborators. It covers what currently works: the customer-facing assessment journey, landing pages, reports users receive, email touchpoints, and how partners can use the system. For internal operational details, automation architecture, and roadmap planning, refer to the companion internal document.

Overview

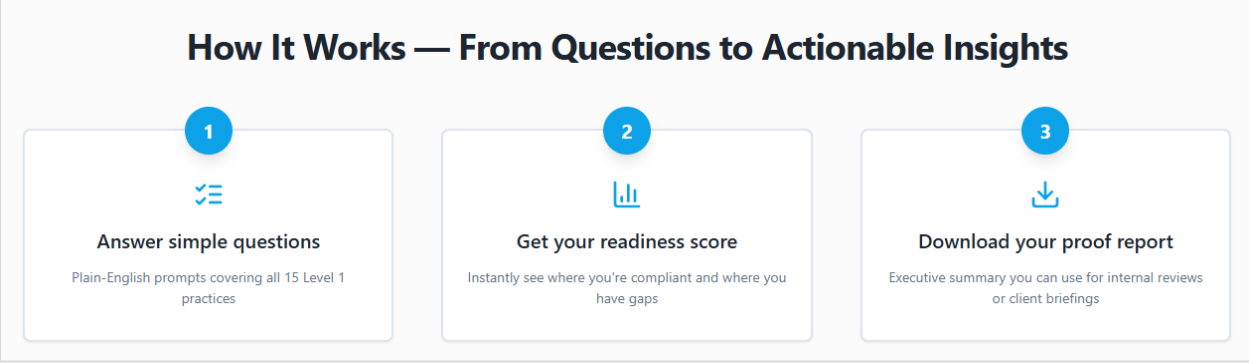
Opsfolio's CMMC and SOC 2 compliance readiness tools are designed to reduce friction and enable self-assessment, helping organizations evaluate their cybersecurity and compliance posture through guided Readiness Assessments and Self-Assessments.

These workflows are intentionally designed to:

- Reduce friction during initial engagement and enable self-service assessment
- Help prospects understand their current readiness position
- Generate immediate value through automated self-assessment reports
- Enable channel partners to engage prospects at scale
- Create structured follow-up opportunities for consulting and remediation services

These tools function as a customer-facing compliance engagement experience, currently focused on Readiness Assessments and Self-Assessments, combining:

- Landing pages
- Guided assessments
- Automated report generation
- Email touchpoints
- Readiness scoring
- Partner-branded engagement workflows



1. Customer Journey Overview

Typical Lead Journey

1. Prospect receives a campaign link or visits a landing page
2. Prospect signs up using a simple form
3. Prospect starts the compliance readiness assessment
4. Assessment questions guide the user through their current compliance posture
5. Readiness calculations are performed automatically
6. A report or readiness summary is generated
7. Follow-up conversations can be initiated by the partner
8. Customer progresses toward remediation and compliance engagement

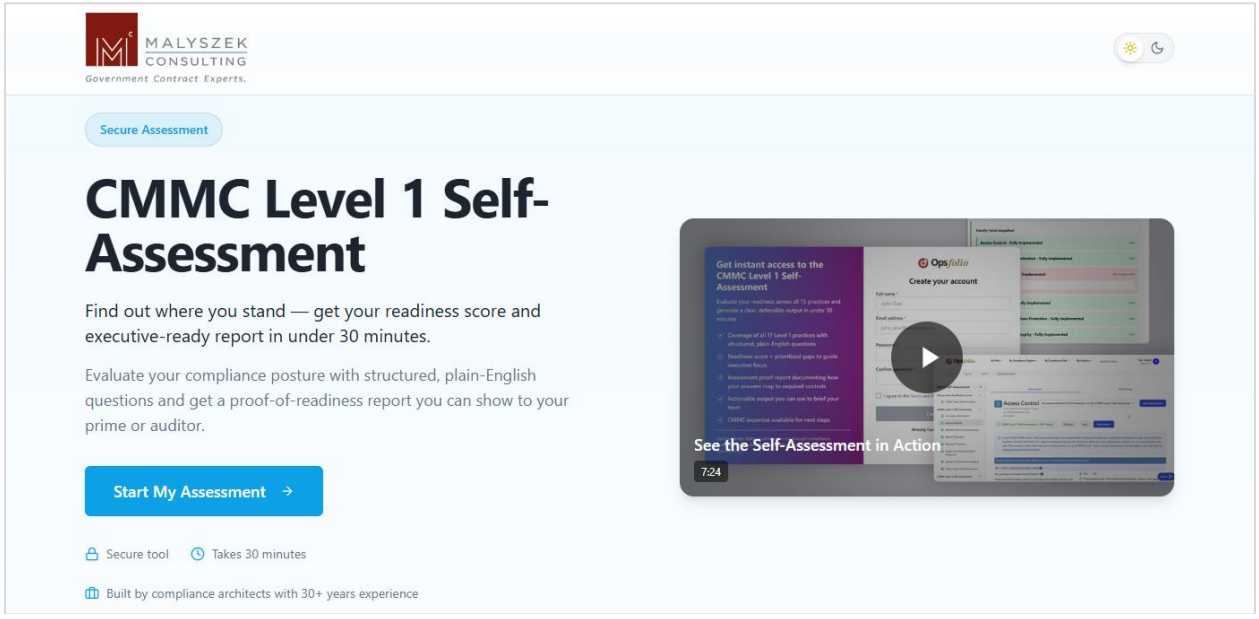
The process is designed to feel lightweight, guided, and self-service.

2. Landing Pages & Campaign Experience

Example Public Landing Pages

Opsfolio – CMMC Level 1 Self-Assessment
https://opsfolio.com/regime/cmmc/self-assessment-landing/

Opsfolio – Self-Assessment Malyszek
https://opsfolio.com/lp/cmmc/self-assess-malyszek/
https://opsfolio.com/lp/cmmc/self-assess-malscmmc/



Landing Page Goals

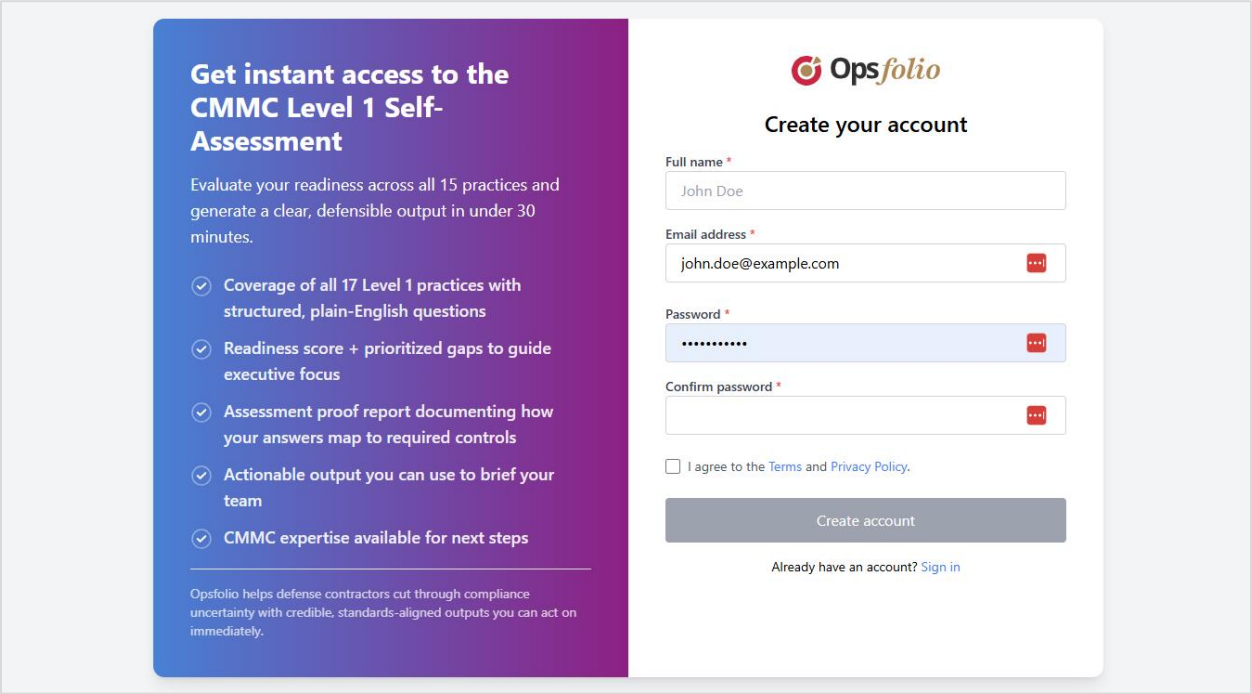
The landing pages are designed to:

- Introduce compliance-readiness assessments
- Explain the business value of self-assessment
- Encourage immediate engagement
- Capture prospect information
- Guide users toward assessment completion

Typical landing page elements include:

- Compliance overview
- Business-risk positioning
- Readiness messaging
- Assessment entry points
- Call-to-action buttons
- Lead capture forms
- Partner branding

3. Sign-Up & User Inputs



Initial Sign-Up Information

The current workflows typically collect:

- First Name
- Last Name
- Email Address

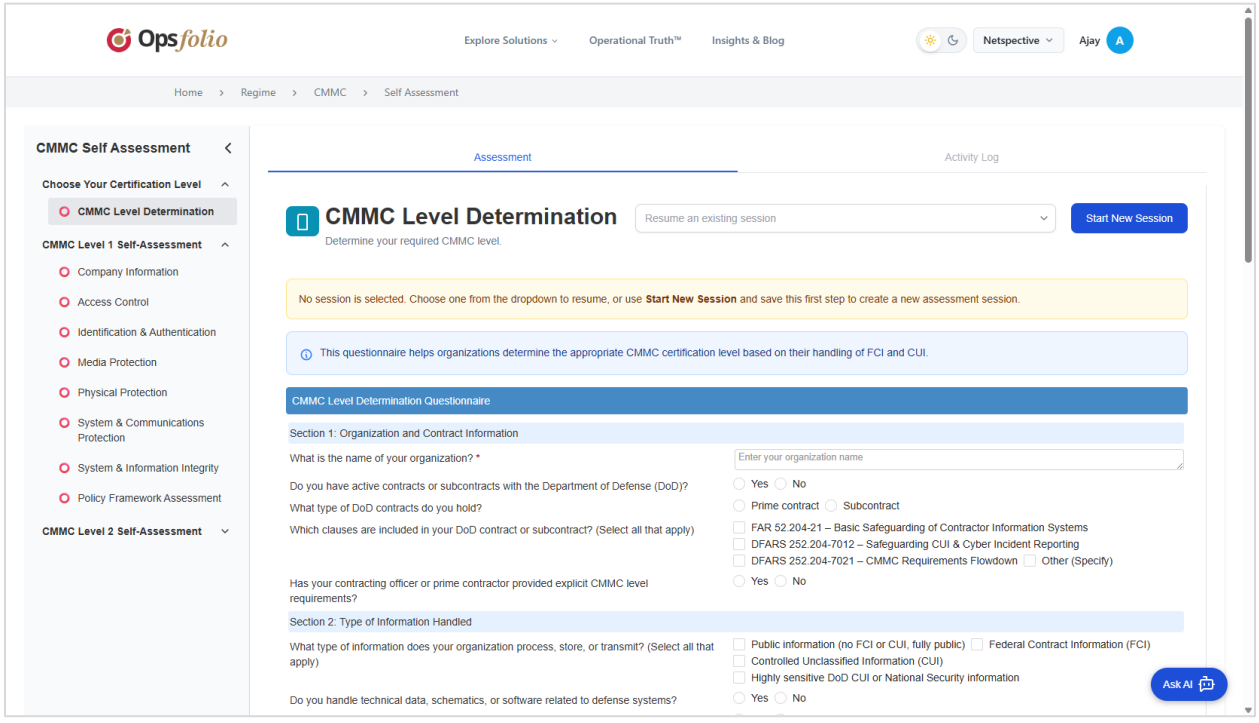
Additional information may be collected throughout the assessment process depending on the workflow.

4. Assessment Experience

CMMC Assessments

The CMMC Self-Assessment walks users through a structured series of questions covering their current security practices. The experience is guided and self-service, covering areas such as:

- Questions to determine the applicable CMMC level
- Current security practices and controls
- Existing policies and documented processes
- How access to systems and data is managed
- Incident response and recovery preparedness
- Risk management and vendor oversight practices
- Documentation and day-to-day operational practices



At the end of the assessment, users receive a clear picture of:

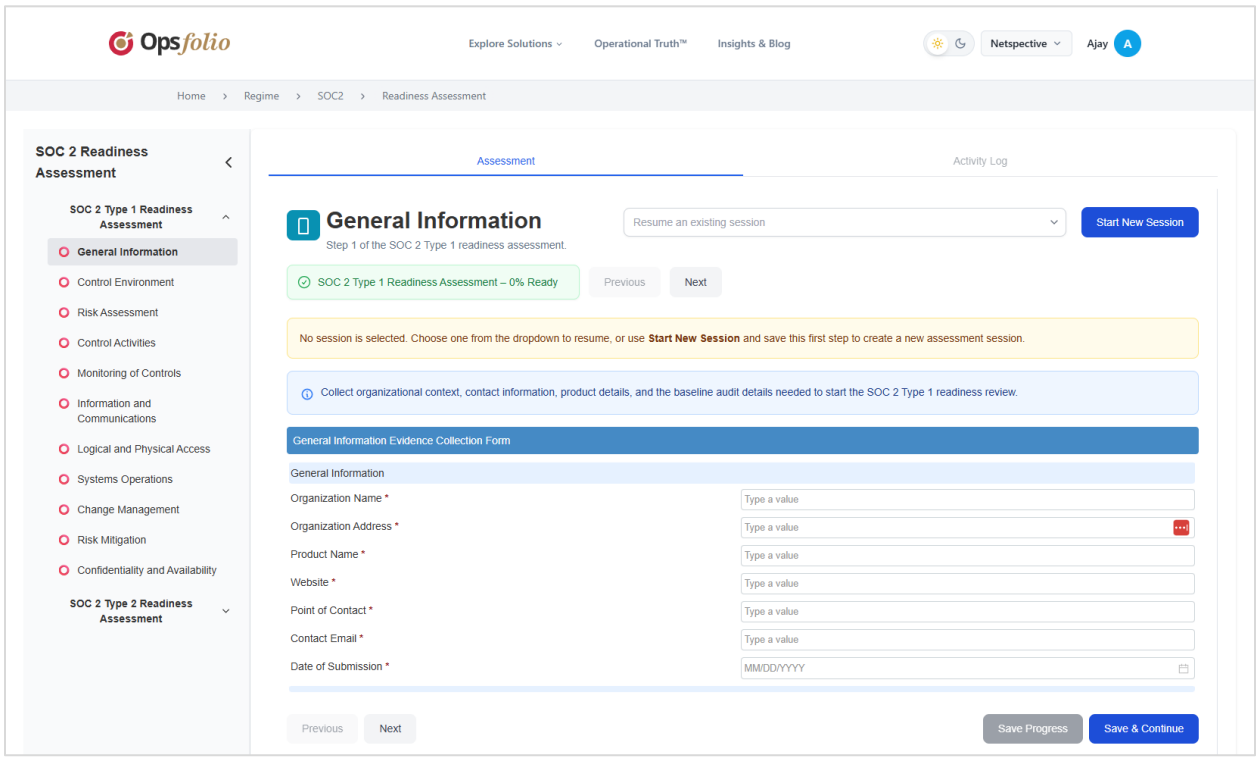
- Where they likely stand against CMMC requirements
- Specific areas that need attention before certification
- A starting point for remediation conversations

SOC 2 Readiness Assessments

The SOC 2 Self-Assessment guides users through a structured review of their operational and security practices. It covers areas such as:

- How security governance and oversight is structured
- Operational controls currently in place
- Readiness for an external SOC 2 audit
- Availability of evidence and supporting documentation
- User access management and identity practices
- Monitoring, logging, and operational procedures

The completed assessment gives organizations a practical, directional view of where they stand and what to address before pursuing a SOC 2 audit.



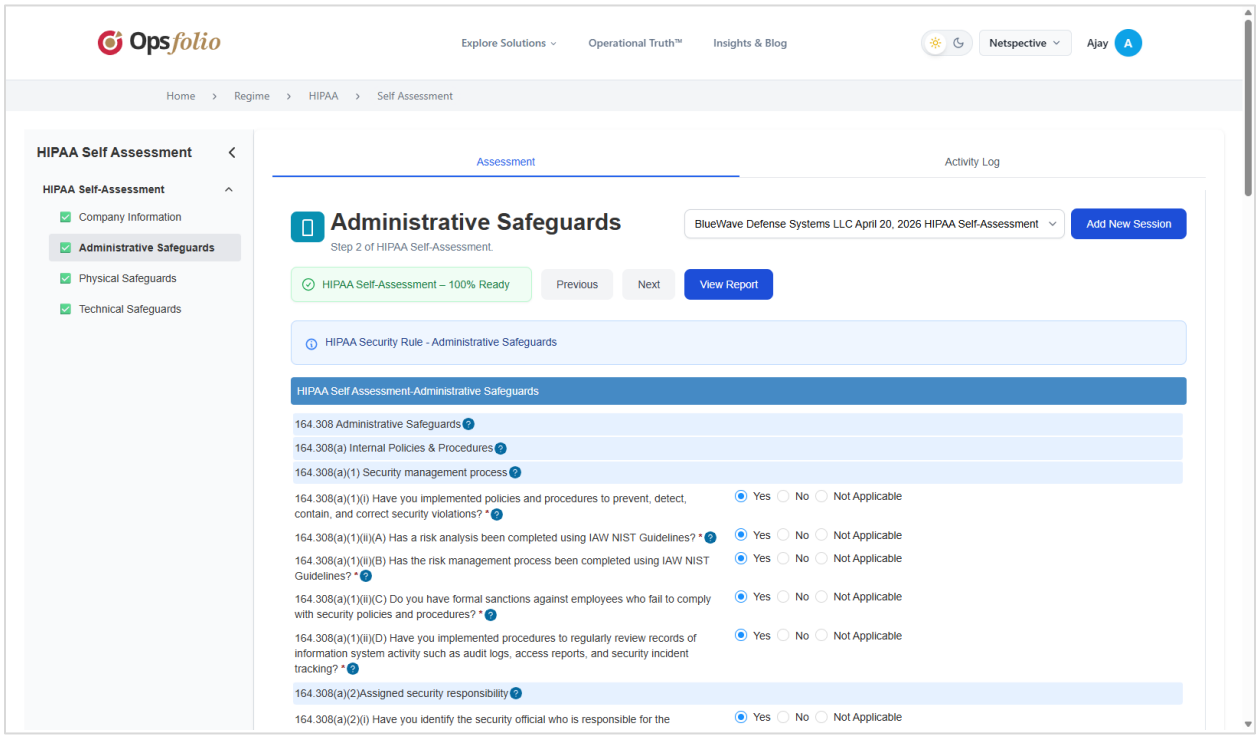
HIPAA Self-Assessment

The HIPAA Self-Assessment guides users through a structured, four-step review of their organization's current safeguard implementation. The experience is guided and self-service, covering:

- Company and contact information

- Administrative Safeguards: security management, workforce access, training, incident response, and contingency planning (164.308)
- Physical Safeguards: facility access, workstation controls, and device and media handling (164.310)
- Technical Safeguards: access controls, audit controls, data integrity, authentication, and transmission security (164.312)

At the end of the assessment, users can view their report immediately via the View Report button, which is available throughout the workflow once the session is saved.



5. Automated Emails & Customer Touchpoints

Automated Customer Experience

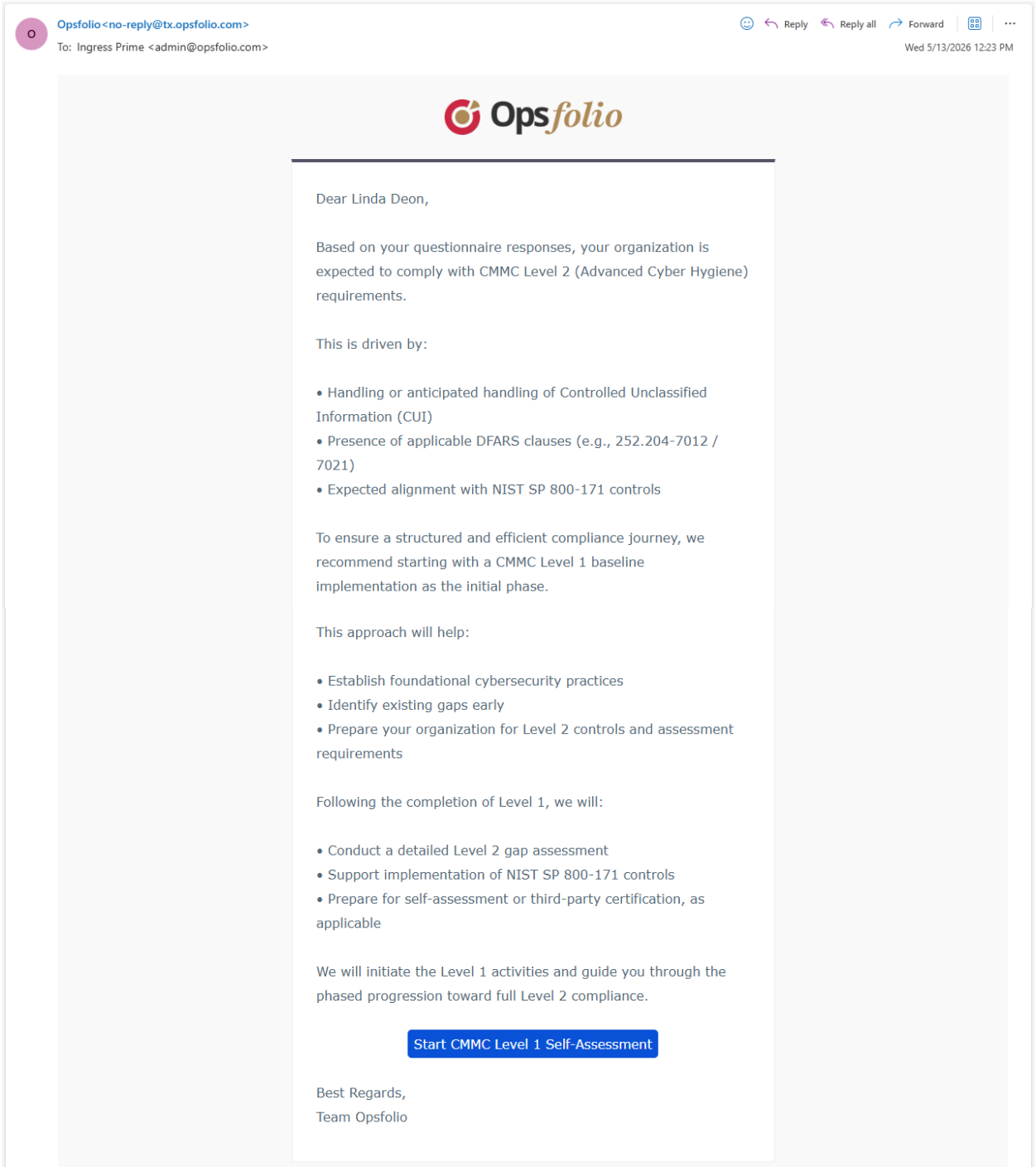
Several workflows currently trigger automated customer-facing emails.

Examples include:

- Assessment initiation notifications
- Workflow-based email responses

- Level determination follow-up emails
- Report delivery emails

These touchpoints help maintain engagement during the assessment journey.



Opsfolio<no-reply@tx.opsfolio.com>
To: Ingress Prime <admin@opsfolio.com>
Reply Reply all Forward
Wed 5/13/2026 12:23 PM

Opsfolio

Dear Linda Deon,

Based on your questionnaire responses, your organization is expected to comply with CMMC Level 2 (Advanced Cyber Hygiene) requirements.

This is driven by:

• Handling or anticipated handling of Controlled Unclassified Information (CUI)
• Presence of applicable DFARS clauses (e.g., 252.204-7012 / 7021)
• Expected alignment with NIST SP 800-171 controls

To ensure a structured and efficient compliance journey, we recommend starting with a CMMC Level 1 baseline implementation as the initial phase.

This approach will help:

• Establish foundational cybersecurity practices
• Identify existing gaps early
• Prepare your organization for Level 2 controls and assessment requirements

Following the completion of Level 1, we will:

• Conduct a detailed Level 2 gap assessment
• Support implementation of NIST SP 800-171 controls
• Prepare for self-assessment or third-party certification, as applicable

We will initiate the Level 1 activities and guide you through the phased progression toward full Level 2 compliance.

Start CMMC Level 1 Self-Assessment

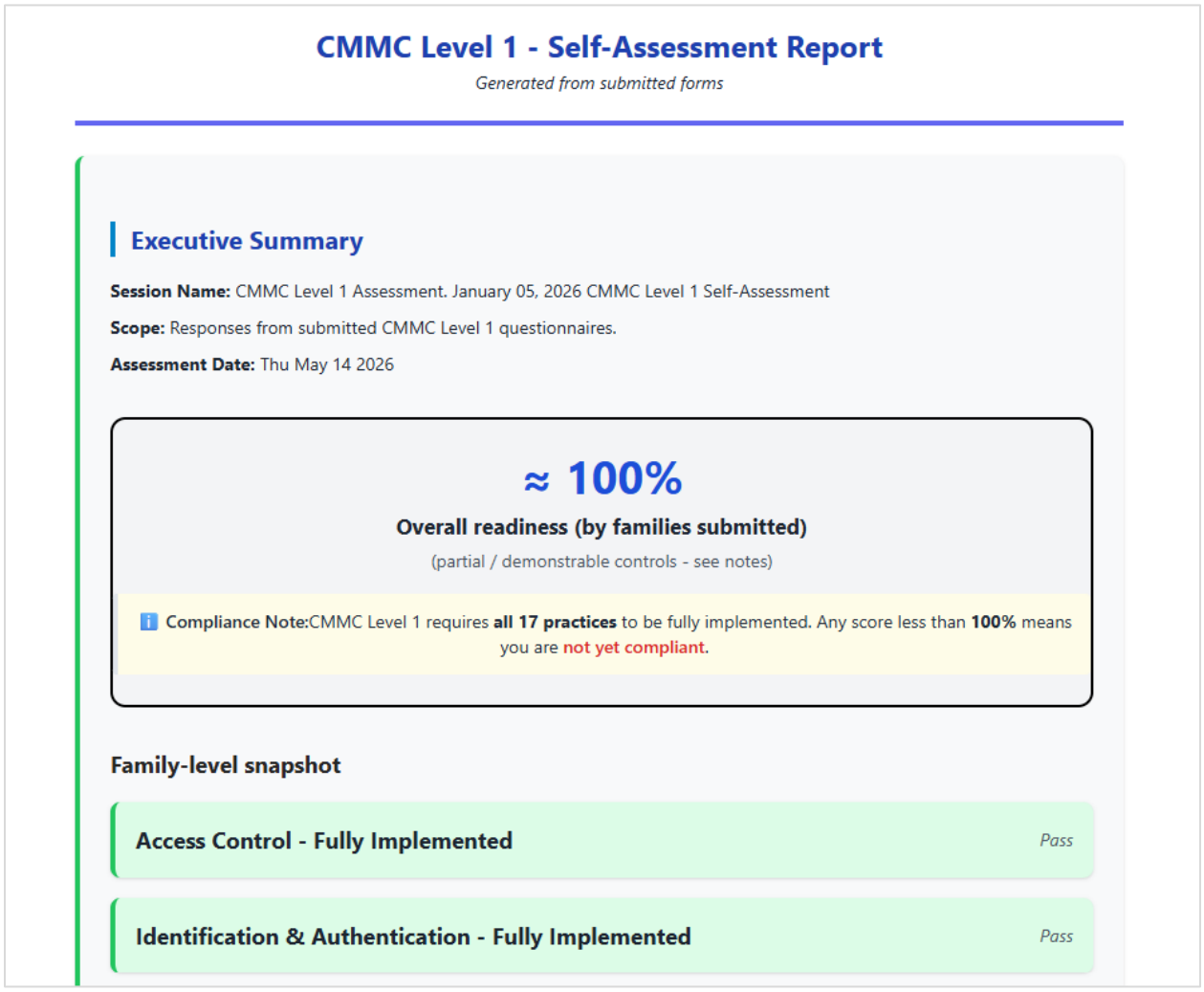
Best Regards,
Team Opsfolio

6. Reports & Outputs Generated

CMMC Level 1 Reports

Upon successful completion of the CMMC Level 1 Self-Assessment:

- A self-assessment report is automatically generated
- A report link is delivered to the user



CMMC Level 1 - Self-Assessment Report

Generated from submitted forms

Executive Summary

Session Name: CMMC Level 1 Assessment. January 05, 2026 CMMC Level 1 Self-Assessment

Scope: Responses from submitted CMMC Level 1 questionnaires.

Assessment Date: Thu May 14 2026

≈ 100%

Overall readiness (by families submitted)

(partial / demonstrable controls - see notes)

ℹ️ **Compliance Note:**CMMC Level 1 requires **all 17 practices** to be fully implemented. Any score less than **100%** means you are not yet compliant.

Family-level snapshot

Access Control - Fully Implemented *Pass*

Identification & Authentication - Fully Implemented *Pass*

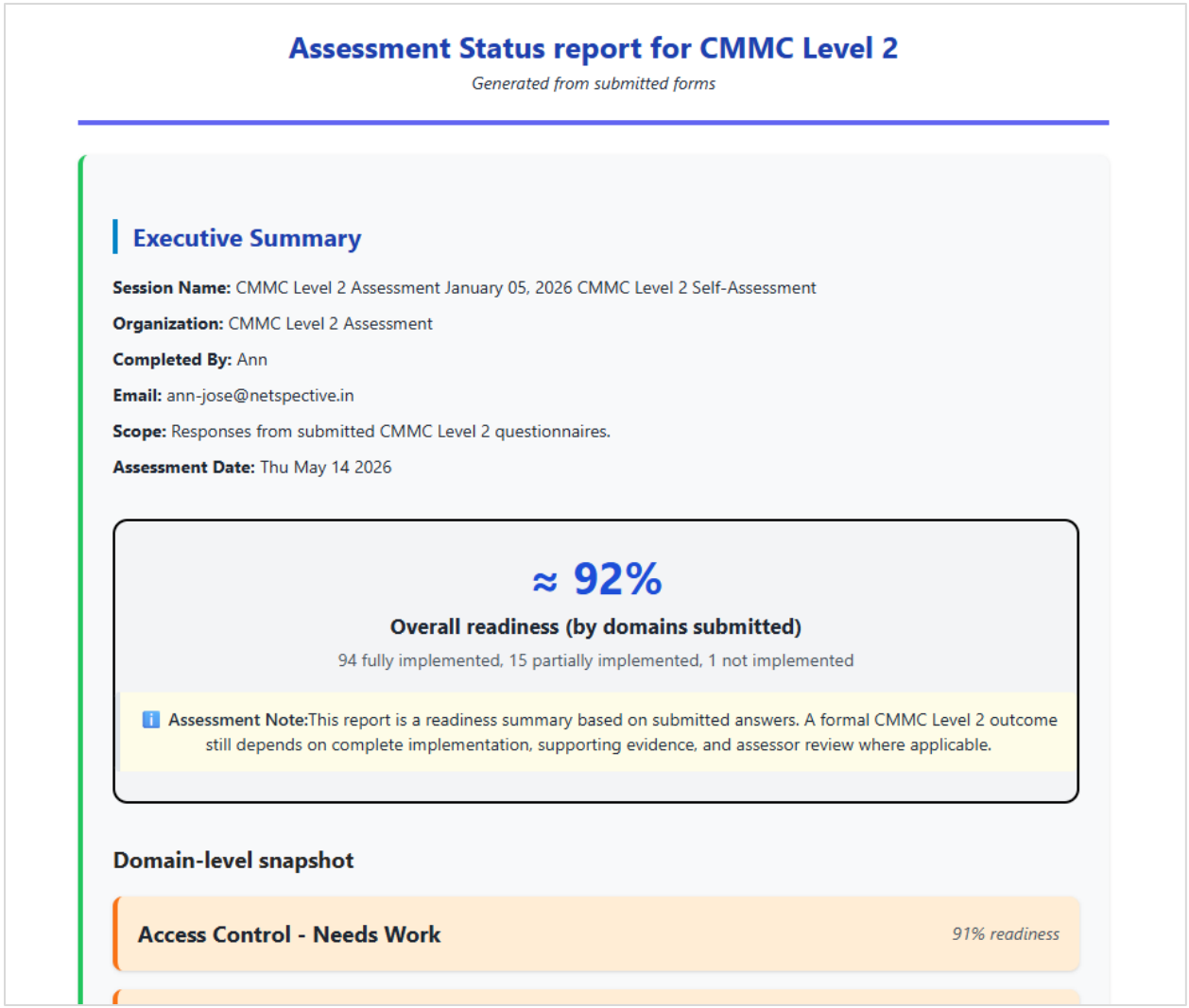
The self-assessment reports help organizations understand:

- Current readiness status
- Compliance gaps
- Areas requiring additional work
- Suggested improvement focus areas

CMMC Level 2 Reports

Upon successful completion of the CMMC Level 2 Self-Assessment:

- A self-assessment report is automatically generated
- A report link is delivered to the user



Assessment Status report for CMMC Level 2

Generated from submitted forms

Executive Summary

Session Name: CMMC Level 2 Assessment January 05, 2026 CMMC Level 2 Self-Assessment

Organization: CMMC Level 2 Assessment

Completed By: Ann

Email: ann-jose@netspective.in

Scope: Responses from submitted CMMC Level 2 questionnaires.

Assessment Date: Thu May 14 2026

≈ 92%

Overall readiness (by domains submitted)

94 fully implemented, 15 partially implemented, 1 not implemented

Assessment Note: This report is a readiness summary based on submitted answers. A formal CMMC Level 2 outcome still depends on complete implementation, supporting evidence, and assessor review where applicable.

Domain-level snapshot

Access Control - Needs Work *91% readiness*

The report helps organizations understand:

- Current readiness status across all 14 CMMC Level 2 practice domains
- Practice-level compliance gaps and areas of partial implementation
- Which of the 110 required practices are met, partially met, or not yet addressed
- Recommended focus areas before engaging a C3PAO for formal assessment
- An overall readiness posture summary

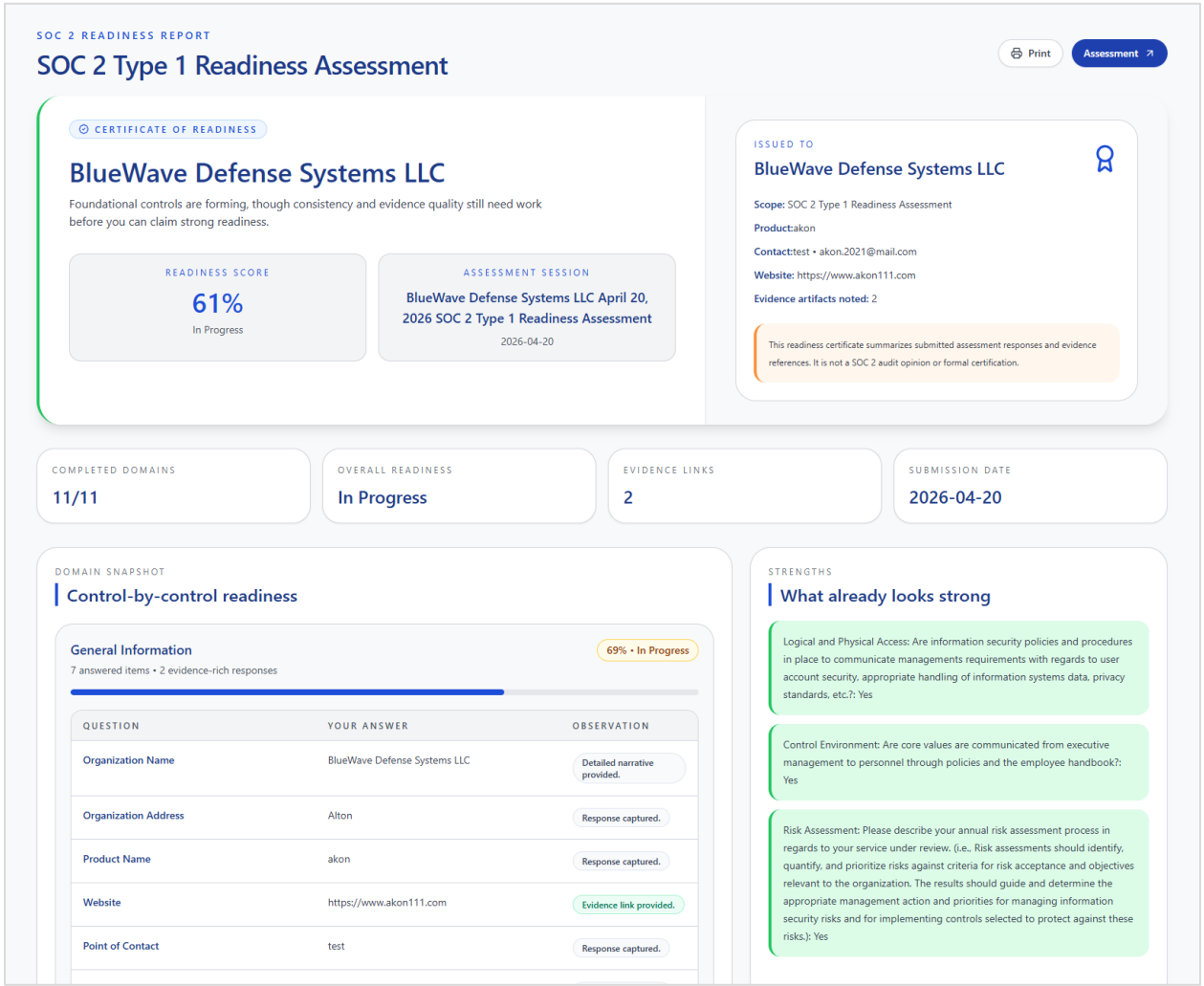
The Level 2 self-assessment report gives organizations a structured, practice-level view of their current compliance posture and a concrete starting point for remediation planning.

SOC 2 Readiness Reports

SOC 2 readiness workflows generate:

- Self-assessment report summarizing readiness findings
- Gap-oriented observations
- Operational maturity indicators
- Directional compliance insights

These self-assessment reports are intended to serve as starting points for deeper readiness discussions.



HIPAA Self-Assessment Reports

Upon successful completion of the HIPAA Self-Assessment:

- A self-assessment report is automatically generated
- A report link is delivered to the user

HIPAA Self-Assessment Report

Generated from your saved HIPAA assessment session

100%

Overall safeguards readiness

Overall readiness score derived from answered HIPAA safeguard controls.

Executive Summary

Session Name: BlueWave Defense Systems LLC April 20, 2026 HIPAA Self-Assessment

Organization: BlueWave Defense Systems LLC

Completed By: Jerom

Assessment Date: Not provided

Controls Reviewed	Yes	No	Not Applicable
54	54	0	0

Safeguard Breakdown

Administrative Safeguards 30 yes, 0 no, 0 not applicable	100% section score
Physical Safeguards 12 yes, 0 no, 0 not applicable	100% section score
Technical Safeguards 12 yes, 0 no, 0 not applicable	100% section score

The report helps organizations understand:

- Overall safeguards readiness score across all HIPAA Security Rule controls
- Section-level scores for Administrative, Physical, and Technical Safeguards
- A breakdown of controls reviewed with Yes, No, and Not Applicable counts
- Specific priority gaps tied to individual 164.308, 164.310, and 164.312 regulation references

- The user's own responses and explanations captured against each gap item

The HIPAA Self-Assessment report gives healthcare organizations and their business associates a structured, regulation-referenced view of their current safeguard posture and a prioritized starting point for remediation.

7. How Channel Partners Can Use the System

Partner-Driven Campaigns

These Readiness Assessment and Self-Assessment tools are designed to support partner-led engagement models.

Channel partners can:

- Share branded campaign links
- Run outreach campaigns
- Use custom landing pages
- Receive customer engagement visibility
- Use generated reports for follow-up conversations
- Position remediation and consulting services

The Malyszek implementation is an example of this partner-driven model.

Why This Matters for Partners

The workflows help partners:

- Start conversations faster
- Reduce manual discovery effort
- Generate compliance discussions earlier
- Create consulting opportunities
- Scale outreach without large technical teams

Instead of beginning with generic cybersecurity conversations, partners can immediately discuss:

- Readiness findings
- Gap areas
- Business risks
- Improvement opportunities

8. CMMC Customer Journey

The diagram below maps the full CMMC customer journey from initial awareness through to Level 1 or Level 2 compliance completion. It shows three distinct phases across two swim lanes: the customer's actions and Netspective's supporting workflow at each stage.

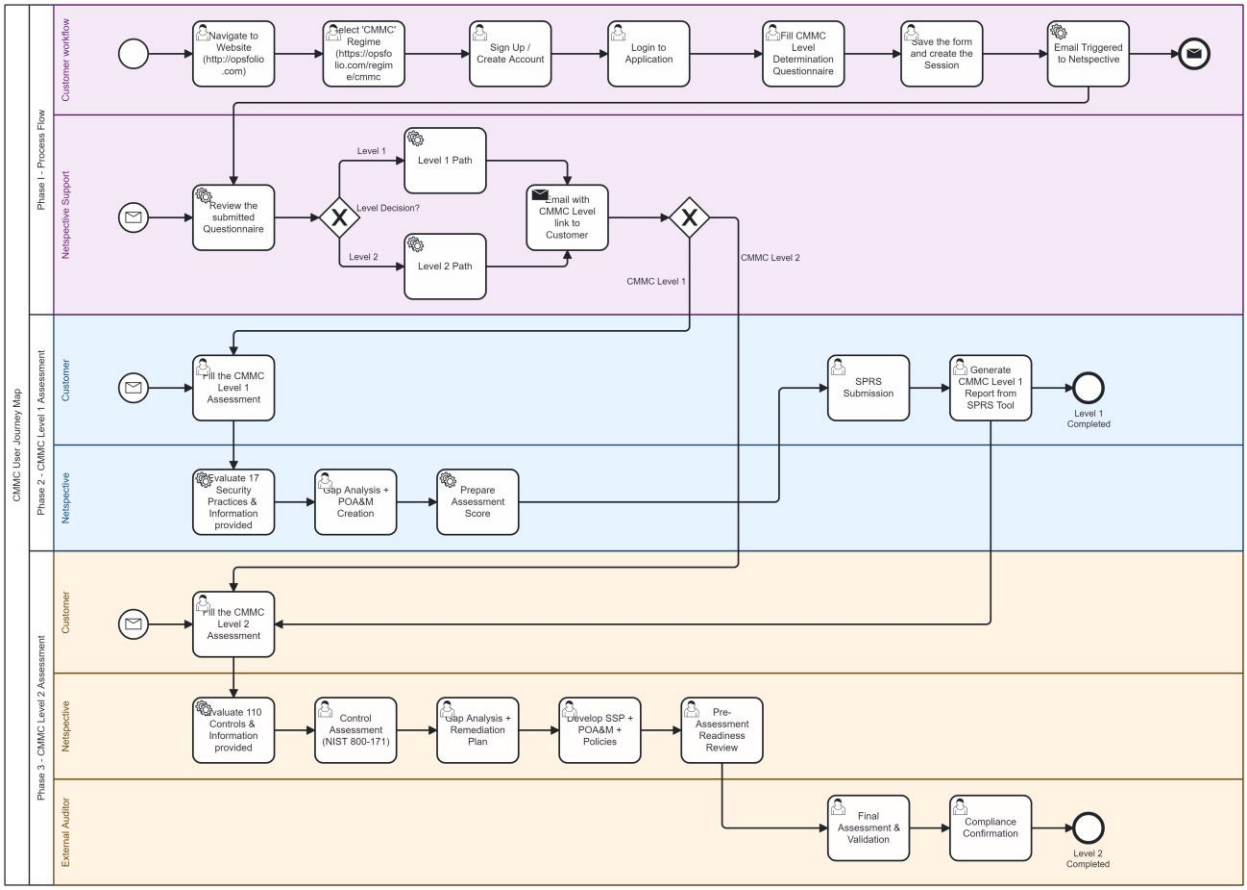


Figure: CMMC Customer Journey Map - from initial website visit through Level 1 or Level 2 completion

Customer Workflow

This is the top swim lane and shows the actions taken by the customer from the very start of their journey. The customer:

- Navigates to the Opsfolio website (opsfolio.com)
- Selects the CMMC Regime (opsfolio.com/regime/cmmc)
- Signs up or creates an account
- Logs in to the application
- Fills in the CMMC Level Determination Questionnaire
- Saves the form and creates the session, triggering an automated email to Netspective

Phase 1: Level Determination and Routing

Once the customer's questionnaire is submitted, Netspective reviews the session and determines the appropriate CMMC level. This is a short routing phase:

- Netspective reviews the submitted questionnaire
- A level decision is made: Level 1 or Level 2
- An email is sent to the customer with a link to their appropriate CMMC level assessment
- Customer follows the Level 1 or Level 2 path depending on the outcome

Phase 2: CMMC Level 1 Assessment

For customers routed to Level 1, the journey follows a self-assessment path supported by Netspective's evaluation workflow.

Customer actions:

- Fills in the CMMC Level 1 Assessment in the Opsfolio Web App
- Completes SPRS submission
- Generates the CMMC Level 1 Self-Assessment Report from the SPRS tool
- Level 1 journey is complete

Netspective supporting workflow:

- Evaluates the 17 security practices and information provided by the customer
- Performs gap analysis and creates a POA&M
- Prepares the assessment score

Phase 3: CMMC Level 2 Assessment

For customers routed to Level 2, or who progress from Level 1, the journey continues into a more rigorous assessment supported by both Netspective and an External Auditor.

Customer actions:

- Fills in the CMMC Level 2 Assessment in the Opsfolio Web App

Netspective supporting workflow:

- Evaluates all 110 controls and the information provided, against NIST 800-171
- Performs a Control Assessment (NIST 800-171)
- Produces a Gap Analysis and Remediation Plan
- Develops SSP, POA&M, and supporting Policies

- Conducts a Pre-Assessment Readiness Review

External Auditor (C3PAO):

- Conducts the Final Assessment and Validation
- Issues Compliance Confirmation, completing the Level 2 journey

9. Current Capabilities

Partners and external collaborators can count on the following being available and working today:

- Live public landing pages with campaign and partner-branded variants
- Guided CMMC and SOC 2 Self-Assessments that prospects can complete independently
- Automated self-assessment reports delivered to prospects upon completion
- Automated assessment-triggered emails keeping prospects informed at each stage
- Partner visibility into prospect engagement and assessment completion
- A self-service experience prospects can complete in under 30 minutes

Self-assessment reports available today:

- CMMC Level 1 Self-Assessment report
- SOC 2 Readiness Self-Assessment report
- CMMC Level 2 Self-Assessment report

10. Business Value

These tools help transform compliance engagement from:

Traditional Manual Discovery → Guided Automated Readiness Engagement

This creates value for:

- Customers seeking quick readiness visibility
- Channel partners needing scalable outreach
- GTM teams looking for engagement acceleration
- Consulting organizations seeking qualified compliance leads

Final Summary

Opsfolio's Readiness Assessment and Self-Assessment tools provide a structured, customer-friendly compliance engagement experience that combines:

- Readiness assessments
- Automated reporting
- Partner-led engagement
- Customer education
- Compliance awareness
- Funnel acceleration

The workflows help prospects quickly understand where they stand while giving partners and GTM teams a scalable way to initiate meaningful compliance-readiness conversations.