



GRMS Client Implementation Checklist

Item	Description	Assigned To:	Completed	Rec'd by GRMS
1.	Execute Master Services Agreement (MSA) This is the agreement between your company and GRMS outlining the supplier risk assessment program.			
2.	Create Statement of Work (SOW) Create the Statement of Work (SOW) which describes the risk components that will be included in the risk assessment programs as well as other GRMS SLAs. Risk Assessment Programs			
3.	Provide client logo to GRMS The logo will be used for branding the client portal and supplier enrollment landing page. The logo should be a minimum of 1024px in width at 300dpi in PNG format.			
4.	Provide Insurance Requirements Provide to GRMS any insurance requirements that the suppliers will need to meet.			
5.	Review Risk Rating Criteria The risk rating criteria is used to determine the risk rating for each risk component. Risk Rating Criteria – U.S. Risk Rating Criteria – Canada			
6.	Please provide product and service categories to be used for enrollment and assigning insurance risk tiers.			
7.	Provide samples of any required documents to be collected As part of the enrollment process, suppliers will be directed to a required document page for required documents and instructions for their submittal.			
8.	Provide electronic supplier contact list The list should be what is easily output from your accounting system into a simple format such as MS Excel. https://www.globalrms.com/suppliercontactrequirements			
9.	Review & approve enrollment form https://enroll.globalrms.com/client_domain_name			
10.	Establish supplier exception email address Client to create an email for GRMS Support to direct suppliers for exception requests. This email is hosted and monitored by client. Recommended: SupplierRisk@client_domain_name.com			
11.	Review & approve Supplier invitation letter GRMS will provide a template supplier invitation letter which will be used to invite the suppliers to the program and advise participation is required.			
12.	Determine internal communication plan Communicating the program to all internal stakeholders is critical. Recommended Internal Notice Recommended Supplier Notice			
13.	Establish date to begin contacting suppliers This is the date that GRMS begins contacting suppliers for enrollment.			
14.	Establish post implementation meeting date This is the date where the GRMS Client Implementation Manager meets with client to provide pass/fail statistics and other trends based on actual suppliers enrolled after applying initial risk assessment criteria.			
15.	Implement Microsoft 365 SSO (optional) The GRMS Veritas Platform supports SSO with Microsoft 365. If you would like this configured, please provide your IT contact person to GRMS.			
16.	Determine internal training requirements GRMS conducts training webinars and can provide other training materials based on client requirements.			