30-DAY PORTFOLIO FOUNDING PILOT

PRIVACY OPERATIONS

Standardize one client-delivery workflow before expanding across the portfolio.

A practical guide for Nigerian DPCOs that want repeatable evidence, ownership, review and reporting delivery while preserving each client's context.

WHAT THIS GUIDE HELPS YOU DO

Standardize one client-delivery workflow, then judge whether the operating model can support a controlled portfolio.

Request — Owner — Evidence — Review — Report

THE PORTFOLIO DELIVERY GAP

Every client engagement should not require a new operating method.

When delivery structure varies by consultant or account, the firm spends more effort reconciling work and has less visibility into evidence and review readiness across active engagements.

01

Methods vary by engagement

Requests, ownership and review steps are handled differently across clients, making consistent delivery difficult to maintain.

02

Evidence chasing repeats

Consultants follow up through email and separate trackers without a shared record of what each client has provided.

03

Portfolio visibility is limited

Delivery leaders cannot easily see which engagements are progressing, waiting on evidence or ready for review.

04

Reports require reconciliation

Client status and supporting context must be assembled manually before a consistent report can be produced.

> **Files preserve information.** Privacy Operations keeps the work, owner, evidence, review, and reporting context moving together.

THE PORTFOLIO OPERATING MODEL

Use common workflow structure without flattening client-specific context.

Privora gives the delivery team a repeatable sequence for one recurring client workflow while each engagement keeps its own owners, evidence and decisions.

Request
01

Open a defined client request with the expected evidence, delivery context and due date.

Owner
02

Make the responsible consultant and client-side owner visible for the next action.

Evidence
03

Connect submitted files and follow-up context to the client request they support.

Review
04

Apply a consistent review step while preserving engagement-specific questions and decisions.

Report
05

See delivery and review status clearly before preparing the client-facing update.

ONE CONNECTED RECORD

For every engagement, the owner, evidence, current status, review decision and reporting context remain connected while the operating method stays repeatable.

THE PORTFOLIO PILOT

Begin with one client workflow and a controlled delivery scope.

The 30-day pilot tests a shared method across a controlled client set agreed during onboarding, without promising a fixed client count or portfolio-wide rollout.

01

Defined portfolio scope

One defined client workflow and a controlled client set agreed during onboarding around active delivery work.

02

Founder-led onboarding

The ₦50,000 initial payment reserves kickoff; onboarding then sets the shared workflow, delivery owner, client context and result to inspect.

03

Weekly portfolio review

Review evidence movement, ownership, exceptions and reporting readiness across the agreed pilot scope.

04

End-of-pilot decision

At day 30, assess delivery consistency, evidence visibility and reporting readiness before deciding whether to continue.

TOTAL FEE

₦100,000

INITIAL PAYMENT

₦50,000

BALANCE

Balance due by day seven after onboarding.

ANNUAL SUBSCRIPTION CREDIT

100% of the completed pilot fee is credited toward an annual Privora subscription when conversion occurs within 30 days after the pilot ends.

FIT AND NEXT STEP

Use the pilot when one recurring client workflow is ready to standardize.

The strongest starting point has active client work, a responsible delivery owner and a team willing to use one shared operating method during the pilot.

A STRONG FIT HAS

- A recurring client-delivery workflow varies between engagements
- Evidence requests and follow-up require repeated manual reconciliation
- A named delivery owner can coordinate the agreed pilot scope
- Active review or reporting work can test the shared method

OPERATIONAL VALUE

Standardize one client-delivery workflow, then judge whether the operating model can support a controlled portfolio.

Reply to the sender

Share the first client workflow and your preferred kickoff window.

Reply to the sender