BOOTCAMP SESSION DESCRIPTIONS

Day One of Bootcamp - May 7th

Global Risk Exchange: How to Make Better Risk Decisions Faster
with Gary Phipps

Experience an interactive demonstration of efficient risk assessment methodologies in this strategic session. See ProcessUnity's capabilities for rapid vendor evaluation, assessment scoping, and risk intelligence development. Gain valuable strategies for implementing an efficient, data-driven approach to third-party risk decision-making based on actionable.

New Feature Showcase: Workflow Enhancements
with Jeff Robbins, Rochelle Prescott, and Dave Caplice

Join the ProcessUnity product team for an exclusive demonstration of our latest workflow enhancements. Through focused demonstrations, you'll explore user-centric improvements, advanced administrative capabilities, and critical system functionalities that address real business challenges. Gain valuable insights into how these enhancements can optimize your implementation and deliver measurable operational benefits to your organization.

Custom Integrations using External API Connections
with Sandeep Bhide and Scott Wood

Enhance your ProcessUnity implementation with strategic system integrations in this technical session. Learn to establish secure API connections, implement various authentication methods, and leverage specialized workflow steps for data exchange. Gain practical knowledge about security considerations and configuration options for building robust integrations with external business systems.

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Define Your Program
with Gary Phipps

Establish a comprehensive risk management framework in this strategic program development session. Explore key migration considerations, data integration best practices, and essential organizational settings aligned with your risk management objectives. Gain foundational knowledge to design a structured, customized risk management program that reflects your organization's unique requirements.

Expression Writing Fundamentals
with Emily Smith

Develop essential expression writing skills in this structured, hands-on session. Explore expression components, syntax rules, and practical applications while building from foundational concepts to intermediate techniques. Learn to create calculated fields, implement conditional formatting, and troubleshoot common syntax issues to address complex business requirements in your ProcessUnity implementation.

Optimizing Third-Party Portal Experience
with Jon Francis

Discover strategic approaches to enhance vendor engagement in this focused session. Learn proven methodologies for streamlining questionnaire completion, effective contact management, and data visualization techniques that drive higher completion rates. Gain practical strategies to increase vendor participation and improve assessment outcomes through optimized portal experiences.

Adapting Your Platform to Third-Party Assessment Program Changes
with Andrew Hafner

Develop a flexible risk management framework in this strategic session. Learn methodologies for modifying risk calculations, incorporating new assessment factors, and implementing workflow changes while maintaining operational continuity. Acquire techniques for accommodating evolving business requirements while preserving historical data integrity and assessing program effectiveness.

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Run Your Program (Part 1)
with Gary Phipps

Master essential program operations in this comprehensive session on vendor risk management execution. Learn efficient vendor onboarding processes, impact questionnaire techniques, and methods for generating actionable insights from risk profiles. Acquire practical knowledge to operationalize a consistent, efficient third-party risk management program with effective monitoring capabilities.

Button Configuration Essentials
with Krislin Braham

Master the fundamentals of automated workflow design in this technical session. Explore implementation scenarios from essential status updates to complex form integrations with record creation capabilities. Learn best practices for incorporating user feedback mechanisms and effective process automation to design intuitive interfaces that streamline workflows and enhance system adoption.

Troubleshooting Through Data Validation Reports
with Rajath Ramesh

Develop advanced data management techniques on validation and migration in this technical session. Learn methodologies for handling complex data types, managing user references, and implementing external ID strategies for data integrity. Acquire essential skills to ensure accurate information transfer and maintain high data quality standards in your ProcessUnity environment.

Validators vs Required Properties: Building Effective Controls
with Tom Vautour

Discover the essential differences between required fields and validators in this practical session. Learn when to use each approach, how to write practical validation expressions, and how to implement frameworks that maintain data integrity while enhancing user experience. Gain techniques to enforce data quality standards that ensure consistent, accurate information throughout your ProcessUnity implementation.

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Run Your Program (Part 2) - Threat & Vulnerability Management
with Gary Phipps

Integrate advanced threat intelligence capabilities into your risk management program. Discover methodologies for identifying vulnerable third parties, developing response strategies for emerging threats, and implementing automated monitoring parameters. Gain practical approaches to enhance organizational resilience through integrated threat intelligence and continuous monitoring protocols.

Platform Hygiene: Streamlining Your Environment
with Meggan Weith

Optimize system performance through effective platform maintenance strategies. Discover techniques for improving report performance, implementing notification rule governance, and analyzing component usage to minimize system impact. Gain practical knowledge to implement a structured maintenance program that ensures continued platform effectiveness and improved user experience.

Questionnaire Pre-Population Techniques
with Kendra Zander

Implement efficient assessment methodologies on questionnaire automation in this technical session. Learn strategies for configuring response mapping, creating custom reports, and implementing automated actions for consistent data transfer. Develop skills to diagnose and resolve common implementation challenges to enhance data consistency and streamline assessment processes.

What is UNITE:2025?

Presented by **ProcessUnity**, and formerly the ProcessUnity Customer Summit, join your colleagues, industry peers, and experts from our workflow and exchange solutions for a day-and-a-half event packed with product deep dives, customer case studies, and opportunities to network with leaders in your field. An optional post-conference training bootcamp begins with a half-day session on May 7 and a full-day session on May 8.

May 6 - 8, 2025 at the Mission Bay Resort in San Diego, California

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