



Customer security response checklist

Use this before submitting a questionnaire or promising new work.

Coordinator: _____ Customer and service: _____

Requested date: _____

Clarify the request

- ☐ Confirm the service, systems and customer information in scope.
- ☐ Identify the customer's reviewer, the decision waiting and the requested deadline.
- ☐ Clarify mandatory requirements, acceptable evidence and ambiguous questions.

Establish the facts

- ☐ Ask the responsible owner what operates today and where it applies.
- ☐ Check supporting evidence, its date and its limitations.
- ☐ Classify each unresolved item: missing evidence, unclear scope, partial capability or missing capability.

Decide the next action

- ☐ Choose: demonstrate, clarify, implement, propose an alternative, change scope or decline.
- ☐ Assign an owner and resources before promising work or dates.
- ☐ Keep current capability, approved plans and customer acceptance separate.

Review and submit

- ☐ Have factual owners review answers and authorized owners approve commitments.
- ☐ Remove unnecessary sensitive details and use an approved exchange method.
- ☐ Explain qualifications; do not force an unsupported yes into a restricted field.
- ☐ Save the submitted version and agree who tracks open items and the next update.

For each unresolved question, record: current answer | evidence | gap | owner | next action | date.

Before submission: Can the relevant owner support every material claim, and has every new commitment been authorized?