



| Guide

How to Create a Trust Center Strategy



Introduction

Now that security reviews are a typical part of the B2B technology buying cycle, more and more organizations are turning to Trust Centers to streamline the buyer security review process. Not only does a [Trust Center](#) allow businesses to easily house and share their security documentation, it also helps establish a foundation for customer trust while positioning security as a competitive advantage. But where do you start?

In this piece, we'll break down how to create your Trust Center strategy to set your business up for success. We'll dive into:



The benefits of a Trust Center



The pillars of customer trust



How to align key stakeholders



Measuring and optimizing your Trust Center strategy



Understanding Trust Center metrics for success

Reducing friction in buyer security reviews

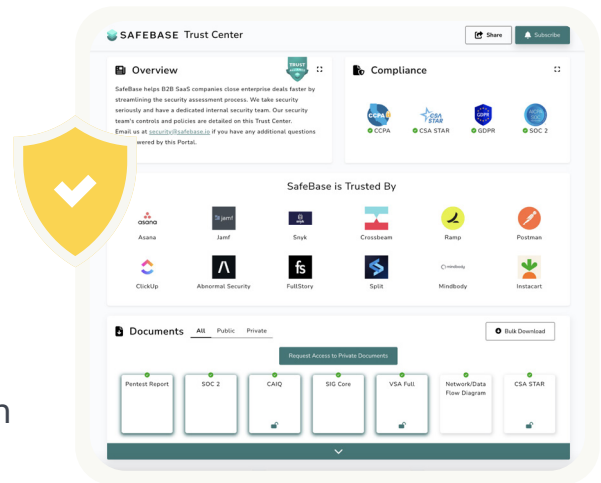
In our ever-more-connected world, customer trust is rapidly becoming the bedrock on which B2B relationships are built. For organizations selling technology, demonstrating a solid security posture is crucial to your success.

While most organizations now engage in buyer-led security reviews, including requests to complete a security questionnaire, the experience for sellers is still suboptimal. Sellers report that the process of responding to security questionnaires is often disorganized, rife with broken communication, and lacks visibility among internal teams, as well as with customers and prospective buyers.

In order to streamline the buyer review process, more and more leaders are building Trust Centers.

Benefits of a Trust Center

A Trust Center houses all of your company's security documentation and information in one customer-facing space. Sellers can proactively share their Trust Center with buyers and customers, allowing them to self-serve the information they need on their own time, which often mitigates the need to respond to a security questionnaire. However, when there is a need to respond to a questionnaire, the right Trust Center may also provide [questionnaire automation tools](#) that dramatically reduce response times.



Organizations that leverage a Trust Center experience:

- ✓ a significant reduction in inbound security questionnaires
- ✓ an improved buyer experience
- ✓ accelerated sales cycles
- ✓ reduced friction among internal stakeholders
- ✓ a greater, more measurable impact on revenue

Build or Buy? Static Trust Page vs. Trust Center

While there are endless combinations of trust-focused activities to help you tell your company's security story, your strategy will revolve around your public-facing Trust Center.

A Trust Center is a central hub that houses all of your company's security information in one place, organizing your trust philosophy, critical documentation, and ongoing updates about your security posture. This type of portal allows customers, buyers, and partners to self-serve the information they need to do their due diligence.

While a static trust page offers a baseline of transparency, a Trust Center is interactive by design, allowing reviewers to request access to sensitive documentation, sign up to receive updates and alerts, and even complete the NDA process in a few clicks.

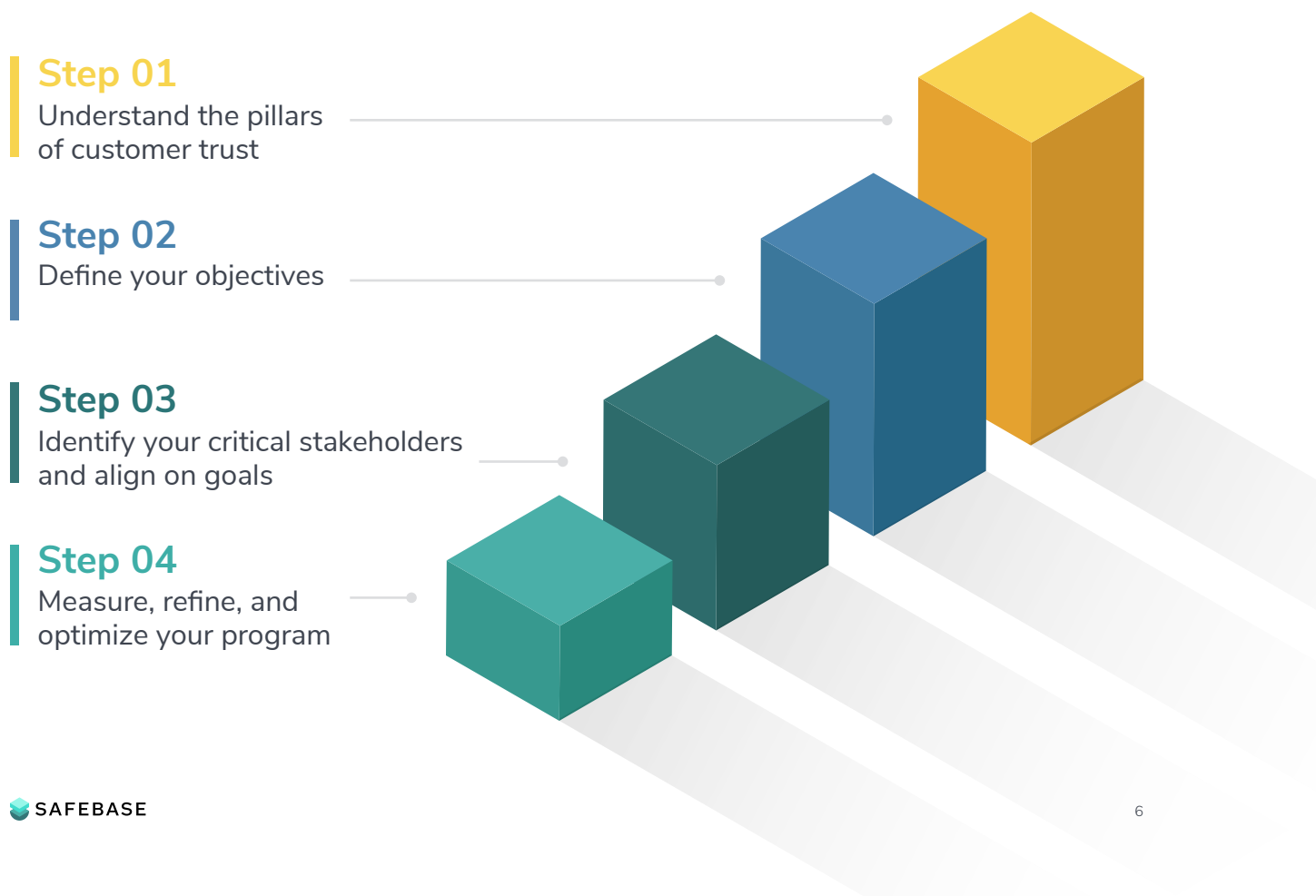
On the backend, a strong Trust Center provides your team with permissioning controls, integrates with your CRM and data warehouses, and provides analytics that demonstrate the documents that are most critical to your audience.

With a public-facing Trust Center in place, your team will take a massive step toward more seamless security assessments.

The four steps to building a Trust Center strategy

In order to optimize the impact of your Trust Center, you want to start by developing a strategy that reflects your organization's goals, stakeholders, and resources. Not only will this help you set a foundation for the level of transparency you provide to your buyers and customers, it will also help decide on a [Trust Center technology](#) partner and what resources to apply to your enablement and training programs.

There are four steps to create a Trust Center strategy that improves the security review process for both your organization and your buyers:



Understand the pillars of customer trust

Before you start building your Trust Center strategy, you need to better understand what customer trust means to your business. The answer to that question will be different for every company, but we've found that there are five crucial areas to think about when it comes to customer trust. We refer to these as the Five Pillars of Customer Trust.



Transparency

All trust-building information and documentation are well-articulated and made easily accessible to the right parties



Proactivity

Trust-building information is provided to interested parties in a timely and comprehensive manner, anticipating customer and buyer needs and questions before they ask



Connectivity

The proliferation of trust-building information is streamlined between buyers and sellers and across internal stakeholders that have a role in building customer trust



Control

Organization has real-time oversight into how trust-driving information is accessed and utilized by buyers and customers



Insight

Organization maintains ongoing understanding of the impact of trust-building programs, including areas for improvement and ROI

The pillars of customer trust

The maturity, resources, and appetite of your team and business will dictate how you choose to activate each of these pillars in your Trust Center strategy, which will in turn help guide decisions like which technology partner you choose and what programs you build out to support the use of the Trust Center.

For example, a company that has recently been the victim of a breach may be particularly keen to rebuild customer trust. This organization would benefit from investing in a Trust Center platform that helps them lean into proactivity by allowing them to easily send communications to their buyers and customers about updates to their security posture.

Meanwhile, companies with complex sales processes and a high volume of inbound security review inquiries may choose a partner that can connect directly to their CRM platform, allowing for greater visibility and agency for the company's sales reps. This investment in connectivity will help reduce friction in the sales process and accelerate the speed at which deals close.

The pillars of customer trust

When thinking about operationalizing customer trust, here are a few ways the five pillars can be used to develop goals for your Trust Center strategy:

	Goal 1	Goal 2
Transparency	Organize security documentation into one public-facing portal (your Trust Center)	Lay out clear guidelines for what needs to be gated; the rest should default to open access
Proactivity	Develop strategies to share your Trust Center early in sales journey	Plan to regularly share security updates with customers and interested parties
Connectivity	Create a simpler process for NDA signing	Integrate security efforts with your CRM and internal communications tools
Control	Create systems that make granting — and revoking — permission to security documentation simple	Create clear rules for who can access sensitive documentation
Insight	Integrate security assessment-related data with your data warehouse	Report Trust Center program impact to executives and BOD

Define your objectives

The next step in building your Trust Center strategy is to document what “success” looks like to your team. In developing your objectives, consider both the qualitative and the quantitative outcomes you’ll want to track.

Some example objectives include:

- Reduce the number of inbound security questionnaires
- Shorten the length of sales cycles
- Sign larger deals
- Build and maintain customer trust
- Shorten the feedback loop between customers and product
- Create seamless NDAs that empower sales to get to signature faster
- Shift security team focus from tactical to strategic projects
- Provide more white glove support to highest-value customers

Lay out your objectives in such a way that you can track and report on progress over time, including identifying where to access metrics and how to collect critical feedback.

Using your Trust Center to increase buyer confidence

A Trust Center is a valuable resource for combating security questionnaires mid-sales cycle. It can also help build confidence before a buyer or customer ever engages with a salesperson. Once the Trust Center is designed, many companies choose to publish it publicly on their websites (like [OpenAI](#)), LinkedIn page (like [Palantir](#)), or even in their email signatures to bring more visibility to their security stance. Hosting your Trust Center in a publicly-accessible place makes self-service even easier for customers and prospects — and sends a strong signal of your company’s commitment to transparency.

Of course, a smartly-designed Trust Center is a requisite part of increasing buyer confidence. Check out a few [Trust Center examples](#) to see how companies like Asana, HubSpot, and Plaid display their security posture.



Identify your critical stakeholders and align on goals

Once you've defined your objectives, you'll need to identify your critical internal stakeholders who will provide insight, feedback, ideas, and resources. Consider the business units whose success is dependent on your team's ability to communicate your security posture effectively with customers and prospective customers. This could include the executive, sales, legal, customer success, and marketing teams, among others.

Bring this group of stakeholders together to weigh in on optimal use of the Trust Center and advise on areas of interconnectivity. For example, the legal team may see an opportunity to streamline the NDA-signing process using the Trust Center, reducing back-and-forth communication, while the marketing team may want to leverage a link to the Trust Center on the company's Trust & Security webpage. Document these touchpoints and consider the ways you can incorporate them into your Trust Center plan.

The more integrated your Trust Center strategy is with those of your stakeholders, the more valuable your team's everyday efforts will become — and the more resources you'll be able to garner.

Identify your critical stakeholders and align on goals

When thinking about operationalizing customer trust, here are a few ways the five pillars can be used to develop goals for your Trust Center strategy:



Security being one of our selling points, the work of the go-to-market teams and the security team at Metadata are completely intertwined. Our ability to communicate our security posture to prospective customers — and existing customers — is an absolutely essential element of our sales process, and, by extension, our ability to win.”



Ray Taft | CISO at Metadata

Measure, refine, and optimize

No strategy is complete without a defined process for assessing progress and making necessary changes as time goes on. To round out your Trust Center strategy, build a dashboard that aggregates quantitative data, like inbound security questionnaire volume and the size of impacted sales deals, that can be updated on a regular basis. Make sure to also create a space for capturing anecdotal feedback from your internal stakeholders and those impacted by the strategy, like salespeople and even customers.

Common Trust Center success metrics

- **Reduction in security questionnaires**
- **Annual contract values**
- **Security-influenced revenue**
- **Most-accessed documentation**
- **Documentation age**

Then, determine and communicate a regular reporting cadence, bringing together the stakeholders you've lined up to periodically report on success and identify next steps for improvement.

Having these insights at your fingertips will help you and your team demonstrate progress, garner additional resources and buy-in, and most importantly, continuously improve the Trust Center experience for your customers and prospective customers.

Crossbeam's Trust Center Tells a Story of Trustworthiness

Crossbeam, a rapidly-growing partner ecosystem platform, has reaped significant benefits from the launch of its Trust Center. Previously, the company's sales and security teams had been overwhelmed, responding to a bespoke security questionnaire for every buyer. With its Trust Center, sellers proactively share the company's security posture with buyers and customers, allowing them to request access to security documentation before they initiate a formal security review.

As a result, according to Crossbeam's CISO Chris Castaldo, the company has been able to **reduce inbound security questionnaires by 98%**. What's more, the company's proactive approach to sharing its security information sends a powerful message to buyers about how seriously Crossbeam takes security.



Trust is a core value at Crossbeam, which means security is table stakes. It's the foundation of everything we build and a key part of how we go to market — plus it's one of the major reasons our customers love working with us. We see our investments in security as a revenue enabler, and being able to effectively communicate with our customers about our security commitments is essential."



Bob Moore | CEO at Crossbeam

Conclusion

A Trust Center is a powerful tool that will help your team feel prepared for an ever-more-connected future, where security is the basis of every customer relationship. Launching your company's Trust Center is best done with the support of a thoughtful Trust Center strategy that lays out a path to success and aligns your resources and stakeholders.

Once implemented, you'll be well on your way to stronger and more sustainable customer trust. By taking a holistic, thoughtful approach to the way your company shares its security information, you'll move faster than the competition, reduce friction and burnout for internal collaborators, and build long-lasting, trusting relationships with your customers.

SafeBase is the scalable Trust Center that automates the security review process between buyers and sellers. With a SafeBase Trust Center, companies can seamlessly share sensitive security documentation with buyers and customers, including streamlining the NDA signing process by integrating with your CRM and your data warehouse.

If you're ready to take back the time your team spends on security questionnaires, create a better buying experience, and position security as the revenue-driver it is, get in touch with us.

