



6-Week DQI Coaching Curriculum Overview

“So You’ve Been Named the DQI... Now What?” — The Complete DQI Mastery Program

WEEK 1 — Role Clarity & Foundations

“What the DQI Really Is — and What You Are NOT Responsible For”

Module Summary:

Most DQIs begin confused, overwhelmed, and unsure of their responsibilities.

Week 1 gives **total clarity**, defines the role, eliminates misconceptions, and builds the foundation of confidence.

Learning Objectives:

- Understand the true purpose of the DQI under regulatory requirements
- Know the boundaries of the role (what’s delegated vs overseen)
- Build your DQI Charter
- Identify stakeholders and accountability chain
- Clarify your authority vs your responsibilities

Worksheets / Templates:

- DQI Charter Template
- DQI Responsibility Map
- Accountability Chain Diagram

Deliverables:

- Completed DQI Charter
- Written role clarity
- Defined scope & boundaries

Coaching Activities:

- Guided clarification conversation
- Organizational mapping exercise

Outcome:

You start Week 2 knowing **exactly** what you own and what you don’t.

WEEK 2 — Rapid Risk Assessment (Non-Technical)

“Identify Your Real Threats in Under an Hour”

Module Summary:

DQIs need to know where risk lives — not in technical jargon but in organizational behavior, vendors, data flows, and processes.

Learning Objectives:

- Understand the regulatory requirement for risk assessments
- Learn the DQI Risk Framework (People → Process → Technology → Vendors → Evidence)
- Complete a 5-step rapid risk assessment
- Identify top 3 vulnerabilities

Worksheets / Templates:

- Simple Risk Assessment Template
- Data Flow Worksheet
- Asset Inventory Cheat Sheet
- Gap Prioritization Matrix

Deliverables:

- Completed risk assessment draft
- Top 3–5 risks list
- First draft of risk treatment steps

Coaching Activities:

- Live risk review session
- "Where could this break?" scenario analysis

Outcome:

You gain immediate visibility into what matters and what needs to be fixed first.



WEEK 3 — Governance Framework & Required Documents

“Build the Core of Your Compliance Program (Without Writing From Scratch)”

Module Summary:

This week gives the DQI their entire documentation foundation — the backbone of compliance, audits, and oversight.

Learning Objectives:

- Understand what a WISP (Written Information Security Program) requires
- Know which policies matter (and which do NOT)
- Build/update the core governance documents needed for compliance
- Define processes for change management, access, and incident handling

Worksheets / Templates:

- WISP Template
- Essential Policy Pack (25 policies)
- Governance Checklist

Deliverables:

- Completed WISP
- Updated policies
- Documented governance framework

Coaching Activities:

- Template walkthrough
- Policy alignment session

Outcome:

You now have **regulator-ready governance documents** — without wasting weeks writing them.

WEEK 4 — Evidence Engine & Documentation Automation

“What Regulators Actually Look For — And How to Track It in 5 Minutes a Week”

Module Summary:

Documentation is the DQI’s shield. This week is all about evidence, logs, oversight, and defensibility.

Learning Objectives:

- Understand the role of evidence in audits & incident investigations
- Build your Evidence Log
- Create a process for continuous monitoring
- Learn what evidence actually matters (and what doesn't)
- Create monthly/quarterly tasks for recurring oversight

Worksheets / Templates:

- Evidence Log
- Training Log
- Access Review Template
- Vendor Oversight Form
- Monthly Compliance Checklist

Deliverables:

- Fully operational evidence recordkeeping system
- Monthly/quarterly oversight schedule

Coaching Activities:

- Evidence audit simulation
- Oversight calendar buildout

Outcome:

You build a **defensible compliance record** that protects both you and your organization.

WEEK 5 — Vendor Oversight & IT Coordination

“How to Manage IT Without Being Technical — And Avoid the #1 Cause of DQI Failure”

Module Summary:

Regulators heavily emphasize vendor management. This week shows DQIs how to evaluate and oversee vendors *without* needing to be an expert.

Learning Objectives:

- Understand vendor risk requirements
- Learn questions to ask IT providers
- Evaluate MSPs, SaaS vendors, EHRs, financial software
- Document vendor due diligence



- Track vendor compliance evidence

Worksheets / Templates:

- Vendor Due Diligence Checklist
- MSP Accountability Checklist
- Vendor Compliance Scorecard

Deliverables:

- Vendor oversight report
- Updated vendor list with compliance evidence
- Documented risk ranking of vendors

Coaching Activities:

- Vendor Q&A session
- Real-world vendor audit walkthrough

Outcome:

You gain **control over your vendors** and prevent blind spots that cause most compliance failures.

WEEK 6 — Oversight, Annual Reporting, & Long-Term Program

“Become a Confident, Auditor-Ready DQI — With a Clear 12-Month Roadmap”

Module Summary:

Week 6 finalizes your governance cycle, reporting structure, and long-term DQI program.

Learning Objectives:

- Build your DQI Annual Report
- Understand leadership reporting requirements
- Learn how to maintain compliance year-round
- Create a 12-month DQI oversight plan
- Prepare for audits, investigations, or regulator reviews

Worksheets / Templates:

- DQI Annual Report Template
- 12-Month Oversight Calendar
- Leadership Reporting Slides

**Deliverables:**

- Completed annual report
- 12-month compliance calendar
- Go-forward DQI improvement plan

Coaching Activities:

- Draft annual report review
- “Ask Me Anything” final session

Outcome:

You leave the program with a **fully functioning, defensible, regulator-aligned DQI program** ready to run confidently.

PROGRAM DELIVERABLE SUMMARY (What They Complete After 6 Weeks)

Your clients finish with:

- A written DQI Charter
- A rapid risk assessment
- A complete WISP (security program)
- Policy pack (10 critical policies)
- Evidence logging system (with templates)
- Vendor oversight function
- Incident response structure
- 12-month oversight calendar
- DQI annual report
- Personal liability protection plan

This is the most complete DQI coaching structure available for regulated industries.