

10 Tips to Drive Internal Adoption of the Vendor Onboarding Portal

Rolling out the onboarding portal is only the beginning. The real value comes when business teams use it consistently as the default path for vendor security reviews. Here are 10 simple, high-impact ways InfoSec teams can encourage adoption and support implementation across the organization.



1. Make the portal the only intake channel

Start all new vendor reviews in one place. If requests are coming through email, Slack, and side conversations, adoption will stall.

Tip: Respond to ad hoc requests with: “We now use an onboarding portal for vendor reviews so we can capture everything upfront and keep you updated automatically. Please submit your request here: [Onboarding Portal Link]”

2. Partner with Procurement and IT as champions

Adoption spreads faster when the onboarding portal is positioned as a shared business enabler, not just a security requirement.

Partnering with Procurement and IT helps reinforce three clear benefits:

- **Faster, smoother vendor reviews:** A single intake point with the right context upfront helps reviews progress faster and without the unnecessary back-and-forth.
- **Safer vendor decisions:** Vendors are consistently reviewed before onboarding, reducing blind spots and unmanaged risk.
- **Less friction for business teams:** Clear expectations and a predictable process make it easier for teams to engage new vendors.

Ask Procurement or IT leaders to reinforce a simple message: *“Using the Onboarding Portal helps protect the business while supporting faster vendor onboarding.”*

3. Embed the link into Procurement workflows

Work with Procurement, Legal, and GRC teams to place your onboarding portal URL directly into existing vendor onboarding steps.

Where to add it:

- Purchase request forms
- Vendor setup checklists
- Procurement playbooks

4. Make the portal easy to find in internal documentation

Update any existing “How to Onboard a Vendor” or “Security Review Process” docs.

Common documents to update include:

- Internal wiki pages
- Procurement, P2P, and TPRM playbooks
- IT or security request pages or ticketing systems
- New starter packs
- Risk assessment procedures
- Control register and/or ISO 27001 or SOC 2 control documentation

5. Create a short internal announcement template

Don’t assume teams will discover it. You might also want to include our “About UpGuard for Business Teams” template to provide additional context.

Example: “We’ve launched a new vendor onboarding portal, available here: [Onboarding Portal Link]. Use this link to request security reviews and track progress in one place.”

6. Add the portal link to your team’s email signatures

A low-effort, always-on reminder.

Example: “Looking to bring on a new vendor? Request a security review from our team here: [Onboarding Portal Link]”

7. Pin it in the right Slack or Teams channels

Put the link where vendor conversations already happen.

Best places:

- #procurement
- #it-requests
- #security-help
- Vendor onboarding channels

8. Support less technical users

Some business users may need more guidance the first time they submit a vendor request. Share UpGuard's help article so they know exactly what to expect and what information to provide:

<https://help.upguard.com/en/vendor-requesters>

9. Use questionnaires and automation to reduce manual follow-up

Start by designing an onboarding questionnaire that captures all the information InfoSec and Procurement need from the business upfront. Then use automation to map those responses into the Vendor Profile, applying the right tags, tiers, or portfolios automatically. When requests arrive complete and correctly structured, InfoSec can respond faster, building trust in the process and driving repeat usage.

10. Close the loop with visible outcomes

Business teams adopt tools that give them clarity and feel familiar. Configure UpGuard outcomes and statuses to mirror your existing internal processes and ways of communicating, then surface decisions clearly in the portal so stakeholders can see progress and resolution without chasing.

Adoption is behavioural, not technical.

The portal succeeds when teams realize it's the fastest and clearest way to get a vendor approved. A little reinforcement early will save months of fragmented intake later.

Learn more at [upguard.com](https://www.upguard.com)