

# A Journey to Empowered Risk Management

We had the pleasure of speaking with a remarkable customer the other day. [Intuitive Surgical](#) develops, manufactures, and markets robotic products designed to improve clinical outcomes of patients through minimally invasive surgery. We spoke with Doug Phan, Information Security Compliance, Risk and Governance leader, about his organization's journey.

Earlier this year, Intuitive Surgical migrated from a hosted environment for their Archer platform to a Software as a Service (SaaS) deployment model. This step represents new sophistication and empowerment in Intuitive Surgical's approach to corporate governance and risk management.

## About SaaS

SaaS is software that is delivered and managed remotely via the internet. Archer's SaaS customers pay a monthly subscription to use the platform. The subscription also includes all product upgrades and security updates, as well as instant access to every new product innovation Archer makes.

Since Archer launched SaaS as an option in 2019, a growing number of our customers have migrated to our SaaS deployment model, which not only provides access to the Archer use cases each customer purchases, but also includes customer and infrastructure support, automatic version upgrades and immediate access to new product features and functions. Over 85% of new Archer customers are now choosing the SaaS deployment model for convenient access to regular product upgrades and ongoing innovation.

## Before Archer

In our recent conversation, Doug described their business. "Our company is in healthcare, which is a lifesaving kind of business," he told us. We manufacture devices that enable surgeons to perform non-intrusive surgery completely remotely. We deploy worldwide."

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### Customer Profile

- Headquarters in Sunnyvale, CA
- Founded in 1995
- \$5.71 billion in assets
- 9,700+ employees

Doug told us his organization's products are fascinating from a technological perspective, and important from a societal perspective as well. We can all acknowledge the healthcare advantages of robotic surgery and of having access to the right surgeon at the right time, free from the prohibitors of time and space.

As so many other businesses do, Intuitive Surgical started its risk management efforts with spreadsheets. Office productivity software was readily available to the resources who possessed the skills to assemble and maintain their initial risk register. Doug told us, "We used to do it all with Excel, where users managed the data in matrices, but you couldn't get access to it. The data was hard to access for many stakeholders, and you had to know what you were doing to work with the spreadsheets."

## Selecting Archer Hosted

"Our relationship with Archer is about three years old," Doug told us. "We have a pretty high standard. I'm part of the information technology security organization, and we completed a seven-month selection process when we decided to implement risk management software. We put Archer through a drill where we looked at several leading vendors in the space. We created a shortlist from [Gartner's magic quadrant](#) and developed our request for proposals and proof of concept. We definitely picked the right product."

"One of our criteria was to have the ability to create our solution, one that fits our business," Doug added. "For example, the regulatory compliance use case – when we did the audit and control testing, we found it had the end-to-end solution we needed."

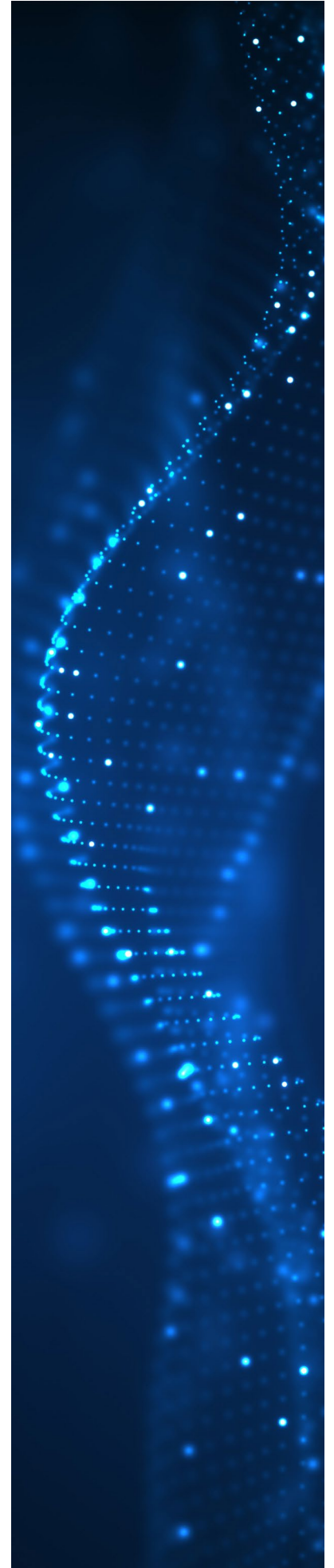
"We saw that we'd come a long way from convoluted Excel spreadsheets," Doug remarked "We put in a lot of time at the beginning, working with Archer's consulting team to build the right foundation. And I believe we have done so, because with that foundation, incrementally deploying solutions is something that we could do very quickly. During our time using the hosted deployment model, we worked closely with Archer's consulting team and support organization. Any time we had to make a change, migrations were flawlessly executed."

## Migrating to Archer SaaS

A few years later, Intuitive Surgical learned about the advantages of a SaaS deployment model and was drawn to migrate to SaaS for regular upgrades and ongoing access to innovation. Their collaborations with Archer's consulting and support teams in a hosted environment had given them confidence that migration to SaaS wouldn't be unduly disruptive.

These dates tell the story: Intuitive Surgical's migration to SaaS project kicked off on June 14 of this year; final migration to the production environment was completed by July 21 – a mere six weeks later.

Doug observed: "From planning through to the execution, I'm very impressed with the methodology Archer had in place. The implementation team from Archer walked us through. It was very methodical, very efficient."



Doug explained he's been in security auditing for over fifteen years. "So, when I saw the documentation that Archer provided me, I said 'what?' I was so impressed...technical folks, we know documentation, right?" He described how Archer Advisory Consultants Wesley Stinson and David Freeman provided procedural documentation and demonstrated how the implementation met all of Intuitive Surgical's requirements. "It was impressive. I've never seen any group coming in from operational services that has documentation and methodology like this. You guys are genius!"

And system performance? "Much better," Doug said. "We're really looking forward to benefiting from all of the fruits of the Archer platform on SaaS."

## Life with Archer on SaaS

"Now," Doug said, "everything is securely managed at our fingertips. Everything we do is available on the platform – we don't memorize anything. This is our entire third-party practice, all of our documentation, audits and assessments, all of our dashboards, and we were thrilled to provide management with that. Everything's online."

With SaaS at the foundation, Intuitive Surgical is empowered with constant innovations and regular upgrades to the platform. They've gained the flexibility to deploy solutions incrementally. For example, Doug's team built a risk register for the infrastructure team in just a few weeks.

Doug had more praise for our team: "Our exception on-demand applications (ODAs) are very sophisticated now from the workflow, thanks to the consulting team who helped us to build it. We just bought Archer Engage for Vendors after seeing the demo. We bought every single module we saw, including the publication application for regulatory and compliance."

He very generously added: "If you have any prospects that are considering SaaS, you can use us as a reference, and I will be glad to do that."

We started this post by saying we had the pleasure of speaking with Doug, and his remarks praising our product and our colleagues were very gratifying. Here at Archer, we derive enormous satisfaction from supporting clients who contribute so much to the world.

## Discover More

Archer is a leading provider of integrated risk management (IRM) solutions that enable customers to improve strategic decision-making and operational resilience with a modern technology platform that supports qualitative and quantitative analysis driven by both business and IT impacts. As true pioneers in GRC software, Archer remains solely dedicated to helping customers manage risk and compliance domains, from traditional operational risk to emerging issues such as ESG. With over 20 years in the risk management industry, the Archer customer base represents one of the largest pure risk management communities globally, with more than 1,200 customers including more than 50% of the Fortune 500.

Visit [www.ArcherIRM.com](http://www.ArcherIRM.com).

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Doug Phan,  
Information Security Compliance,  
Risk and Governance Leader  
**Intuitive Surgical**

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