

SECURITY & PRIVACY

AWARENESS TRAINING & REINFORCEMENT TOOLKIT



Your Guide for Successful Planning, Implementation and
Assessment of Your Data Protection Awareness Program

HOW TO IMPLEMENT A SUCCESSFUL AWARENESS, TRAINING & REINFORCEMENT PROGRAM



SIX-STEP BEST PRACTICE IMPLEMENTATION MODEL

- 1 Identify Risks and Align with Organizational Risks
- 2 Link Program Outcomes to Business Goals
- 3 Define and Position the Program
- 4 Gain Active Support of Senior Management
- 5 Effective Execution: Bring It All Together
- 6 Measure and Sustain Positive Business Impact

Questions?

Please forward any questions
or comments to:
security@mediapro.com.

Leading a successful data protection awareness effort requires a great deal of thoughtful planning, political savvy, and communication skills. The best data protection initiative can fall short without a thorough implementation plan that reinforces business goals, addresses target audience needs, gains management support, and captures measurable results.

MediaPro designed this Data Protection Awareness, Training, and Reinforcement Toolkit to provide guidance for implementing a successful data protection program in your organization. Based on extensive research on high-impact best practices by communications specialist Dr. Jack Zenger, we have outlined a six-step “best practice” implementation model to serve as a roadmap for designing a relevant, cost-effective, and measurable data protection training and awareness program.

This toolkit will also determine how prepared you are to implement a successful program. The following pages contain detailed descriptions of the six implementation steps and an assessment tool to gauge your individual and organizational readiness. You can also visit our website, www.mediapro.com, for additional resources, including products and services, such as our Adaptive Security and Privacy Curriculum and reinforcement packages, to support your data protection initiative.

By leveraging even a few best practices from this toolkit, your organization can reap the benefits of a focused and successful implementation strategy, including empowering your employees with the know-how to reduce security and privacy risks and build strong customer relationships.



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IDENTIFY RISKS AND ALIGN WITH ORGANIZATIONAL GOALS

Link Your Initiative with Organizational Goals and Values

BEST OF THE BEST

“At IBM, our well-publicized culture fosters respect for our customers and our employees. Our vision for security and privacy is no exception. We’ve woven it into the very fabric of our culture. That does more than anything to position and publicize the value of security and privacy knowledge and training.”

Matt Leonard
*Senior Manager, Customer
Information Policy
IBM*

“Linking security and privacy training to company goals is a ‘heavy lifting’ exercise. We key it to our ‘Standards in Business Practices’ in areas like respecting employees and ethical business conduct. That seems to strike a chord with our employees and positions data protection as part of the culture.”

Barb Lawler
*Chief Privacy Officer
Intuit*

Identifying organizational risks and aligning those with your organization’s strategic goals is essential to build support for a data protection initiative. Executives may see data protection as an important compliance issue, but they may not appreciate its larger role in helping the organization mitigate risks that detract from achieving its business objectives and strengthening their corporate culture.

Make your case compelling by identifying awareness, training, and reinforcement components that mitigate risk and directly support your organization’s business goals. For example, ensuring everyone in your organization applies secure data practices can reduce risk, increase customer loyalty, and build your reputation as a trustworthy and secure organization. Additionally, adhering to sound data protection principles may not only fulfill compliance requirements but also support corporate values. A well-executed awareness initiative that includes training and reinforcement helps integrate these values more deeply into employee behaviors and the overall company culture.

Whatever your initiatives may be, the key is that your organization’s risks align with your organization’s business goals and values to positively impact business results and corporate culture.

ARE YOU READY?

Answer yes or no to the following questions:

Yes No

I can define the data protection behaviors needed for each target audience in my organization to meet business goals.

☐ ☐

I can identify how components of my data protection program will enable each user population to perform these behaviors.

☐ ☐

I have outlined how my initiative can improve the performance of specific user populations and impact business results.

☐ ☐

I can make a compelling case to senior management for implementing a training and awareness initiative.

☐ ☐

Give yourself one point for every “yes” answer and enter your score here:



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LINK PROGRAM OUTCOMES TO BUSINESS GOALS

Link Participant Behaviors to Business Goals

BEST OF THE BEST

“Data protection is ultimately rooted in user’s behavior, so businesses of all sizes and employees in all professions need to understand how behavior affects the risk and reality of data loss—and what that ultimately means for both the individual and enterprise.”

John N. Stewart
Chief Security Officer,
Cisco

“It is time for all organizations [...] to start reviewing their approaches to preventing fraud rather than just dealing with its effects. Investment in proper fraud prevention systems and approaches, from online security to data sharing, and education are the cornerstones of such an approach.”

Peter Hurst
Chief Executive,
Cifas

Now that you have aligned your initiative to your organization’s business drivers and values, next, define the specific data protection behaviors desired for each user population and identify how these behaviors will help the organization succeed in meeting its business goals.

Be aware that different user populations and business units may have different expected behaviors. For example, sales and marketing, IT, or call centers all have basic as well as unique data protection requirements. Ensure that each of these benefits align with the business goals and values you identified in Step 1.

Once you have specified the data protection behaviors and outcomes desired for each user population, think about how to present a compelling business case for your training and awareness initiative. You will need to gain management support to approve or fund the resources necessary to put the plan in motion, so showing how your initiative can improve the performance of the user population and help the organization meet its business goals will serve as an important foundation for the rest of the implementation plan.

ARE YOU READY?

Answer yes or no to the following questions:

Yes No

I can define the data protection behaviors needed for each target audience in my organization to meet business goals.

☐ ☐

I can identify how components of my data protection program will enable each user population to perform these behaviors.

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I have outlined how my initiative can improve the performance of specific user populations and impact business results.

☐ ☐

I can make a compelling case to senior management for implementing a training and awareness initiative.

☐ ☐

Give yourself one point for every “yes” answer and enter your score here:



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DEFINE AND POSITION THE PROGRAM

Leaders as Data Protection Champions

BEST OF THE BEST

“To support employee understanding of data protection principles, policies are made readily available throughout IBM. Managers use a variety of communication tools to sustain a level of urgency around security and privacy, including e-mails, workshops and conference calls.”

Matt Leonard
Senior Manager Customer
Information Policy
IBM

“We launched a pilot project so it was possible to take advantage of ‘water cooler’ chat to discover how much of the message was getting through. Employees weren’t interested in big picture stuff. It was all about ‘How does this affect me?’

Kevin McLean
Information Security Manager
Ricoh Europe

Awareness is all about consistent and effective communication. You should know what you want to do, how best to do it, and have an overall plan in place for rolling out each phase of a complete data protection program. To achieve maximum results, the pieces of your data protection awareness strategy should all align and support each other, rather than be stand-alone and disjointed initiatives.

A well-developed initiative should include distinct offerings for user awareness, training, and reinforcement activities to provide continual learning and feedback throughout the year. All forms of communication around your data protection awareness content should have consistent messaging and a consistent visual presentation, while also aligning and supporting the organization’s policies and practices. This will result in greater awareness and retention of the overall data protection message, as well as support an effective end-user communication strategy that drives behavioral change. True behavioral change will help your organization meet its business goals.

ARE YOU READY?

| Answer yes or no to the following questions: | Yes | No |
|--|--------------------------|--------------------------|
| I have evaluated the overall completeness of my plan, ensuring all components are connected and support each other. | <input type="checkbox"/> | <input type="checkbox"/> |
| I have developed a rollout strategy for my plan and considered the best execution method for each phase. | <input type="checkbox"/> | <input type="checkbox"/> |
| I have identified how my plan will ensure continual learning occurs and methods for collecting feedback throughout the year. | <input type="checkbox"/> | <input type="checkbox"/> |
| I have secured key resources to help me develop appropriate, relevant, and practical data protection content and messaging. | <input type="checkbox"/> | <input type="checkbox"/> |
| Give yourself one point for every “yes” answer and enter your score here: | <input type="text"/> | |



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GAIN ACTIVE SUPPORT OF SENIOR MANAGEMENT

Link Participant Behaviors to Business Goals

BEST OF THE BEST

“Company cultures are hard to change and can only become more data protection conscious if top management leads the way. There’s no silver bullet for the issue,” he notes, saying “companies must pay more attention to user awareness and physical security.”

Tim McNight
Sr. Director & CISO
Northrop Grumman

“Winning executive support for security and privacy training? I think that’s an easy one! The investment I request from senior executives for employee training is small compared to the option of putting our business at risk!”

Michele Kemper
Vice President,
Chief Compliance Officer
Safeco Corporation

To gain support from both senior management and the business units involved, it is vital to develop a business roll-out strategy that will inform those involved of: 1) what you want to do; 2) why you want to do it; and 3) the internal and external resources needed to accomplish each objective. Reinforce the value of proper data protection practices by highlighting key business drivers in your plan. Include industry data to demonstrate the “risk vs. reward” for implementing the initiative.

Once you’ve gained initial support, look for opportunities to get influential leaders directly involved, such as providing input on your key program objectives and behavioral outcomes or helping roll out your implementation plan. By involving senior management as key participants, they can serve as data protection champions and facilitate company-wide change.

It’s also critical to realize that the most important role that leaders play is that of role model. Employees will view the data protection training and awareness initiative as important and relevant if they see their leaders as active participants. This kind of high-level visibility will help ensure the overall success of the training and awareness effort.

ARE YOU READY?

Answer yes or no to the following questions:

Yes No

I have a clear and concise strategy for successfully communicating my awareness initiative to senior management.

☐ ☐

I’ve highlighted key business drivers in my plan and included industry data to demonstrate the “risk vs. reward” for implementing my program.

☐ ☐

I have identified opportunities in my data protection initiative to involve senior management as key participants.

☐ ☐

I encourage our executives and managers to actively participate and serve as role models.

☐ ☐

Give yourself one point for every “yes” answer and enter your score here:



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EFFECTIVE EXECUTION: BRING IT ALL TOGETHER

Communication and Rollout Strategies

BEST OF THE BEST

“We realized early on that different training methods are needed for different employee groups, and that security and privacy content needs vary depending on the audience. We provide function-based training for HR, Marketing, Sales, Call Center and Purchasing employees in a variety of formats.”

Dale Skivington
Chief Privacy Officer
Kodak

“Technology is not the only element of a data leak prevention strategy. 80% of all data leaks occur because of accidents - that is users being unaware of data [protection] policies.”

The Forrester Wave
Data Leak Prevention

Now that you are ready to officially launch your data protection awareness program, the next step is to enlist a wider circle of key functional managers and necessary resources. First, determine the most effective and economical methods for delivering the data protection message to employees, based on the organization’s infrastructure and cultural norms. Make sure you are not caught short-funded; validate that the investment commitment is solid and can meet your needs.

In addition to champions in management, enlist the help of various specialists in the organization to validate your plan, as well as identify and remove hurdles. Working closely with internal subject matter experts and IT representatives, will ensure that the best content is delivered accurately and effectively.

Using both internal and external resources strategically is key to the success of any training and reinforcement plan. Align the support you need and track your progress to keep your data protection initiative focused and on target.

ARE YOU READY?

Answer yes or no to the following questions:

Yes No

I have selected the most effective, relevant, and cost-effective methods for delivering training to various audiences.

☐ ☐

I have identified and validated the resources needed to properly execute each phase of my initiative.

☐ ☐

I have enlisted multiple specialists to review and validate my program, as well as identify potential risks and solutions.

☐ ☐

I have a plan identifying measurable responsibilities and expectations for all involved in executing each component of the initiative.

☐ ☐

Give yourself one point for every “yes” answer and enter your score here:



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MEASURE AND SUSTAIN POSITIVE BUSINESS IMPACT

Measuring ROI and Business Impact

BEST OF THE BEST

“We build in clear metrics from the start, which help set us up for the next stage of implementation and achieve our future goals. ‘Moving the needle’ helps us evaluate what we’ve accomplished, adjust our future direction and show training ROI to management.”

Andrea White
Chief Privacy Officer
Toyota

“Informal reinforcement of privacy principles while ‘walking the halls’ is very effective for me. I look for opportunities to have conversations with employees, loud enough for others to hear. Often someone else will pop in and bring up a privacy issue that they are concerned about, and on it goes.”

Lynn Majors
Privacy Officer
T-Mobile

Measuring a program’s effectiveness can be time consuming, but it is vital in demonstrating the relevance of your efforts and for making data protection training, awareness, and reinforcement an ongoing priority for your organization.

It is best to develop a set of quantifiable measurements to track during and after training occurs, such as a reduction in the number of data protection incidents. Another proven technique is to conduct a pre-assessment and post-assessment with employees to track an increase in data protection awareness and knowledge across the organization.

Once you have recorded these results, communicate these metrics back to senior management and to the organization. Develop reinforcement materials highlighting achievements and progress toward goals so managers and employees can see the results of their data protection training and awareness efforts.

Finally, encourage the organization to include the completion of data protection training (as well as annual refresher training) as a performance goal in employee evaluations. Doing so will reinforce the message that data protection is not a management fad, but a critical cultural and business issue.

ARE YOU READY?

Answer yes or no to the following questions:

Yes No

I have a process for evaluating the impact of my data protection initiative on business results.

☐ ☐

I have developed a set of quantifiable measurements to track during and after training occurs.

☐ ☐

I have a plan for communicating the results of the program back to senior management.

☐ ☐

I will ensure that our managers understand how to provide employees with recognition for using the knowledge on the job.

☐ ☐

I have recommended that the completion of data protection activities be included in employee performance goals.

☐ ☐

Give yourself one point for every “yes” answer and enter your score here:

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ARE YOU PREPARED
TO IMPLEMENT A
SUCCESSFUL
PROGRAM?

DATA PROTECTION
AWARENESS, TRAINING, AND
REINFORCEMENT TOOLKIT



GET A FREE EVALUATION OF YOUR ASSESSMENT SCORE

If you'd like feedback on your assessment score or your implementation plan, contact MediaPro at **1-800-726-6951** or email your questions to security@mediapro.com.

Access a variety of data protection information resources by visiting our web site at www.mediapro.com/security.

Now that you've learned the best practices for implementing a data protection awareness, training, and reinforcement program, it's time to see how prepared you and your organization are to put your plan in motion. Take a moment to enter your assessment scores from the previous pages and add them together at the bottom of the page to obtain your grand total.

If you scored between 21 and 25:

Excellent! You have carefully considered the key implementation factors and are well positioned to conduct a successful data protection awareness program.

If you scored between 16 and 20:

Very good. You have reviewed the necessary implementation steps and are in good shape to conduct a data protection awareness program, although you may need to enhance your plan in one or two key areas.

If you scored between 11 and 15:

Good. You understand the steps involved but probably need to revisit several steps in the implementation model.

If you scored 10 or below:

Challenged. You may want to revisit all or parts of your implementation plan to make sure you have the information, support, and resources needed to move forward.

ASSESSMENT SCORE GRAND TOTAL

Enter your scores from the previous pages and add them to obtain your grand total:

| | |
|---|----------------------|
| 1) Align Your Vision of Organizational Goals | <input type="text"/> |
| 2) Link Program Outcomes to Business Goals | <input type="text"/> |
| 3) Define and Position the Program | <input type="text"/> |
| 4) Gain Active Support of Senior Management | <input type="text"/> |
| 5) Effective Execution: Bring It All Together | <input type="text"/> |
| 6) Measure and Sustain Positive Business Impact | <input type="text"/> |
| Grand Total: | <input type="text"/> |

DATA PROTECTION
AWARENESS, TRAINING, AND
REINFORCEMENT TOOLKIT

C R E D I T S

MediaPro extends special thanks to Dr. Jack Zenger, co-founder and CEO of Zenger Folkman.

In 1977, Dr. Zenger co-founded Zenger-Miller, which The Wall Street Journal named one of the top 10 companies providing executive education. He was inducted into the Human Resources Development Hall of Fame in 1994 and received the Thought Leader Award from his industry colleagues in 2005. He was honored with the American Society of Training and Development's Lifetime Achievement in Workplace Learning and Performance Award in 2011. He is the author or coauthor of seven books on leadership and teams, and is considered to be one of the most authoritative voices on improving organizational performance.

AWARENESS, TRAINING
& REINFORCEMENT

MediaPro is nationally recognized for producing high-quality communication materials and award-winning web-based courseware.

In addition to our award-winning Data Protection Awareness, Training, and Reinforcement products, MediaPro has developed thousands of customized courses for many Fortune 1000 companies and governmental institutions including: Adobe, Bank of New York Mellon, Boeing, Cisco, Intuit, Marriott Hotels & Resorts, Microsoft, Motorola, Northwestern Mutual, Oracle, T-Mobile, Verizon Wireless, Western Union, and the States of California, Ohio, and Washington.

For more information about our award-winning security and privacy awareness products and services, please contact us at (800) 726-6951, or visit us on the web at www.mediapro.com.

P R O D U C E D B Y

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