

## CASE STUDY

## Culture-Shifting Security Awareness with Martha's Vineyard Bank

Martha's Vineyard Bank, based in Massachusetts, knows the value of investing in the right things at the right time. When the opportunity to improve their cybersecurity posture presented itself, a focus on employee security awareness was a high priority.

John Shorrock, Training and Development Manager for the Bank, has long been a proponent of the KnowBe4 approach to security awareness. As one of KnowBe4's oldest customers, Shorrock knew early the importance that security awareness training would play in protecting employees and the business as a whole from ever-evolving cyber threats.

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The relationship started in 2011 when Shorrock sought out employee training content that was easy to deploy and keep up to date with the latest phishing and cybersecurity threats. The Bank's Board of Trustees set improvements in their information security approach as a long-term goal. They knew employee education was critical to achieve that goal. Shorrock says he knew his employees needed something that would have more of an impact than simply reading policy and taking a test.

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Shorrock says. "Being a small company, it could very easily have a negative impact if we weren't on top of it."

### The Requirements

Shorrock was keen to take advantage of some of the KnowBe4 platform's earliest features, such as the combination of phishing simulation with expert-led, video-based training, to deliver training on an annual basis. Shorrock says that KnowBe4 was the only company at the time he was aware of that provided such an approach.

"[KnowBe4] has been really on the cutting edge of a lot of the information," Shorrock says.

Over the years the Bank's approach to security awareness has evolved along with KnowBe4's own capabilities. Shorrock has shifted to biweekly simulated phishing tests and regular, shorter training modules to target those employees who clicked on simulated phishing tests. This regular monitoring has revealed that most clicked phishing tests are either new employees or those accessing work email when not at work via mobile device or tablet. This has allowed Shorrock to tailor training content to ensure it addresses risks employees would face at work and at home.

"KnowBe4 had a number of innovations," Shorrock says. "We could have [training in] shorter vignettes, they could provide phishing tests to our employees, and [could] make them realistic not only to help our employees through the business line but for their personal lives as well."

"This plays a good part in helping us stay on top of [threats] and keeping our people educated," Shorrock continues. "Continued education about the importance of a small mistake here being a large catastrophe somewhere else."

The Smart Groups feature of the KnowBe4 platform, which can be used to automate the delivery of training and phishing based on user behavior and attributes, has both saved Shorrock time and made it easier to show training completions and improvements for audit purposes. The bank's IT director is the main benefactor of the automated reports the KnowBe4 platform produces, Shorrock says, which are then delivered to the board of trustees during regular information security reviews.

### Reaping the Dividends

The success Shorrock has seen with the ongoing simulated phishing and training initiative aligns with a piece of advice that's central to the mission of Martha's Vineyard Bank: "An investment in knowledge pays the best interest," a phrase penned by Massachusetts' own Benjamin Franklin.

Shorrock says he sees much less clicking from employees from when he first started the training initiative all those years ago. Employees have even reported real phishing emails and potential cybersecurity issues in time for IT staff to step in and prevent serious damage from being done. The training has helped incorporate this focus on cybersecurity into each of the bank's 10 locations.

"We have brought that level of importance to the front of the employee's mind," Shorrock says. "They're the eyes and ears of the banks, our front line, because they meet every customer."

Shorrock says he also knows he has the support of his KnowBe4 customer success manager behind him when he has questions or wants to work in some new feature into his regular training initiative.

"I love the service support I get from KnowBe4," he says. "I work with some vendors that may have a great system, but if they can't help me, then I'd look for someone else."

Looking toward the future, Shorrock says he hopes to take advantage of even more short-form training and whatever innovations KnowBe4 might come up with next. He says he's grateful for the continued support for training improvements he gets from his board of trustees, as the board knows an informed employee base is an integral part of the bank's number one priority: customer satisfaction.

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"When you're small, you have to be innovative with how you do things," Shorrock says. "Our values are very much focused around service; not just talk, but delivering how we would like our personal banking done."