



MANAGED SECURITY AWARENESS TRAINING - SERVICE GUIDE

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1 OVERVIEW

Managed Security Awareness Training is an integrated security awareness training and simulated phishing service. The InterVision Cybersecurity experts assist you with every critical step to creating an effective security awareness campaign. The service combines simulated phishing attacks with interactive and engaging security training to help you create an effective “Human Firewall” against attacks. Our team provides the tools and the knowhow to help you get an effect campaign off the ground and consistently executed throughout the year.

Our robust reporting capability allows you to receive reports demonstrating your effectiveness and comparisons of your organization’s phish-prone percentage with other companies in your industry. Our team with help you see how you stack up and track your performance improvement over time.

The service includes a subscription to KnowBe4 Software as a Service, InterVision Support, and the Managed Security Services Cybersecurity team assistance with executing your security awareness campaign.

2 SERVICE DESCRIPTION

The Managed Security Awareness Training and simulated phishing platform is a subscription service that is designed to help train users through video and interactive content, simulate phishing attacks and campaign reporting. The Service provides access to

- the cloud-based software platform
- onboarding assistance
- administrator support

The service is offered with various levels of capabilities.

2.1 HOW IT WORKS

The managed security awareness training campaign uses a proven methodology and combines it with high quality content to make the most effective training program. Our integrated campaign utilizes the following steps:

Baseline Testing - We setup baseline testing to assess the phish-prone percentage of your users through a simulated phishing attack.

Train Your Users - We leverage a library of security awareness training content; including interactive modules, videos, and other content (dependent upon subscription level). We set up an automated training campaigns with scheduled reminder emails.

Phish Your Users - We draw from best-in-class, fully automated simulated phishing attacks, thousands of templates with unlimited usage, and community phishing templates to build you a phishing campaign. This continues to monthly, quarterly or a periodic time-frame consistent with your training goals.

See The Results - The console provides enterprise-strength reporting. Both high-level and granular stats and graphs ready for management reports. We even have a personal timeline for each user. And if you need assistance pulling reports we got you covered.

3 SERVICE DETAILS

3.1 PACKAGES

The service is available in multiple packaged tiers – Silver, Platinum, Diamond.

The key difference in these packages is the training videos and content available.



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The **Silver** package includes training content level I;
Platinum package includes training content level II;
Diamond package includes training content level III.

Below is a summary of the differences

Training Content	Most Popular		
	Level I	Level II	Level III
Training Modules	17	65	230
Micro Modules (90 sec-5 min)	11	32	186
Video Modules	4	60	583
Posters / Images	22	35	243
Newsletters / Security Documents	19	49	328
Games	—	5	38

In addition, some packages offer enhanced capabilities beyond Phishing/Smishing tests and training campaigns. These include:

- Vishing Security Test
- USB Drive Test
- Callback Phishing
- AIDA
- Social Engineering indicators
- Email Exposure check

To utilize these features as a managed service, client will need to purchase extended services either through our professional services team or through our client service management offering.

For the latest information and details about available training content visit [THIS LINK](#)¹ for a complete overview.

3.2 SERVICE LIMITS AND RESTRICTIONS

Standard service includes up to 5 user groups.

After initial setup, the Service includes up to 10 changes per month. For organizations with more user and group add/change/delete events we recommend utilizing the Active Directory integration.

3.3 ROLES AND RESPONSIBILITIES MATRIX

The following table breaks down the service elements for covered managed services and the responsibility for each.

¹ <https://www.knowbe4.com/products/security-awareness-training-library>



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	Client	InterVision Ops Center	Extended Services*
General			
Client contact and escalation information	X		
Security Awareness Training Software admin accounts	X	X	
Administrative access to features and functions in the console	X	X	
Overall project management of the Security awareness program	X		*Available
Task execution of the security awareness program (see details below)		X	
Setup and implementation			
Provide company admin account information	X		
Provide users CSV file	X		
Add user into the Console via CSV	*	X	
Integrate with Active Directory			X
Complete ASAP (Automated Security Awareness Program) questionnaire	X		
Engage company stakeholder to inform them of the security awareness training program (template message available in ASAP output)	X		
Customize the Admin console (add logo, time zone, business hours)	X	X	
Allowlist KnowBe4 in client mail server	X		



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	Client	InterVision Ops Center	Extended Services*
Provide a logo URL which is accessible via public web server for training template	X		
Security Awareness Program Administration			
Delete and edit users (non-Active Directory integration)	*	X	
Create groups in console	*	X	
Add/Delete users to groups	*	X	
Provide input to phishing campaign questionnaire	X		
Create Phishing campaign	*	X	
Provide Phishing campaign results (also available in console)	*	X	
Communicate the Security Awareness Program to Employees	X		
Install phishing alert button	X		
Select Training module	X		
Setup Training campaign	*	X	
Provide Training campaign reports (also available in console)	*	X	
Setup "Scam of the Week" campaign	*	X	
Setup remedial training module for Phishing test failures	*	X	
Setup automated ongoing phishing campaign (monthly frequency is default)	*	X	



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	Client	InterVision Ops Center	Extended Services*
Setup Security Hints and Tips campaign	*	X	
Review campaign results	X		♦1
Utilize Non-Phishing/Smishing or Training Campaign Resources	X		♦1
Utilization of games, posters, images, newsletter content	X		
Incident / Problem Management			
End user support	X		
Campaign admin support		X	
Trouble shoot access and availability issues to console		X	
Escalate issue(s) to software vendor		X	
Change Management			
Notification to account admin. of system maintenance that requires outage		Via KnowBe4	

* Client may perform each of these tasks or may request InterVision to perform these on their behalf

¹ InterVision Service Management or Professional Engineering Services can be purchased to assist

3.4 REPORTING

Real-time reporting of phishing, training, and other campaigns is available through the admin console. If preferred, Clients may request a report (CSV, PDF) by making a service request.

4 SERVICE ACTIVATION

4.1 INSTALLATION AND CONFIGURATION



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A InterVision project manager to serve as the central point of contact for service enablement that will collect information from the client to perform the following work:

- Create administrator account(s) within the domain as directed by the client
- Import users via client-provided CSV file or integrate with client Active Directory
- Create base user subscriptions
- Assign subscription types to the user subscriptions as directed by the client
- Provide client security awareness training administrator an introduction to the platform and/or direct them to self-training and knowledge base resources.

4.2 SETUP

InterVision team will project manage and assist with the initial service activation and console setup. The set up will include the following:

- Provisioning of the service console
- Adding administrator and users in to the console (CSV import or active directory integration)
- Customize console with client company information
- Provide instructions to allowlist KnowBe4 mail server
- Provide the client with the Automated Security Awareness Program (ASAP) online questionnaire to structure phishing / training campaign
- Set up user group
- Set up initial phishing campaigns
- Set up initial training campaigns
- Set up ongoing phishing campaign (monthly, quarterly, or other timeframe recurring)

Many of the set up tasks require the client completing the a questionnaire and/or accepting our default campaigns. Some recommendations in the initial report may require extended services to be administered (see responsibility matrix).

5 SERVICE DELIVERY

5.1 SERVICE OPERATIONS AND SUPPORT

InterVision operations center provides tier 1 support. This support includes user and group administration, active directory integration, white listing guidance, and FAQ information. InterVision also escalates questions and issues to KnowBe4 for additional levels of support.

5.2 MANAGED SERVICES

The InterVision Cybersecurity team is responsible to assist you in every step along the way. After initial set up we keep your campaign going with automated time line prompts and responsive assistance from our team.

The following ongoing managed services are offered:

- User and group administration
- Assistance with creation and execution of phishing campaigns
- Assistance with creation and execution of training campaigns
- Assistance with creation and execution of “scam of the week” and / or “helpful hints and tips” campaigns
- Technical support



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Our professional services offer extended services to assist with utilization of non-phishing/smishing and training resources within the KnowBe4 portal.

5.3 INTERVISION SERVICE PORTAL

The InterVision Security Awareness Training service console is accessible via <https://training.knowbe4.com/login>

The InterVision Service portal for to request support is accessible via <https://support.intervision.com/>

6 ITEMS

The following are Managed Security Awareness Training specific orderable services.

Minimum service term starts at 1-year contract.

Items	Contract Options
Managed Security Awareness Training – Silver – Managed	Monthly recurring fee.
Managed Security Awareness Training – Platinum – Managed	Monthly recurring fee.
Managed Security Awareness Training – Diamond – Managed	Monthly recurring fee.
Managed Security Awareness Training – Compliance+ – Managed	Monthly recurring fee.
Managed Security Awareness Training – PhishER – Managed	Monthly recurring fee.

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7 MANAGED SECURITY AWARENESS TRAINING - SERVICE GUIDE CHANGE LOG

Below are the changes to this service guide.

Change date	Change Type	Change Details
2019.03.13	New Document	Initial release
2019.11.22	Standardization	Updated RACI and service scope format to match standard.



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Change date	Change Type	Change Details
2020.09.29	Addition	Added license level information
2023.02.17	Update	Updated licensing level information. Added PhishER and Compliance+ references.
2025.05.27	Update	Updated InterVision naming standard, replaced broken links to KB4 KBs, updated wording for non-phishing/smishing/training sections