CASE STUDY

Shift Promotes Data Protection by Adopting a Security Culture

Founded in 1992, Shift is a Brazilian information technology organization dedicated to diagnostic medicine. Shift's solutions are used in clinical analysis laboratories throughout Brazil, Argentina, Paraguay, Bolivia and Uruguay. Approximately 25,000 employees of Shift client laboratories use its system, which is responsible for processing and management of information for over 370 million tests a year.

Cybersecurity has always been a concern for Shift because the diagnostic medicine and healthcare industry is a frequent target of cyber attacks. Thanks to their focus on operational efficiency and security in the development of their products, Shift's lab information management platform is increasingly prepared to face these threats.

Regardless, over the past several years, Shift has put into practice a more comprehensive information security strategy that includes governance processes, a cybersecurity and compliance committee and an internal web portal to clarify clients' doubts related to Brazil's General Data Protection Law (LGPD).

Once the committee and portal were established, the organization took another step to ensure organization-wide information security by building a security culture among its nearly 250 employees in Brazil. The strategy includes the promotion of the employees' qualification and awareness about security culture.

Why Shift Selected KnowBe4: Ease of Use, Diversity of Training Content and Cost-Benefits

In 2022, after assessing other available platforms for information security awareness training, Shift chose KnowBe4's security awareness training and simulated phishing platform.

"We thought about developing a tool internally, but it would be very expensive. We also studied other platforms, which didn't meet our needs, and did not have a good cost-benefit ratio, which is something that we found in KnowBe4," says Javier Rojas, Shift's Governance, Risks and Compliance coordinator.

According to Rojas, the diversity of training content, formats, interactive courses, web series and games, were all critical factors in the decision process. Cristina Bertolino, Governance and Organizational Development Director at Shift, also highlights the ease of use offered by KnowBe4 to set up awareness campaigns and simulated phishing tests.

Shift

Industry

Healthcare Technology

Headquarters

São José do Rio Preto, Brazil

Challenge

Protecting data safety and increasing employee awareness on information security

Success by the Numbers

- 2 new trainings every month

- More than 80% employee compliance with security training

- 95% of employees said they are more aware of information security

- Managers and a dedicated training analyst help reinforce the security culture across the organization

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"The easiness to structure these campaigns and the dashboard for viewing employees' maturity and the training's evolution were relevant attractions," Bertolino says.

Coordinated Focus on Learning Between Shift and KnowBe4

Around three years ago, Shift created its own corporate university to teach employees and customers technical knowledge. To ensure that KnowBe4 training content is used in the best possible way, Shift involved the teaching institution's pedagogical team in the curation of content and the implementation of the KnowBe4 platform.

"We did integrated work that involved the university coordination, Shift's board, and the communications area, in addition to technical and governance teams," Bertolino says.

Rojas says that the process before implementation included content curation, creation of communication campaigns, determination of Key Performance Indicators (KPIs) and expected results.

After a pilot program with 10 employees, Rojas' team made adjustments and standardized which training was delivered. This included biweekly, 20-minute courses mixed with reading materials, web series/videos, and games to ensure employees' engagement. For the managers, Shift set KPIs for training completion rates linked to annual bonuses.

It took approximately 10 weeks for the KnowBe4 platform to start running for all employees of the organization.

Consistent Training Helps Drive Shift's Security Culture

Since the implementation of the KnowBe4 platform in 2022, Shift sends biweekly training to its employees. In the first phase of implementation, the organization used early episodes of the award-winning series "The Inside Man," KnowBe4's streaming quality series. Employees loved the series, so Shift kept the strategy for phase two of the training project.

"We use the most recent episodes of the series to keep employees' interest and engaged," Rojas says.

"Today, as a result of a greater cultural awareness about cybersecurity, in the case of phishing, approximately 80% of our employees contact our IT/security team to determine if an email is a threat and how to handle it."

With over 60 trainings deployed to employees in the last year, Shift has already noticed security awareness improvements across its organization. In May 2023, the organization ran its first simulated phishing test. As part of an adaptation curve, there were a small number of employees who opened the phishing test emails. On the other hand, we also had good examples of people with greater awareness of this type of threat across the organization, which clearly demonstrated the return of using the KnowBe4 platform.

"Today, as a result of a greater cultural awareness about cybersecurity, in the case of phishing, approximately 80% of our employees contact our IT/security team to determine if an email is a threat and how to handle it," Rojas says.

"We've built a stronger security culture at Shift, and that's led to a focus on security awareness and the hiring of a CISO," Bertolino says.

Leveraging KnowBe4 to Help With Employee Training Completion

Currently, the rate of training completion across Shift employees is over 80%.

"It's very hard to reach 100%, because there are always some employees on leave or vacations, for example," Bertolino says. But that, according to her, is no reason for them not to complete required training. The organization created what it calls "repechage": the employees can do trainings in two periods of the year in case they could not complete them in the last 12 months.

The organization counts on an in-house training analyst to keep track of achieving goals and KPIs. This person compiles data extracted from the KnowBe4 platform dashboards every week and sends them to managers. The KnowBe4 platform also lets managers set up alerts when an employee does not accomplish training. "Thus, managers can demand from his/her teams to ensure that their goal will be achieved," Rojas says.

"The fact KnowBe4 offers content in other languages will help facilitate this expansion, and, surely, it is a differentiator of KnowBe4's tool."

Shift Employees Highly Satisfied With the Security Awareness Program

Rojas said employees have been highly satisfied with the security awareness program and understand the importance of it, which motivates participation and engagement with KnowBe4 training content.

Shift conducted a survey to understand employees' level of satisfaction with the training. The results were positive and have contributed to establishing the security culture across the organization.

According to Rojas, the average grade of satisfaction is around 9 out of 10, and 95% of employees said the KnowBe4 campaigns increased their awareness of security issues.

"That helps us a lot in audit processes with clients," Bertolino says. "The security qualification front is a pillar to raise the maturity of our employees. They are people who deal with clients on a daily basis since they are implementing a solution in labs, or in Shift itself, dealing with these organizations' information."

Shift Plans to Expand Security Awareness Program

Shift plans to expand the KnowBe4 platform across the organization's employees in other Latin American countries.

"The fact KnowBe4 offers content in other languages will help facilitate this expansion, and surely, it is a differentiator of KnowBe4's tool," Bertolino says.

Shift also plans to use Smart Groups to cluster users by type of simulated phishing email they click to deliver targeted training content.

"Today we know which areas present better or worse performance in each training, and also which of them present a higher rate of completion. Based on the analysis of this data, segmenting campaigns will make us more efficient," Rojas says.