

Case Study

Southern Chautauqua FCU Gets Employees Excited About Security With KnowBe4

SOUTHERN CHAUTAUQUA FEDERAL CREDIT UNION
IMPACT. EMPOWER. ACHIEVE.

Industry

Financial Services

Location

Lakewood, New York

Challenge

Making required security training something employees actually care about

For members in Western New York, Southern Chautauqua Federal Credit Union is more than a place to bank. It is a community-based, low-income designated federal credit union serving about 22,000 members and at-risk families across 11 branches.

Their work requires trust, and one way to build that trust is to educate employees about keeping the institution safe. As a federally regulated credit union, Southern Chautauqua FCU has to prepare employees for fraud, scams and email threats — without turning required security training into a boring box to check.

Protecting members meant going beyond compliance and building a security culture where employees were motivated to care about security.

At a Glance

- **92% decrease in Phish-prone™ Percentage**
- **Faster employee reporting of suspicious emails**
- **Greater relevance and engaging security training**

Making Required Training Matter

The need for security training was never in question. The challenge was finding training that was useful and straightforward on a platform with a rich feature set.

"In the industry we work in, fraud and security are big things," says Shaa Moore, Southern Chautauqua FCU Chief Information Officer. "We need security training and testing so employees know what to expect in the real world."

Southern Chautauqua FCU used various security training vendors over the years, but the experience was always far from engaging. Moore wanted to offer employees more relevant content on a platform that was easier to use and had better tracking capabilities.

"The quality of training was what we were missing," Moore says. "We didn't have all the available options, like games, flexible modules and tracking."

Moore started to search for a platform that would bring those pieces together and keep employees ready for the threats they were likely to encounter every day.

From Reactive Training To Proactive Defense

Moore found KnowBe4, which was worlds away from the tired training programs they'd used in the past. Suddenly, they had a platform with robust features that employees actually wanted to use.

"We've been a customer of KnowBe4 for eight or nine years now," Moore says. "Security training is where we started, and now we're really getting to the defense part of it."

In addition to KnowBe4 Security Awareness Training, Southern Chautauqua FCU uses KnowBe4 to address phishing, email defense and AI defense.

PhishER Plus enables employees to report phishing emails in real time so the credit union can act quickly. And instead of relying on manual alerts that ask employees to watch for certain subjects or messages, the team uses PhishRIP™ to find and remove those emails across the organization.

"We just push a button, and it rips it out of everyone's inbox," Moore says.

The credit union has also added KnowBe4's Defend, AI Defense Agents (AIDA) and Real-Time Coaching to strengthen visibility, decrease human and AI risks and give employees instant feedback when they take positive security actions.

"AIDA pulls current events into training," Moore says. "We don't have to make a template for that because AIDA can do it for us. It speeds up campaign creation and develops campaigns around real events."

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Making Security Wins Worth Celebrating

Once Southern Chautauqua FCU started using KnowBe4, Moore had a clearer way to measure how employees responded to simulated phishing tests. The credit union's initial Phish-prone™ Percentage hovered around 14%. Today, it's below 1%. That improvement demonstrates how much better employees can identify and report potential email threats.

The biggest shift since adopting KnowBe4, however, isn't a number. It is how much more empowered employees feel about participating in the credit union's security process.

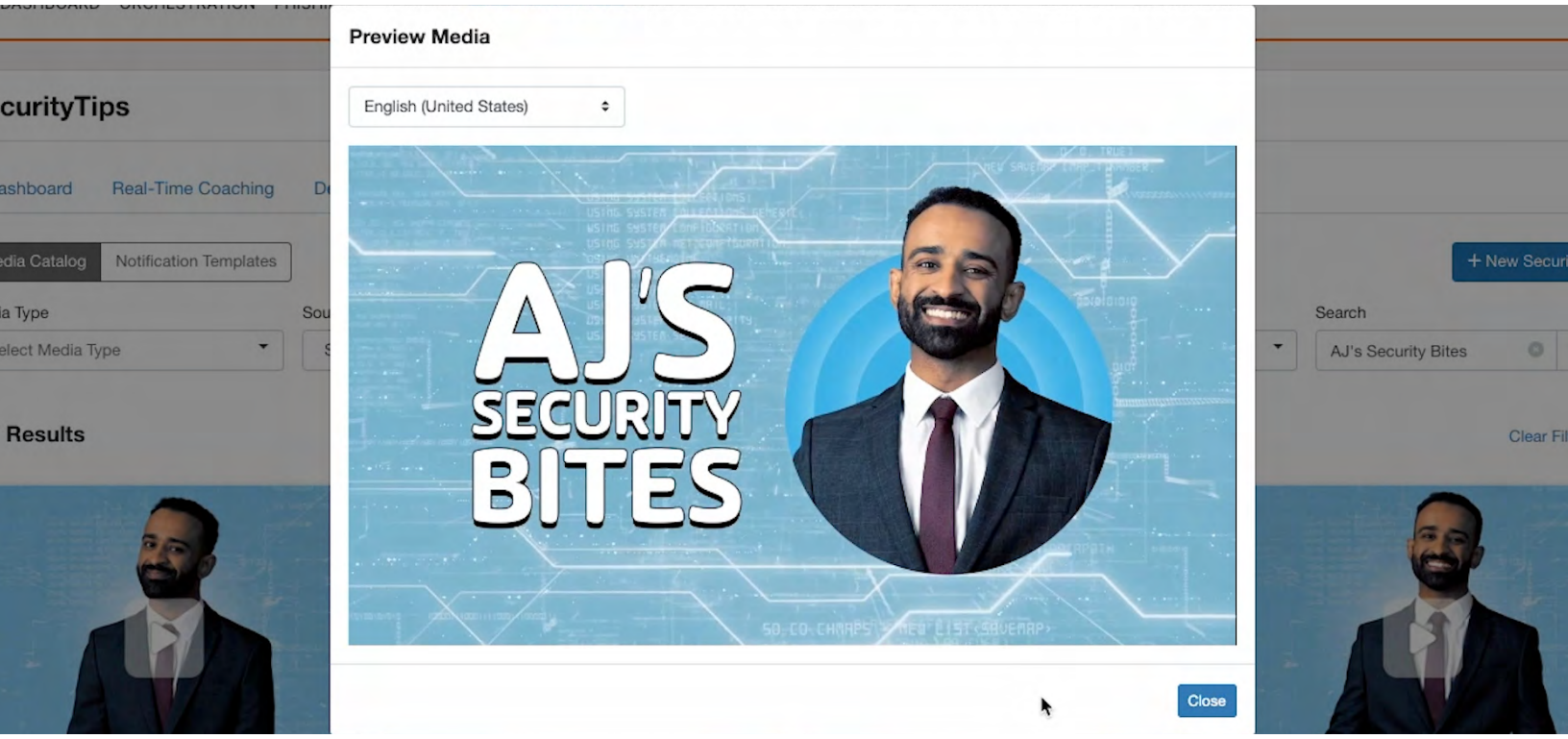
"Employees are excited to talk about email security and threats," Moore says. "And we celebrate those wins."

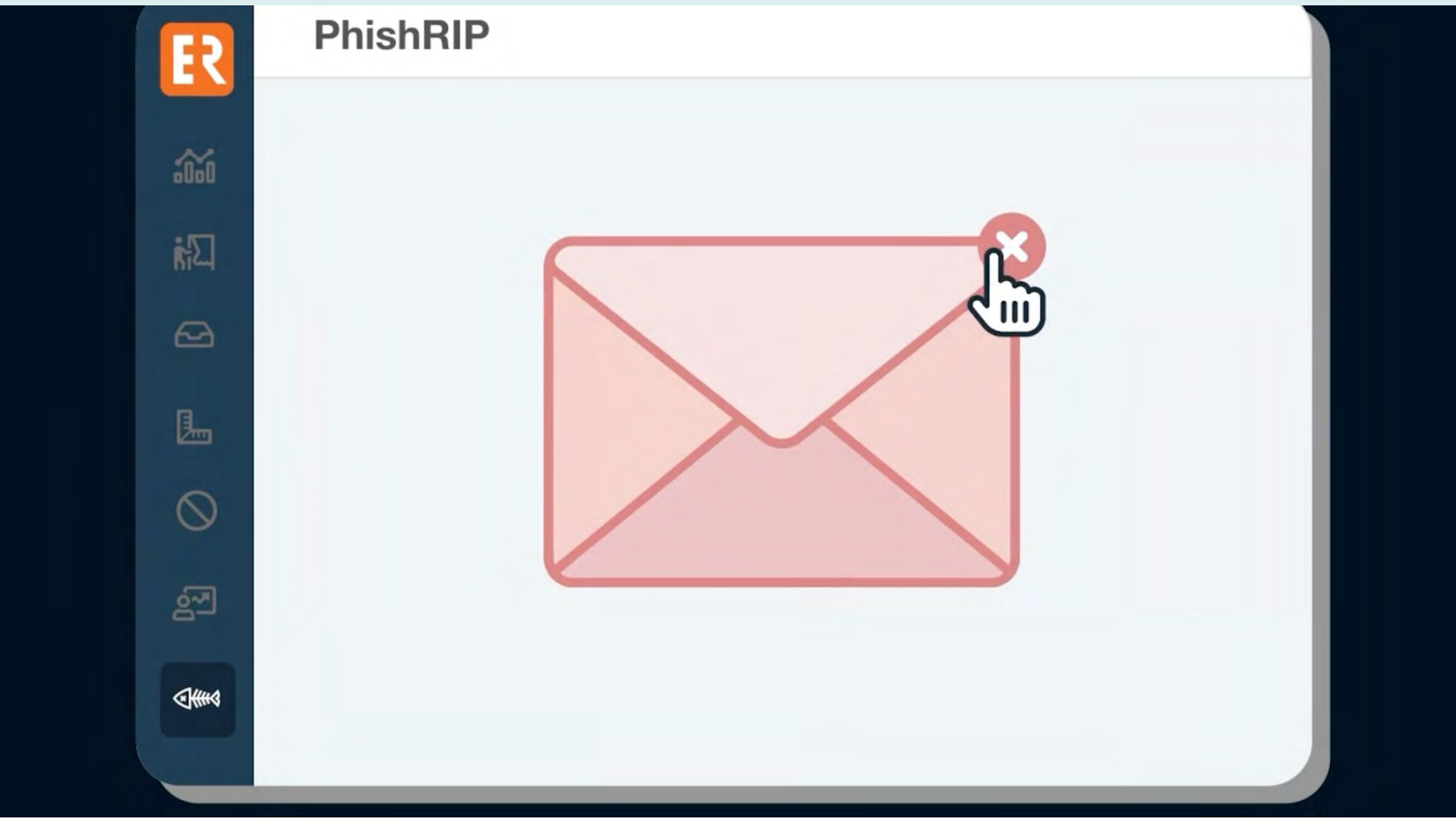
When employees report a real phishing email, the credit union shares that success and rewards them with bonuses or gift cards. That approach has made security feel less like something to fear and more like something for employees to own.

Real-Time Coaching adds to that momentum by giving employees immediate feedback when they take the right action, turning phishing awareness into friendly competition.

"The most impactful thing about [Real-Time Coaching] is the positive messages," Moore says. "Employees get instant feedback and share those messages with each other."

Success breeds success, and recognizing positive steps forward motivates employees to keep the momentum going.





Staying Fresh and Remaining Vigilant

Southern Chautauqua FCU continues to build on its security program, knowing KnowBe4 has everything the credit union needs for a relevant, up-to-date training experience.

"If we didn't have a platform like KnowBe4, we wouldn't have as good of a security culture as we have now," Moore says. "We'd be chasing people down to do their training, and people wouldn't all be on the same page. Having a unified place for training has improved our security culture and keeps the credit union more secure."

At Southern Chautauqua FCU, the boring security training checkbox is no more. By treating security as a shared value rather than a chore, they've turned their team into a community of confident defenders who show up to decrease risk for their members every single day.

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KnowBe4, Inc. | 33 N Garden Ave, Suite 1200, Clearwater, FL 33755
855-KNOWBE4 (566-9234) | www.KnowBe4.com | Sales@KnowBe4.com

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