Redefining the Technical Training Norm

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Proofpoint
Ordinary Training...
• One curriculum fits all
• Tell, show, and lecture approach
• Content is static
• No customization based on role, learning level, or skill
• Lack of inquiry and practice
• On the job training, learn as you go (from anyone and everyone)
• Onboarding first day to week
Redefining the Ordinary to be Extraordinary: Role, Skill, and Level-Based Training...
• Understand how a role interacts, engages, values, experiences, and faces challenges with a product or process
• People-centric
• Create “A Day in the Life” of a user
• Teach applicable, role-specific skills
• Define interrelated learning paths
• Learning mimic real-world experiences and challenges
  • Eliminate “rainbows and unicorn” approach
• Infuse inquiry: Practical doing, questioning, problem-solving, and troubleshooting skills
Role, Skill, and Level in a Sentence

As a <role>, I need to understand <applicable skill> at <appropriate level> to obtain <value-added outcome>?
Role, Skill, and Level Development Process...
Role-Based Process At-A-Glance

- Role Research
- Roles Defined
- Skills Inventory
- Role-Skill-Level Matrix
- Learning Paths Defined
- Skill Priority

RB1 - RB2 - RB3 - RB4 - RB5 - RB6
Case Example: The Details...
Cybersecurity Product: Proofpoint Security Awareness Training

Product Overview: SaaS; Methodology created at CMU; Engage and educate end users against cyber attacks, using training based on real-world threat intelligence; Reduce phishing and malware infections up to 90%
Time Frame: May to August 2019

Target Audience: Customers who manage the product in their organizations

Prior Training Method: Weekly instructor-led, online-live, 45 minutes workshop; 78 hours a year effort from Support Lead Tier 2 employee
Role-Based Process: The Phases Overview...
Role Research:

Role-Based Process At-A-Glance

- Role Research
- Roles Defined
- Skills Inventory
- Role-Skill-Level Matrix
- Learning Paths Defined
- Skill Priority

RB1 RB2 RB3 RB4 RB5 RB6
• Interview client-facing departments
  ▪ Sales, Support, Professional Services, Technical Support, Trainers, and Product Managers

• Job titles, core tasks, areas of successes and challenges, common knowledge, background/education, motivation, usage, and features not used but should

• Analyze surveys and support tickets
Roles Defined:
• Use RB1 research to perform qualitative and quantitative analysis to uncover emerging themes

• Define user roles
Security Awareness Training Roles

Super Administrator

Phishing Administrator

Training Administrator

User Administrator

Reporting Administrator
Internal Role Examples

Support

- Tier 1
- Tier 2
- Senior

Sales

- Conversation
- Pitch
- Demo
- Evaluation

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Skills Inventory:

Role Research
Roles Defined
Skills Inventory
Role-Skill-Level Matrix
Learning Paths Defined
Skill Priority

Role-Based Process At-A-Glance
• With a team of experts, define each skill, feature, function, process, and task associated with the product

• Concentrate on the norm, not outliers (e.g. not commonly used, customized, or customer-specific features)
### PRODUCT INVENTORY

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263 skills/tasks in inventory
Role-Skill-Level Matrix:

Role-Based Process At-A-Glance
**Knowledge Level Descriptions**

**Level 1**

Foundational knowledge, no prior learning requirements; Focus on facts, benefits, terminology, user experience, system requirements, navigation, features, menus, configuration, installation, settings, basic processes, and implementation.

**Level 2**

Intermediate knowledge, completion of level 1; Adds inquiry and/or application of performing tasks, processes, reporting, policies, troubleshooting, maintenance, and best practices.

**Level 3**

Advanced knowledge, completion of level 1 and experience in the application of level 2; Deeper dive into complex tasks, customization, configurations, data analysis, troubleshooting, integration, reporting, and analytics.
Define if role needs and at what level

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Learning Paths Defined:

Role Research → Roles Defined → Skills Inventory → Role-Skill-Level Matrix → Learning Paths Defined → Skill Priority

Role-Based Process At-A-Glance
Learning Paths

SECURITY AWARENESS TRAINING LEARNING PATH: LEVEL 1
- Security Awareness Training: Platform
- Security Awareness Training: User Management
- Security Awareness Training: Modules

SECURITY AWARENESS TRAINING LEARNING PATH: LEVEL 2
- Security Awareness Training: Notifications
- Security Awareness Training: Assignments
- Security Awareness Training: Reports
Learning Path

SECURITY AWARENESS TRAINING LEARNING PATH: LEVEL 1

Security Awareness Training: Platform

Phishing Administrator
Learning Paths

SECURITY AWARENESS TRAINING LEARNING PATH: LEVEL 1

Security Awareness Training: Platform

SECURITY AWARENESS TRAINING LEARNING PATH: LEVEL 2

Security Awareness Training: Reports
Skill Priority:

Role-Based Process At-A-Glance

Role Research  Roles Defined  Skills Inventory  Role-Skill Level Map  Learning Paths Defined  Skill Priority
Security Awareness Training Learning Paths for Super, Training and User Administrators

SECURITY AWARENESS TRAINING LEARNING PATH: LEVEL 1

- Security Awareness Training: Platform
- Security Awareness Training: User Management
- Security Awareness Training: Modules

SECURITY AWARENESS TRAINING LEARNING PATH: LEVEL 2

- Security Awareness Training: Notifications
- Security Awareness Training: Assignments
- Security Awareness Training: Reports
Results in Real World Application...
Former 45 minute workshop transformed to:

- Five roles and learning paths
- Six courses available 24-7; Re-review as needed (JITT)
- Four hours of content
- Infused with best practices, expert insights, use cases, interactive elements, troubleshooting, and learning supplements
- Tier 2 Support Lead return to core job responsibilities
- Easy access via the Learning Management System
Questions, Connect, and Contact:

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