



Security Awareness Training Efficiency Checklist



- ✓ Content from 6 providers engages every type of user (even the picky ones)
- ✓ Instant feedback after phishing simulations are clicked or reported
- ✓ Regular content updates to keep up with threats
- ✓ Reports that actually measure something to stakeholders
- ✓ Hands-free 10-minute onboarding
- ✓ Auto-reminders behind and your compliant
- ✓ One-click Google/Azure sync
- ✓ One-click allowlisting
- ✓ Built-in API for custom integrations

Why **Efficient SAT** Matters

Security awareness training (SAT) is often a checkbox for compliance—but it shouldn't be a waste of time. Done right, SAT can actually strengthen your cybersecurity culture without draining your team's resources.

Why bother **streamlining**?

- ✓ **Users are overloaded.** Long training videos are skipped or forgotten.
- ✓ **Admins are overworked.** Managing SAT can eat up an admin's time.
- ✓ **Leaders want ROI.** Time spent wrangling training is time not spent on business growth.

Miller's Law

People can hold ~5-9 things in their working memory.



AUTOMATE INTEGRATE UPGRADE & OUTSOURCE

Efficiency means training that's faster, simpler, and more impactful for everyone.

[Read the full blog here](#)

✓ Automate what slows you down

Manual training management? Not anymore. Automating these tasks takes a lot of the stress out of delivering SAT and ensures you're building robust, repeatable processes that will grow with your business.



What to Automate:

- ✓ New user onboarding
- ✓ Campaign scheduling (training + phishing)
- ✓ User reminders and notifications
- ✓ Progress tracking and reporting
- ✓ Compliance documentation
- ✓ Configuring allowlisting
- ✓ Reported email triaging

With Phin:

Save tens of hours per month handling onboarding, training campaigns, and reporting, so you can focus on customers, not admin.

- ✓ Hands-free campaigns after **10-minute onboarding**
- ✓ Auto-reminders so no one falls behind and your client stays compliant

- ✓ **Reports** that generate themselves
- ✓ Use AI to automatically pull reported emails with easy-to-view URLs, headers, and tags right in your helpdesk

✓ Integrate with tools you already use

SAT shouldn't be its own island. Connect it to your stack.



Smart Integrations:

- ✓ Push training metrics into your PSA dashboard
- ✓ Sync users with Google or Azure
- ✓ Auto-generate support tickets or reminders
- ✓ Manage billing in one place
- ✓ Analyze and triage reported emails without leaving your help desk

With Phin:

Integrations reduce mistakes and duplicate work, so it's nothing but smooth sailing for your admins.

- ✓ One-click Google/Azure user sync
- ✓ One-click allowlisting
- ✓ Built-in API for custom integrations
- ✓ Report phishing button in your inbox
- ✓ Analyze and triage reported emails without leaving your help desk
- ✓ Remove malicious emails and domains across all tenants with the click of a button

✓ Upgrade to SAT that actually works for you

Compliance checkboxes aren't enough anymore. Today's threats (and users) need smarter training that actually improves security.



A Modern SAT Platform Offers:

- ✓ Engaging, bite-sized content (not hour-long slide shows)
- ✓ Current phishing simulations based on real-world attacks
- ✓ Leaderboards and gamification
- ✓ Real-time analytics and feedback
- ✓ Phishing simulations that go beyond training
- ✓ Seamless integration with HR, IT, and communication systems

With Phin:

- ✓ Content from 6 providers engages every type of user (even the picky ones)
- ✓ Instant feedback after phishing simulations are clicked or reported
- ✓ Regular content updates to keep up with threats
- ✓ Reports that actually mean something to stakeholders
- ✓ Phishing simulations you don't need to triage
- ✓ Triage all reported emails without leaving your help desk
- ✓ Remove malicious emails and domains across all tenants with the click of a button

✓ Outsource to experts who do the work for you

Your techs weren't hired to run training programs full-time. Let someone else do it for them.



What an SAT Partner Should Do:

- ✓ Simplify training campaign setup and management
- ✓ Tailor content to your clients' needs
- ✓ Keep training up to date
- ✓ Deliver white-labeled reports and dashboards
- ✓ Support you and your clients along the way

With Phin:

- ✓ Automated training, phishing, and reporting
- ✓ White-labeled everything
- ✓ Hands-on support team
- ✓ You get the credit, we do the work.



Security awareness training should be simple

Looking for a provider that checks all the right boxes, and not just compliance? Download this **SAT acceptance criteria checklist** to see if we fit your requirements.

[Download Checklist](#)[Learn More](#)

Criteria	Description/Notes
Training	
Compliance training content	Depending on the customers you serve: • GDPR • HIPAA • PCI DSS
Robust Content Library	• Short, digestible training • Frequently updated • Multiple formats and topics
Gamification	• Leaderboard, scores, and badges
Free NFR Licenses for internal MSP team	
Immediate phishing simulation feedback for end-users	
Security	
Report Phishing Button	
SOC 2 Certification	
ISO 27001 Certification	
Phishing simulation for end-users	
Support	
	• Onboarding • Helpdesk • QBRs
	• Via their website, Slack, Discord, Reddit, etc.