



CUSTOMER SUCCESS STORY

A New Experience Everyone Loves

EMPLOYEES

Soft Skill Insights
More Loyalty
Career Development



CANDIDATES

Greater Interest
Right Fit Validation
Improved Response



HR

Higher Retention
More Candidates
Profit Contribution



CISO

Reduced Security Risks
NIST & Regulatory Compliance
Zero Trust Validation



C-SUITE

More Performance
Lower Budgets
Increased Revenue





Financial Services Firm Gains Insights

THE SITUATION



A leading financial services accounting and tax firm needed to gain valuable employee insights to guide HR and security decisions, policies, and compliance.

For the fourth year, this firm was named as one of Accounting Today's **Best Firms to Work For**. **INSIDE Public Accounting (IPA)** selected them as a **Top 300 organization** and named them as a **Top 50 performer** given their ability to deliver superior client results, while also planning for long-term sustainability and growth.

To maintain and expand on their success, this firm enlisted the team at RemotelyMe to complete an employee Career Quotient Indicator (CQI) Assessment and detailed analysis related to HR and security risks, trust, and engagement for their employees.

Like many organizations, this financial services firm needed to:

- Move beyond ineffective one-size-fits-all Security Awareness Training (SAT)
- Create what Forrester and Gartner call a security aware culture
- Improve engagement to reduce mistakes that lead to safety & security incidents
- Increase trust to drive 4X more performance and 2X more engagement (Deloitte)
- Measure and improve soft skills to reduce risks for attrition & phishing clicks



Financial Services Firm Gains Insights

THE PROBLEM



Over 90% of security breaches are caused by human mistakes, quite often due to phishing lures. Microsoft's Digital Data report shows only a 3% reduction in phishing clicks *after* employees complete security awareness training (SAT).

NIH studies show three primary factors lead to most phishing clicks: **High workload, high stress, and low trust.**

New NIST CSF 2.0, CIS18, PCI DSS 4.0, GDPR, and other mandates focus on "people" requirements for communications, risk-aware cultures, roles, responsibilities, supply chains, and HR practices. As such, simple SAT may no longer be compliant. One breach, audit failure, or lawsuit could result in millions for remediation, brand damage, and lost revenue.

Like most organizations, this financial services firm needed:

- **INSIGHTS:** Human Risk Management data and analysis into HR and security risks, engagement, and compliance
- **PERSONALIZATION:** Personalized, effective training and coaching to improve employee security, engagement, soft skills, and culture
- **IMPROVEMENT:** Security, trust, engagement, and compliance improvement trends and validation and metrics



Financial Services Firm Gains Insights

THE SOLUTION



This financial services firm engaged with RemotelyMe to complete an employee assessment and analysis related to HR and security risks, trust, and engagement.

RemotelyMe provided an email, which was sent to employees encouraging them to participate voluntarily. Given the insights and career advantages, 97% completed the 9-minute visual neuroscience assessment.

Over 92% praised the assessment for being accurate, insightful, and helpful. RemotelyMe used the data collected to complete a comprehensive analysis on risks, trust, nine soft skills, attributes, learner types, profiles, and more.

Employees received personalized RemotelyMe training courses and coaching to improve scores and accelerate careers.

The benefits to this financial services firm included:

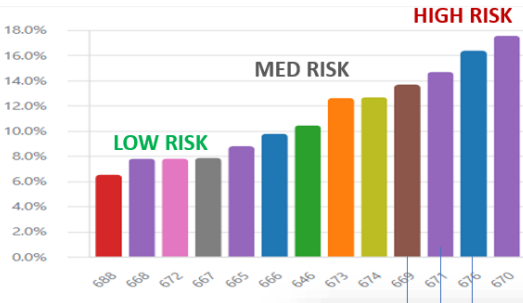
- Insights into at-risk and disengaged employees with correlations showing “why”
- Predictive biomarker data revealing potential HR and security risks and “why”
- Correlations between workloads, stress, trust, and risk factors and “why”
- Recommendations for personalized training and coaching to improve scores



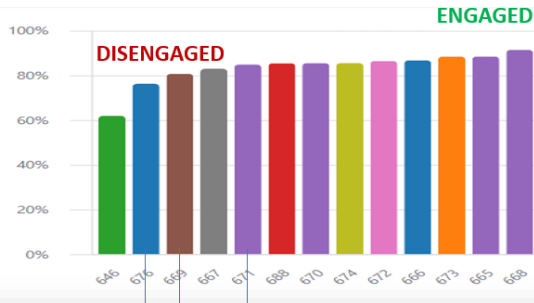
Financial Services Firm Gains Insights

THE RESULTS

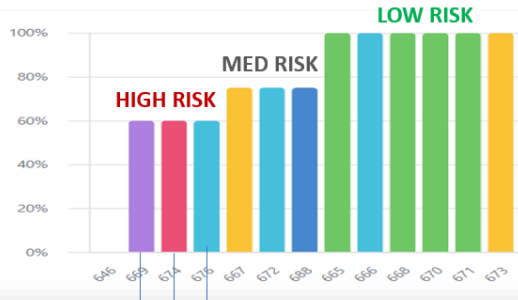
RISK SCORES



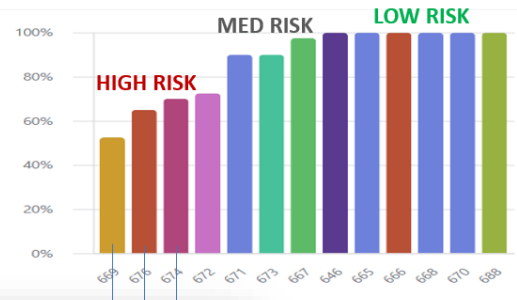
TOTAL SCORES



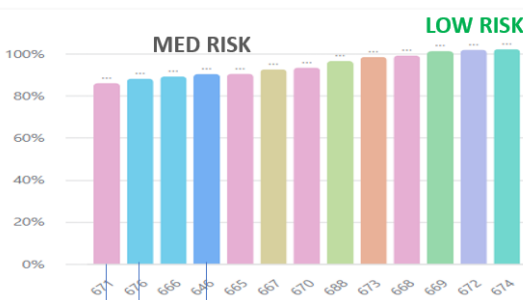
WORKLOAD DEVIATION SCORES



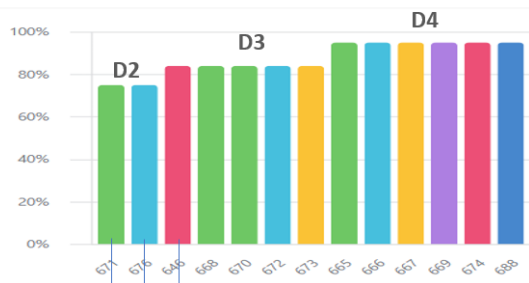
STRESS SCORES



OVERALL SOFT SKILLS SCORES



LEADERSHIP SITUATION SCORES (BLANCHARD SITUATIONAL LEADERSHIP)



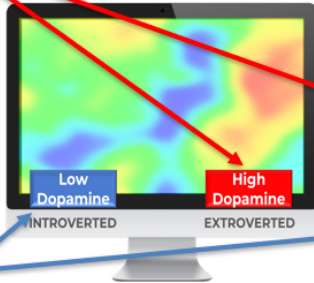
The results delivered to this financial services firm include:

- Detailed risk, trust, and total scores based on roles, responsibilities, and science
- Workload deviation, stress, and profile scores related to HR and security risks
- Nine soft skills scores related to job requirements and career goals
- L&D platform to deliver personalized courses and coaching to improve scores

What We Offer



Predictive Risk Scores



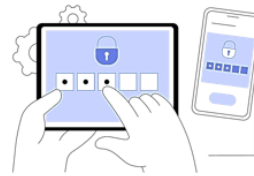
Know who's at risk in only nine minutes.

Personalized Training



Combined security & career 15-min courses & coaching.

Adaptive Controls



Personalize controls & access based on risks.

HRM



Behavioral science & coaching increases retention 16X.

"Every CISO should know before they KnowBe4 by using HERMAN CYBER as a pre-requisite to personalize security training and controls." – CISO, Leading Tech Firm

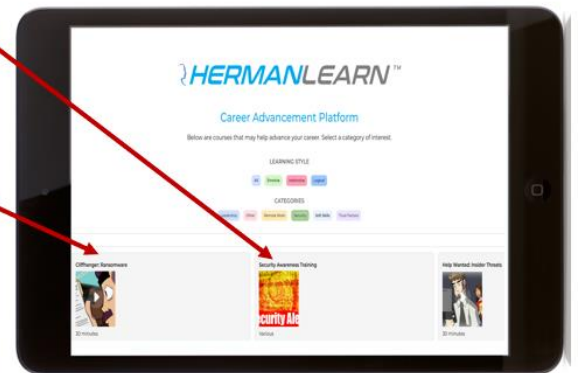
INSIDER THREAT?

PHISHING FAILURES?

PASSWORD PROBLEMS?



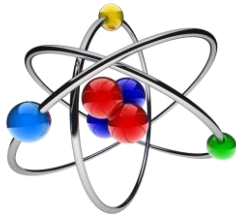
Based on learning styles, roles & risks



Improves trust, leadership & engagement

Higher trust equals higher security compliance

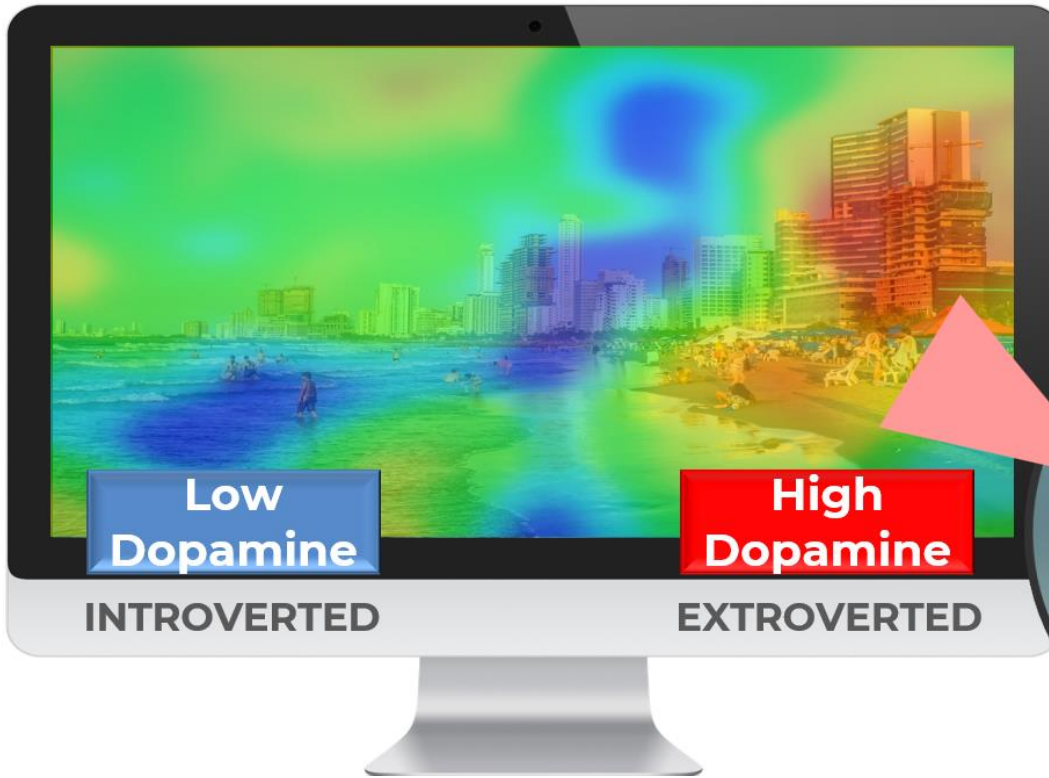




Why We're Different

Our Science

Visual Neuroscience Assessment

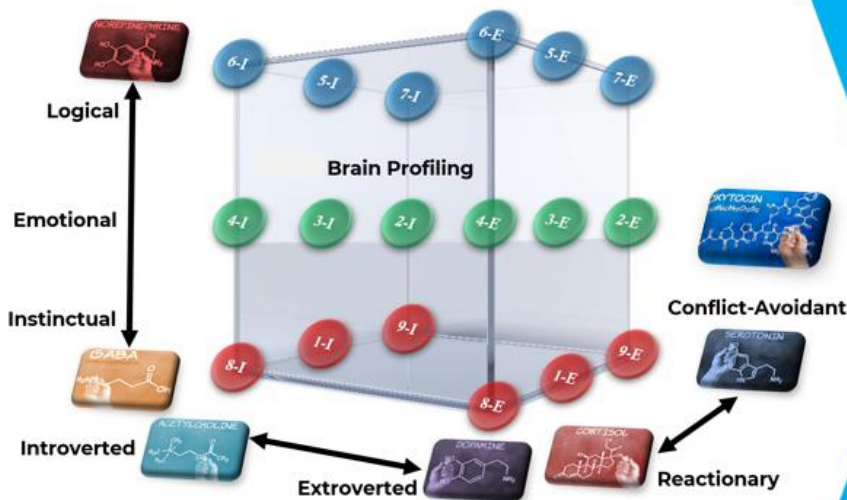


Customized videos influence answers

93% reliability

Patent pending

Predictive Biomarkers



Security & HR Risks



O*NET, SHRM, NIST, CIS, Harvard, LinkedIn Data