

Train Employees To Spot Phishing — Checklist

Print and tick off. Setup is ~60 min; quarterly cadence is ~20 min.

Date completed: _____

Re-run this quarterly. Each pass takes about 12 minutes.

Beginner — do these in order

- 1. 4-pattern phishing library built**
3 real examples per pattern
- 2. Kickoff session scheduled and run**
20 min, all-hands
- 3. 'Report Phishing' button installed in email**
Gmail / Outlook
- 4. Report channel routed to security@yourdomain**
+ thank-you auto-reply
- 5. Quarterly refresher cadence on calendar**
Every 3 months
- 6. No-blame culture announced and signed by leadership**
Written and verbal
- 7. Metrics dashboard started**
Reports/month, click rate, time-to-report
- 8. Library refresh cadence set**
Quarterly, with new patterns

Advanced — if you want to go further

- Run Gophish for free simulations
- Subscribe to KnowBe4 or Hoxhunt
- SIEM integration of reports
- Quarterly tabletop exercise
- Deepfake-voice training segment
- Cyber insurance with training rider