

■ SERVICE BRIEF

# KnowBe4 Deployment

## *Security Awareness Training & Phishing Simulations*





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This document outlines the scope, deliverables, responsibilities, and terms governing Redesign's deployment services for KnowBe4's Security Awareness Training and Phishing Simulation platform.

These services are designed to configure and launch an effective employee security training program using KnowBe4's industry-leading tools.

This service engagement is governed by this Service Brief and associated with SKU: SEC-KB4-DEPLOY. The quantity defined in the quote determines the number of users to be onboarded and enrolled in security awareness training and phishing simulations under this engagement.

*The FUTURE BELONGS  
to the CURIOUS.*

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# 01. Services Overview

Redesign's KnowBe4 Deployment Service enables organizations to rapidly stand up and launch a security awareness training and phishing simulation program.

This engagement includes provisioning users, configuring baseline testing, scheduling phishing simulations, assigning training modules, and customizing reporting features – all aligned with security awareness best practices.



## 02. Offer Structure

### PRIMARY SERVICES

#### Includes

- Covers Pre-Engagement
- Assessment
- Implementation
- Post-Engagement activities as part of this engagement

### OPTIONAL ADD-ONS

#### Separate SOW

#### Available options may include:

- Multilingual content deployment
- Custom SCORM integration
- Advanced reporting
- Or managed phishing services

## 03. Project Scope

This engagement includes the initial deployment and configuration of KnowBe4 for security awareness and phishing simulation capabilities for the number of users defined in the quote.

### In-Scope Activities

- KnowBe4 platform access and admin setup
- Design and facilitation of Identity Provider (IdP) provisioning groups
- Integration of IdP with KnowBe4 User Provisioning
- Setup of baseline phishing simulation
- Assignment of starter training modules
- Configuration of notification emails and reminders
- Branding of program Notification Templates
- Reporting configuration and dashboard setup
- One-time test and validation

### Platform Requirements

- Active KnowBe4 subscription/license for the required user count
- Admin access to Customer KnowBe4 portal
- Email relay integration permissions (if required)

## 04. Quantity & Effort Model

- **Service SKU: SEC-KB4-DEPLOY**
- **Quantity: Number of users to be enrolled in training and simulation**
- **Work per Unit Includes:**
  - Platform and user configuration
  - Initial phishing simulation setup
  - Training campaign launch
  - Access and reminder configuration
  - Reporting and review handoff

### EXAMPLE

A quantity of 500 under SKU SEC-KB4-DEPLOY covers onboarding and training/phishing configuration for 500 users.

## 05. Services & Key Activities

Stage	Key Activities
 Pre-Deployment Planning	<ul style="list-style-type: none"><li>▪ Confirm licensing, user count, and platform access</li><li>▪ Review training objectives and simulation sensitivity</li><li>▪ Validate email delivery and infrastructure settings</li><li>▪ Validate Identity Provider Capabilities and Provisioning Requirements</li><li>▪ Assign internal point of contact</li></ul>
 Platform Configuration	<ul style="list-style-type: none"><li>▪ Configure User Provisioning integration with Identity Provider</li><li>▪ Ingest or Configure Groups (Console/Smart groups)</li><li>▪ Assign training module(s) Group</li><li>▪ Configure simulated phishing campaign settings</li><li>▪ Setup notifications, reminders, and reporting alerts</li></ul>
 Launch & Validation	<ul style="list-style-type: none"><li>▪ Launch initial phishing test (baseline campaign)</li><li>▪ Send out training invitations</li><li>▪ Monitor access and delivery success</li><li>▪ Review simulation metrics and user responses</li></ul>
 Knowledge Transfer & Close-Out	<ul style="list-style-type: none"><li>▪ Provide walkthrough of dashboards and reporting</li><li>▪ Share best practices for ongoing campaign management</li><li>▪ Deliver deployment summary report</li></ul>

## 06. Deliverables

The following deliverables will be provided as part of this engagement:



### Configured KnowBe4 platform

- Users
- Training
- Phishing



### Knowledge Transfer Session (virtual, 1 hour)

## 07. Services Scope Changes

Changes to user count, content types, email configuration, or campaign design must be mutually agreed upon in writing. A revised SOW may be required depending on the scope and impact.

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## 08. Services Scope Exclusions

Changes to user count, content types, email configuration, or campaign design must be mutually agreed upon in writing. A revised SOW may be required depending on the scope and impact.

- Custom SCORM content development or upload
  - Ongoing management of training or simulations
  - Integration with third-party systems (e.g., LMS, SIEM)
  - Reporting customization beyond standard platform views
  - Managed phishing or continuous awareness programs
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## 09. Customer Responsibilities

- **Platform Access:** Provide admin-level access to KnowBe4 tenant
- **User Data:** Supply clean user provisioning group(s) and required attributes for KnowBe4 Smart groups
- **Technical Readiness:** Coordinate with email/security team for allowlisting and delivery success
- **Policy Alignment:** Provide any company-specific language for email templates or training context
- **Point of Contact:** Assign internal coordinator for communication and review

Failure to meet these requirements will prevent Redesign from delivering the services outlined in this Service Brief.

## 10. Services Schedule

- **Start Date:**  
Determined after signed quote and access are confirmed
- **Completion:**  
Customer sign-off upon deliverable handover and knowledge transfer session

## 11. Terms and Conditions

This engagement will be governed by the Seller's terms and conditions located at:

### ⓘ SERVICES WILL NOT BEGIN UNTIL THE FOLLOWING PREREQUISITES ARE MET:

- Signed quote referencing SKU: SEC-KB4-DEPLOY and quantity
- Platform access and valid licenses for the defined number of users
- User import file and email delivery configuration confirmed

Failure to meet these requirements will prevent Redesign from delivering the services outlined in this Service Brief.

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