Project Title: Phishing Awareness Training Tracker

Phase 1: Problem Understanding & Industry Analysis

Problem Statement

Phishing remains a leading cybersecurity threat, with employees often failing simulations due to lack of awareness. Organizations rely on spreadsheets and manual processes to track results and training compliance, leading to poor visibility, delayed follow-ups, and inconsistent reporting. A centralized Salesforce-based solution is needed to streamline result tracking, automate training assignments, and provide real-time compliance insights.

Requirement Gathering

- Log phishing simulation results (Employee, Campaign, Outcome, Date).

- Auto-assign remedial training when employees fail simulations.

- Notify employees and managers via email reminders.

- Track training completion status and update awareness scores.

- Provide dashboards for HR/security teams to view compliance rates, department-wise performance, and awareness trends.

- Ensure scalability and simple UI for non-technical staff.

Stakeholder Analysis

- **Employees** – Participate in simulations, complete assigned training.

- **Managers** – Monitor team awareness levels, ensure compliance.

- **HR / Security Teams** – Conduct phishing campaigns, assign training, analyze results.

- **Salesforce Admin** – Configure system, manage users, ensure security controls.

Business Process Mapping

- Employee participates in phishing simulation → Result logged in Salesforce.

- If failed → System auto-creates Training Assignment + sends notification.

- Employee completes training → Status updated, Awareness Score recalculated.

- Managers and security teams review dashboards and reports.

- Regular reports highlight top-performing and at-risk employees/departments.

Industry-Specific Use Case Analysis

- Cybersecurity training programs increasingly require automation to scale across large organizations.

- Phishing simulation tracking is often fragmented; Salesforce can centralize results and training compliance.

- Awareness scoring helps identify departments most vulnerable to social engineering attacks.

- Comparable to governance, risk, and compliance (GRC) tools, but built on a familiar CRM platform.

AppExchange Exploration

- **Security Awareness Apps** – Look for prebuilt cybersecurity awareness or training management apps.

- **Learning Management Apps (LMS)** – Explore Salesforce LMS integrations (e.g., Cornerstone, Docebo).

- **Notification Tools** – Use AppExchange components for advanced reminders or messaging.

- **Gamification Tools** – Explore apps that add points/badges to motivate users.