Brandon Hall Group
EXCELLENCE AWARDS 2023

Shared Assessments:
Best Customer Training Program

Shared Assessments and Infopro Learning

Best Customer Training Program

December 2023

Company Background

SHARED ASSESSMENTS

Company-at-a-Glance	
Headquarters	Santa Fe, New Mexico, U.S.A
Year Founded	2006
Revenue	Privately held
Employees	35
Global Scale (Regions that you operate in or provide services to)	North America, UK, Europe, Asia-Pacific
Customers/Output, etc. (Key customers and services offered)	Membership organization with over 335 corporate members that span all industries. Shared Assessments provides thought leadership, products, and education on issues surrounding third-party risk management or vendor management.
Industry	Risk Management
Website	Sharedassessments.org

Company Background

Infopro Learning

Company-at-a-Glance	
Headquarters	New Jersey, U.S.A.
Year Founded	1989
Revenue	Private
Employees	800
Global Scale (Regions that you operate in or provide services to)	North America, Europe, Asia, Africa, Australia, and South America
Customers/Output, etc. (Key customers and services offered)	Infopro Learning provides a full suite of learning services to organizations. 70% of its clients are Fortune 1000 or global companies, HQ outside of the USA.
Industry	Full-service L&D Solutions provider
Website	http://www.Infoprolearning.com/

Budget and Timeframe

Budget and Timeframe	
Overall budget	USD 36,035
Number of (HR, Learning, Talent) employees involved with the implementation?	9
Number of Operations or Subject Matter Expert employees involved with the implementation?	None from Infopro Learning
Number of contractors involved with implementation	2
Timeframe to implement	8 months
Start date of the program	November 2021

Business Conditions and Business Needs

Background:

Shared Assessments is a global membership organization committed to promoting best practices, training, and products for ensuring third-party risk certainty.

Shared Assessments has developed a product called the Shared Assessments Standardized Information Gathering (SIG) Questionnaire. The SIG is a configurable solution that customizes third-party risk assessment questions to assess the risk posed by an organization's vendors. The SIG was developed by leveraging the collective expertise and knowledge of a large and diverse member base. The SIG is updated annually to ensure that it remains relevant in the face of evolving risk environments and priorities. The SIG questionnaire is a third-party risk management product suite component that enables organizations to create, tailor, evaluate, and retain vendor assessments. SIG and the other suite of industry-standard products are employed by over 15,000 organizations globally to manage third-party risks.

Business Needs:

Shared Assessments wanted to address the ongoing issue of providing clear instructions for the SIG without over-complicating it. Most of their clients use the basic functionality and need straightforward training that is easy to follow. It was crucial for them to develop a training program that made it easy to use and allowed users to customize the questionnaire to meet their specific risk assessment needs.

This training program is essential to the SIG as it ensures customers can quickly and easily leverage the most used features. By providing this valuable resource to their customers, Shared Assessments aims to improve the overall effectiveness of their product.

With limited bandwidth to support the need internally, Shared Assessments partnered with Infopro Learning due to their expertise in learner engagement and ability to create diverse forms of digital media that could be embedded within a digital learning program. SIG Fundamentals offers show-me simulations with visual elements to enhance the learning experience as part of this initiative. It provides a practice simulation for learners to reinforce their understanding in a safe environment.

This simulation has been created in Articulate Storyline 360 with the output in HTML5.

Overview

Shared Assessments aims to enhance its customers' experience by providing a value-added service through its SIG Fundamentals Training. While Shared Assessments offers multiple products focused on third-party risk management, the SIG is their premiere product. It was important for Shared Assessments to provide clear, easy-to-use training to ensure that customers could quickly utilize the SIG's main features without following a complicated manual or attending infrequent, live training sessions.

The SIG Training program aims to educate customers on the proper use and functionality of the SIG. Shared Assessments offers this training program to provide customers with the necessary knowledge and skills to assess third-party risk effectively. This program is designed to be accessible and user-friendly, enabling customers to quickly and easily learn how to use the various features of SIG.

Shared Assessments is committed to providing customers with value-added services through the SIG Training program, highlighting its dedication to offering innovative solutions that address its clients' needs. By investing in its customers' success, Shared Assessments ensures they are equipped with the necessary products and resources to effectively manage third-party risks.

To offer a seamless learning experience to its customers, Shared Assessments teamed up with Infopro Learning to build its own content from scratch, allowing them to tailor the content to its learners' requirements. The project aimed to accomplish the following objectives at a high level:

- Showcase the diverse capabilities of the SIG for assessing third-party risks.
- Provide guidance on utilizing the different features of the SIG effectively.
- Equip customers with the skills to select the most appropriate questions from the SIG questionnaire based on their requirements.
- Provide a virtual environment where customers can apply their newfound knowledge and skills in a simulated practice setting.

Design of the Program

The training was designed using specific instructional strategies to meet the learning objectives of SIG Fundamentals for Shared Assessments' customers. This included:

Engaging Interactivities: Succinct, easily consumed, interactive courses increase end users' attentiveness, as well as the overall effectiveness of the training.

Explainer videos: Short videos were created within the training program to increase excitement and improve information retention. This breaks up the monotony of a traditional eLearning course where learners have to flip through pages. The interactivities within the videos keep the learners engaged and interested throughout the training program.

Show-me Simulations: Infopro Learning developed various simulations to guide learners on how to use the SIG questionnaire effectively and customize it according to the customers' needs. These simulations cover different aspects of the SIG to ensure a comprehensive understanding.

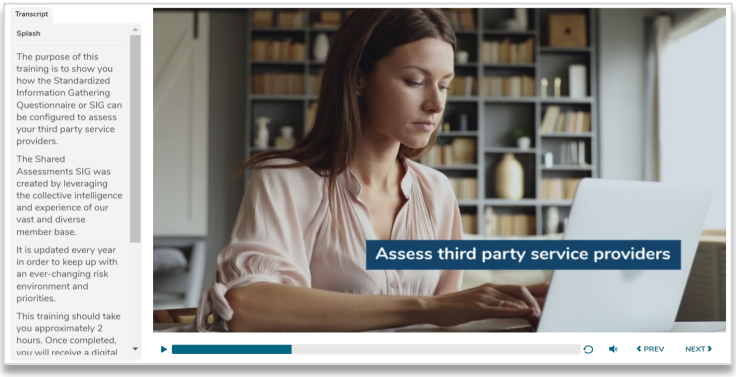
These simulations were designed to provide learners with a realistic and interactive experience that mirrors the SIG. In particular, "Show Me" simulations were designed to demonstrate how to use the SIG when conducting third-party risk assessments. It involved a step-by-step guide that showed learners how to use and modify the SIG questionnaire per their needs. Visual elements were also incorporated to enhance and emphasize the key takeaways of each section. Each step performed in the 'Show Me' simulation was explained.

Practice Simulations: The practice simulations allow learners to respond in a fail-safe environment. These are followed by detailed feedback.

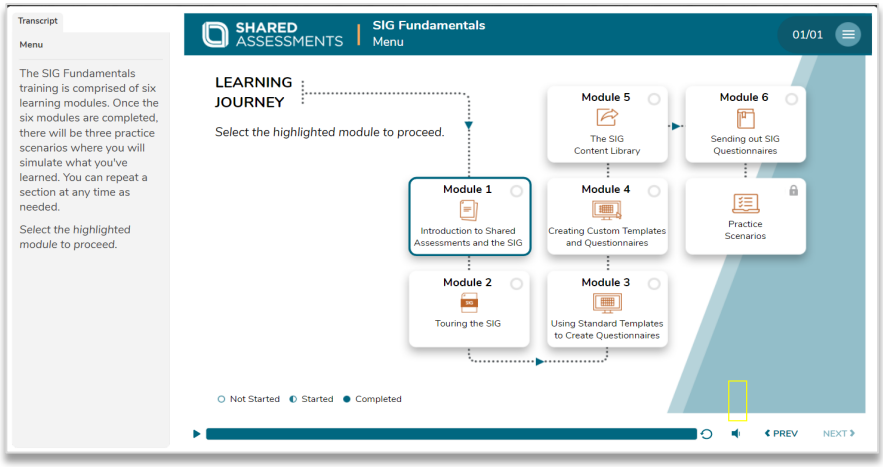
Scenarios: Scenarios create a realistic context for learners to apply their knowledge and skills. Moreover, scenarios present learners with a problem or situation, allowing them to use critical thinking skills to analyze the situation and see the content in a realistic setting.

Course Highlights: The training program comprises six modules, each focusing on a specific function of the SIG questionnaire. The training program concludes with the practice simulation, where learners can apply their learnings from the six modules and practice the SIG in a simulated environment.

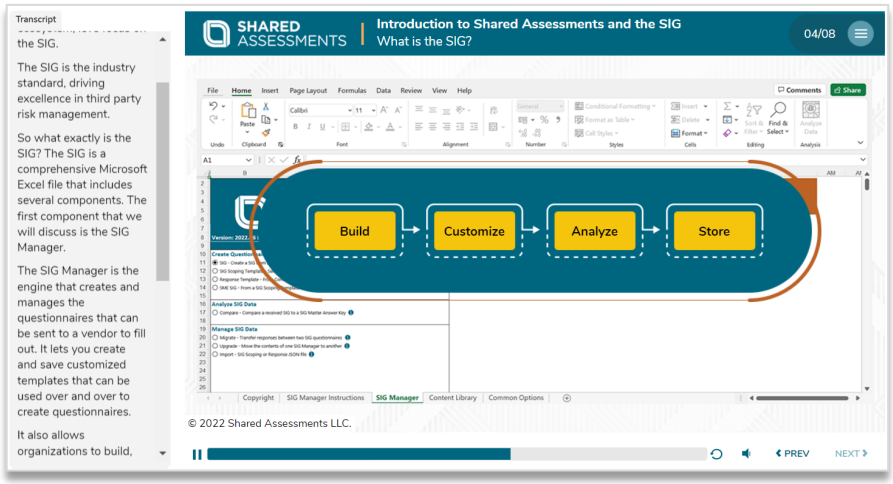
The SIG Fundamentals program starts with a short introductory video that sets the tone for the training program.

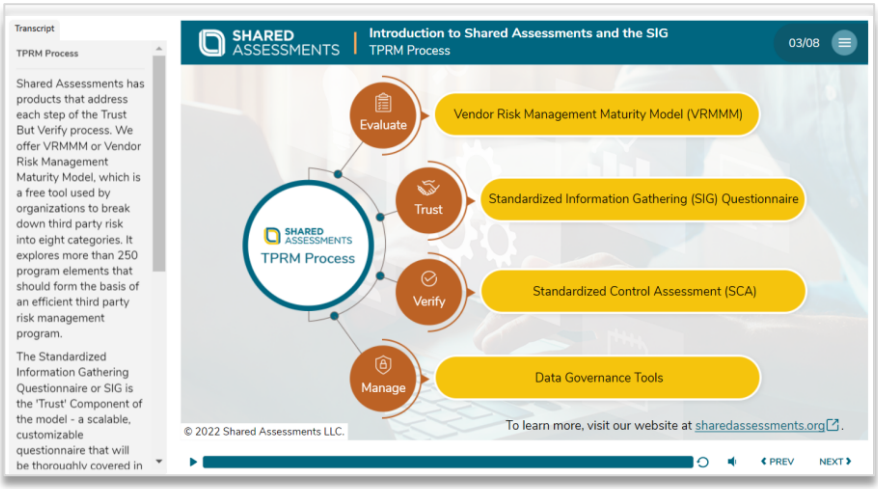


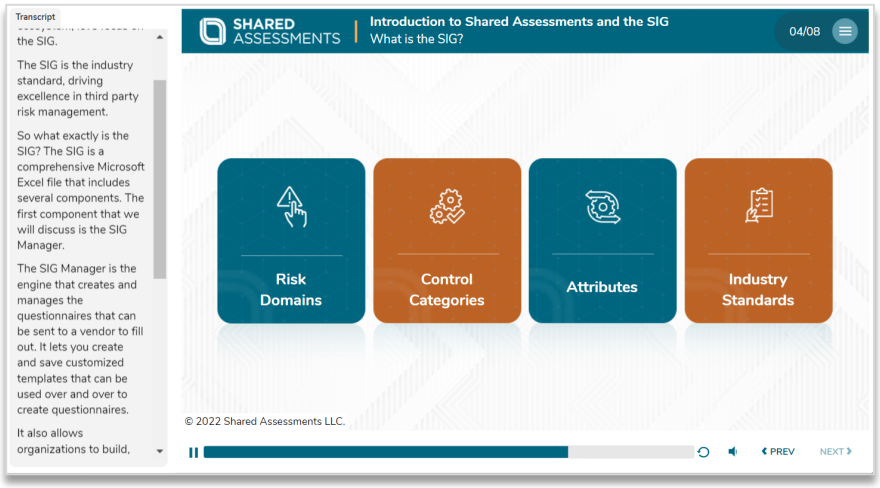
To help learners track their progress, the course starts with a menu screen that provides a comprehensive overview of the entire program.



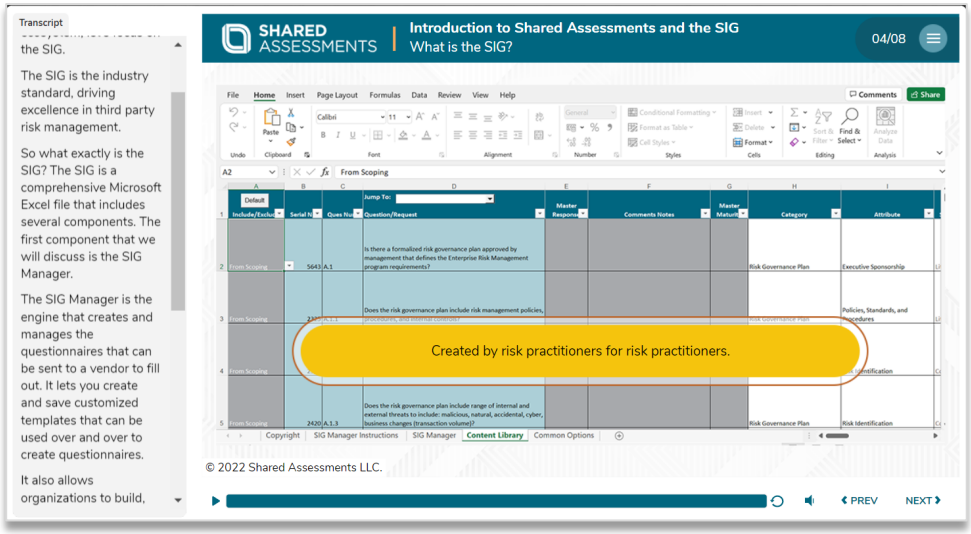
Impactful and engaging visuals are used throughout the training to emphasize the key points of the training.



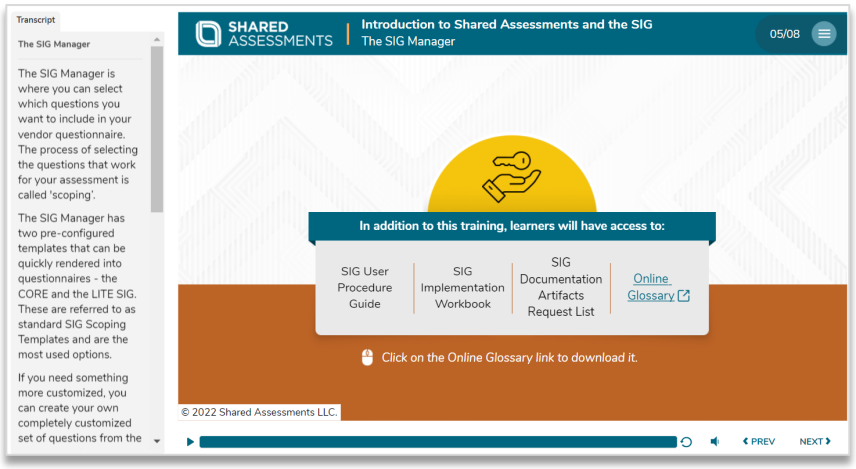




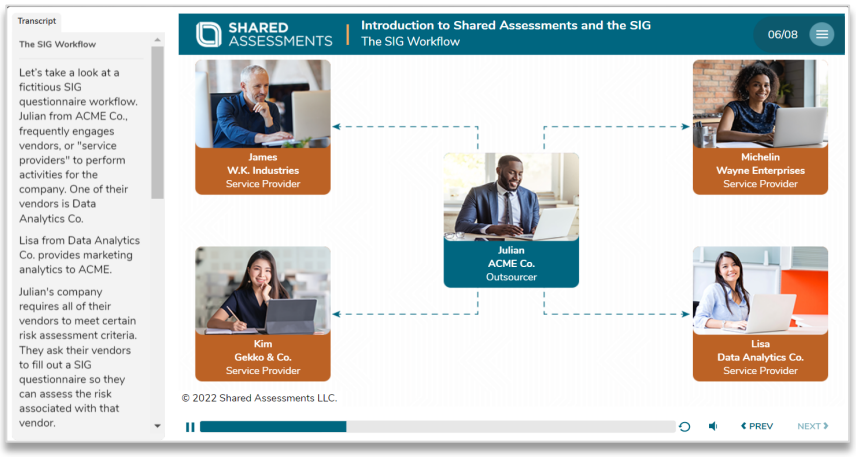
The 'Show-Me' simulation demonstrates the various functionalities of the SIG tool and makes the learner accustomed to the SIG questionnaire in a virtual setting.

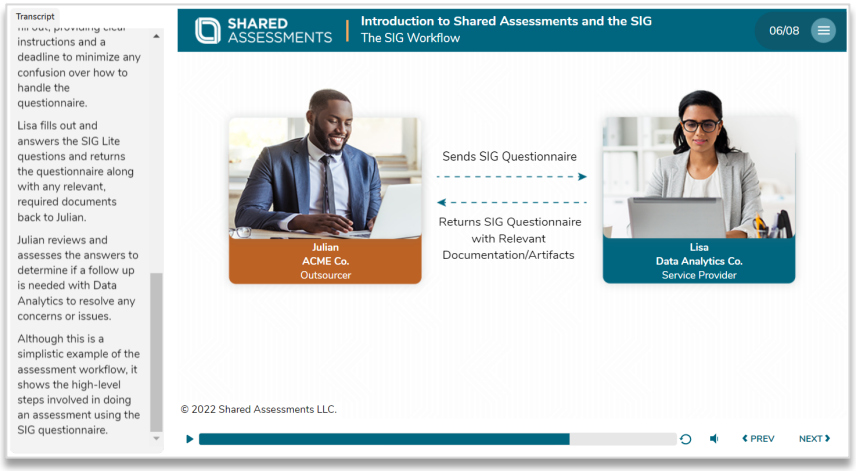


The transcript is structured to enable learners to go through the entire course and ensure accessibility for those with disabilities.

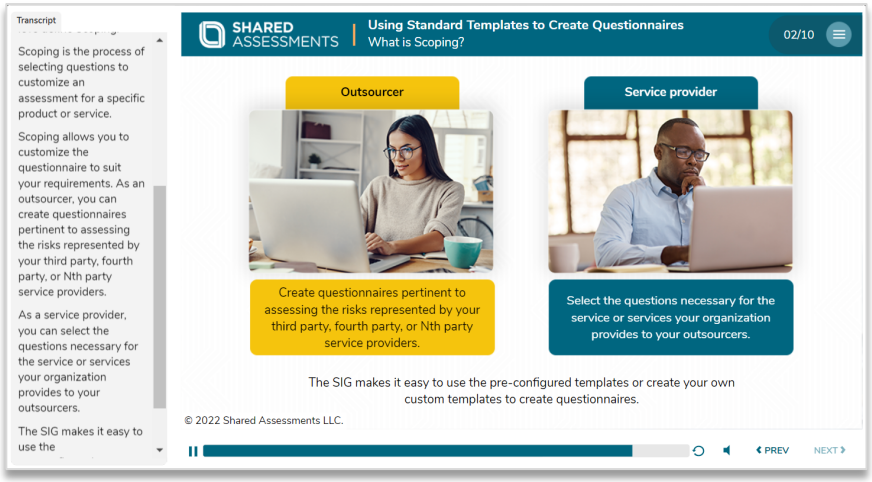


A scenario-based approach demonstrates how the SIG questionnaire can be used to assess the vendors and the risk associated with them.





To increase retention and help learners achieve better learning outcomes, various tips are shared throughout the training program.



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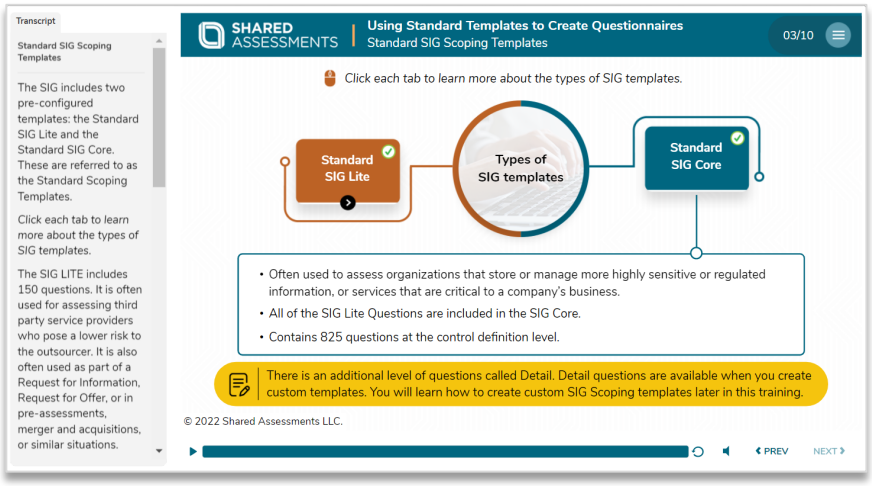
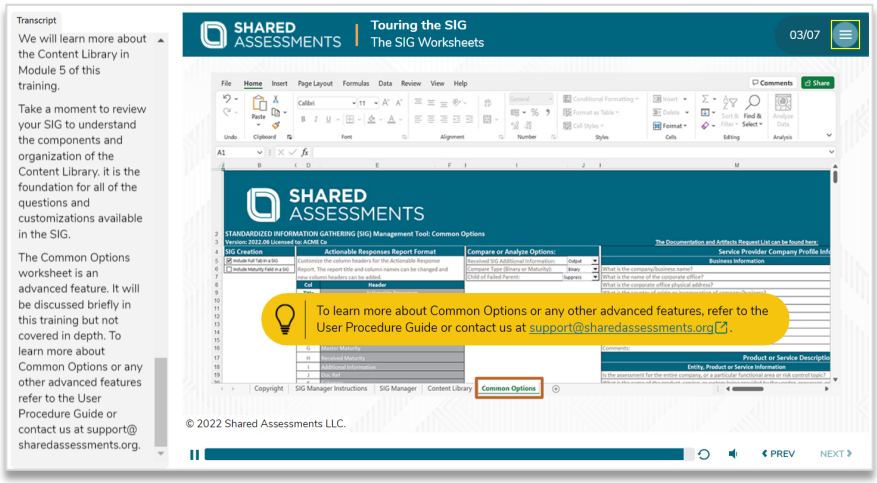
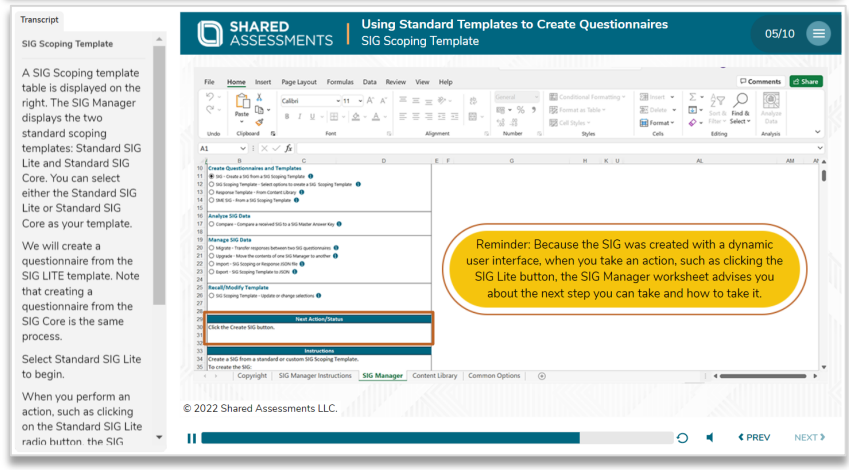
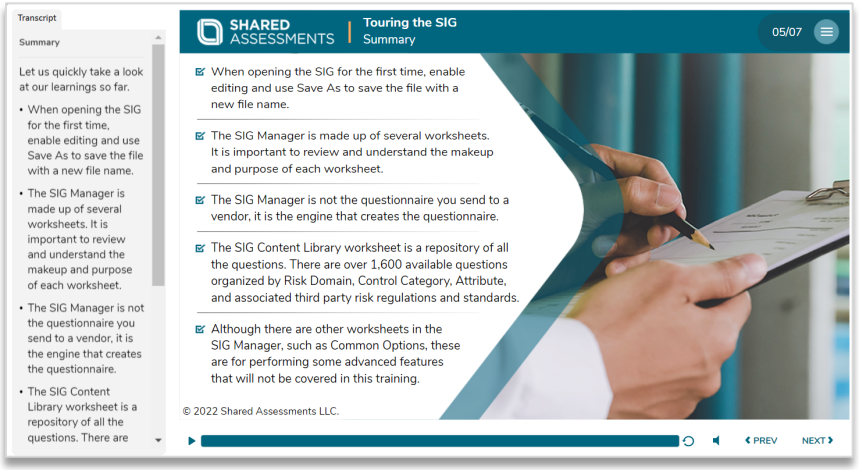




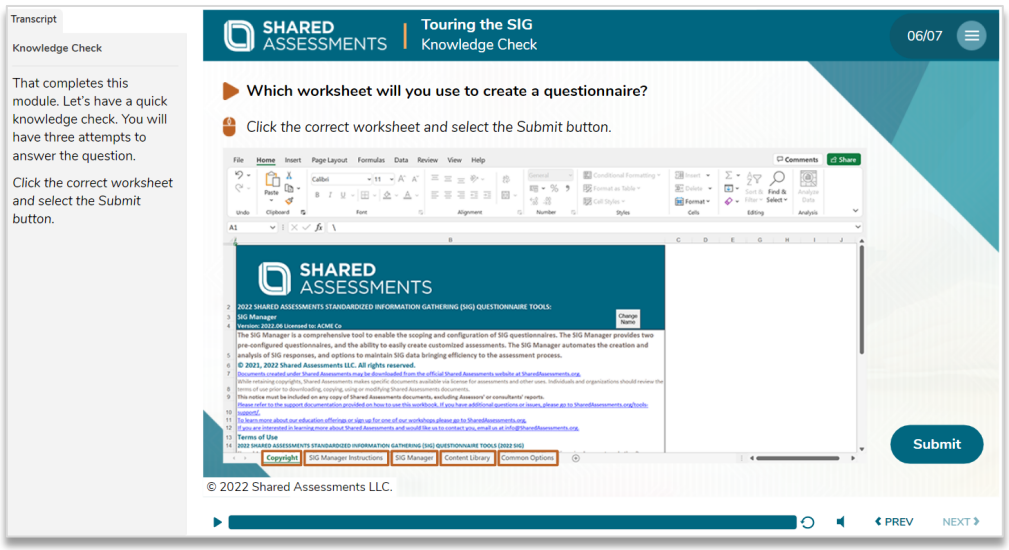
The learners are provided with additional information to enhance their learning experience, promoting greater engagement and interactivity. Visualizing visually appealing elements and presenting the content, such as "Things to Remember", aids in the learners' comprehension of essential concepts and facilitates retention.



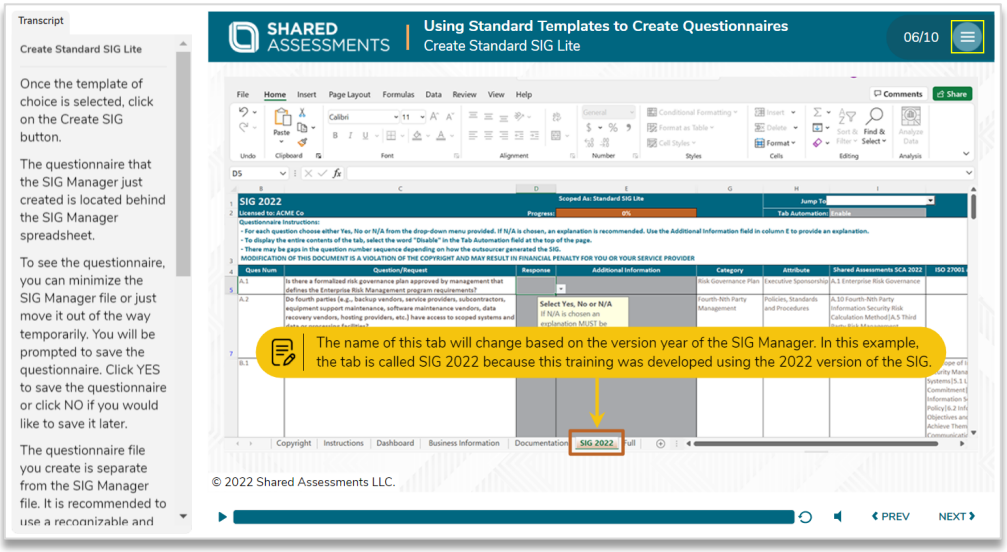
To increase knowledge retention, each module is concluded with a summary screen that briefly summarizes the key takeaways of the module.



Knowledge checks based on the SIG are incorporated into the training to maintain the learners' interest and involvement throughout the training. Including such interactive elements in training enhances the learners' overall experience and facilitates a deeper understanding and retention of the subject matter.



Alongside the tips provided throughout the training, learners also received notes throughout the simulation that offered additional information for each step. These notes act as guides, providing insight into the various options available within each function or tab.



Minimalistic visuals have been used to focus on essential information and avoid overwhelming the learners with unnecessary details.

Transcript
Custom Scoping
In addition to the SIG Core and SIG Lite templates, you can create custom SIG templates to suit your requirements. Similar to the process for the SIG Core and SIG Lite templates, when you create a custom template, the SIG selects questions from the Content Library and includes them in the created questionnaire.
SIG questions can be customized by:
Risk domain;
Control Category;
And external laws, standards, or regulations to which they map, known as Mapping
SHARED ASSESSMENTS
Creating Custom Templates and Questionnaires
Custom Scoping
02/16
SIG questions can be customized by:
Risk Domain
Category
Mapping References
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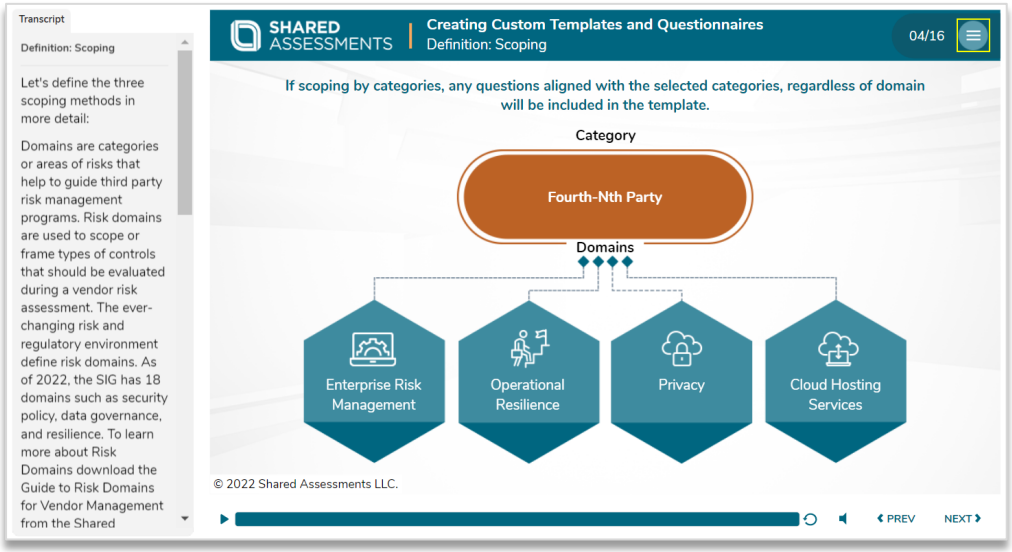
Transcript
Definition: Scoping
Let's define the three scoping methods in more detail:
Domains are categories or areas of risks that help to guide third party risk management programs. Risk domains are used to scope or frame types of controls that should be evaluated during a vendor risk assessment. The ever-changing risk and regulatory environment define risk domains. As of 2022, the SIG has 18 domains such as security policy, data governance, and resilience. To learn more about Risk Domains download the Guide to Risk Domains for Vendor Management from the Shared
SHARED ASSESSMENTS
Creating Custom Templates and Questionnaires
Definition: Scoping
04/16
If scoping by categories, any questions aligned with the selected categories, regardless of domain will be included in the template.
Category
Fourth-Nth Party
Domains
Enterprise Risk Management
Operational Resilience
Privacy
Cloud Hosting Services
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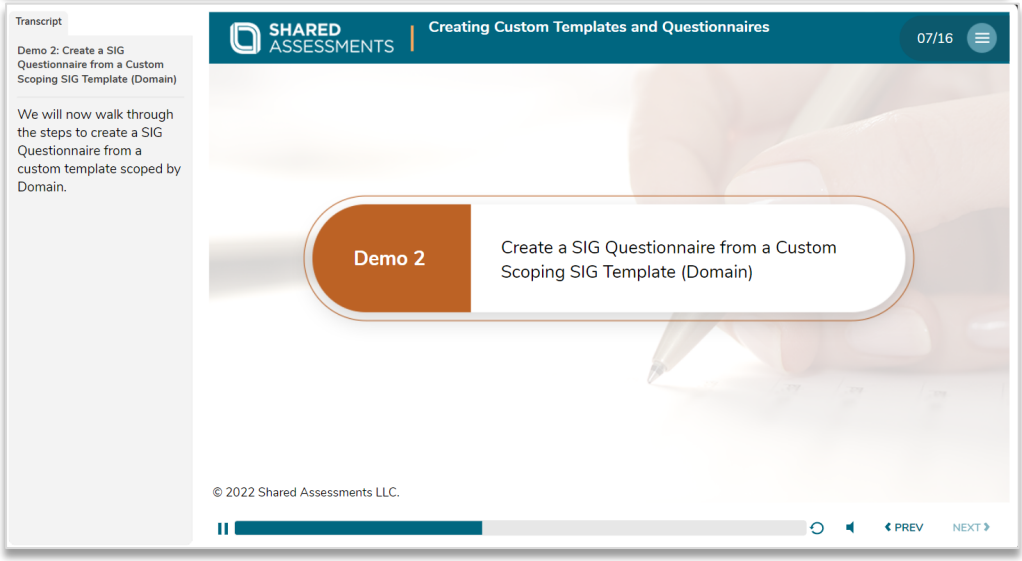
Transcript
Demo 2: Create a SIG Questionnaire from a Custom Scoping SIG Template (Domain)
We will now walk through the steps to create a SIG Questionnaire from a custom template scoped by Domain.
SHARED ASSESSMENTS
Creating Custom Templates and Questionnaires
07/16
Demo 2
Create a SIG Questionnaire from a Custom Scoping SIG Template (Domain)
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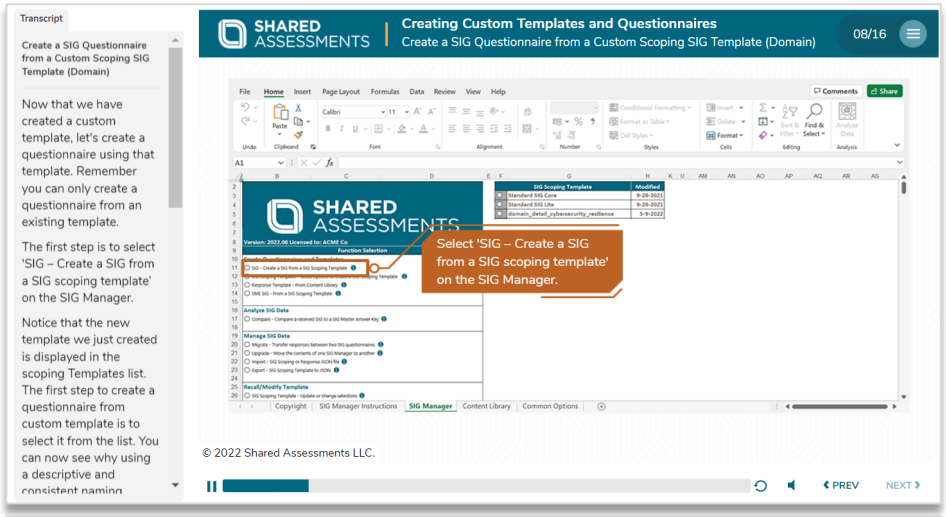
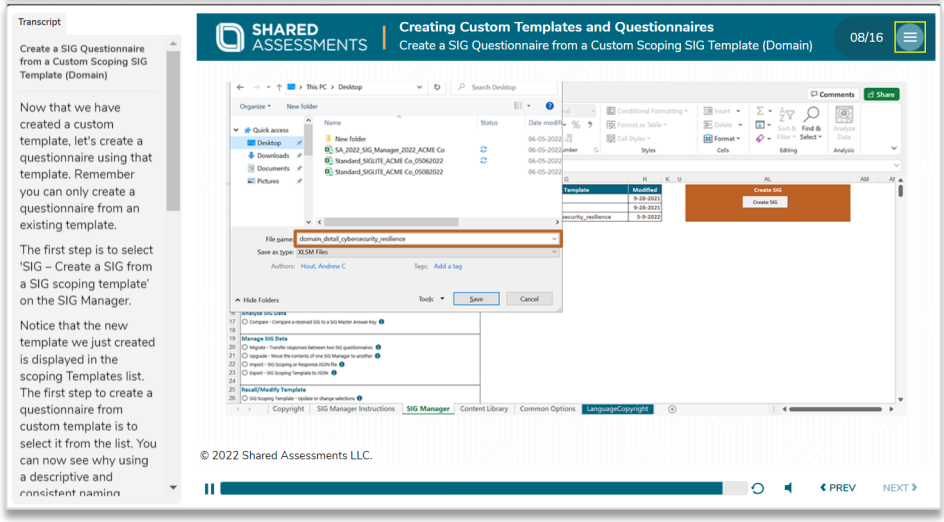
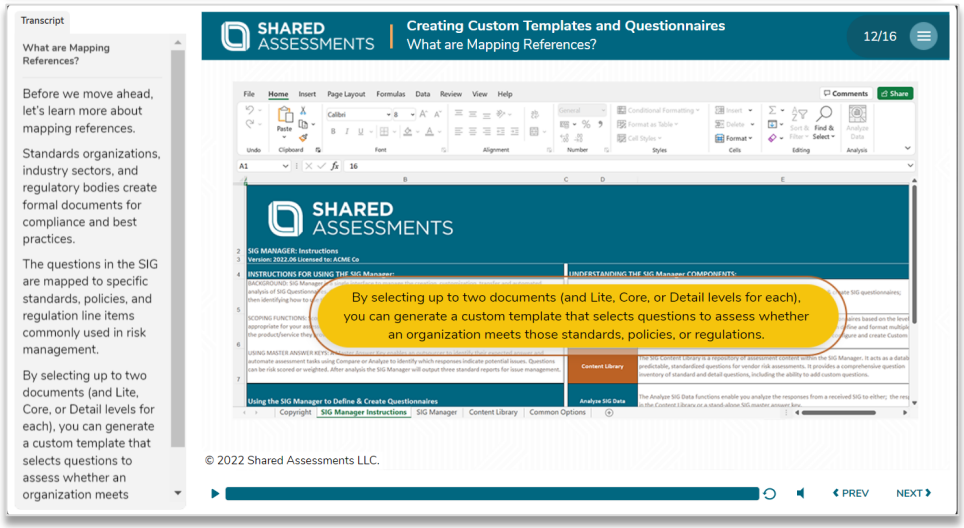
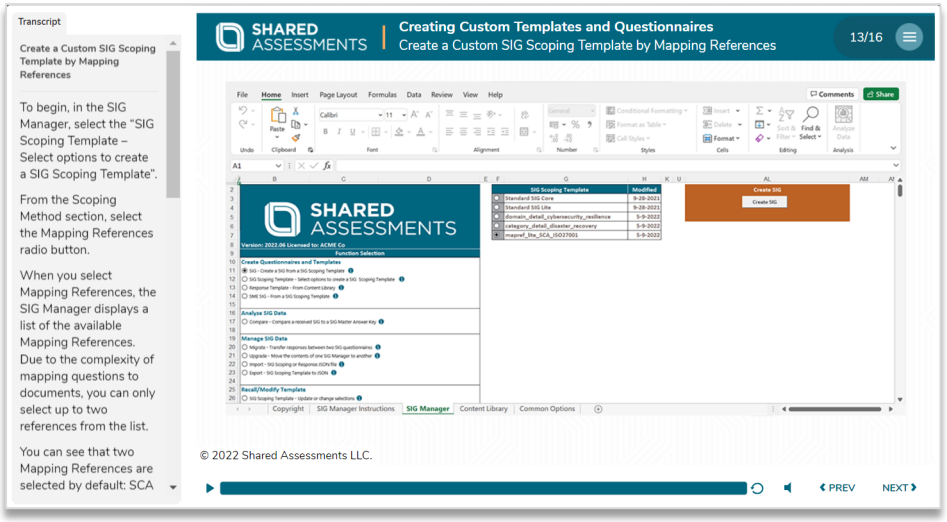
Learners are guided to perform the correct steps with a specific prompt designed for each step.








Transcript
Create a Custom SIG Scoping Template by Mapping References
To begin, in the SIG Manager, select the "SIG Scoping Template – Select options to create a SIG Scoping Template".
From the Scoping Method section, select the Mapping References radio button.
When you select Mapping References, the SIG Manager displays a list of the available Mapping References. Due to the complexity of mapping questions to documents, you can only select up to two references from the list.
You can see that two Mapping References are selected by default: SCA
SHARED ASSESSMENTS
Creating Custom Templates and Questionnaires
Create a Custom SIG Scoping Template by Mapping References
13/16
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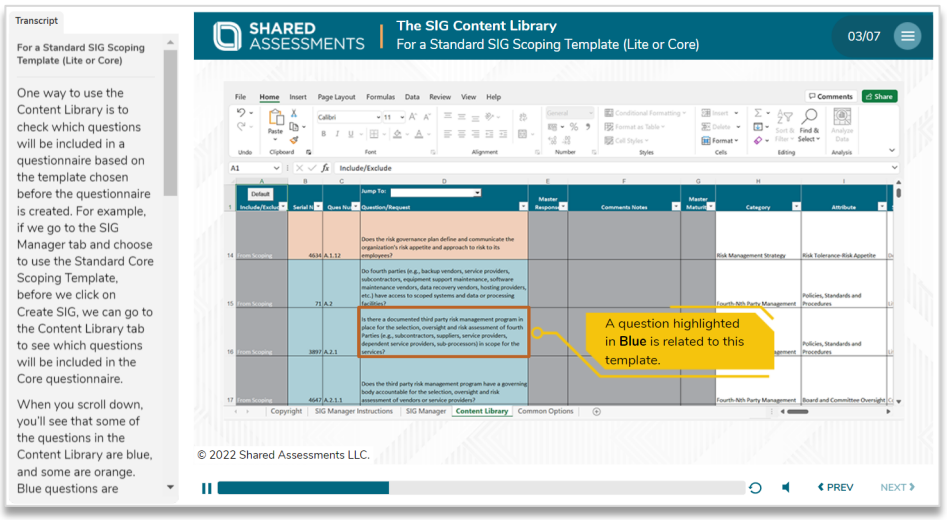
Transcript
For a Standard SIG Scoping Template (Lite or Core)
One way to use the Content Library is to check which questions will be included in a questionnaire based on the template chosen before the questionnaire is created. For example, if we go to the SIG Manager tab and choose to use the Standard Core Scoping Template, before we click on Create SIG, we can go to the Content Library tab to see which questions will be included in the Core questionnaire.
When you scroll down, you'll see that some of the questions in the Content Library are blue, and some are orange. Blue questions are
SHARED ASSESSMENTS
The SIG Content Library
For a Standard SIG Scoping Template (Lite or Core)
03/07
A question highlighted in Blue is related to this template.
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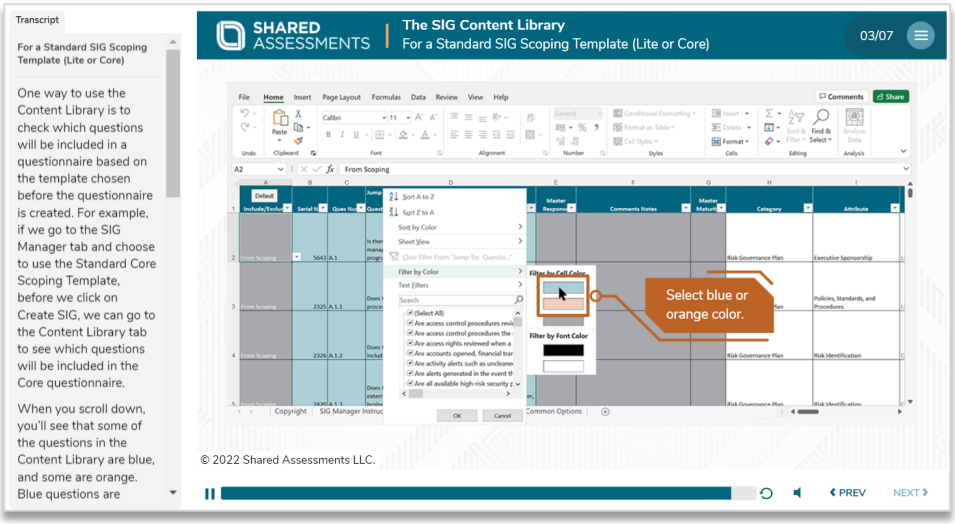
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When you scroll down, you'll see that some of the questions in the Content Library are blue, and some are orange. Blue questions are
SHARED ASSESSMENTS
The SIG Content Library
For a Standard SIG Scoping Template (Lite or Core)
03/07
Select blue or orange color.
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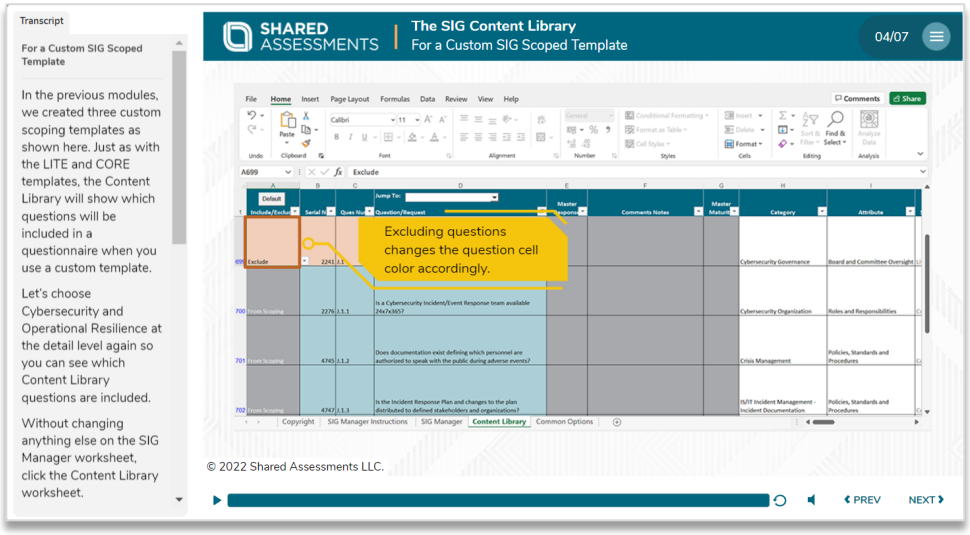
Transcript
For a Custom SIG Scoped Template
In the previous modules, we created three custom scoping templates as shown here. Just as with the LITE and CORE templates, the Content Library will show which questions will be included in a questionnaire when you use a custom template.
Let's choose Cybersecurity and Operational Resilience at the detail level again so you can see which Content Library questions are included.
Without changing anything else on the SIG Manager worksheet, click the Content Library worksheet.
SHARED ASSESSMENTS
The SIG Content Library
For a Custom SIG Scoped Template
04/07
Excluding questions changes the question cell color accordingly.
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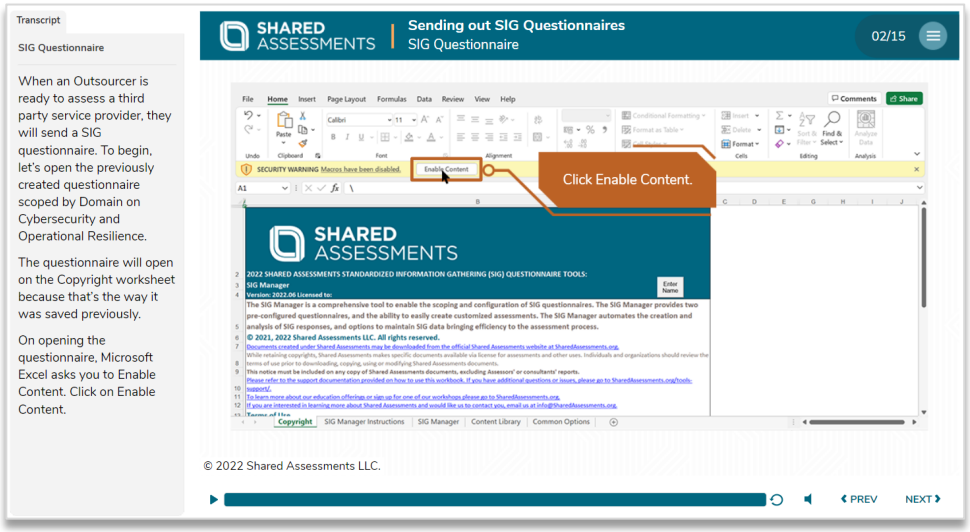
Transcript
SIG Questionnaire
When an Outsourcer is ready to assess a third party service provider, they will send a SIG questionnaire. To begin, let's open the previously created questionnaire scoped by Domain on Cybersecurity and Operational Resilience.
The questionnaire will open on the Copyright worksheet because that's the way it was saved previously.
On opening the questionnaire, Microsoft Excel asks you to Enable Content. Click on Enable Content.
SHARED ASSESSMENTS
Sending out SIG Questionnaires
SIG Questionnaire
02/15
Click Enable Content.
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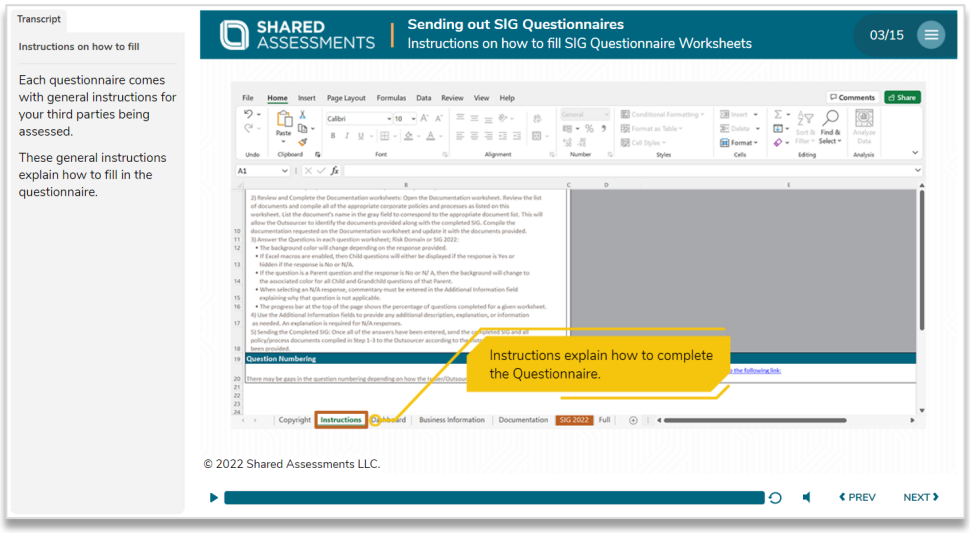
Transcript
Instructions on how to fill
Each questionnaire comes with general instructions for your third parties being assessed.
These general instructions explain how to fill in the questionnaire.
SHARED ASSESSMENTS
Sending out SIG Questionnaires
Instructions on how to fill SIG Questionnaire Worksheets
03/15
Instructions explain how to complete the Questionnaire.
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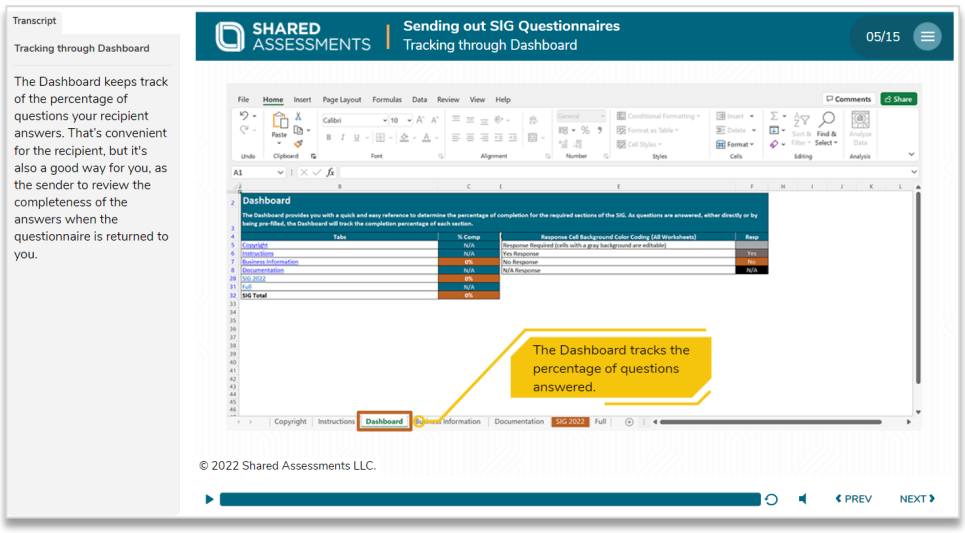
Transcript
Tracking through Dashboard
The Dashboard keeps track of the percentage of questions your recipient answers. That's convenient for the recipient, but it's also a good way for you, as the sender to review the completeness of the answers when the questionnaire is returned to you.
SHARED ASSESSMENTS
Sending out SIG Questionnaires
Tracking through Dashboard
05/15
Dashboard
The Dashboard tracks the percentage of questions answered.
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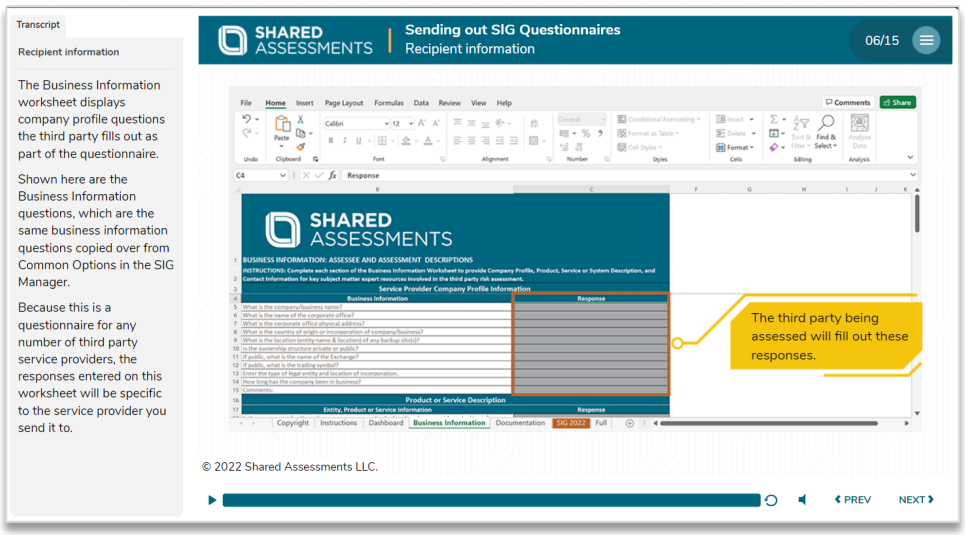
Transcript
Recipient information
The Business Information worksheet displays company profile questions the third party fills out as part of the questionnaire.
Shown here are the Business Information questions, which are the same business information questions copied over from Common Options in the SIG Manager.
Because this is a questionnaire for any number of third party service providers, the responses entered on this worksheet will be specific to the service provider you send it to.
SHARED ASSESSMENTS
Sending out SIG Questionnaires
Recipient information
06/15
The third party being assessed will fill out these responses.
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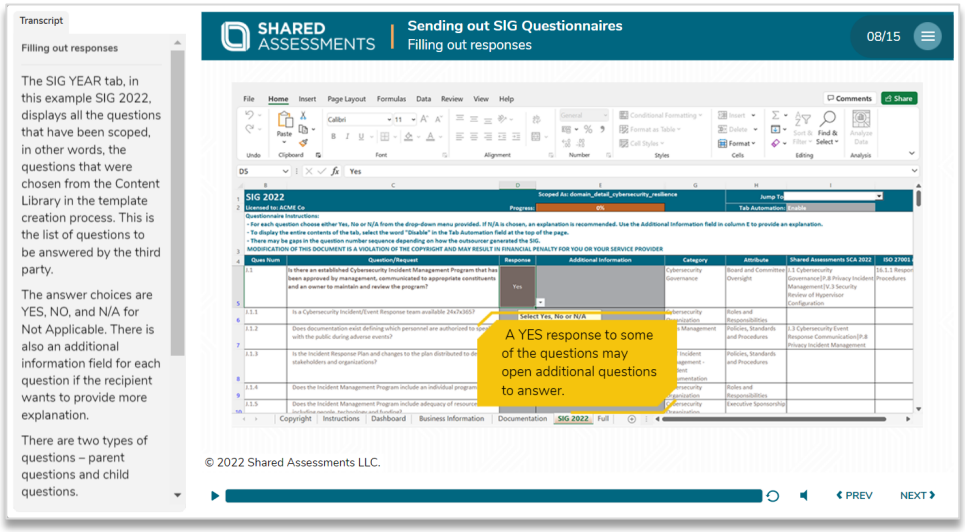
Transcript
Filling out responses
The SIG YEAR tab, in this example SIG 2022, displays all the questions that have been scoped, in other words, the questions that were chosen from the Content Library in the template creation process. This is the list of questions to be answered by the third party.
The answer choices are YES, NO, and N/A for Not Applicable. There is also an additional information field for each question if the recipient wants to provide more explanation.
There are two types of questions – parent questions and child questions.
SHARED ASSESSMENTS
Sending out SIG Questionnaires
Filling out responses
08/15
A YES response to some of the questions may open additional questions to answer.
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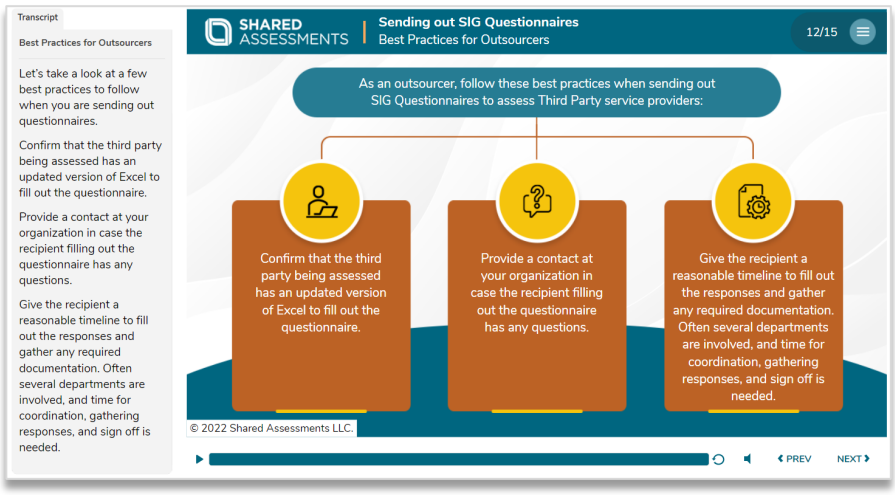
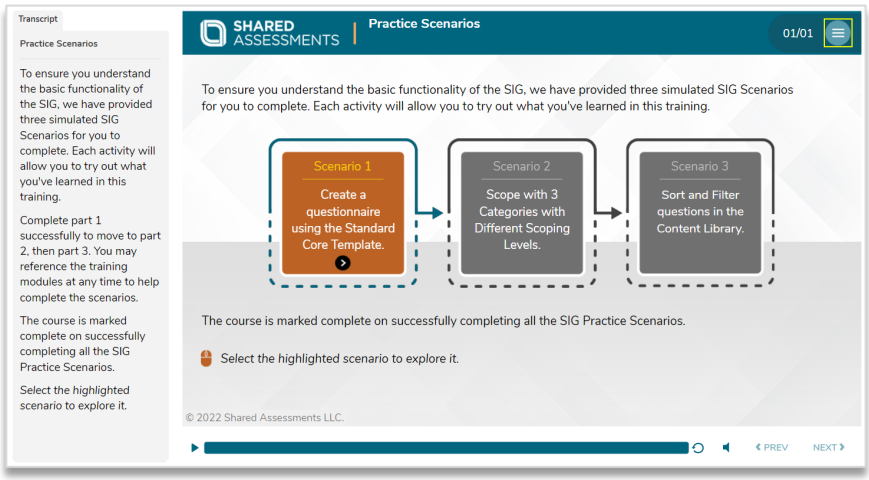
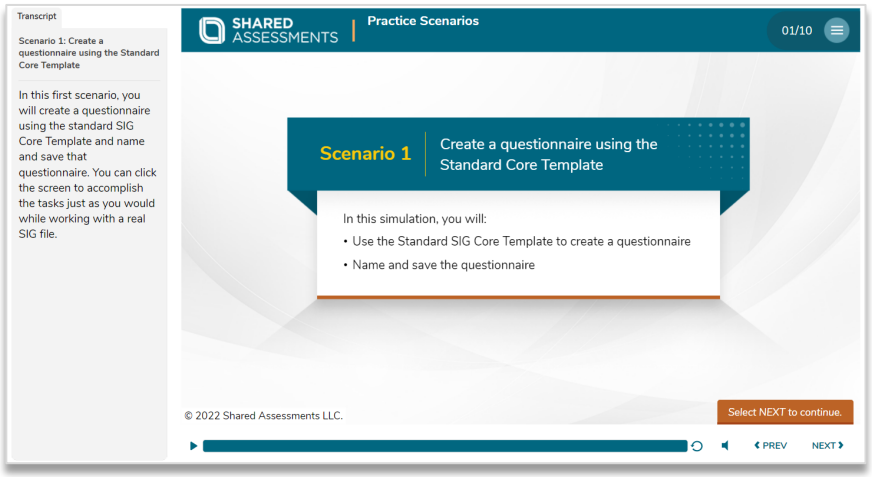
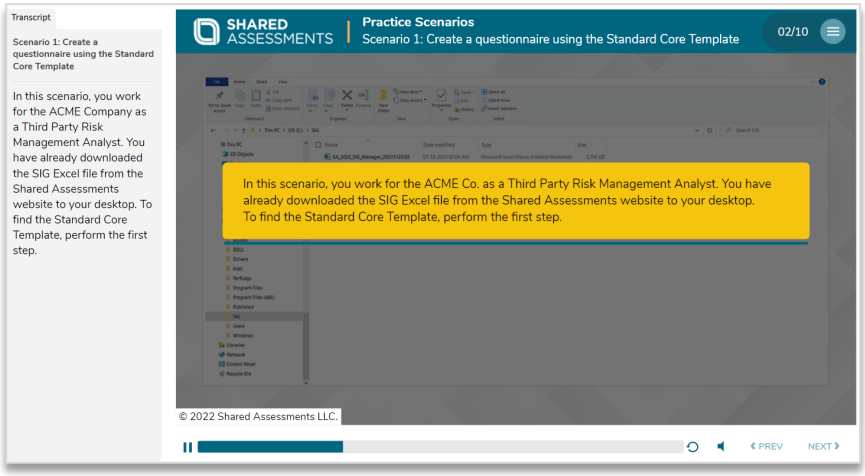
PREV
NEXT



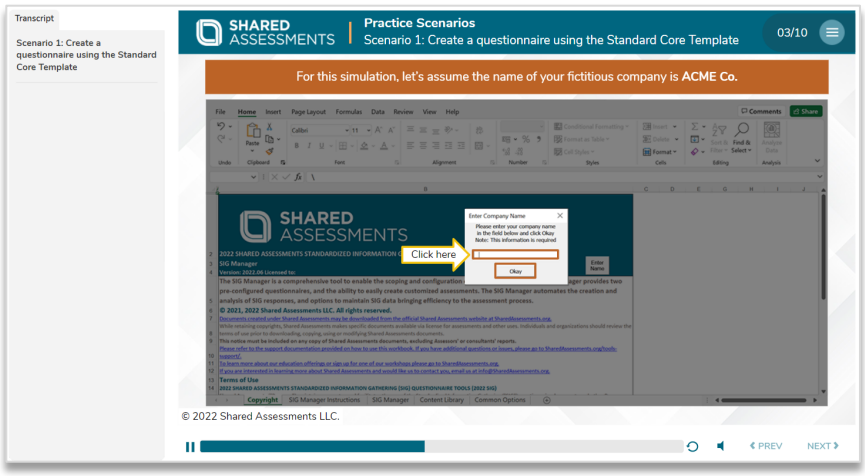
The practice scenarios offer a fail-proof simulated environment for learners to practice their learnings. Each practice scenario is explained in detail, and learners are guided through the simulation step-by-step.



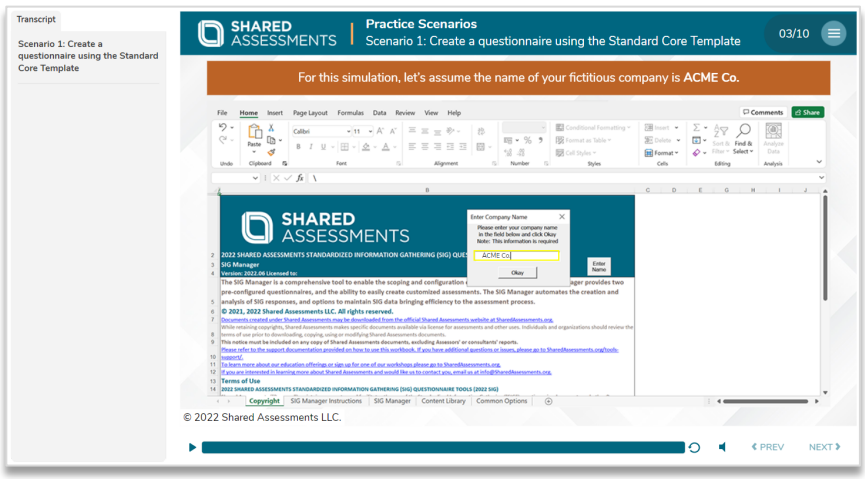




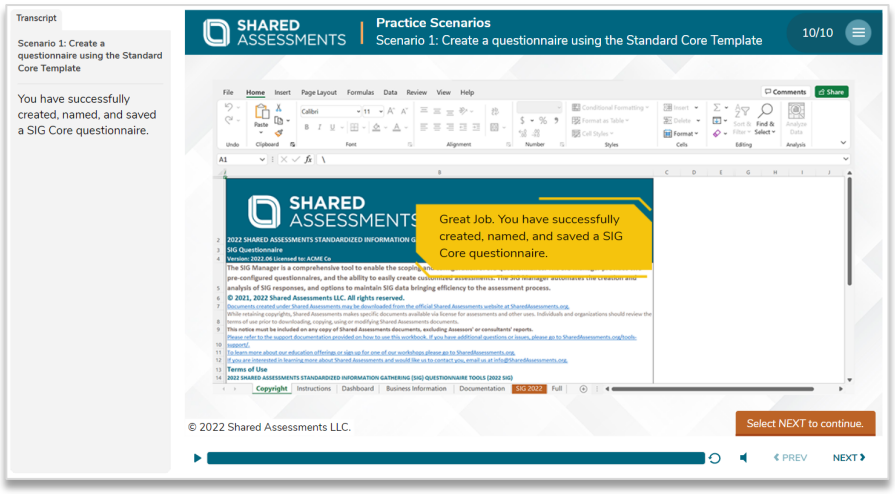
If the learner cannot locate the next step, a prompt asking the learner to 'Click here' is displayed on the screen using a swift animation.

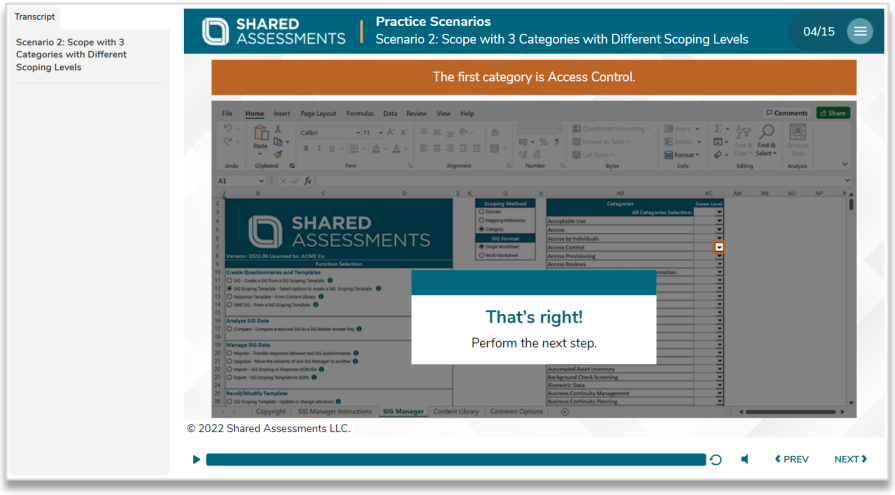


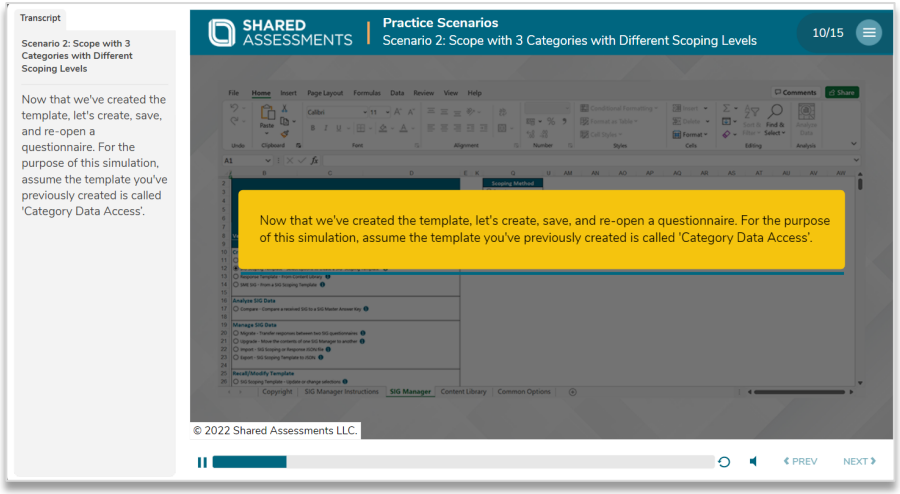
Learner experiences the practice scenarios just as they would experience the SIG tool.

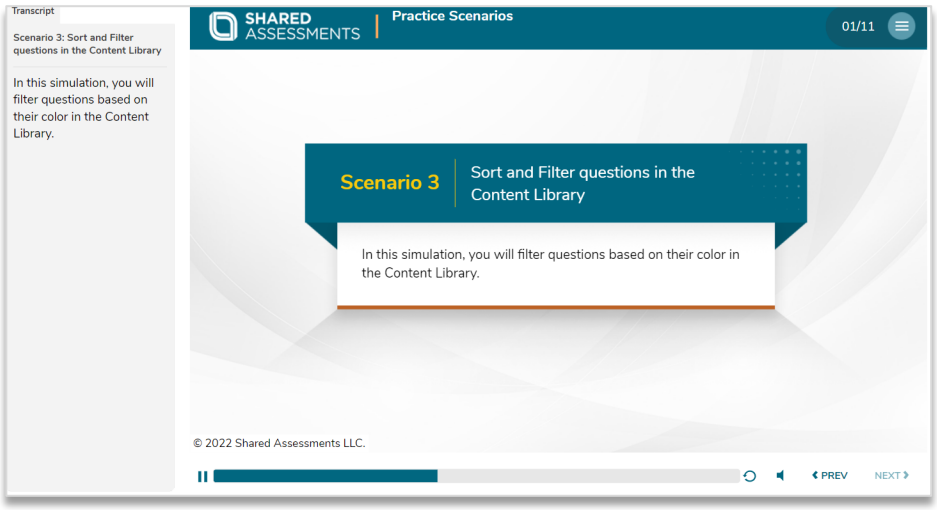


On successfully completing the practice scenario, learners are given appropriate feedback that reinforces their learning.








Transcript
Scenario 3: Sort and Filter questions in the Content Library
In this simulation, you will filter questions based on their color in the Content Library.
SHARED ASSESSMENTS
Practice Scenarios
01/11
Scenario 3
Sort and Filter questions in the Content Library
In this simulation, you will filter questions based on their color in the Content Library.
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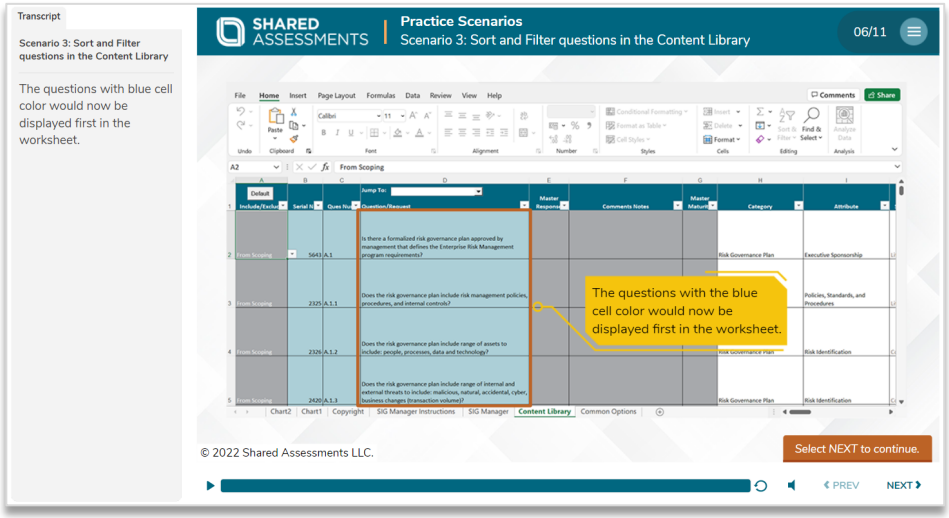
PREV
NEXT


Transcript
Scenario 3: Sort and Filter questions in the Content Library
The questions with blue cell color would now be displayed first in the worksheet.
SHARED ASSESSMENTS
Practice Scenarios
Scenario 3: Sort and Filter questions in the Content Library
06/11
The questions with the blue cell color would now be displayed first in the worksheet.
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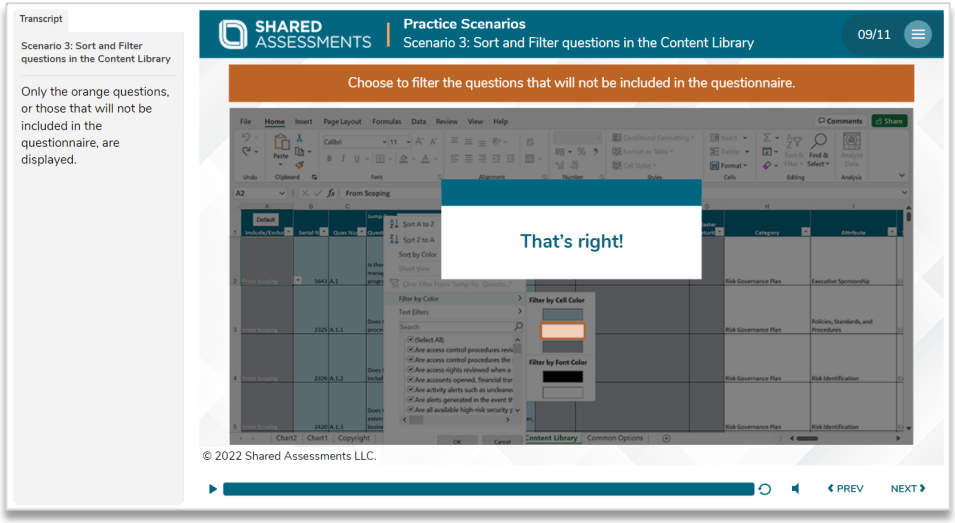
Select NEXT to continue.
PREV
NEXT


Transcript
Scenario 3: Sort and Filter questions in the Content Library
Only the orange questions, or those that will not be included in the questionnaire, are displayed.
SHARED ASSESSMENTS
Practice Scenarios
Scenario 3: Sort and Filter questions in the Content Library
09/11
Choose to filter the questions that will not be included in the questionnaire.
That's right!
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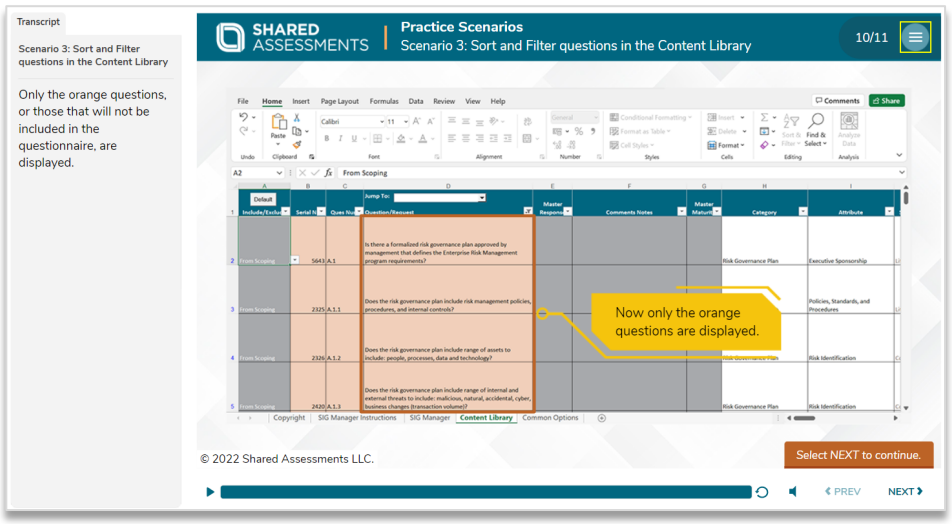
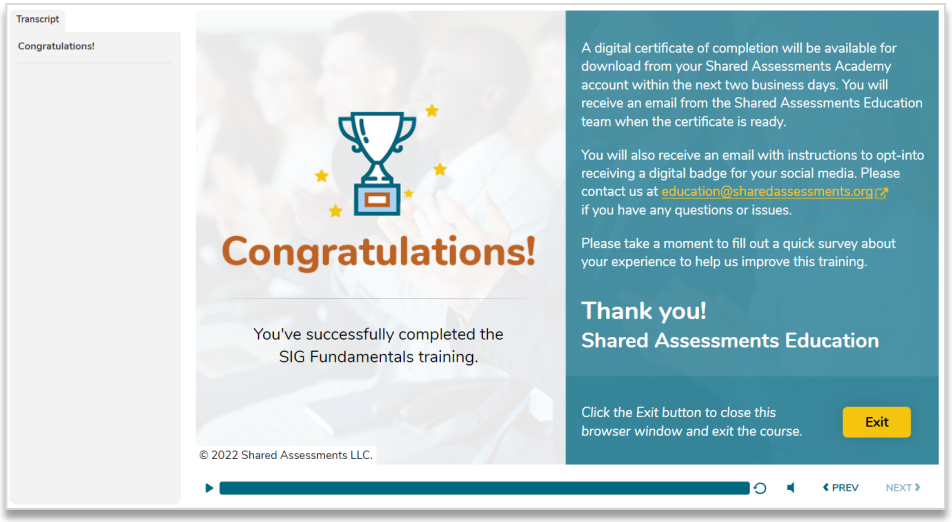
PREV
NEXT



At the end of the training program, Shared Assessments offers all learners a digital certificate of completion.



Delivery of the Program

Learning is delivered to customers through the learning management system (LMS), Litmos. Shared Assessments has created a new Learning path for SIG Fundamentals within Litmos, which consists of one course with two modules that must be completed in a specific order. The first module includes a comprehensive self-study course with six lessons and one assessment, while the second is a course satisfaction survey. Shared Assessments can gather user feedback through reporting by incorporating the satisfaction survey.

Shared Assessments also incorporated a 90-day learning path expiration period.

Once the SCORM package was complete, it was uploaded into the designated Litmos learning path and course. Shared Assessments then integrated the course link into its member management system and website. This integration offered several benefits, including an automatic certificate of completion and Shared Assessments CPE credits for learners upon completing the learning path.

Shared Assessments promotes this learning on two pages on the organization's website, direct email marketing, social media marketing, and targeted email outreach to existing SIG users. In addition, this product is recommended by the organization's Sales Department to potential new SIG users.

Measurable Benefits

In the last six months, more than 260 individuals have signed up for the SIG Fundamentals, making it the most sought-after educational program. According to the survey results, 87% of the respondents would recommend the training to their peers, indicating its effectiveness. Additionally, an overwhelming majority of 97% of the survey participants found that the training equipped them with the necessary groundwork to utilize the Shared Assessments SIG. Furthermore, the high number of SIG Fundamentals course registers suggests a growing demand for comprehensive education on the Shared Assessments SIG. The positive feedback from the survey respondents reinforces the course material's quality and the training's effectiveness in imparting knowledge.

It is also worth noting that the SIG Fundamentals course is designed to cater to a wide range of learners, from beginners to experienced professionals. Therefore, the popularity of the course indicates that it has successfully met the needs of individuals at different skill levels.

In conclusion, the high number of registrations and the positive feedback from survey respondents highlight the effectiveness of the SIG Fundamentals course in providing a strong foundation for utilizing the Shared Assessments SIG. The course's comprehensive approach and flexibility in catering to diverse learners make it an excellent choice for anyone seeking to enhance their knowledge of SIG.

Overall

The comprehensive eLearning training program on the SIG, developed by Infopro Learning, was designed to:

- Guide the customers in using the various functionalities of the SIG.
- Help the customers practice the steps to modify and select the questions per the SIG questionnaire requirement.

The objective was to offer learners fundamental knowledge with a practical and engaging approach that provides comprehensive and relevant guidance in using the SIG. The positive customer feedback and increasing usage of the content confirm that the course achieved its goal, and that Infopro Learning is on the right track for creating future courses.

What's Next:

After the blockbuster success of the comprehensive training for the SIG, Shared Assessments is planning to launch another course for their customers that would delve deeper into the SIG and provide the customers with advanced knowledge self-study training.

The advanced course will delve deeper into the product's advanced features, enabling users to customize the questionnaire further using more complex functionality. The initiative reflects Shared Assessments' commitment to providing customers with relevant and up-to-date training resources to manage third-party risks effectively.

About Brandon Hall Group™

With more than 10,000 clients globally and 30 years of delivering world-class research and advisory services, Brandon Hall Group™ is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

Professional Certifications
Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

Membership
Individual and Enterprise Membership Options: Includes research assets, advisory support, a client success plan and more.

Advisory Offerings
Custom Research Projects, including surveys, focus group interviews and Organization Needs Assessment for Transformation, Technology Selection and Strategy.

Excellence Awards
Three annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

ORGANIZATIONAL EXCELLENCE CERTIFICATION PROGRAM
recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.

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uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's twenty-eight-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.