

Find & Follow Playbook Series

Capture, Share, and Maintain Trusted SOPs

A step-by-step plan for delivering trusted policies and procedures at your Financial Institution.

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The 2-Minute Drill

The Problem Financial Institutions Face

Financial institutions live in two worlds at the same time:

- + **The audit world:** policies and formal documentation exist to prove rules, oversight, and consistency.
- + **The real world:** employees need answers while someone is standing at the counter, on the phone, or waiting in a drive-thru lane.

A breakdown happens when policies and procedures are disconnected from employees' workflows as they respond to requests and solve problems.

The result is operational friction you see every day: interruptions and repeated questions, inconsistent services, and months-long ramp-up times. As systems, tools, and rules change, the complexity only compounds.

Why Most Documentation Efforts Fail

When teams decide it's time to "document everything," they typically start with one of two approaches:...

- + Open Word and start writing
- + Use a "capture every click" tool

The result is more content, not more clarity. Procedures become hard to maintain, difficult to find, and disconnected from real work. Over time, employees stop using them.

What This Playbook Gives You

This playbook outlines how to run a successful documentation project with ScreenSteps that actually creates an impact without consuming your life.

You will learn how to:

- + Bring policies in as-is to make them easy to find and apply
- + Transform scattered procedures into optimized SOPs
- + Use AI to fill knowledge gaps without typing a single word
- + Deliver guidance where employees actually work
- + Maintain accurate documentation over time, especially as procedures change.

The goal is not to create more documentation. The goal is to build documentation that helps you employees perform tasks, respond to requests, and solve problems confidently.

Project Plan

Step 1: Bring Your Policies Into ScreenSteps As-Is (estimated time: 1-2 hours)

1. Create a manual in ScreenSteps called Policies
2. Create chapters in the manual for every policy category (Lending, Deposit Accounts, BSA/AML, Operations, HR).
3. Import the policy/procedure into ScreenSteps

TIP: No policies? No problem. We'll cover how to create new documentation in Step 4.

Step 2: Turn Existing Documentation Into Usable Job Aids (estimated time: 2-7 minutes per guide)

1. Create your knowledge base structure
2. Import existing documentation (individually or in bulk)
3. Use Clarify AI Transform to optimize documentation into clear guides
4. Assign guides for review, updates, and approval

Step 3: Identify Knowledge Gaps (estimated time: Initially 30-60 minutes, ongoing for maintenance)

1. Audit your knowledge base structure to identify what is missing
2. Interview SMEs to identify what is missing

Step 4: Create New Content From Scratch Using AI (estimated time: 2-7 minutes per guide)

1. Use Clarify AI Create to get knowledge out of the employee's head and into articles
2. Let ScreenSteps format the articles automatically
3. Use Clarify AI Assistant to create general knowledge articles
4. Add screenshots or videos when necessary
5. Review articles for clarity and understanding

Step 5: Set Approvals, Certifications, and Keep Content Fresh (estimated time: ongoing)

1. Use collaborator comments to tag SMEs for assistance
2. Set content certifications to notify admins when articles need to be reviewed

Step 6: Launch It to the Team (Where They Actually Work) (estimated time: ongoing)

1. Set up ScreenSteps Sidekick for access to guides in existing workflows
2. Train employees to search for articles when they need help
3. Train employees on feedback loops for direct communication

Step 7: Feedback, Requests, Reporting, and Continuous Improvement (estimated time: ongoing)

1. Review viewer feedback and article requests for knowledge updates
2. Review analytics for optimization and adjustments
3. Send change notifications as guides change



Setting the Scene

Setting the Scene

The Goal: Moving Away from Tribal Knowledge

You're reading this because you're trying to solve a very real, practical problem.

You're responsible for operations, training, compliance, or process improvement in a bank or credit union, and every day, you see the symptoms of not having a reliable system to capture, use, and manage operational documentation. You see employees constantly interrupting each other with questions, processes that are handled differently depending on who's on shift, long onboarding times, and documentation that technically exists but isn't accessible when it matters most.

You're trying to move away from relying on shadowing and word-of-mouth training (i.e., tribal knowledge), but you don't have a clear plan for how to do it.

This is that plan.



The Problem You Keep Running Into

Banks and credit unions live in two worlds at the same time:

- + **The audit world:** Examiners, auditors, and compliance teams need documentation that proves the institution has rules, oversight, and consistency.
- + **The real world:** Frontline employees need answers while someone is standing at the counter, on the phone, or waiting in a drive-thru lane.

Most teams do a decent job in the audit world. They have policies. They have formal, high-level procedures. They have approvals. Everything looks great on paper.

And then you talk to employees and realize that they never use the policies (don't even know how to find them), official procedures to help employees perform tasks don't exist or are not useful, employees are using a random job aid their coworker made three years ago, and they're asking the same handful of "how do I...?" questions every day.

Everything feels a little disjointed and chaotic because there's no single source of truth for employees to rely on to get operational information to do their jobs.

Why The Typical Documentation Project Falls Apart

When a bank or credit union finally decides, "Alright, we're doing this. We're going to document everything," the default playbook usually looks like one of these:

- + **Approach 1: Open Word and start writing.**

You create a Word doc, start writing down everything you know, add screenshots, and try to build the "complete" procedure manual. You might also pull in subject matter experts and do the classic approach: "Sit with me for an hour. I'll watch what you do. I'll write it all down."

This is the old-school way. And it fails every time.

+ **Approach 2: Use a “capture every click” tool.**

This is the Snippet / Snagit / Scribe style approach: take screenshots of every click, auto-generate a guide, and call it documentation.

These tools work well for short, simple tasks. But as procedures get longer and more complex, these tools become less effective.

Plus, they don't have a system for delivering and maintaining the SOPs. So yes, you documented it. But it's not going to be easy to find, follow, or update when things change.

What's This Playbook Going To Help You Do?

This playbook outlines how to run a successful documentation project with ScreenSteps that **actually creates an impact** without consuming your life.

It walks you through how to take what you already have—policies, procedures, tribal knowledge, and scattered documents—and turn it into a usable system inside ScreenSteps. Not just something that satisfies auditors, but something your frontline and back-office employees can actually rely on while they're doing real work.

By the end of this playbook, you'll understand how to:

- + Leverage your existing policies without rewriting them
- + Make policy information findable and usable in daily operations
- + Identify and fill gaps in frontline procedures and job aids
- + Break complex banking workflows into clear, followable guides
- + Use ScreenSteps and its AI tools to create documentation quickly
- + Organize content so employees can find what they need in seconds
- + Keep documentation accurate as processes, systems, and rules change

Most importantly, this playbook helps you shift from “we have documentation” to “our documentation helps us run operations.”

Using ScreenSteps

ScreenSteps is the platform you'll use to turn knowledge into documentation people can actually find, follow, and trust.

Instead of being another place where documents go to sit, ScreenSteps is designed to support work as it's happening.

ScreenSteps provides your team:

- 1: Tools to quickly turn complex information into clear, usable guides
- 2: A structured system to organize knowledge across your organization
- 3: Guidance employees can access exactly when they need it
- 4: A reliable way to keep knowledge current as rules and policies change

In this documentation project, you'll use ScreenSteps to bring together everything that's currently scattered across policies, procedures, job aids, and people's heads. You'll organize that content into clear manuals, chapters, and articles so it's easy to navigate.

You'll use built-in AI tools to create and clean up procedures quickly, whether you're importing existing content or building new guides from scratch. And you'll use ScreenSteps' search, chat, and contextual help to make sure employees can actually use what you've built while they're doing real work.

By the end of the project, ScreenSteps becomes the single place your team goes to find answers, follow procedures, and stay aligned as things change.

01

Import Your Policies into ScreenSteps

Step 1: Import Your Policies Into ScreenSteps As-is

Policies exist to define rules and boundaries. They establish limits, requirements, and conditions. In a bank or credit union, they are the foundation of compliance and governance.

What policies are not meant to be are step-by-step instructions. They don't show employees how to do the work. That's the role of reference guides and job aids, which translate policy and procedures into action (we'll get to those next).

Most financial institutions already have strong policies and procedures, usually stored in systems built for governance—SharePoint, policy management tools, shared drives, or document repositories. These systems do an excellent job with approvals, version control, board sign-off, and attestations. From a compliance standpoint, they work.

Where they fall down is in **daily usability**.

When an employee needs a specific rule in the middle of a member interaction, those systems make it hard to find the answer quickly. The policy exists, but it's buried. That's the gap ScreenSteps fills.

The screenshot shows the ScreenSteps application interface. The browser address bar displays 'demo.screensteps.app/site/25688/toc/manual/135041'. The left sidebar contains a navigation menu with categories like Content, Feedback, Reporting, Design, Site, Settings, and Support. The main content area shows a 'Table of contents / Policies' page with a search bar and a table of chapters. The table has columns for Chapters (6 Total), Permissions, Articles, and Status. All listed chapters have a 'Published' status.

Chapters (6 Total)	Permissions	Articles	Status
Lending	Public	8 Articles	Published
Deposit Accounts	Public	8 Articles	Published
BSA/AML	Public	7 Articles	Published
Operations	Public	2 Articles	Published
Human Resources	Private	2 Articles	Published
Member Services	Public	2 Articles	Published
Governance & Board Oversight	Public	2 Articles	Published
Compliance	Public	2 Articles	Published
Risk Management & Audit	Public	2 Articles	Published
IT & Cybersecurity	Public	2 Articles	Published
Marketing & Communications	Public	2 Articles	Published

How to Use ScreenSteps for Policies

1: Create a manual in ScreenSteps called Policies

2: Create chapters in the manual for every policy category (Lending, Deposit Accounts, BSA/AML, Operations, HR). These often have numbers associated with them.

3: Either import the policy/procedure into ScreenSteps (if it's in DOCX format) or create an article for each policy and copy/paste the policy into ScreenSteps.

That's it for importing existing policies and procedures.

Tip: No Policies? No Problem.

If you don't have existing policies, you can build them from scratch using ScreenSteps. It has collaborative editing features and AI tools that can help you produce amazing policies. We'll talk more about this in Part 4 and 5.

Once your policies are in ScreenSteps, they're immediately searchable. Employees can find them by keyword, and ScreenSteps' AI can surface specific rules or limits buried inside long documents. Employees get quick answers and can still click through to the full policy when needed.

02

Convert Documentation into Job Aids

Step 2: Convert Documentation into Job Aids

Overview

Step 1: Create the Structure (Your Table of Contents)

Step 2: Import Your Existing Documentation

Step 3: Reformat for Scannability and Usability

Step 4: Team Review and Updates

Now we move into the part that actually drives daily success: creating reference guides and job aids that are easy to find, easy to follow, and usable in the moment.

The Process

Now we move into the part that actually drives daily success: creating reference guides and job aids that are easy to find, easy to follow, and usable in the moment.

This happens in a clear sequence.

Step 1: Create the Structure (Your Table of Contents)

The first step is building the structure in ScreenSteps. You start by creating manuals for major topic areas. Manuals represent broad domains of work, such as Electronic Funds Transfer, Credit Cards, Online Banking, Lending, or Account Services.

Inside each manual, you create chapters that represent subtopics. For example:

- + In an *Electronic Funds Transfer* manual, chapters might include ACH, Automatic Transfers, and External Transfers.
- + In a *Credit Cards* manual, chapters might include Visa, Visa Online, and Apple/Google/Samsung Pay.

At this stage, you're building the outline—the table of contents that reflects how work is actually organized in your institution.

The screenshot shows the 'Table of contents' page in the ScreenSteps application. The interface includes a sidebar on the left with navigation options: Content, Feedback, Reporting, Design, Site, Settings, and Support. The main content area is titled 'Table of contents' and features a search bar and a 'Reorder' button. A table lists the structure of the content, with columns for Title, Permissions, Contents, and Status. The table shows a hierarchy of manuals and chapters, all of which are currently unpublished.

Title	Permissions	Contents	Status
> Policies		1 Manual	
> Procedures		10 Manuals	
Electronic Funds Transfer	Public	1 Chapter	Unpublished
Credit Cards	Public	1 Chapter	Unpublished
Online Banking	Public	1 Chapter	Unpublished
Lending	Private	1 Chapter	Unpublished
Account Services	Public	1 Chapter	Unpublished
Debit Cards	Public	8 ---	Unpublished
Deposits & Payments	Public	4 ---	Unpublished
Fraud, Disputes, & Risk Events	Public	7 ---	Unpublished
Branch & Teller Operations	Public	2 ---	Unpublished
Call Center	Public	3 ---	Unpublished

Step 2: Import Your Existing Documentation

Once the structure exists, you bring in your existing content and place it into the appropriate manuals and chapters.

If your documentation is in Word format, you can upload DOCX files directly into ScreenSteps. If content exists in PDFs or other formats, that information can be copied and pasted into ScreenSteps articles....

Tip: Do This In Bulk

If you're working with the ScreenSteps team, this step is handled in bulk for you. You're given a secure OneDrive folder, and you upload all existing procedural content there—Word documents, PDFs, PowerPoint files, and anything else that contains instructions. There's no need to clean up or reorganize beforehand. Just provide the source material as-is.

One recommendation is that, as content is brought in, you will want to split job aids out. For example, if a single document contains multiple procedures, those procedures are separated into individual articles. For example, a document titled Debit Cards might include instructions for:

- + Issuing a debit card
- + Instant issue
- + Replacing a lost or stolen card
- + Increasing debit card limits

In ScreenSteps, each of those should become its own article. One article equals one procedure.

Put yourself in the employee's shoes: what is the request they are being asked? That should be the single procedure.

This is critical for findability and usability.

At the same time, foundational information (*background, explanations, and context*) is separated from actionable steps. Foundational knowledge becomes its own articles, while procedural articles focus only on what the employee needs to do.

If you're working with the ScreenSteps team, this separation and splitting is handled for you at scale using Clarify AI Bulk Import.

Step 3: Reformat for Scannability and Usability

Next, use **ScreenSteps Clarify AI Transform** to reformat procedures so they're easy to follow in real time.

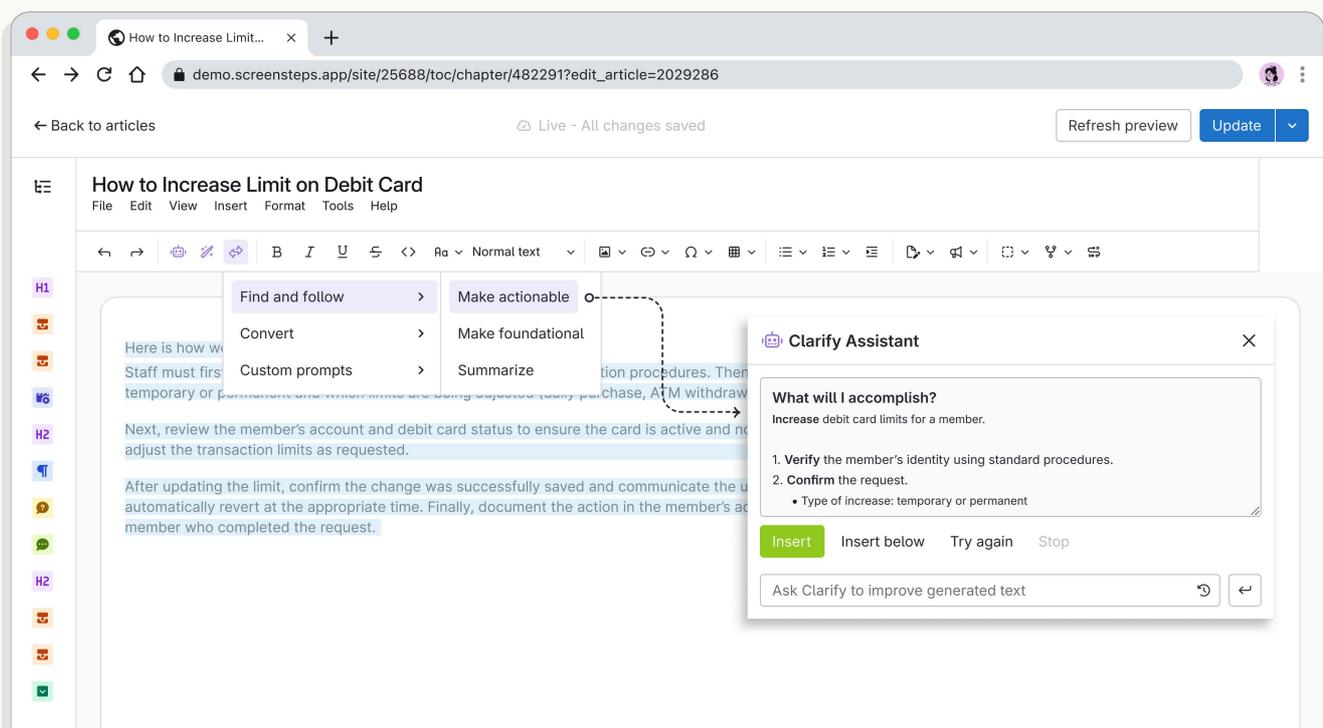
Here's how:

- 1: Open the article
- 2: Select all of the copy in the article
- 3: Open the Clarify AI Transform dropdown
- 4: Choose Find & Follow
- 5: Select "Make Actionable" or "Make Foundational" based on article type

Long narrative text is rewritten into clear, concise steps. Headings are clarified. Content is structured so employees can scan the page, understand where they are in the process, and move forward confidently. The guide reads like a recipe, not a policy memo.

This step is what turns "documentation" into a job aid.

Note: This is done for you if you are doing the bulk import option with the ScreenSteps team.



The screenshot shows a web browser window with the URL `demo.screensteps.app/site/25688/toc/chapter/482291?edit_article=2029286`. The page title is "How to Increase Limit on Debit Card". The editor interface includes a menu with options: "Find and follow", "Convert", "Custom prompts", "Make actionable", "Make foundational", and "Summarize". A "Clarify Assistant" dialog box is open, displaying the following content:

Clarify Assistant

What will I accomplish?
Increase debit card limits for a member.

1. **Verify** the member's identity using standard procedures.
2. **Confirm** the request.
 - Type of increase: temporary or permanent

Buttons: **Insert**, Insert below, Try again, Stop

Input field: Ask Clarify to improve generated text

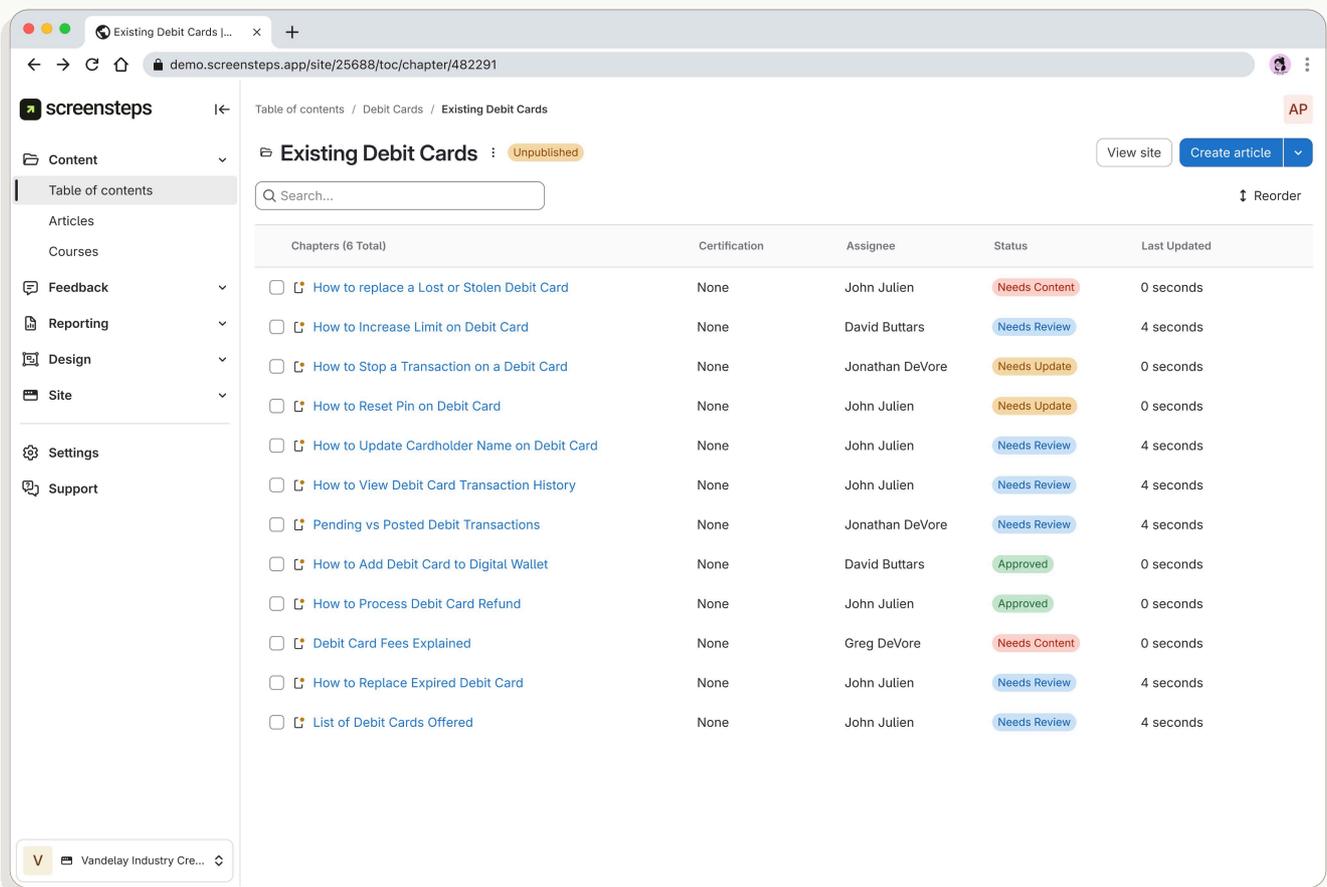
Step 4: Team Review and Updates

Finally, your team reviews the content.

Each article is assigned to an owner and given a status (such as Needs Review or Needs Update). Reviewers confirm accuracy and make corrections where procedures have changed over time. Editors can use the track changes and comments feature to easily collaborate with others.

As updates are made, editors can reassign articles to others and update the status. At any given point, you can identify who is responsible for what and track progress over time.

Because each procedure now stands on its own, reviews are faster and far less overwhelming than reviewing large, bundled documents.



The screenshot displays the 'Existing Debit Cards' page in the Screensteps application. The page is titled 'Existing Debit Cards : Unpublished' and includes a search bar and a 'Reorder' button. A table lists 14 articles, each with a checkbox, a title, a certification level, an assignee, a status, and a last updated time. The status column uses color-coded labels: 'Needs Content' (red), 'Needs Review' (blue), 'Needs Update' (orange), and 'Approved' (green). The assignees listed are John Julien, David Buttars, Jonathan DeVore, and Greg DeVore. The last updated times are either '0 seconds' or '4 seconds'.

Chapters (6 Total)	Certification	Assignee	Status	Last Updated
<input type="checkbox"/> How to replace a Lost or Stolen Debit Card	None	John Julien	Needs Content	0 seconds
<input type="checkbox"/> How to Increase Limit on Debit Card	None	David Buttars	Needs Review	4 seconds
<input type="checkbox"/> How to Stop a Transaction on a Debit Card	None	Jonathan DeVore	Needs Update	0 seconds
<input type="checkbox"/> How to Reset Pin on Debit Card	None	John Julien	Needs Update	0 seconds
<input type="checkbox"/> How to Update Cardholder Name on Debit Card	None	John Julien	Needs Review	4 seconds
<input type="checkbox"/> How to View Debit Card Transaction History	None	John Julien	Needs Review	4 seconds
<input type="checkbox"/> Pending vs Posted Debit Transactions	None	Jonathan DeVore	Needs Review	4 seconds
<input type="checkbox"/> How to Add Debit Card to Digital Wallet	None	David Buttars	Approved	0 seconds
<input type="checkbox"/> How to Process Debit Card Refund	None	John Julien	Approved	0 seconds
<input type="checkbox"/> Debit Card Fees Explained	None	Greg DeVore	Needs Content	0 seconds
<input type="checkbox"/> How to Replace Expired Debit Card	None	John Julien	Needs Review	4 seconds
<input type="checkbox"/> List of Debit Cards Offered	None	John Julien	Needs Review	4 seconds

By the end of this process, your existing documentation isn't just imported—it's transformed. You're left with a clear, structured set of job aids that employees can find quickly and follow confidently, and a foundation that makes it easy to fill in gaps going forward.

03

Identify the Gaps

Step 3: Identify the Gaps

At this point, you've already done a lot of heavy lifting.

You've brought your policies into ScreenSteps exactly as they are. You've created a clear structure using manuals and chapters. You've imported existing documentation, split it into usable job aids, reformatted it for clarity and scannability, and had your team review and correct it.

That work alone usually covers a significant portion of what employees need.

But it doesn't cover everything.

No matter how strong your policies are or how much existing documentation you started with, there will always be gaps. There are questions employees ask that were never documented. There are procedures that live entirely in someone's head. There are newer tools, workflows, and edge cases that were never captured in formal documentation.

This next phase is about identifying those gaps and filling them.

Using Structure to Reveal What's Missing

Because you've already organized your content into manuals, chapters, and articles, gap analysis becomes much easier. You're no longer guessing what might be missing. You can see it.

Manuals represent major areas of work. Chapters represent subtopics within those areas. Articles represent individual procedures or foundational topics. When you look at your table of contents, it becomes obvious where content is thin or nonexistent.

Sometimes this means expanding existing manuals. Other times, it means creating entirely new ones.

A common example is **Online and Mobile Banking**. Many institutions discover that while they have policies and vendor documentation, they don't have clear internal job aids for employees to use to support members with these tools. That's a signal to create a new manual.

A typical Online and Mobile Banking manual might include chapters such as:

- + Overview (foundational article)
- + Account Management
- + Navigation and Transactions
- + Transfers and External Accounts
- + Loan and Payment Management
- + Bill Pay
- + Alerts and Notifications
- + Statements and Documents

Once those chapters exist, they act as placeholders.

They prompt the next, more important question: What do employees actually need to know or do in each of these areas?

Inside those chapters, you begin identifying specific procedures and questions, such as:

- + How to make a one-time internal transfer online
- + How to set up a recurring internal transfer
- + How to view scheduled transfers
- + How to add an external account
- + What are the limits for external transfers

This structure turns gap-filling into a concrete task. You're no longer "writing documentation." You're filling in specific, visible blanks.

Online & Mobile Bankin... x +

demo.screensteps.app/site/25688/toc/manual/135044

screensteps |<

- Content
 - Table of contents
 - Articles
 - Courses
- Feedback
- Reporting
- Design
- Site

Settings Support

Online & Mobile Banking

Online & Mobile Banking : Unpublished

Search...

Chapters	Permissions	Articles
Overviews (Foundational Knowledge)	Public	3 Articles
Account Management	Public	6 Articles
Navigation and Transactions	Public	4 Articles
Loan and Payment Management	Private	4 Articles
Bill Pay	Public	4 Articles
Alerts and Notifications	Public	6 Articles
Statements and Documents	Public	3 Articles
Transfers and External Accounts	Public	5 Articles

V Vandelay Industry Cre...

Transfers and Externa... x +

demo.screensteps.app/site/25688/toc/chapter/482298

screensteps |<

Table of contents / Online & Mobile Banking / Transfer and External Accounts

Transfer and External Accounts : Unpublished

View site Create article

Reorder

Chapters (6 Total)	Certification	Assignee	Status	Last Updated
<input type="checkbox"/> How to make a One-Time Internal Transfer Online	None	-	None	30 minutes
<input type="checkbox"/> How to Set Up Recurring Internal Transfers	None	-	None	12 minutes
<input type="checkbox"/> How to View Scheduled Transfers	None	-	None	2 minutes
<input type="checkbox"/> How to Add an External Account	None	-	None	10 minutes
<input type="checkbox"/> What Are the Limits for External Transfers	None	-	None	1 minutes

V Vandelay Industry Cre...

04

Create New Content From Scratch Using AI

Step 4: Create New Content From Scratch Using AI

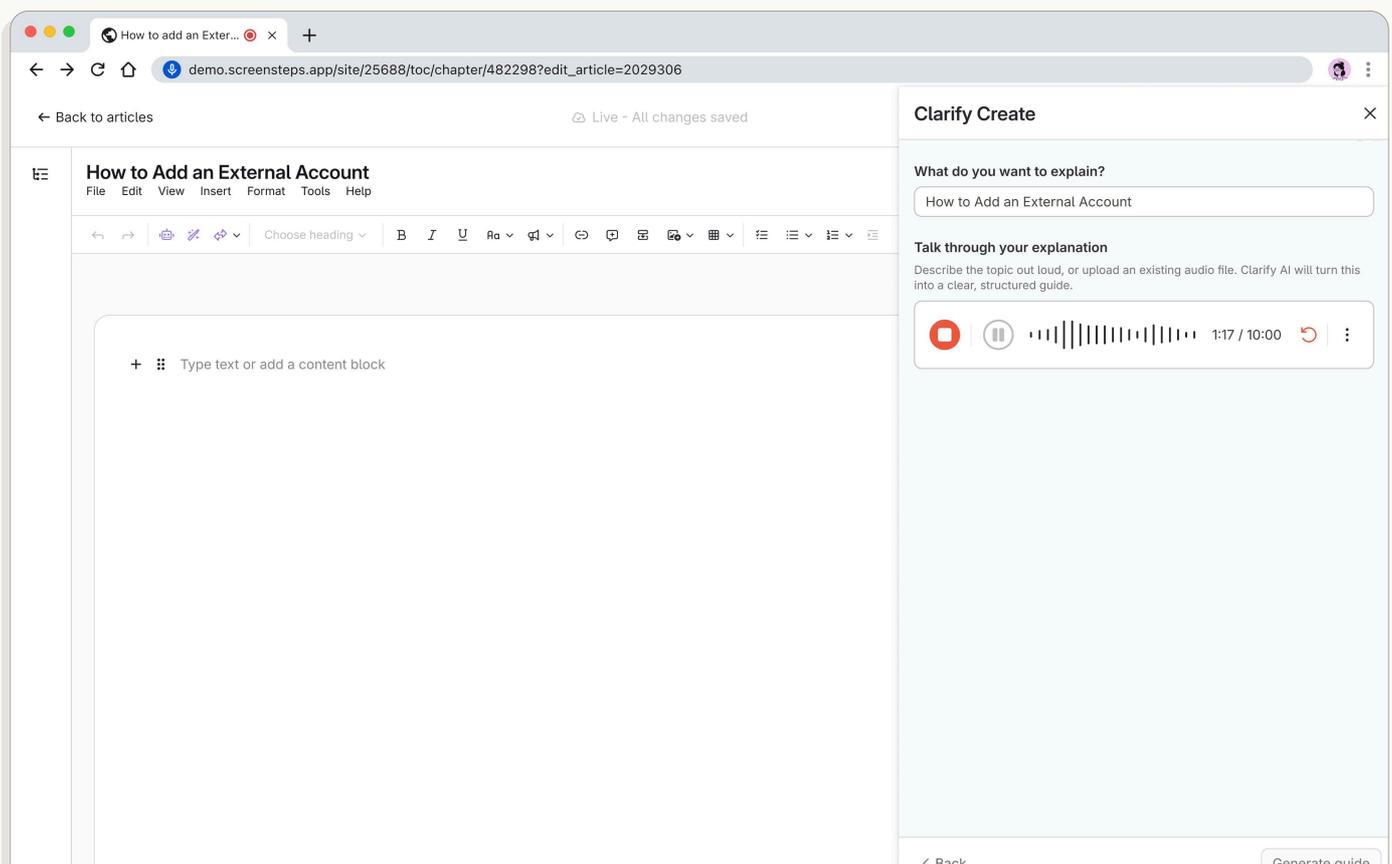
Once you've identified what's missing, you've got to get the information out of your head and onto "paper." This is where documentation projects traditionally stall.

ScreenSteps solves this by making content creation fast and flexible.

Employees can create new guides in whatever way makes the most sense for the situation. They can talk through a process using Clarify AI Create, paste in an email or notes and let AI structure it, type directly if they prefer, or record a screen walkthrough when it's appropriate.

Clarify AI Create

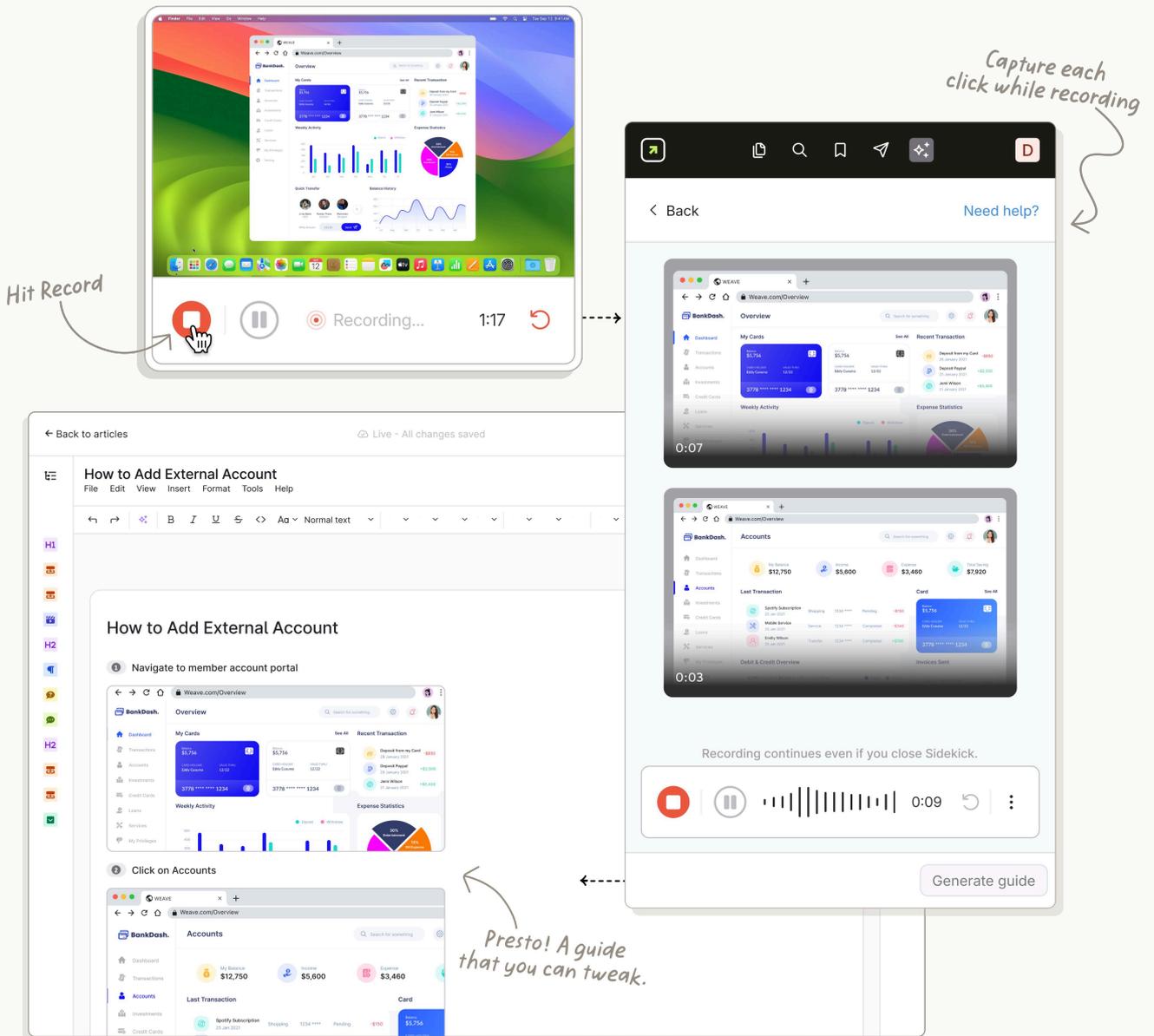
The fastest method for most teams is simply talking it out. An employee opens a placeholder article, hits record, and explains the process as they would to a coworker. ScreenSteps transcribes the audio, turns it into structured steps, formats it like a recipe, and produces a usable first draft in minutes. Screenshots can be added afterward where they add clarity.



The screenshot displays a web browser window with the URL `demo.screensteps.app/site/25688/toc/chapter/482298?edit_article=2029306`. The main content area shows a document editor for the article "How to Add an External Account". The editor includes a menu bar (File, Edit, View, Insert, Format, Tools, Help) and a toolbar with various editing options. The main text area contains a placeholder: "+ :: Type text or add a content block".

On the right side, a sidebar titled "Clarify Create" is open. It contains a text input field with the text "How to Add an External Account". Below this, there is a section titled "Talk through your explanation" with the instruction: "Describe the topic out loud, or upload an existing audio file. Clarify AI will turn this into a clear, structured guide." Underneath this text is an audio player interface showing a red record button, a play/pause button, a progress bar, and a timestamp of "1:17 / 10:00". At the bottom of the sidebar, there are two buttons: "< Back" and "Generate guide".

Screen recording can also be used to generate guides with screenshots pulled directly from the recording. In banking environments, this needs to be handled carefully—test environments are ideal, and capturing PII must always be avoided. When screen recording isn't practical, use the audio-only capture and add screenshots when needed.



Workflow Articles

Also, some procedures aren't linear step-by-step tasks. They involve decision points. "If this happens, do that. If not, go another direction." This shows up constantly in lending, account onboarding, exception handling, and member servicing edge cases.

For these situations, ScreenSteps Workflow Articles allow you to build decision trees so employees can follow the correct path based on the scenario in front of them.

The screenshot shows a web browser window with a title bar containing three window control buttons. The main content area is titled "Opening a New Account" and includes a bookmark icon in the top right corner. The workflow consists of three main sections:

- Is the prospective member an existing member?**
 - Question: "Does the person already have an account with us?" (marked with a green checkmark)
 - Selected: Yes
- What type of account are they opening?**
 - Question: "Ask the prospective member what they want to open:" (marked with a green checkmark)
 - Selected: Checking Account
- Verify Prospective Member Meets The Following Criteria**
 - 1. Current Driver's License with Address (dropdown arrow pointing down)
 - 2. SSN OR TIN (dropdown arrow pointing up)
 - Prospective member must have a Social Security Number (SSN) OR a Taxpayer Identification Number (TIN)
 - 3. Meet Eligibility Requirements (dropdown arrow pointing down)
 - 4. \$25 to open account

Assign articles to coworkers who have the knowledge and ask them to explain the procedure. Once it's documented, you can always format it as a decision tree or a checklist. But don't worry about that right up front – first get the knowledge out of their heads!

05

Set Approvals, Certifications, and Keep Content Fresh

Step 5: Set Approvals, Certifications, and Keep Content Fresh

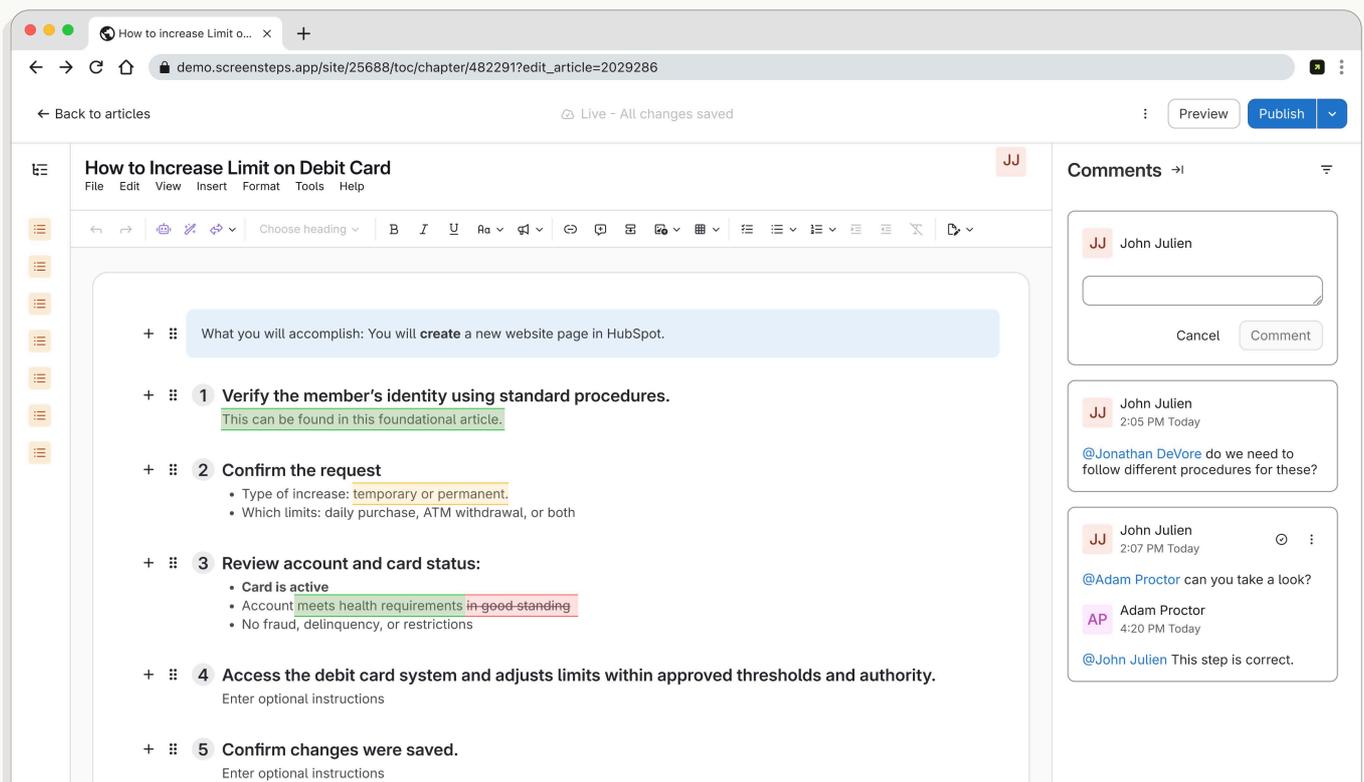
Documentation never stays accurate forever—especially in banking. Systems change, rules evolve, vendors update interfaces, and small process tweaks happen all the time. If documentation isn't actively maintained, it slowly drifts out of date, and that's when people stop trusting it.

ScreenSteps is built to help you manage documentation quality over time, not just create it once and hope for the best.

As content is created and updated, articles can be assigned to specific reviewers and owners. Statuses make it easy to see what needs review, what's in progress, and what's approved.

Collaborator Comments

Authors can leave comments and track changes, allowing teams to collaborate on updates without losing visibility into what's being revised or why.



The screenshot shows a web browser window with the URL `demo.screensteps.app/site/25688/toc/chapter/482291?edit_article=2029286`. The page title is "How to Increase Limit on Debit Card". The document content is a list of steps:

- What you will accomplish: You will create a new website page in HubSpot.
- 1 Verify the member's identity using standard procedures.
This can be found in this foundational article.
- 2 Confirm the request
 - Type of increase: temporary or permanent.
 - Which limits: daily purchase, ATM withdrawal, or both
- 3 Review account and card status:
 - Card is active
 - Account meets health requirements in good standing
 - No fraud, delinquency, or restrictions
- 4 Access the debit card system and adjusts limits within approved thresholds and authority.
Enter optional instructions
- 5 Confirm changes were saved.
Enter optional instructions

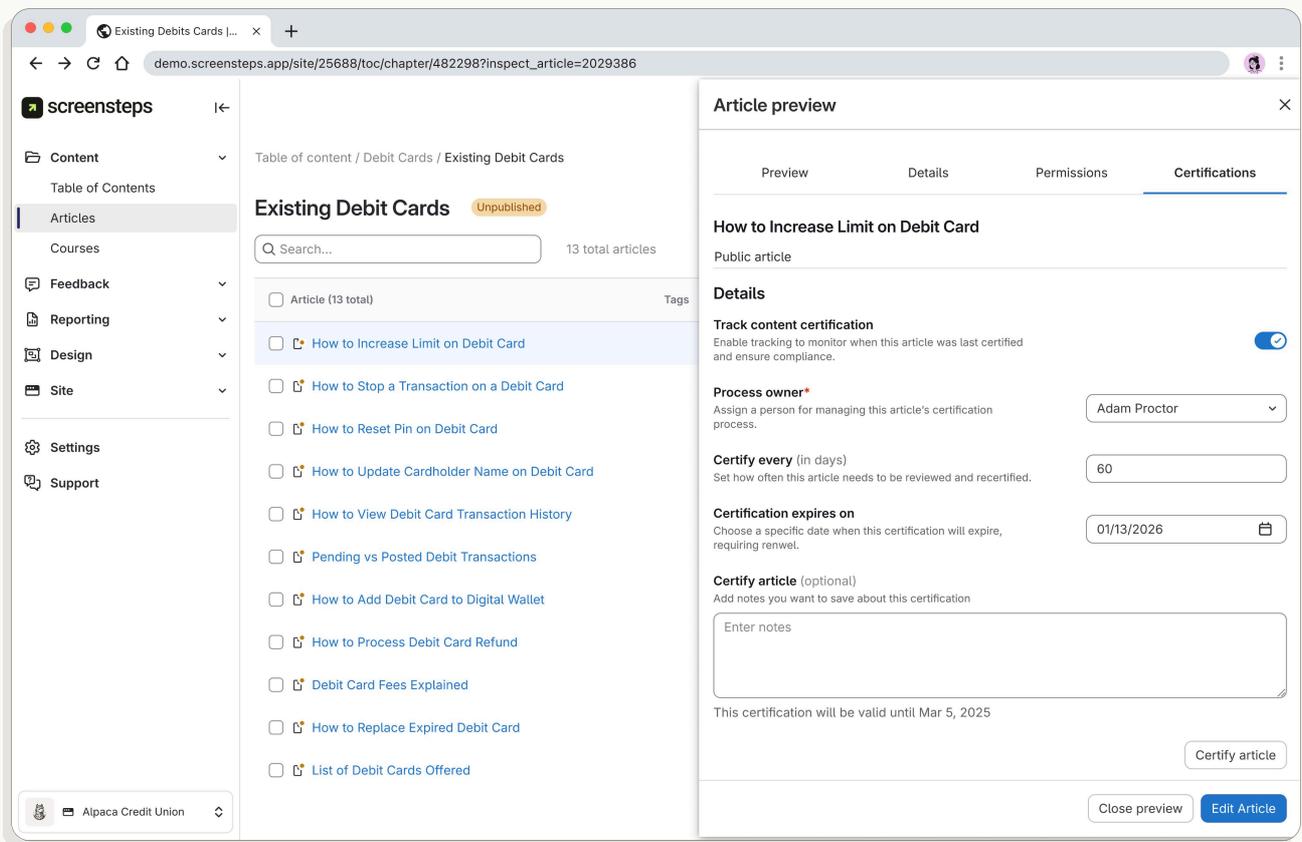
The right sidebar shows a "Comments" section with three entries:

- John Julien (JJ) with a comment input field and "Cancel" and "Comment" buttons.
- John Julien (JJ) at 2:05 PM Today: "@Jonathan DeVore do we need to follow different procedures for these?"
- John Julien (JJ) at 2:07 PM Today: "@Adam Proctor can you take a look?"
- Adam Proctor (AP) at 4:20 PM Today: "@John Julien This step is correct."

Content Certifications

For areas that require more formal oversight, ScreenSteps also supports content certifications. A reviewer can certify an article and set a review interval—such as 90, 180, or 365 days. When that interval is reached, ScreenSteps automatically reminds the appropriate people that the content needs to be reviewed and recertified.

This creates a practical, sustainable way to keep high-risk or high-impact content accurate over time, without relying on memory or manual tracking.



06

Launch It to the Team

(Where They Actually Work)

Step 6: Launch It to the Team

(Where They Actually Work)

Once your content is in ScreenSteps, it becomes immediately usable in ways traditional documentation never is.

ScreenSteps Sidekick

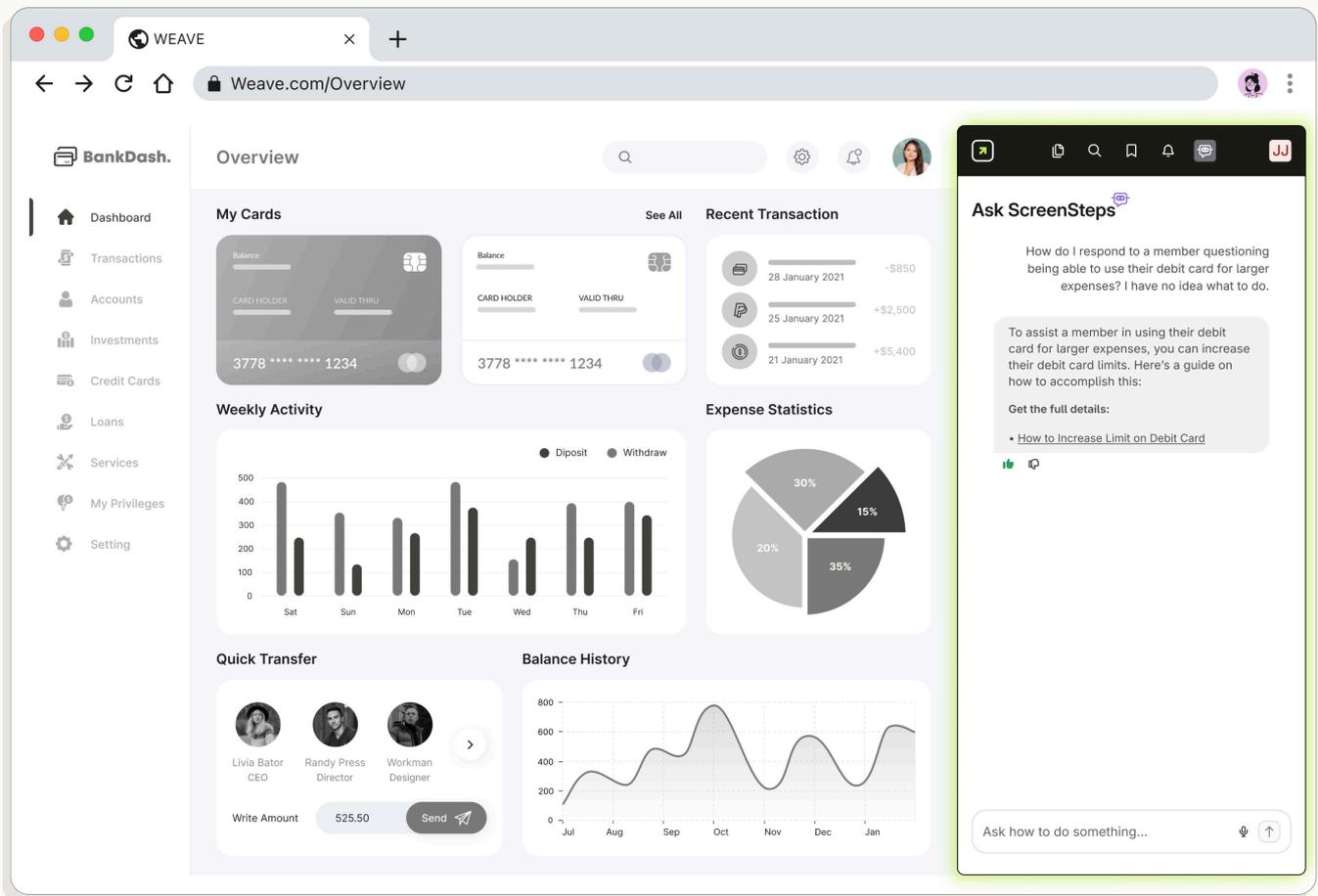
For many teams, the biggest shift happens with Sidekick. Sidekick is a browser extension that brings documentation directly into the applications employees use every day. Whether they're working in online banking admin tools, CRMs, ticketing systems, vendor portals, or any other web-based system, relevant guides can appear right alongside their work.

The screenshot shows a web browser window with the URL 'Weave.com/Overview'. The main content area displays a dashboard for 'BankDash' with sections for 'My Cards', 'Recent Transaction', 'Weekly Activity', 'Expense Statistics', 'Quick Transfer', and 'Balance History'. A Sidekick extension is overlaid on the right side of the browser, displaying a document titled 'How to Increase Limit on Debit Card'. The document content includes:

- What you will accomplish: Increase debit card limits for a member.
- 1 Verify the member's identity using standard procedures.
- 3 Review account and card status:
 - Card is active
 - Account in good standing
 - No fraud, delinquency, or restrictions
- 4 Access the debit card system and adjust limits within approved thresholds and authority
- 5 Confirm changes are saved
- 6 Communicate to the member:
 - New limit amount
 - Effective timeframe
 - When limit will revert (if temporary)
- 7 Document in the core system:
 - Reason for change
 - Duration (if temporary)
 - Staff member completing request

ScreenSteps Chat

ScreenSteps Chat makes the Sidekick even more powerful. Employees can ask real questions the way they think about their work, and the responses are grounded entirely in your documentation. If something isn't documented in ScreenSteps, it won't invent an answer or pull information from the web. That keeps guidance accurate, consistent, and aligned with how your institution actually operates.



This is where Find & Follow becomes real. Employees don't leave the task to hunt for instructions. The instructions meet them in the flow of work, making it easier to do things correctly, consistently, and confidently.

07

Feedback, Requests, Reporting, and Continuous Improvement

Step 7: Feedback, Requests, Reporting, and Continuous Improvement

Once people start using the documentation, the system starts giving back. Employees naturally begin providing feedback.

Viewer Feedback

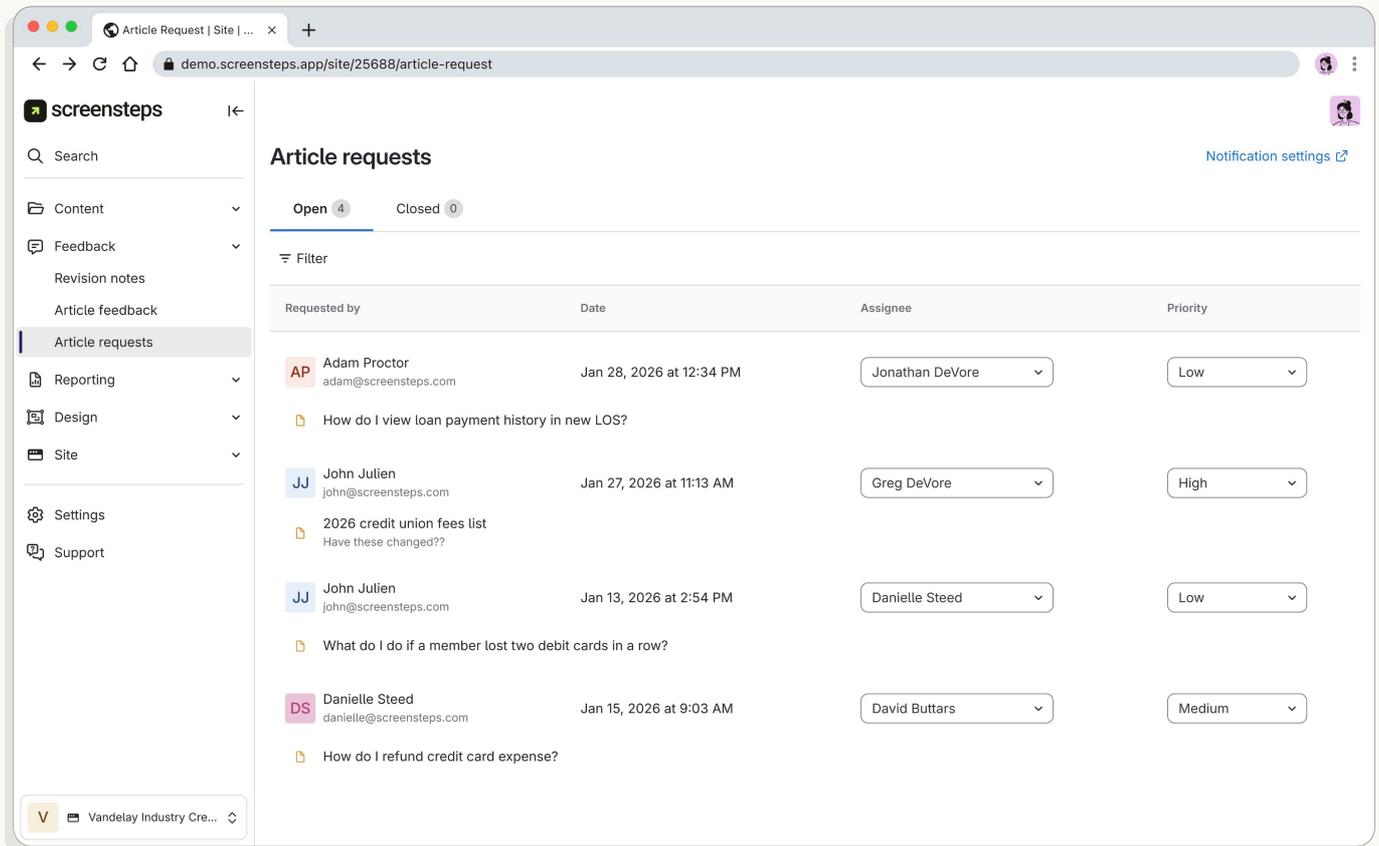
When something is unclear, outdated, or missing, they can leave comments directly on articles. Those comments are visible to editors, not published as part of the guide, which keeps the documentation clean while still capturing real-world input.

The screenshot displays the 'Viewer feedback' section of the Screensteps application. The interface includes a sidebar with navigation options like 'Content', 'Feedback', and 'Viewer feedback'. The main area shows a table of feedback items under the 'Assigned' tab. The table has columns for Author, Owner, Status, and Date. The feedback items are as follows:

Author	Owner	Status	Date
JJ John Julien john@screensteps.com How to Verify Member Identity Over the Phone Not sure what to do if catler doesn't meet criteria 2	Adam Proctor	Unpublished	Jan 30, 2026 at 12:34 PM
JJ John Julien john@screensteps.com Standard Fraud Detection Protocol This needs to be based on the recent regulation...	Adam Proctor	Unpublished	Jan 30, 2026 at 12:37 PM
JD Jonathan DeVore ja@screensteps.com How to Originate Auto Loan The third step here is a little unclear	Danielle Steed	Unpublished	Feb 2, 2026 at 12:37 PM
DB David Butters davidbutters@screensteps.com How to Increase Limit on Debit Card What is default limit and max limit? A member...	Trevor DeVore	Unpublished	Feb 7, 2026 at 12:37 PM

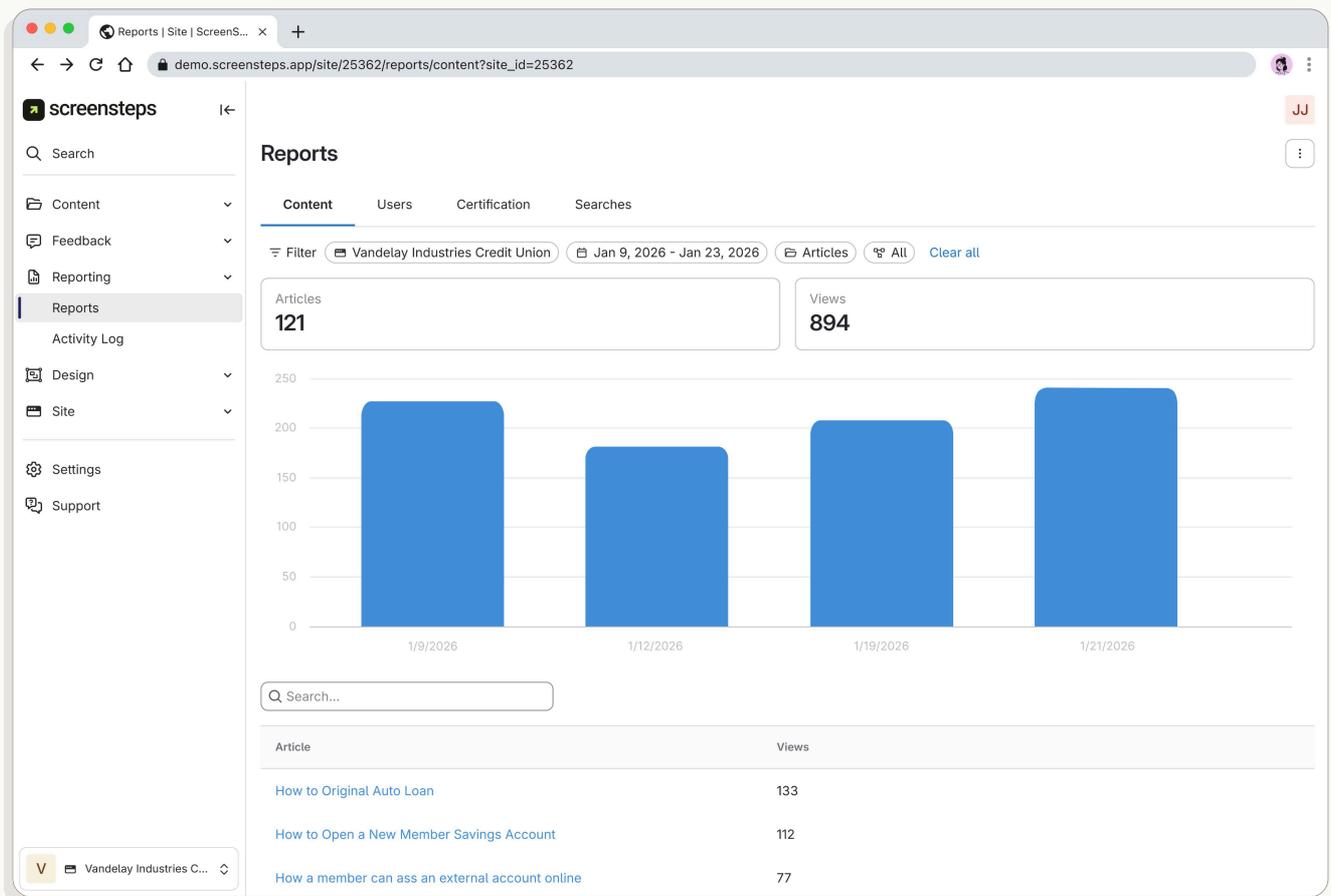
Article Requests

When employees can't find what they're looking for, they can submit requests for new content. This turns documentation from a static library into a living system that improves over time based on actual use.



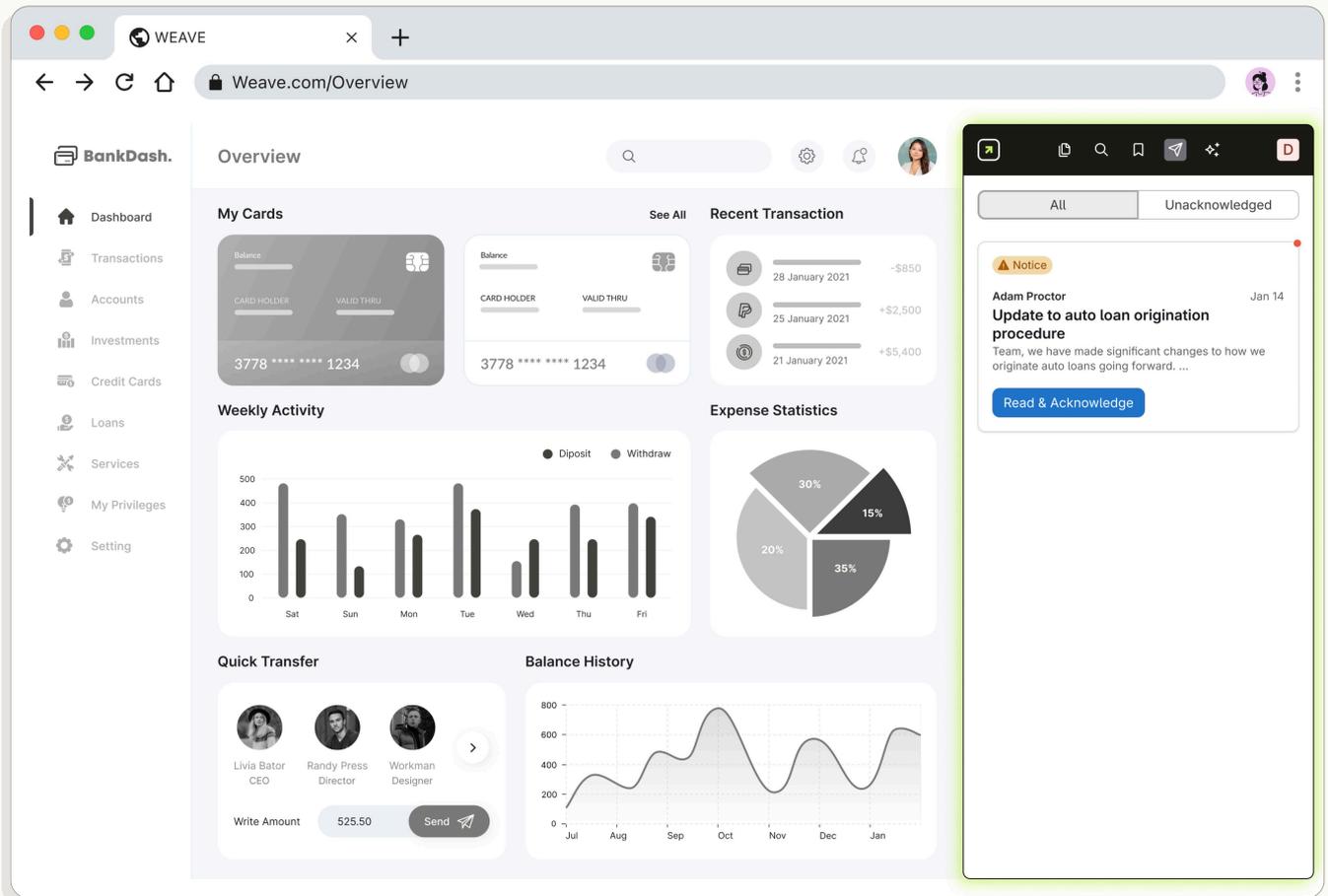
Analytics

At the same time, you gain visibility you likely never had before. ScreenSteps shows you which articles are being used most, what employees are searching for, and whether those searches are leading to the right content. You can see which teams are actively using the knowledge base and where people are getting stuck. That data is incredibly valuable—it highlights what matters most, what’s missing, and where improvements will have the biggest impact.



Change Notifications

When procedures change, ScreenSteps also makes it easy to communicate those updates. You can publish changes and notify the right users, ensuring they're aware of what's new. Employees can acknowledge updates, and you can report on who has seen and confirmed them. In a regulated environment, that level of visibility and accountability isn't just helpful—it's essential.



The End Result

Documentation
That Actually
Helps Run
Operations

The End Result: Documentation That Actually Helps Run Operations

When done well, this isn't "a documentation project."

It's an operational system.

- + Employees stop interrupting each other for answers
- + Frontline teams handle member questions faster
- + Procedures are consistent across locations and shifts
- + Policy information becomes usable, not hidden
- + Executives gain visibility into how work is actually performed
- + Compliance content remains intact, but becomes far more accessible

You aren't just building documentation to satisfy examiners. You're building documentation that helps people do the work correctly, confidently, and consistently.

That's the point.

And that's how you run a documentation project in ScreenSteps.



Let's Get to Work

Ready to capture, deliver, and maintain trusted SOPs at your bank or credit union with ScreenSteps?

Book a demo with the ScreenSteps team to get started.

screensteps.com/demo