



Find & Follow Playbook Series

Employee Gives 2-Week Notice

Capture what matters.
Transfer it cleanly. Keep
the team moving forward.

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The 2-Minute Drill

(A high-level overview of this playbook)

Why the Old Approach Doesn't Work

When teams get desperate, they often fall back on the classic knowledge-extraction strategy: “Tell us all your processes, tips, tricks, and secrets.”

This usually results in a giant pile of raw information: rambling videos, messy transcripts, disconnected notes. That information might feel valuable, but **it's not actually usable....**

Why Find & Follow is the Perfect Framework

Find & Follow isn't about documentation for documentation's sake. It's about creating **usable resources**—checklists, job aids, recipes, decision trees—that employees can **find quickly** and **follow immediately** while doing real work.

Core Principles of Find & Follow

The way teams work and train needs to change. Instead of memorizing every step, click, and process, organizations need to determine what employees need to know and what they need to be able to do.

This starts by separating knowledge:

- + **Foundational knowledge** → the background, context, and best practices
- + **Actionable knowledge** → the tasks, steps, and how-tos

Employees will **learn the foundational** and **perform the actionable**.

Project Plan

Step 1: Prepare Your Plan (estimated time: 15-60 minutes)

1. Create a manual named after the employee (John's Manual)
2. Create chapters for areas of responsibility (Website, Email, Advertising)
3. Create article placeholders for every task (How to Update Website Page)

Important: Separate Foundational Knowledge vs Actionable Knowledge

Step 2: Create the Articles (Estimated Time: 2-7 minutes per guide)

1. Use Clarify AI Create to get knowledge out of heads 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 3: User Acceptance Testing (Estimated Time: 2-3 hours)

1. Set up ScreenSteps Sidekick for contextual help
2. Test each recipe as if you're performing the task
3. Make quick fixes or assign updates when articles are unclear
4. Identify missing articles

Important: At this point, you will have a solid, reliable set of guides to perform the tasks of the departing employee

Step 4: Training the Replacement (Estimated Time: 1-2 weeks)

1. Start with the foundational knowledge
2. Train them to find and follow the actionable guides
3. Practice with real scenarios
4. Transition to real-world use cases happens smoothly

Step 5: Maintaining & Evolving Your Knowledge System

(Estimated Time: Ongoing)

1. Use comments to capture small and immediate updates
2. Use Clarify AI to apply larger updates effortlessly
3. Keep the system alive as processes change
4. Expand the approach across the team
5. Make Find & Follow a part of your operational rhythm



Setting the Scene

Setting the Scene

Why Teams Panic — And How to Stop the Spiral

If you've ever said, "We really need to document what they do," you're not alone. Most teams have been thinking about documenting processes for months... sometimes years. But then someone gives their two-week notice, and suddenly those good intentions turn into a full-blown scramble:

"Oh no. We have two weeks. How are we supposed to capture everything they do?"

The panic comes from imagining documentation the old-fashioned way. Long interviews, long videos, long transcripts, and a long list of things you "should have done by now."

And that's exactly why two weeks feels impossible. But it doesn't have to anymore.



Kenny Park 11:55

Hey, does anyone know how to update our email nurture sequence in HubSpot now that John's leaving? I have no idea where to even start.



Mika Monk 11:57

I just found out John managed all our landing pages. Who's taking that over? I need to make edits today.



Steve Smith 12:05

Wait—John's the only one who knows how to pull the monthly marketing metrics, right? What are we supposed to do in two weeks?



Jenny Bloc 12:07

I'm trying to send out the newsletter, but I can't figure out where the email templates are saved in HubSpot. Can someone help?



Ingemar 12:10

Just heard John gave notice. How do I get access to his workflows in HubSpot before everything breaks next week?

Why the Old Approach Doesn't Work

When teams get desperate, they often fall back on the classic knowledge-extraction strategy:

- + Let's sit them down and record everything they know.
- + Tell us all your processes, tips, tricks, and secrets.
- + Just talk for an hour—we'll figure it out later.

This usually results in a giant pile of raw information: rambling videos, messy transcripts, disconnected notes.

That information might feel valuable, but it's not actually usable.

Nobody has time to dig through a 55-minute video to figure out how to submit an invoice, approve a request, or run a monthly report. That's knowledge extraction. And extraction gives you data, but not clarity.

The Shift: From Knowledge Extraction to Knowledge Transfer

Our goal isn't to pull everything out of their brain. Our goal is to transfer what they know so someone else can actually use it.

Knowledge transfer means:

- + Knowledge is organized, not dumped.
- + Knowledge is actionable, not theoretical.
- + Knowledge is immediately usable, not buried in a transcript.

And that requires structure.

Why Find & Follow Is the Perfect Framework

The Find & Follow Framework is designed specifically for situations like this:

- + Someone knows a lot
- + Someone else suddenly needs to know a lot
- + You don't want the business to crumble in the handoff

Find & Follow isn't about documentation for documentation's sake. It's about creating usable resources—checklists, job aids, recipes, decision trees—that employees can find quickly and follow immediately while doing real work.

This is what stops operational disruption.

It's also what lets you onboard the replacement (whether internal or new hire) without relying on tribal knowledge or hoping someone “remembers how things used to be done.”

The Mindset Shift: Think Like a Restaurant

Imagine the person who's leaving is a chef in your restaurant.

You would never say, “Tell me everything you know about food!”

That would give you a whole lot of information and zero clarity.

Instead, you'd say:

- + List every dish you make.
- + Give me the recipe for each one.
- + Tell me what makes your cheesecake better than everyone else's.

You'd separate:

- + **Actionable knowledge** → the recipes (tasks, steps, how-tos)
- + **Foundational knowledge** → the context (background + best practices)

Actionable Knowledge vs. Foundational Knowledge

In this project, we're going to capture two separate types of knowledge:

1. Actionable Knowledge (The Recipes)

These are the things they do:

- + Submit a weekly payroll file
- + Approve expense reports
- + Troubleshoot an issue
- + Run an onboarding workflow

These become step-by-step guides in ScreenSteps.

2. Foundational Knowledge (The Background Wisdom)

These are the things that help others understand:

- + Why we use this tool
- + How different tasks connect
- + Lessons learned from experience
- + Best practices that the departing employee has developed over time

Both are important. Both get captured separately. And both will be used differently by your remaining team and the future hire.

What Find & Follow Enables

With this approach, your team will:

- + Identify specific tasks the departing employee does.
- + Capture each one as an actionable step-by-step guide.
- + Document the background info they've learned over the years.
- + Organize everything so employees can find it instantly and follow it confidently.

The result?

- + Their departure won't cause chaos.
- + Your existing team can fill in.
- + Your future hire can ramp up quickly.
- + You'll finally have the documentation you've always said you needed.

Yes, This Can All Be Done in Two Weeks

It sounds ambitious, but with the Find & Follow approach and ScreenSteps' AI-powered capture tools, you can pull this off in a structured, calm, and surprisingly fast way.

In the next section, we'll walk you through exactly how to do it.

01

Preparing Your Plan

Chapter 1: Preparing Your Plan

Chapter Overview

Step 1: Create a Manual Named After the Employee

Step 2: Create the Chapters (Their Major Areas of Responsibility)

Step 3: Add Article Placeholders (Actionable Tasks + Foundational Knowledge)

Step 4: Use the Chapters to Guide the Conversation

How to Set Up Your Structure Before You Capture Anything

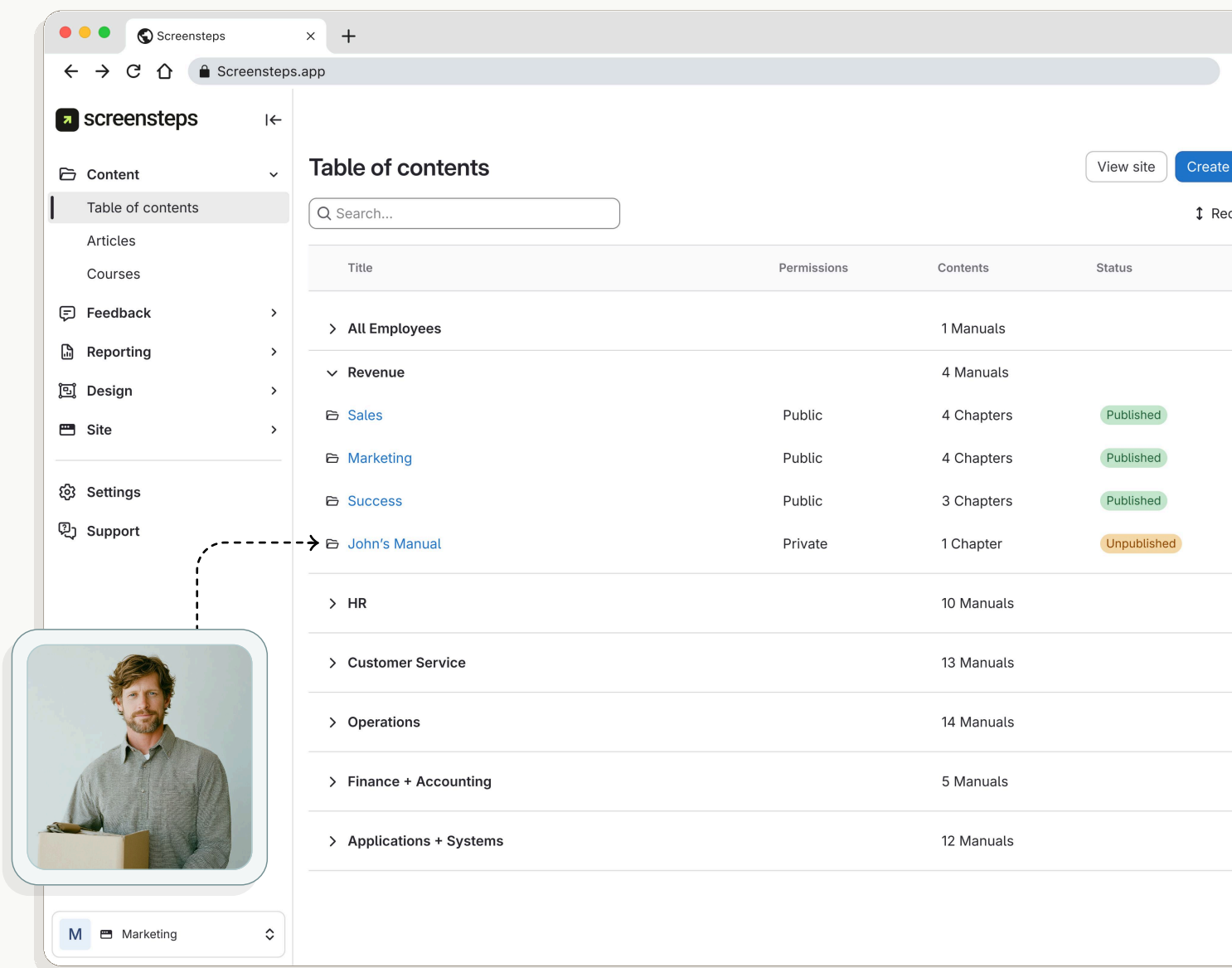
Before you sit down with the departing employee, you need a plan. And the first step in that plan is to create a structure that helps them think clearly and helps you capture knowledge efficiently. If you don't build this structure first, the conversations will be scattered, and you'll spend valuable time trying to untangle what they actually do.

The good news is that ScreenSteps gives you a simple, flexible way to build this structure: create a manual, add chapters, and set up article placeholders long before you capture content.

Step 1: Create a Manual Named After the Employee

Start by creating a manual in ScreenSteps and name it after the person who is leaving. This may feel a little unusual, but it works. When a name is on the manual, everyone instantly knows the purpose of the project: “This is everything Sarah does,” or “This is Tom’s world.”

Later on, once the project is complete and the handoff is done, you can rename the manual to the role (e.g., “Sales Manager,” “Account Representative,” “Marketing Specialist,” “Teller”). But for now, naming it after the person keeps the focus tight: we’re capturing their responsibilities.



The screenshot shows the ScreenSteps application interface. On the left is a sidebar with navigation options: Content (Table of contents, Articles, Courses), Feedback, Reporting, Design, Site, Settings, and Support. The main area displays the 'Table of contents' page with a search bar and a table of manuals. A dashed line connects the 'John's Manual' entry in the table to a profile picture of a man holding a box, indicating the manual is named after an employee.

Title	Permissions	Contents	Status
> All Employees		1 Manuals	
> Revenue		4 Manuals	
> Sales	Public	4 Chapters	Published
> Marketing	Public	4 Chapters	Published
> Success	Public	3 Chapters	Published
> John's Manual	Private	1 Chapter	Unpublished
> HR		10 Manuals	
> Customer Service		13 Manuals	
> Operations		14 Manuals	
> Finance + Accounting		5 Manuals	
> Applications + Systems		12 Manuals	

Step 2: Create Chapters (Their Major Areas of Responsibility)

Once the manual exists, add chapters that represent the broad categories of work the employee handles. These are the “domains” of their job — the buckets that anchor their thinking.

If the employee is a marketer named John, chapters might include:

- + Website
- + Email
- + Advertising
- + Reporting & Analytics

Using the chef analogy from earlier: if a cook is leaving, the chapters might be **Desserts, Entrees, Appetizers, and Prep Work**. You’re not asking the chef to tell you “everything about food.” You’re anchoring their thoughts to specific areas so they can recall tasks more easily.

The same applies here. When you give someone a category like Website, suddenly their brain knows exactly where to go, and they can list what they actually do.

The screenshot shows the Screensteps app interface. On the left is a sidebar with navigation options: Content (Table of contents, Articles, Courses), Feedback, Reporting, Design, Site, Settings, and Support. The main area displays the 'Table of contents / John's Manual'. At the top right of the main area are buttons for 'View site' and 'Create chapter', along with a 'Reorder' icon. Below this is a search bar and a table with the following data:

Chapters (6 Total)	Permissions	Articles	Status
Website	Public	8 Articles	Unpublished
Email	Public	8 Articles	Unpublished
Advertising	Public	7 Articles	Unpublished
Reporting + Analytics	Public	2 Articles	Unpublished
Social Media	Private	2 Articles	Unpublished
Events	Public	4 Articles	Unpublished
Partnerships	Public	7 Articles	Unpublished
Contact Management	Public	3 Articles	Unpublished
Webinars	Public	9 Articles	Unpublished

Step 3: Add Article Placeholders (Actionable Tasks + Foundational Knowledge)

Now that the chapters exist, you'll create articles inside each one. These articles fall into two categories:

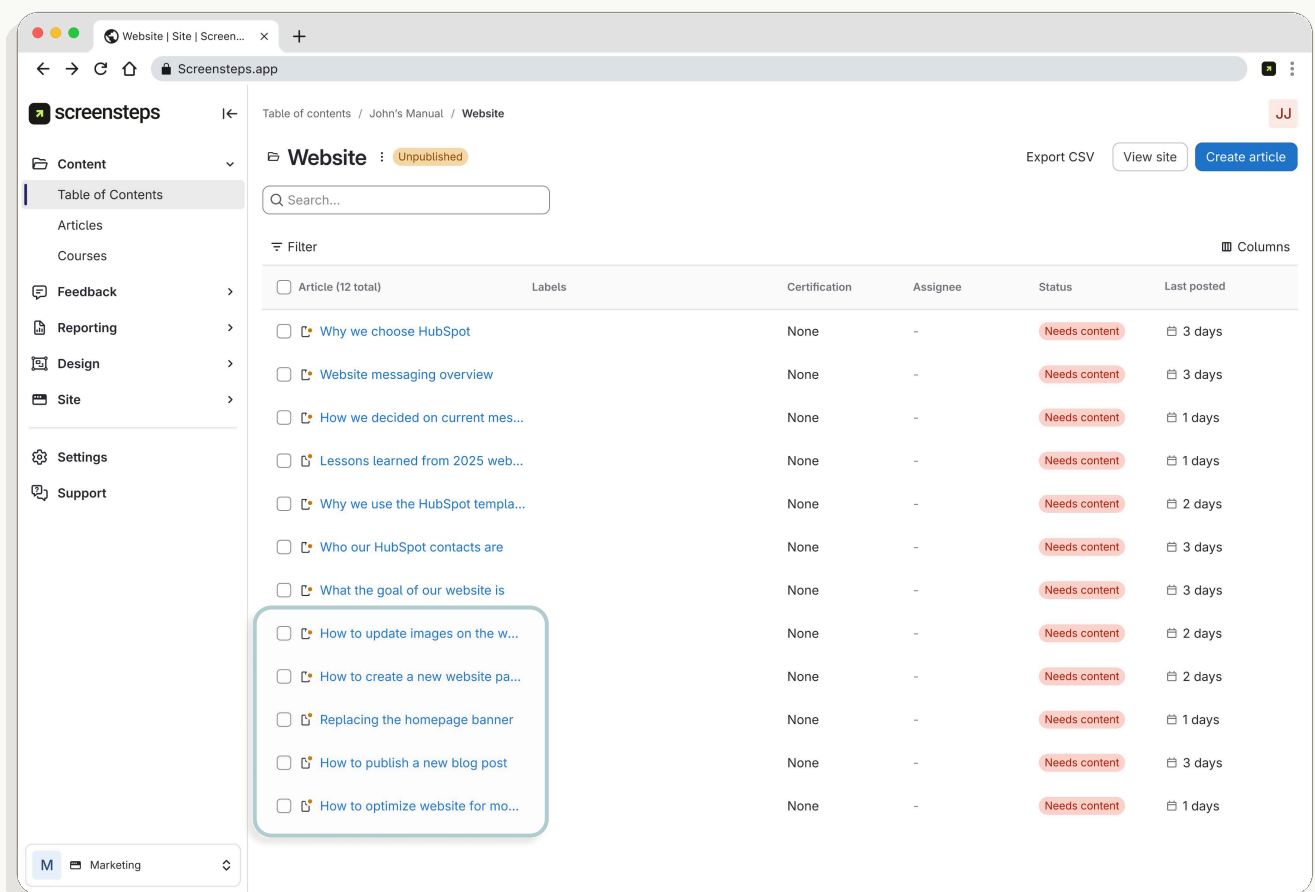
1. Actionable Knowledge (The Recipes)

These are the step-by-step tasks the employee performs. You're not writing the steps yet — you're simply adding placeholder titles.

In the **Website** chapter, actionable titles might include:

- + Update Images on the Website
- + Add a New Webpage
- + Replace the Homepage Banner
- + Publish a Blog Post

These are concrete, specific, and tied to something a new person will need to do.



2. Foundational articles (the background knowledge)

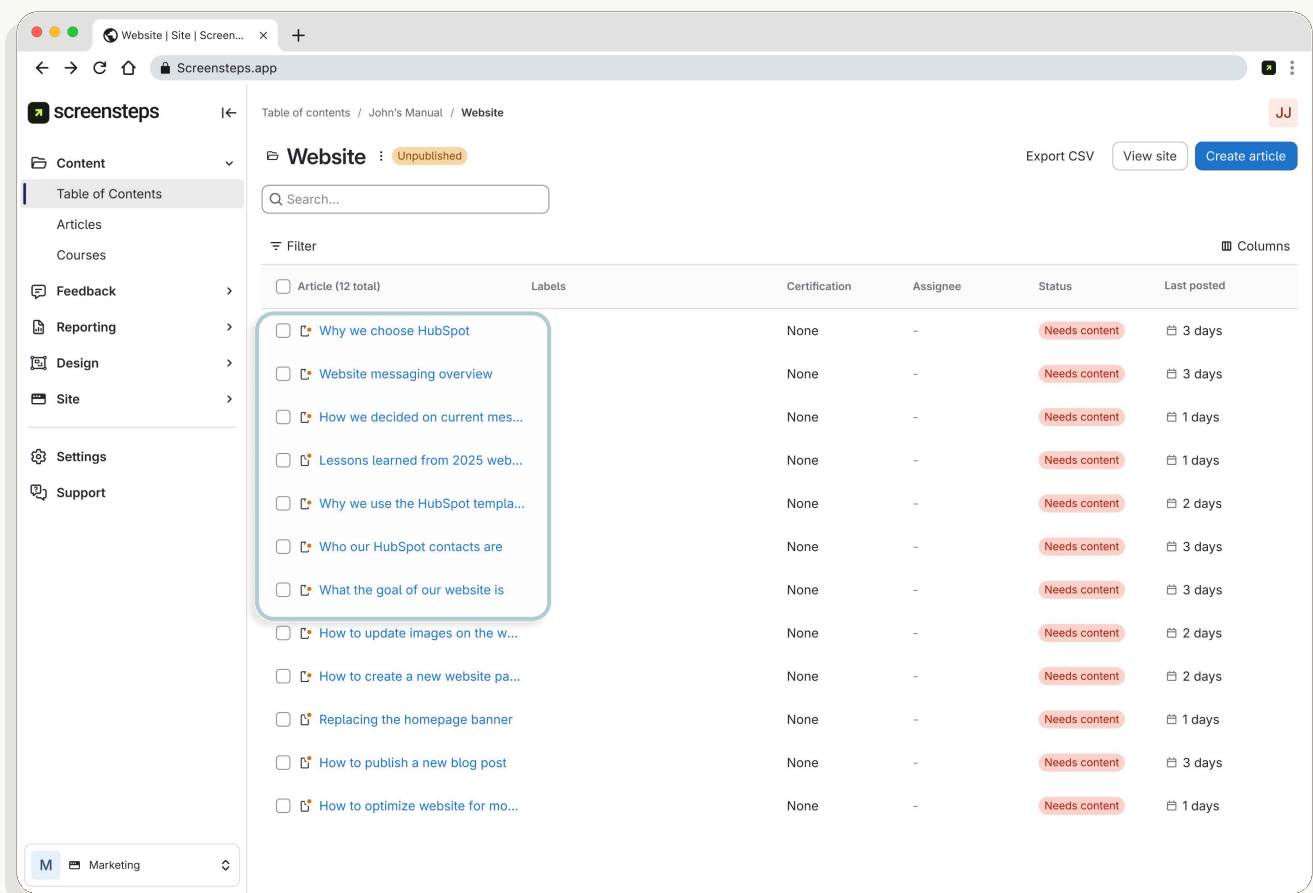
This is the institutional wisdom the employee has built up. Again, don't capture content yet, just add titles.

In the **Website** chapter, foundational titles might include:

- + Why We Chose HubSpot as Our CMS
- + How We Decided on Our Current Messaging
- + Past Experiments With Website Layout
- + Lessons Learned From Our Last Website Redesign

These aren't step-by-step tasks. They help future employees understand why things are done a certain way.

Both types are important. Both need to be captured. And both must be kept separate so actionable guides remain clean and usable.



Tip: Use the Chapters to Guide the Conversation

Once your structure is built, you'll use it during your knowledge-capture sessions. Instead of asking "So... what do you do?", you'll ask more anchored, productive questions like:

- + In the Website area, what do you do daily? Weekly? Monthly?
- + What problems do you solve here?
- + What decisions do you make?
- + What background information would someone need to understand before doing this well?

This framework turns overwhelming conversations into highly focused ones.

Reminder: Don't Worry About Content Yet — Build the Map First

All you're doing in this step is building the outline:

- + **Manual** = the person
- + **Chapters** = their areas of responsibility
- + **Articles** = the tasks and the foundational knowledge within each area

This outline becomes your roadmap for the next two weeks. When it's time to capture the knowledge itself (steps, screenshots, details, and wisdom), you'll know exactly where every piece fits.

Building this structure first makes everything else faster, calmer, and dramatically more accurate.

02

Creating the Recipes

Chapter 2: Creating the Recipes

Chapter Overview

Step 1: Create a Manual Named After the Employee

Step 2: Create the Chapters (Their Major Areas of Responsibility)

Step 3: Add Article Placeholders (Actionable Tasks + Foundational Knowledge)

Step 4: Use Clarify for General or External Knowledge

Step 5: Review, Comment, and Refine

Step 6: Add Screenshots or Videos When Needed

Step 7: Repeat for Every Article

How to Capture Actionable and Foundational Knowledge Quickly and Accurately

Now that you've built the map (the manual, the chapters, and the article titles), you're ready for the part that used to be painful: actually capturing what the departing employee knows.

Historically, this step took forever. You either had to beg the employee to type everything out (which they hated) or interview them for hours, then spend even more hours typing and formatting everything yourself. It was slow, exhausting, and almost always incomplete.

Those days are over.

With ScreenSteps' Clarify AI Create and Clarify AI Assistant tools, the employee doesn't need to type a single sentence unless they want to. They simply talk through the task, and ScreenSteps turns their explanation into a clean, formatted, ready-to-use guide.

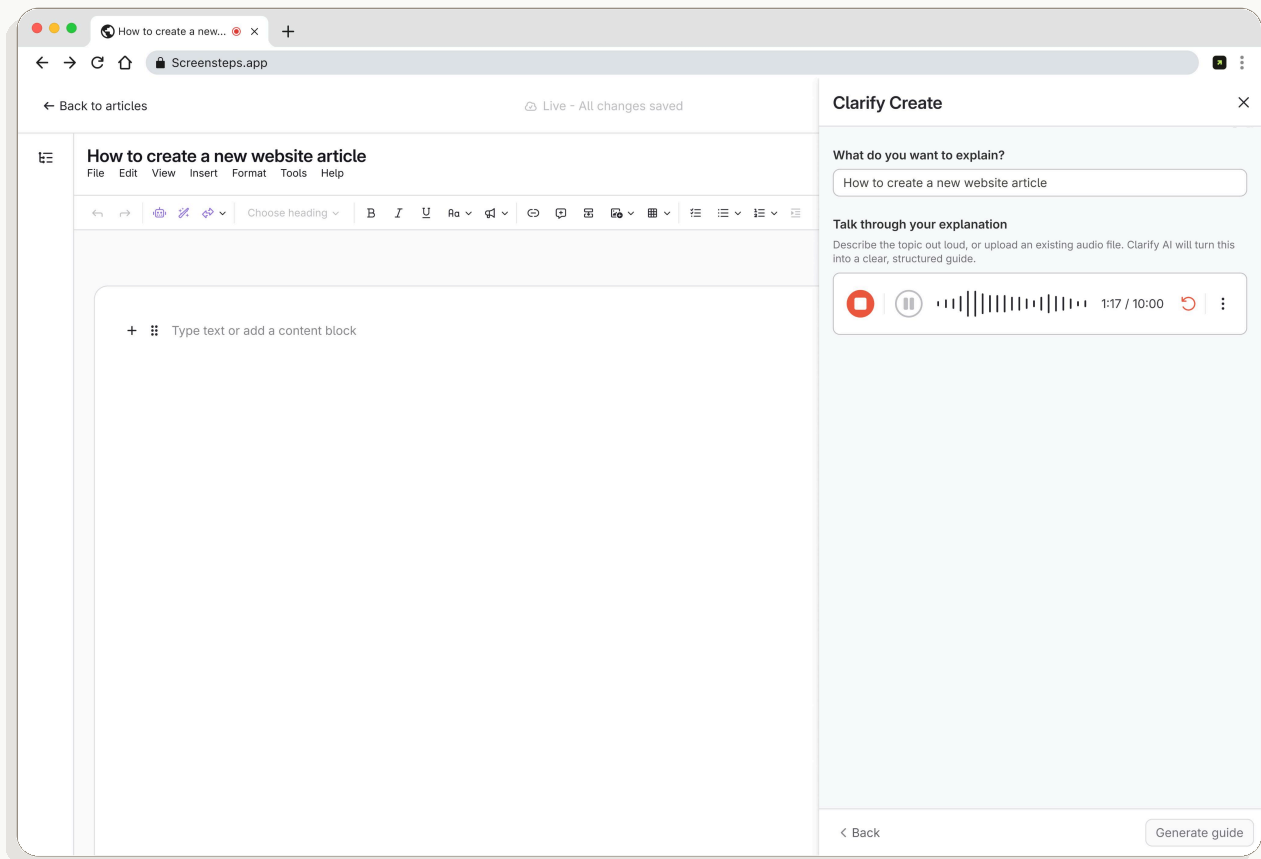
This is where the magic happens...

Step 1: Open the Article and Start Recording

Inside the manual you created earlier, open one of the article placeholders.

Click **Edit**, then click **Clarify AI Create**, and choose **Record My Audio**.

That's it. The employee just talks.



If the article title is How to Create a New Webpage, they explain:

- + what they do
- + the decisions they make
- + the order they follow
- + the considerations involved

They're not typing. They're not formatting. They're simply talking through their work while the AI does the heavy lifting.

Remember: Include Decisions, Not Just Clicks

Some tasks are quick click-click-click procedures, but most internal processes involve much more than that.

When someone is creating a webpage, for example, the steps might include:

- + Determining the appropriate template
- + Writing copy and choosing images
- + SEO considerations
- + Determining URL structures

These decisions matter. They're part of the recipe. So the employee should think out loud and explain:

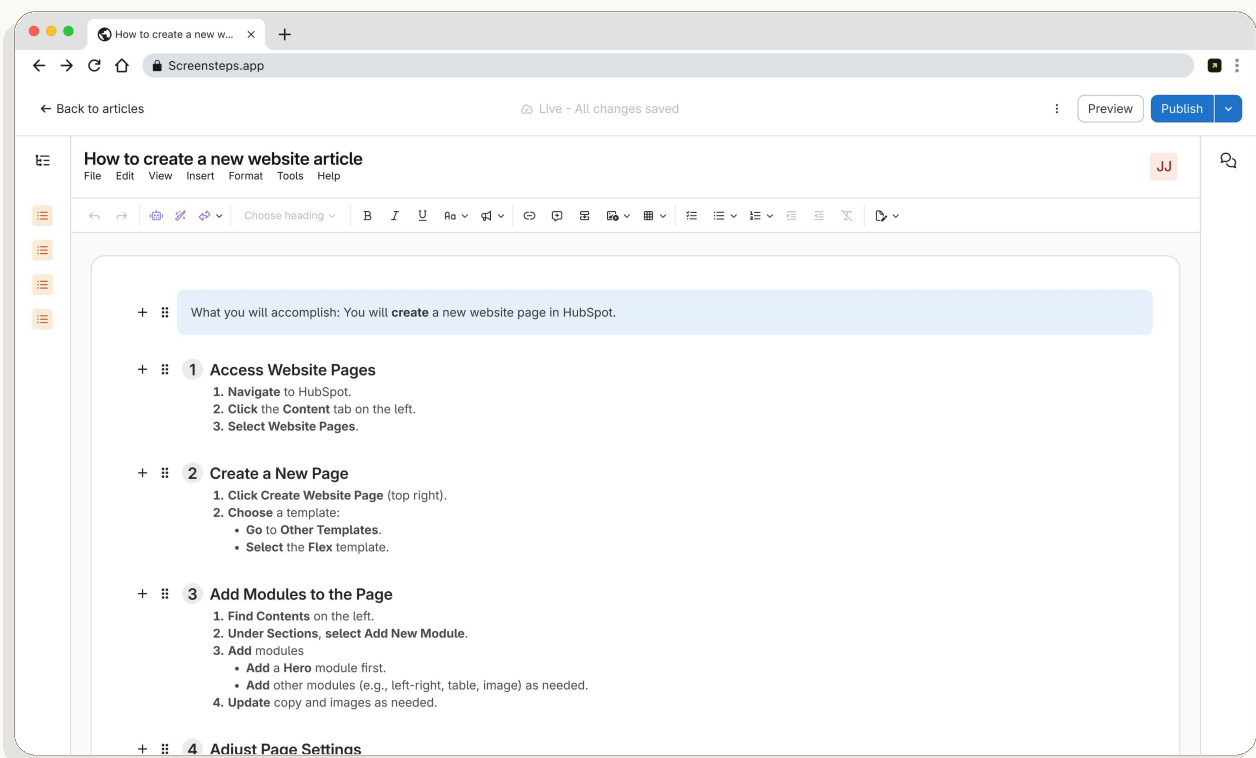
- + Before I build the page, I consider these factors ...
- + I always check X because...
- + If the page will be used for social ads, I do Y first...

Clarify AI Create will turn this into a clear, step-by-step guide with decision points included.

Step 2: Let ScreenSteps Format the Guide Automatically

After the employee finishes speaking, Clarify AI Create does the heavy lifting.

- + Transcribes the audio
- + Identifies the steps
- + Organizes the narrative
- + Turns decision points into clear instructions
- + Breaks the procedure into sections, headings, and steps



This is where the time savings really add up. Instead of spending hours writing, they spend two minutes talking and let the AI produce something that's structured and easy to follow.

Do this for every actionable article in the manual.

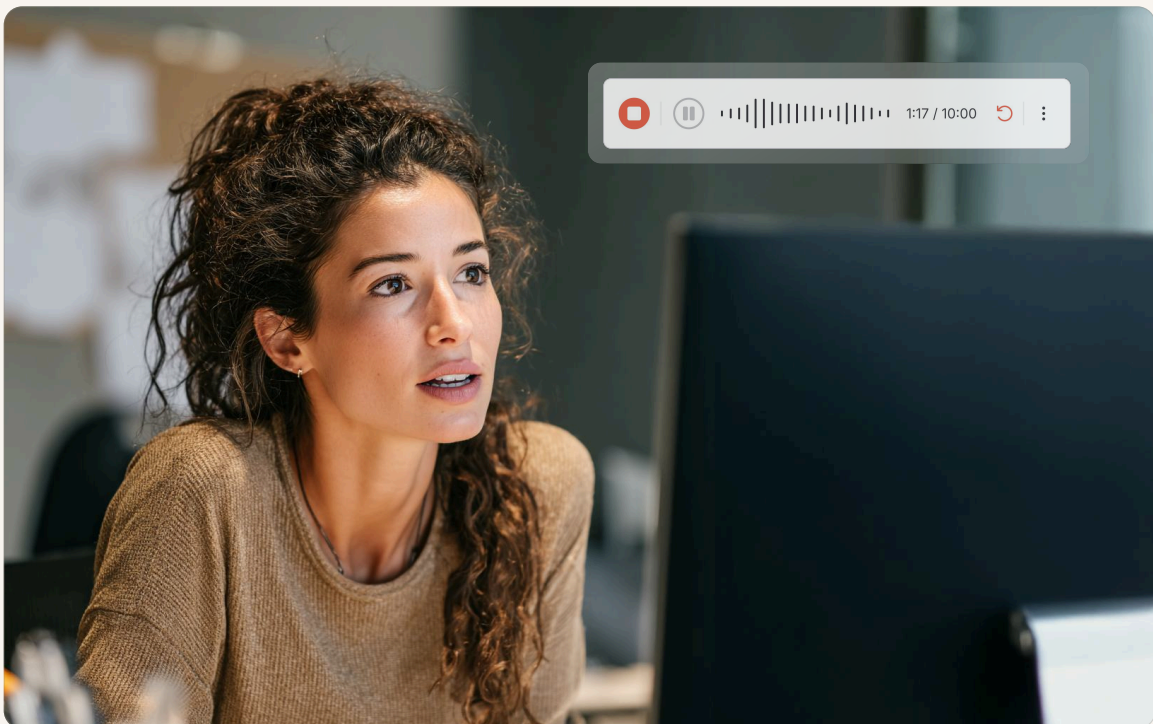
Step 3: Capture Foundational Knowledge the Same Way

Foundational articles work the same way: open the article, hit record, and have the employee talk.

For example, if the article is Why We Chose HubSpot as Our CMS, ask them to explain:

- + The options they considered
- + Why they made the decision they did
- + What to evaluate if the company ever changes platforms

Clarify Create will turn this into a clean foundational article with sections, bullet points, and headings, no formatting required.



Step 4: Use Clarify AI for General or External Knowledge

Not everything needs to come out of the employee's head. For topics that are general or well-known (e.g., "What is HubSpot?"), the employee can use Clarify AI Assistant.

Clarify AI Assistant generates a draft instantly. The employee can then add details, remove irrelevant parts, and adjust to match your company's specifics.

This saves time and prevents them from rewriting information that is already publicly available.

The diagram illustrates the process of using the Clarify AI Assistant to generate content for a HubSpot article. It shows three main components: the Clarify Assistant interface, the generated content, and the final article structure.

Clarify Assistant Interface (Top): The assistant is prompted to "Create an overview of HubSpot for someone who's never used it in our company, and the key terms a new employee should understand." The generated content includes:

- **Pipeline:** A visual representation of the stages of a potential sale, allowing the sales team to track the progress and forecast revenue.
- **Workflow:** A set of automated actions that HubSpot performs based on specific triggers, such as sending emails or updating contact properties.
- **Landing Page:** A standalone web page created specifically for marketing or advertising purposes, which directs users towards a specific action or conversion goal.

The interface also includes buttons for "Insert", "Insert below", "Try again", and "Stop", and a text input field for "Ask Clarify to improve generated text".

Final Article Structure (Bottom): The article is titled "What is Hubspot?" and includes a table of contents and a table of functions.

Table of Contents:

- What is Hubspot?
- How We Use HubSpot in Our Company

Table of Functions:

Function	Cell
Lead Generation	Our marketing team uses HubSpot to create and manage campaigns that attract potential customers through content marketing, SEO, and social media.
CRM System	The software serves as our central customer relationship management (CRM) platform, where all client interactions and data are stored and managed.
Sales Prospection	The sales team uses HubSpot to track leads, monitor sales performance, and automate follow-up activities.

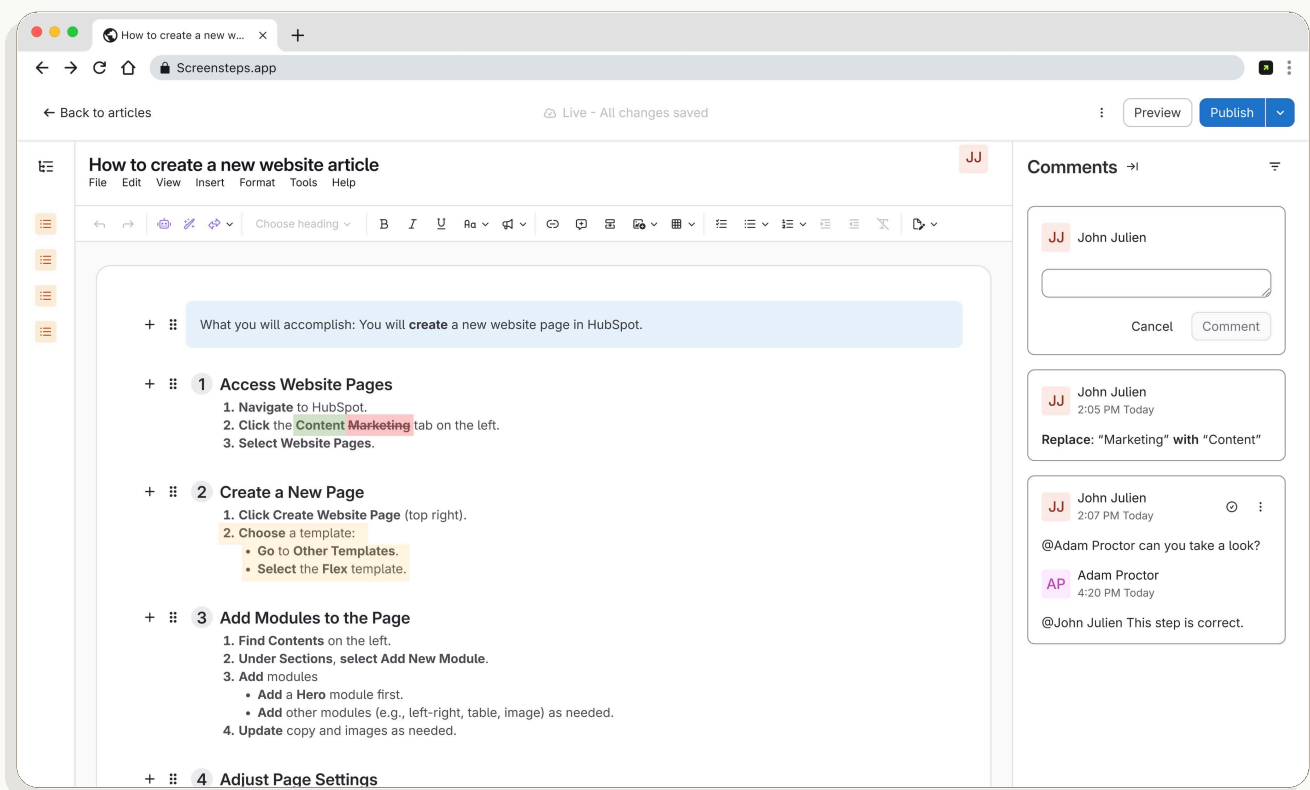
Step 5: Review, Comment, and Refine

Once articles are created, the employee can assign them to you in ScreenSteps. This creates a simple review loop:

- + Leave comments where you need more detail
- + They update the article by either typing or recording new audio
- + You approve or request further edits

It's clean, efficient, and trackable.

You can also use Track Changes if you want to revise wording, improve clarity, or adjust formatting.



Step 6: Add Screenshots or Videos When Needed

Many procedures are perfectly clear in text form, but some benefit from visuals.

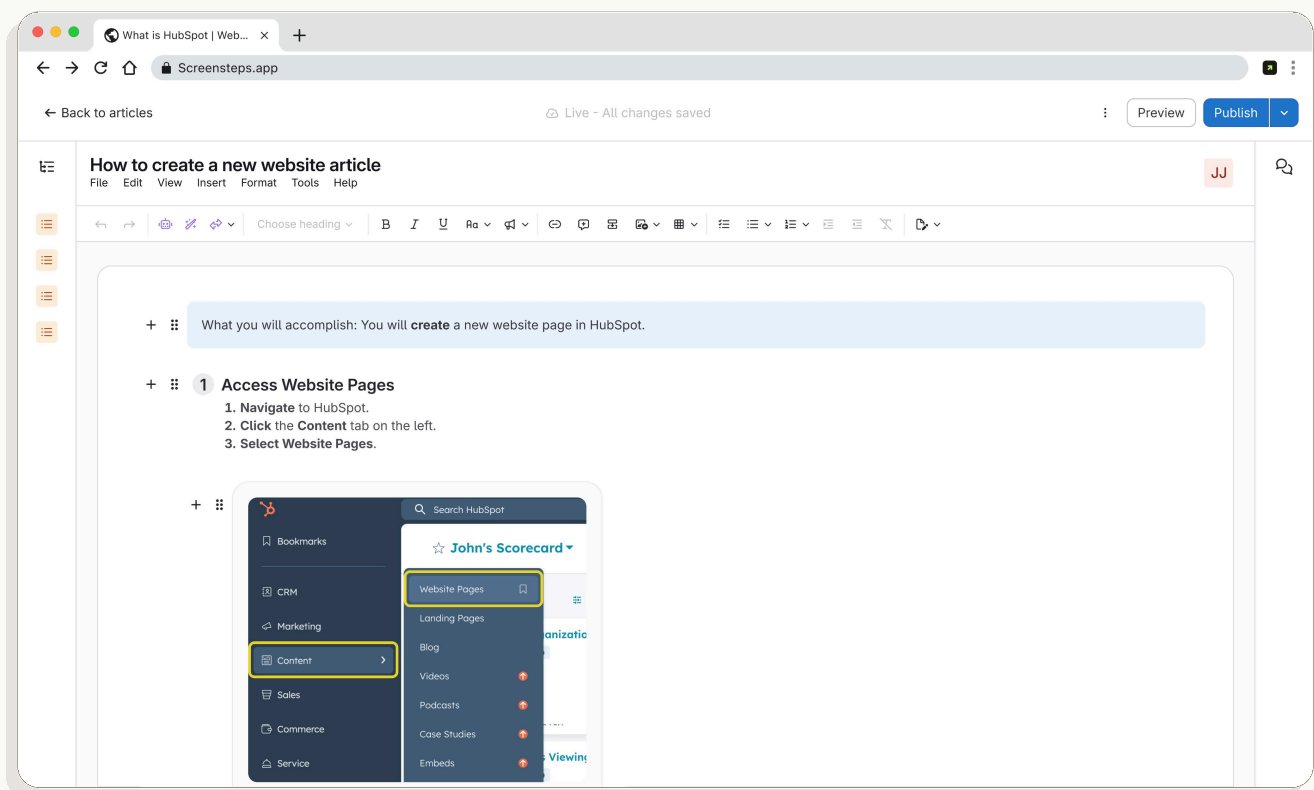
You can easily add screenshots using built-in tools:

+ **Windows:** Windows + Shift + S

+ **Mac:** Control + Shift + Command + 4

Just snip the part of the screen you need and paste it into the article.

If a process is more complex or would be easier to demonstrate, you can insert a video directly into ScreenSteps. The employee can record their screen while talking through the process, and the video will be stored in ScreenSteps for future employees to watch.



Step 7: Repeat for Every Article

Actionable guides?

+ Record audio → Clarify AI Create → Review.

Foundational topics?

+ Record audio or use Clarify AI Assistant → Review.

Existing documents?

+ Copy/paste into Clarify AI Create → Let it generate a recipe → Review.

General background content?

+ Use Clarify AI Assistant to generate a draft → Customize → Review.

This approach is fast. Really fast.

If an employee has around 100 articles to fill in, and each recording takes around two to three minutes, they can capture the bulk of their knowledge in a single day.

That's the power of using AI to speed up knowledge transfer.

03

User

Acceptance
Testing

Chapter 3: Acceptance Testing

Chapter Overview

Step 1: Set Up ScreenSteps Sidekick for Contextual Help

Step 2: Test Each Recipe as If You're Performing the Task

Step 3: Make Quick Fixes or Assign Updates

Step 4: Add Screenshots or Video When It Helps

Step 5: Identify Missing Recipes

Step 6: Finish With a Solid, Reliable Set of Guides

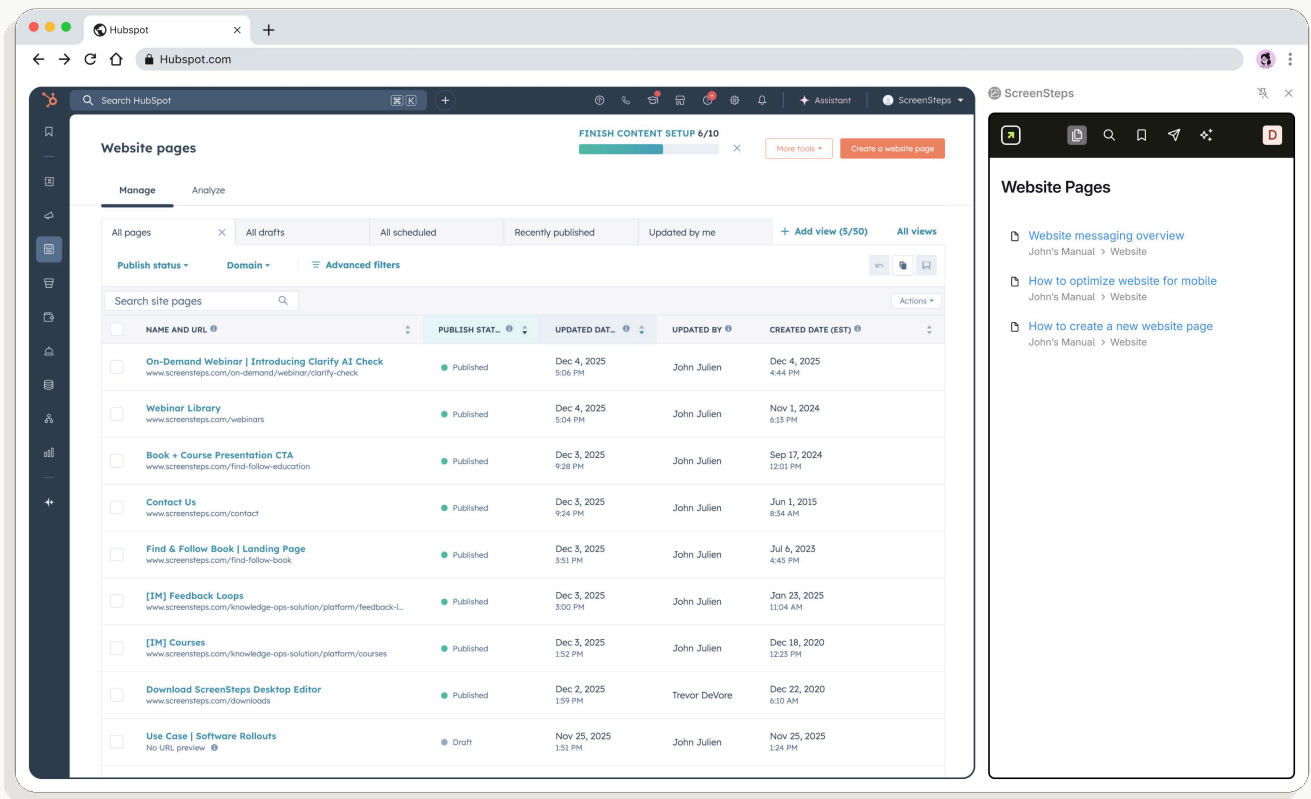
Making Sure Every Recipe Actually Works

Once all the recipes and foundational articles have been captured, it's time to make sure they actually work. User Acceptance Testing is where you validate the instructions, identify gaps, and polish everything so the next person can confidently step into the role.

This step doesn't take long, but it's essential. It ensures that the documentation doesn't just exist but that it actually performs.

Step 1: Set Up ScreenSteps Sidekick for Contextual Help

Before you begin testing, install **ScreenSteps Sidekick**, the Chrome or Edge browser extension. Sidekick lets you create **Smart Suggestions Channels** that recommend the right articles inside the right applications.



If the departing employee worked heavily in HubSpot, you can create Smart Suggestions Channels for:

- + HubSpot CRM
- + HubSpot Website Tools
- + HubSpot Blog
- + HubSpot Marketing Automation

Then, assign the relevant recipes to each channel so they appear in the sidebar whenever someone is working inside that part of HubSpot.

This makes testing easier because you'll see the guides exactly as future employees will see them, right inside the apps they're using.

Step 2: Test Each Recipe as If You're Performing the Task

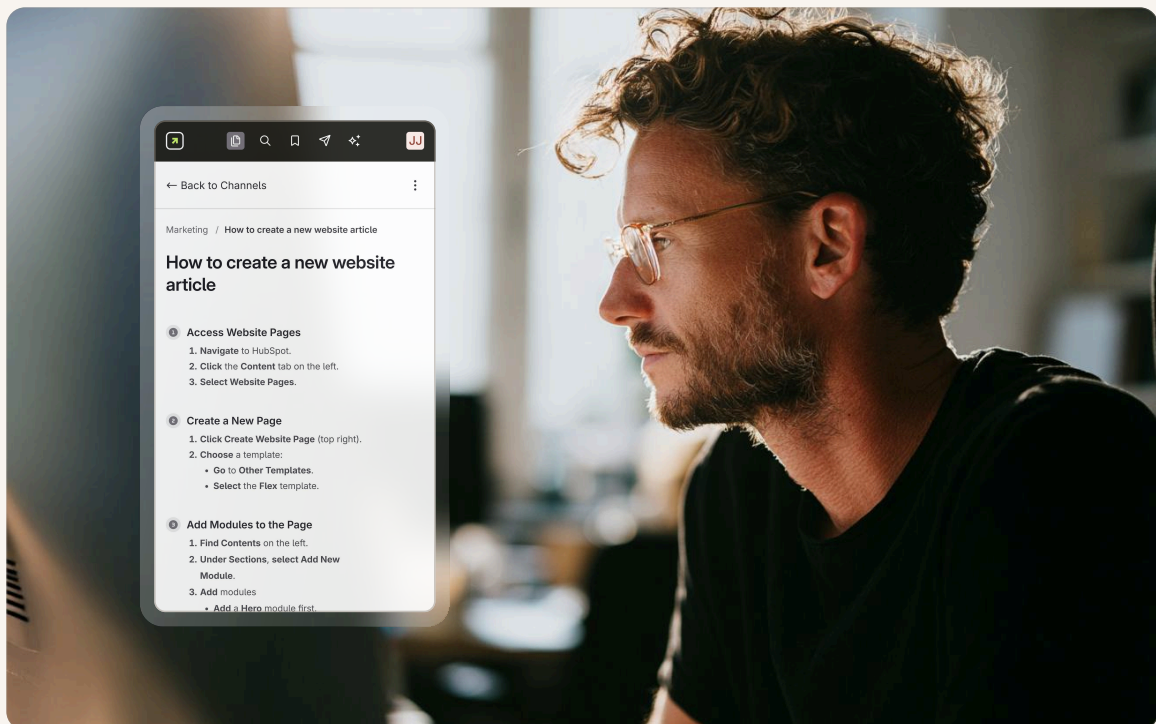
Now you'll go through each article one by one.

Open Sidekick, choose the appropriate channel, and click into the first recipe. Then, actually perform the task exactly the way an employee would:

- + Follow the steps literally
- + Don't rely on your own background knowledge
- + Don't assume anything
- + Let the instructions guide you

If the article says "Click here," you click there. If it says "Fill out this form," you fill out the form. If you hit a step that feels confusing, unclear, or incomplete, you mark it.

This is the fastest way to find the real gaps.



Step 3: Make Quick Fixes or Assign Updates

As you test each article, you'll inevitably find missing steps, unclear instructions, or decisions that need more explanations.

When you find something small, you can update the article yourself, adding a sentence, a note, or a screenshot. For bigger gaps, assign the article back to the departing employee and ask them to expand or clarify.

The beauty of this process is that it's collaborative and lightweight. You're not rewriting entire documents; you're just smoothing out the rough edges.

Step 4: Add Screenshots or Video When It Helps

During testing, you'll notice places where visual support would make the guide significantly easier to follow.

You can quickly capture screenshots:

- + **Windows:** Windows + Shift + S
- + **Mac:** Control + Shift + Command + 4

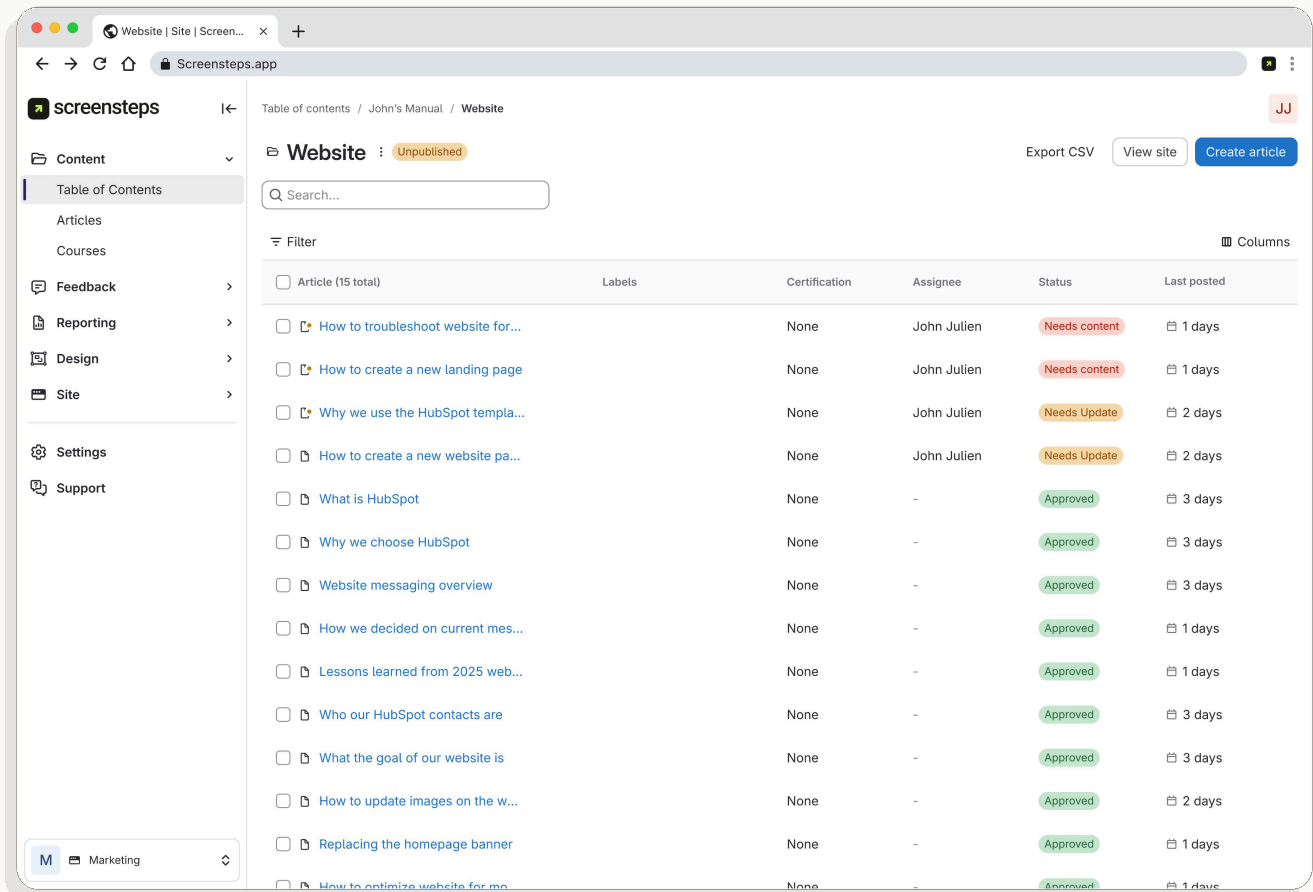
Then paste them directly into the article.

For more complex processes, you can insert a quick screen recording using ScreenSteps' built-in video feature. This is especially helpful for workflows with multiple parts or pages that are easier to demonstrate than describe.

Step 5: Identify Missing Recipes

As you test, you may realize that guides or foundational context are missing. This is normal and expected.

When you find these gaps, add new article titles to the appropriate chapter and assign them to the employee. They can create the missing recipes using the same Clarify Create workflow they used earlier.



The screenshot shows the Screensteps app interface. On the left is a sidebar with navigation options: Content (Table of Contents, Articles, Courses), Feedback, Reporting, Design, Site, Settings, and Support. The main area displays a table of website articles. The table has columns for Article (15 total), Labels, Certification, Assignee, Status, and Last posted. The status column uses color-coded tags: 'Needs content' (red), 'Needs Update' (orange), and 'Approved' (green). The first three articles are marked 'Needs content' and assigned to John Julien. The remaining articles are marked 'Approved' and assigned to either John Julien or a dash (-).

Article (15 total)	Labels	Certification	Assignee	Status	Last posted
<input type="checkbox"/> How to troubleshoot website for...		None	John Julien	Needs content	1 days
<input type="checkbox"/> How to create a new landing page		None	John Julien	Needs content	1 days
<input type="checkbox"/> Why we use the HubSpot templa...		None	John Julien	Needs Update	2 days
<input type="checkbox"/> How to create a new website pa...		None	John Julien	Needs Update	2 days
<input type="checkbox"/> What is HubSpot		None	-	Approved	3 days
<input type="checkbox"/> Why we choose HubSpot		None	-	Approved	3 days
<input type="checkbox"/> Website messaging overview		None	-	Approved	3 days
<input type="checkbox"/> How we decided on current mes...		None	-	Approved	1 days
<input type="checkbox"/> Lessons learned from 2025 web...		None	-	Approved	1 days
<input type="checkbox"/> Who our HubSpot contacts are		None	-	Approved	3 days
<input type="checkbox"/> What the goal of our website is		None	-	Approved	3 days
<input type="checkbox"/> How to update images on the w...		None	-	Approved	2 days
<input type="checkbox"/> Replacing the homepage banner		None	-	Approved	1 days
<input type="checkbox"/> How to optimize website for mo		None	-	Approved	1 days

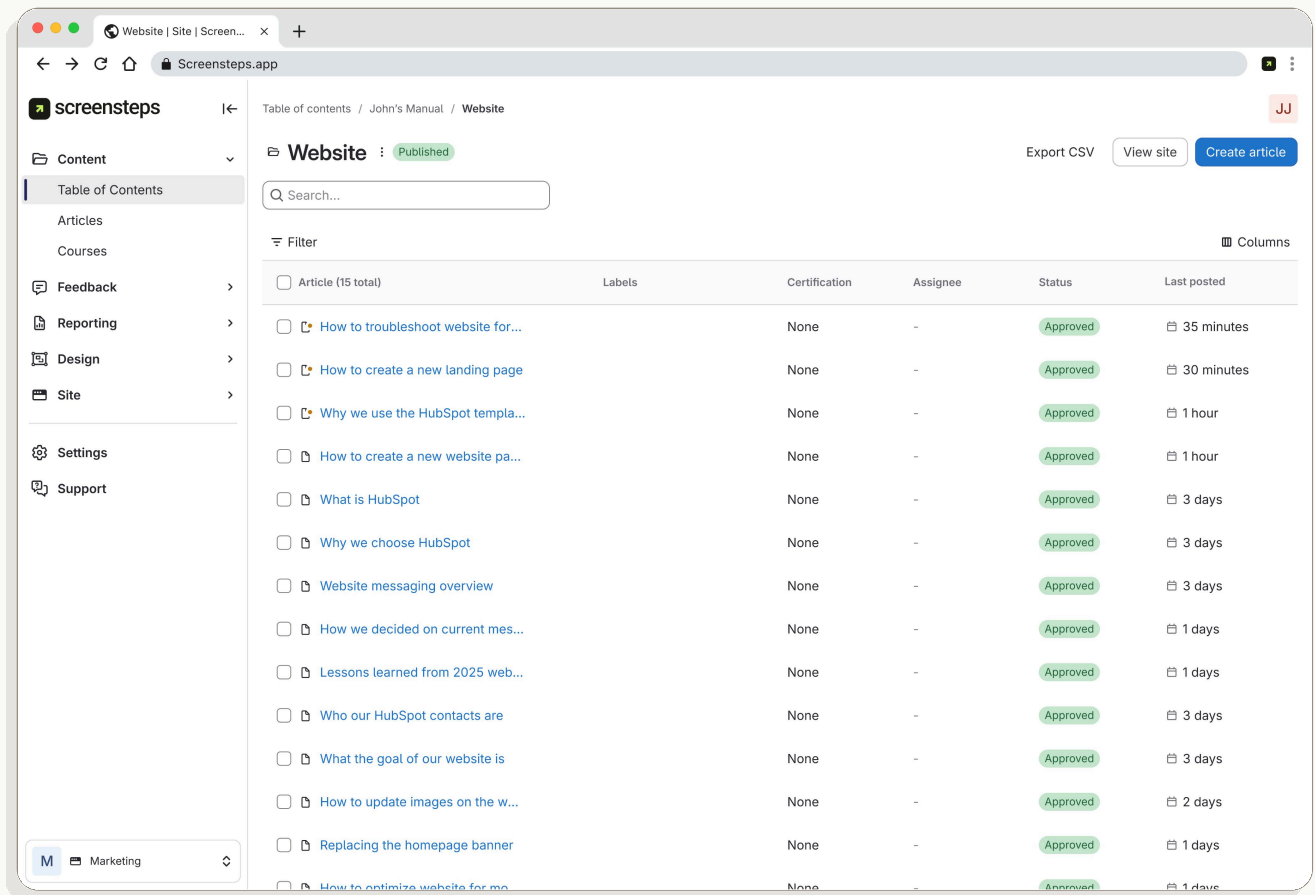
Tip: Spread Testing Over a Few Hours, Not Days

User acceptance testing sounds big, but it shouldn't take forever.

If the employee created most recipes in a few hours, you can usually test them in short bursts over a few days or a focused two-to-three-hour block.

The goal isn't perfection. The goal is usability. If you can follow the guide without confusion, the next person can too.

Step 6: Finish With a Solid, Reliable Set of Guides



By the end of this phase, you'll have a built knowledge base filled with the recipes, guides, and foundational knowledge that the departing employee had stuck in their head.

And importantly, you'll have this in days, not months.

With two weeks' notice, this testing phase fits comfortably inside the timeline and gives you the confidence that everything the employee documented can now be used by anyone who steps into the role.

04

Training the Replacement

Chapter 4: Training Replacement

Chapter Overview

- Step 1:** Start With the Foundational Knowledge
- Step 2:** Train Them to Find and Follow the Guides
- Step 3:** Let Them Practice With Real Scenarios
- Step 4:** Transition Happens Smoothly (Not Painfully)
- Step 5:** Maintain the System as Things Change

How to Step Into the Role Smoothly

By this point, you've done an incredible amount of work in a very short amount of time. You identified the departing employee's areas of responsibility, built out the structure of their job, captured their actionable recipes and foundational knowledge, and completed user acceptance testing to make sure everything works.

Now the big moment arrives: they actually leave.

Whether you've hired someone new, or you're asking another team member to take on additional responsibilities, the question becomes:

How do we train them with everything we've built?

The answer is refreshingly simple.

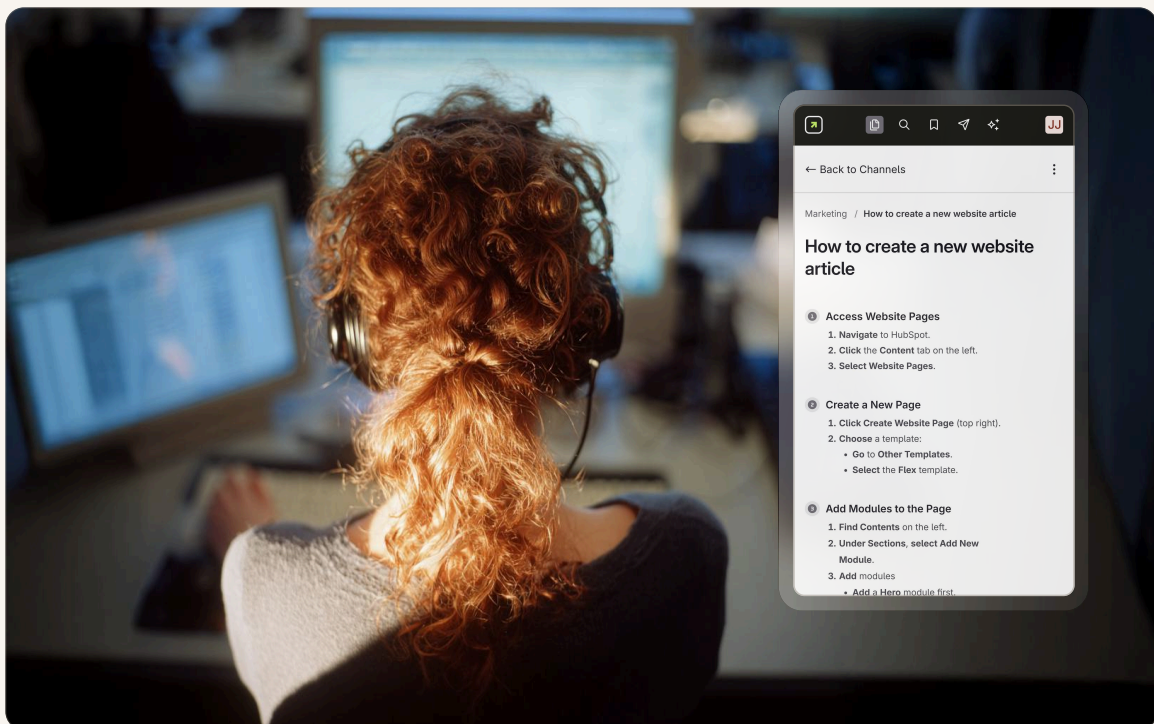
Step 1: Start With the Foundational Knowledge

Before they perform any tasks, the new (or temporary) person needs to understand the role they are stepping into. This is where your foundational articles come into play and are what will give meaning to the actionable recipes.

- + The systems and tools they will use in the role
- + What the standards and expectations are
- + Background principles and knowledge
- + Historical decisions that have been made

These foundational topics are what give meaning to the recipes. It's the difference between following steps and actually knowing what's going on.

Start by walking the employee through these topics. Ask questions to help them think critically about the information and ensure the knowledge is sticking.



Step 2: Train Them to Find and Follow the Guides

Once they have the foundational understanding, it's time to help them actually do the work.

This is where Find & Follow becomes the hero of the story.

The training is straightforward:

1. Present them with a scenario.
2. Ask them to search for the appropriate guide.
3. Have them follow the guide step by step.
4. Verify the outcome.

For example:

"We just received feedback that there's a typo on the homepage. Show me how you would update the webpage."



1. Open Sidekick or ScreenSteps
2. Search "update webpage"
3. Open guide
4. Follow steps

That's it. You're not teaching them the task. You're teaching them to find and follow the resource that teaches them the task.

This builds independence, confidence, and consistency.

Step 3: Let Them Practice With Real Scenarios

The more hands-on practice they get, the faster they'll ramp up.

Use real issues, real requests, and real tasks as practice scenarios. Have them perform:

- + Daily, weekly, and monthly recurring tasks
- + Occasional processes
- + Troubleshooting steps

Their goal isn't to memorize anything. Their goal is to know how to find the right guide and follow it correctly.

That's the magic of a Find & Follow system. No one needs to memorize anything to perform well.

Step 4: Transition Happens Smoothly (Not Painfully)

When the departing employee walks out the door, your coverage doesn't fall apart. Instead:

- + The person filling in knows exactly how to perform the work
- + They understand the background behind the decisions
- + They have clear, step-by-step instructions in front of them
- + They can find answers without tapping someone on the shoulder

The handoff becomes practical, calm, and operationally sound, not a crisis of tribal knowledge.

Step 5: Maintain the System as Things Change

Once the replacement or fill-in is working inside the role, they'll naturally discover things that change:

- + Screens and tools look different
- + Steps move to a different menu
- + New workflows replace old ones
- + Policies and regulations change

This is all normal. The key is to keep the documentation alive. Whenever something changes, they simply update the guide.

Because the structure already exists, maintaining it is easy.

We'll talk about how to do that systematically in the next section.

05

Keeping Your Knowledge System Fresh

Chapter 5: Keeping Your Knowledge System Fresh

Chapter Overview

Step 1: Use Comments to Capture Small or Immediate Updates

Step 2: Use Clarify AI Assistant to Apply Larger Updates

Step 3: Keep the System Alive as Processes Change

Step 4: Expand the Approach Across the Organization

Step 5: Make This Part of Your Operational Rhythm

Keeping Guides Fresh—and Expanding What You’ve Built

Once you’ve captured everything from the departing employee and trained the replacement, you now have something extremely valuable: a complete, usable snapshot of how the team operates today.

But as you know, operations never stay frozen in time. Processes shift, tools evolve, people make improvements, and new information trickles in constantly.

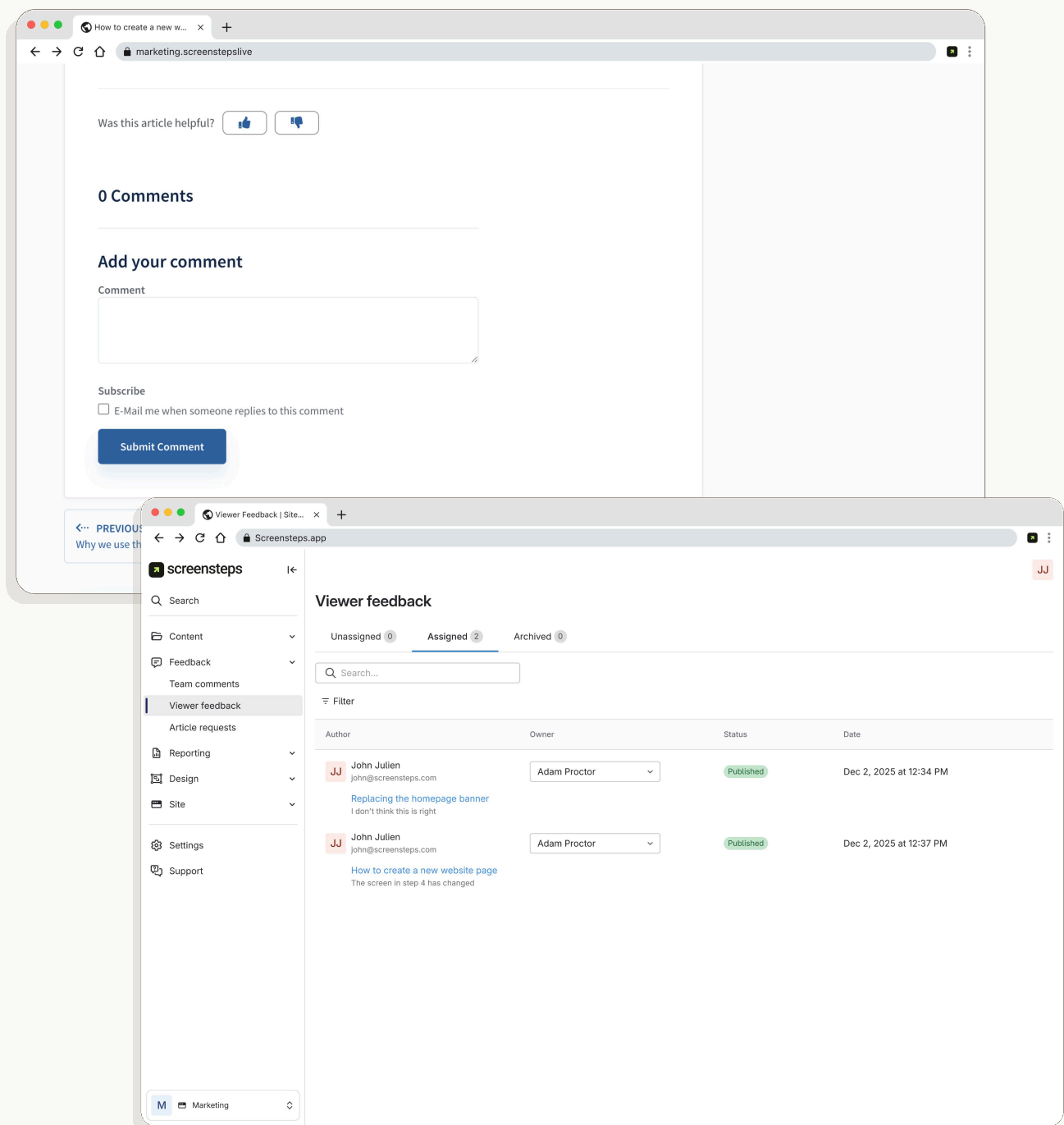
ScreenSteps is built for this.

Maintaining and updating your guides doesn’t require starting from scratch or redoing massive documentation projects. Instead, you’ll make small, ongoing updates that keep everything accurate with very little effort.

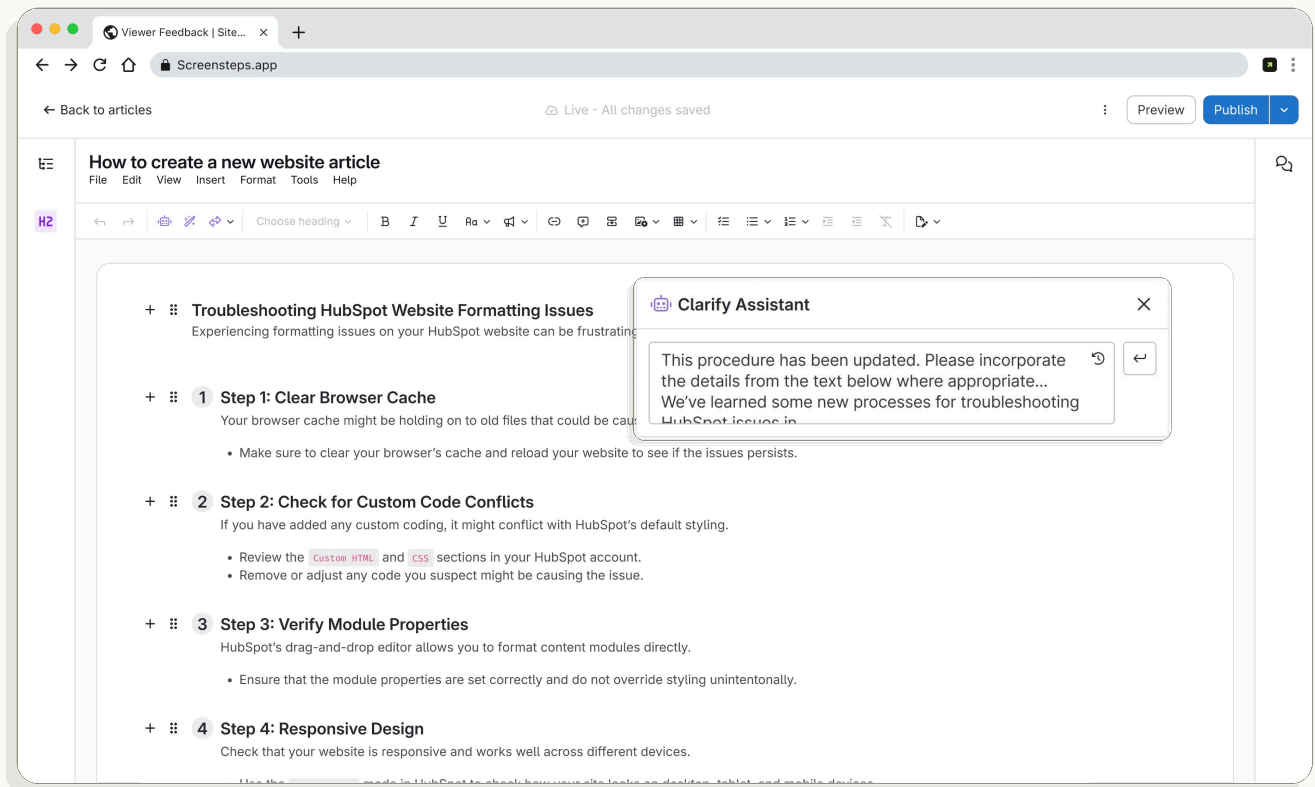
Step 1: Use Comments to Capture Small or Immediate Updates

Whenever someone is reading a guide and notices that it is no longer accurate, they can simply scroll to the bottom of the article and leave a comment.

You or whoever manages the documentation will be notified and can review the suggestion. This keeps updates flowing in naturally from the people who are actually doing the work. It also ensures your knowledge base stays alive and relevant without formal update cycles.



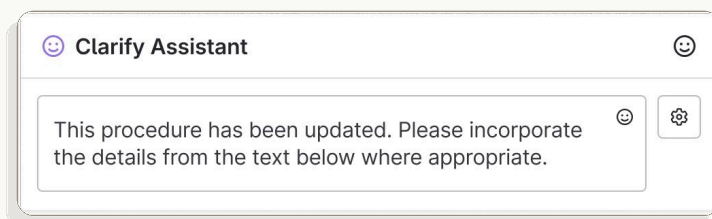
Step 2: Use Clarify AI Assistant to Apply Larger Updates



Sometimes updates come through other channels: emails, chat messages, leadership direction, and new policy changes.

In the past, this meant rewriting entire guides manually. Not anymore.

With Clarify AI Assistant, you simply drop in the text from the communication and create a prompt:



Clarify AI will review the new information, incorporate it into the existing guide, adjust the formatting, and rewrite the content so everything fits together cleanly.

You just review for accuracy, hit save, and the guide is up to date.

This turns updating documentation from a dreaded project into a 60-second task.

Step 3: Keep the System Alive as Processes Change

The goal is not to freeze your operations into a moment in time. The goal is to build a Find & Follow environment where knowledge is always current, always accessible, and always usable.

To maintain this:

- + Encourage employees to comment when things change
- + Assign articles for periodic review when major tools get updated
- + Use Clarify AI Assistant when you receive new instructions
- + Add new articles whenever new processes emerge
- + Keep foundational knowledge current with new lessons and decisions

Maintenance becomes part of normal operations instead of an overwhelming annual chore.

Step 4: Expand the Approach Across the Organization

Here's the secret: What you did for this one departing employee shouldn't be a one-time event.

You can (and should) do this for everyone. Not because you expect people to quit, but because it creates a better workplace.

- + Reduce onboarding, training, and cross training time
- + Fewer interruptions and dependency on individual memories
- + Prepare your team for promotions and role changes
- + Improve consistency and quality across the board

You're not creating documentation to replace people. You're creating clarity so people can grow, move, delegate, and take on more meaningful work.

Step 5: Make This Part of Your Operational Rhythm

Once you see how powerful this system is, you'll want to bake it into your operations.

That might look like:

- + Monthly or quarterly Find & Follow review sessions
- + Asking employees to keep their guides updated as part of their workflow
- + Using Clarify AI Create whenever a new task emerges
- + Reviewing foundational knowledge annually or after major strategy shifts

When this becomes normal, your organization stops relying on tribal knowledge and starts running on clarity, structure, and consistency.

06

Getting Started

Chapter 6: Getting Started

Two Weeks Is More Than Enough — You've Got This

That's everything. When someone gives their two-week notice, you don't need to panic, you don't need to scramble, and you definitely don't need to rely on hours of frantic interviews or walls of messy transcripts.

With the process you just walked through, two weeks is more than enough time to capture what you need, organize it clearly, and prepare your team to keep everything running smoothly.

The reality is simple: when someone quits, the biggest gap isn't their skillset — it's their institutional knowledge. It's the way they've learned to navigate your environment, your systems, your workflows, your quirks, your tools, your decisions, and your standards.

Even if you hire someone extremely qualified, they still won't know how your operations run.

That's what this project captures. That's what these recipes and foundational articles give them.

That's what Find & Follow makes possible.

Two Weeks Isn't a Crisis, Two Weeks Is an Opportunity

With ScreenSteps, Find & Follow, and a little focused time, you can:

- + Capture the knowledge that matters
- + Transfer it cleanly
- + Train someone to fill in immediately
- + Keep your team running without major disruption

You've got everything you need to make it work — and now you have the roadmap.



Let's Get to Work

New to the ScreenSteps world? Schedule a demo with Find & Follow experts to learn how we can support your two-week notice.

