



Pilot, Launch & Optimize Checklist

Once you've prepared your [Find & Follow Training](#) materials, it is time to launch your knowledge base and run your employee training. Use this checklist to ensure you don't miss a step during pre-launch, launch, and post-launch activities.

Pilot

- ☐ Perform a User Acceptance Test
 - ☐ Have someone unfamiliar with the process run through the guides
 - ☐ Can end-users find a guide in your knowledge base?
 - ☐ Can end-users follow the instructions in the guide without asking for help?
 - ☐ Observe those using the guides and make notes on how to improve the guides
- ☐ Update guides from what you observed
- ☐ Test guides again with an unfamiliar user

Launch

- ☐ Launch knowledge base using the [80% Launch method](#)
- ☐ Train employees using the Find & Follow Training Framework
 - ☐ Teach foundational courses
 - ☐ Spend 80-90% of training doing practice activities
- ☐ Take notes on how you can improve the process for future trainings

Expand

- ☐ Launch to other teams and departments following the same training
- ☐ Turn off other knowledge sources (*once you've launched to all your teams*)

Optimize

- ☐ Make adjustments to your training program from employee feedback and the notes you took during the training
- ☐ Track user analytics
- ☐ Update and optimize content
 - ☐ Complete the "20% content" (*i.e. articles not completed prior to launch*)
 - ☐ Respond to comments
 - ☐ Respond to article requests
 - ☐ Fill knowledge gaps
 - ☐ Identify bottlenecks
- ☐ Reinforce using the knowledge base for every interaction and transaction

Additional Resources

Need help creating and launching your Find & Follow Training program? Our ScreenSteps experts can help you implement the training methodology. People who use our consulting services launch 50% faster and achieve ROI quicker. [Talk to a ScreenSteps rep](#) to learn about coaching options.

Other resources include:

- [Coaching Services with ScreenSteps](#)
- [Find & Follow Training eBook](#)
- [Find & Follow Webinar Series](#)



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