

Checklist for Rolling ScreenSteps out to Reps

Use this checklist as part of your rollout plan to increase adoption of ScreenSteps by your reps/agents.

Pre-launch

- Create home intake flow(s)
- Create reference articles
- Create troubleshooting flows
- Confirm 80% of questions can be answered using ScreenSteps
- Optimize organization
- Optimize Search
- Set up Single Sign-on
- Prepare zero-memorization training curriculum

Post-launch

- Confirm reps have their workspace set up appropriately
- Review search queries to see if reps can find what they are looking for
- Review comments and update accordingly
- Include links to ScreenSteps when announcing updates/changes
- Revise content that is outdated/difficult to use
- Continue to add content

Reach to the ScreenSteps team if you need help with any of the items above. We will be happy to provide recommendations or guidance.