



ScreenSteps Smart Search

How ScreenSteps is Using AI to Give Your Users Better Search Results

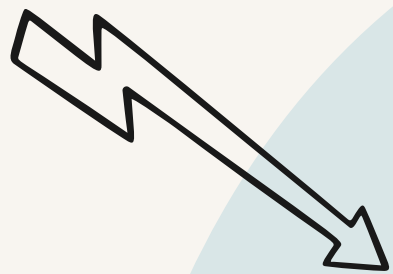
Presentation by: Jonathan DeVore & Greg DeVore

What Do We Want to Help You Accomplish?

To Become a Find & Follow Organization



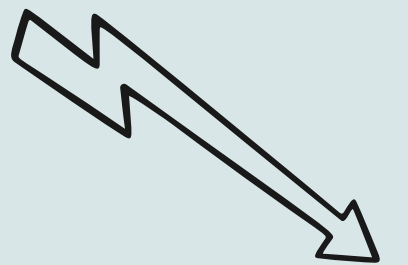
80% Reduction in Escalations



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90% Faster Onboarding



6 months



2 weeks

More Capable Employees



Fewer
Mistakes

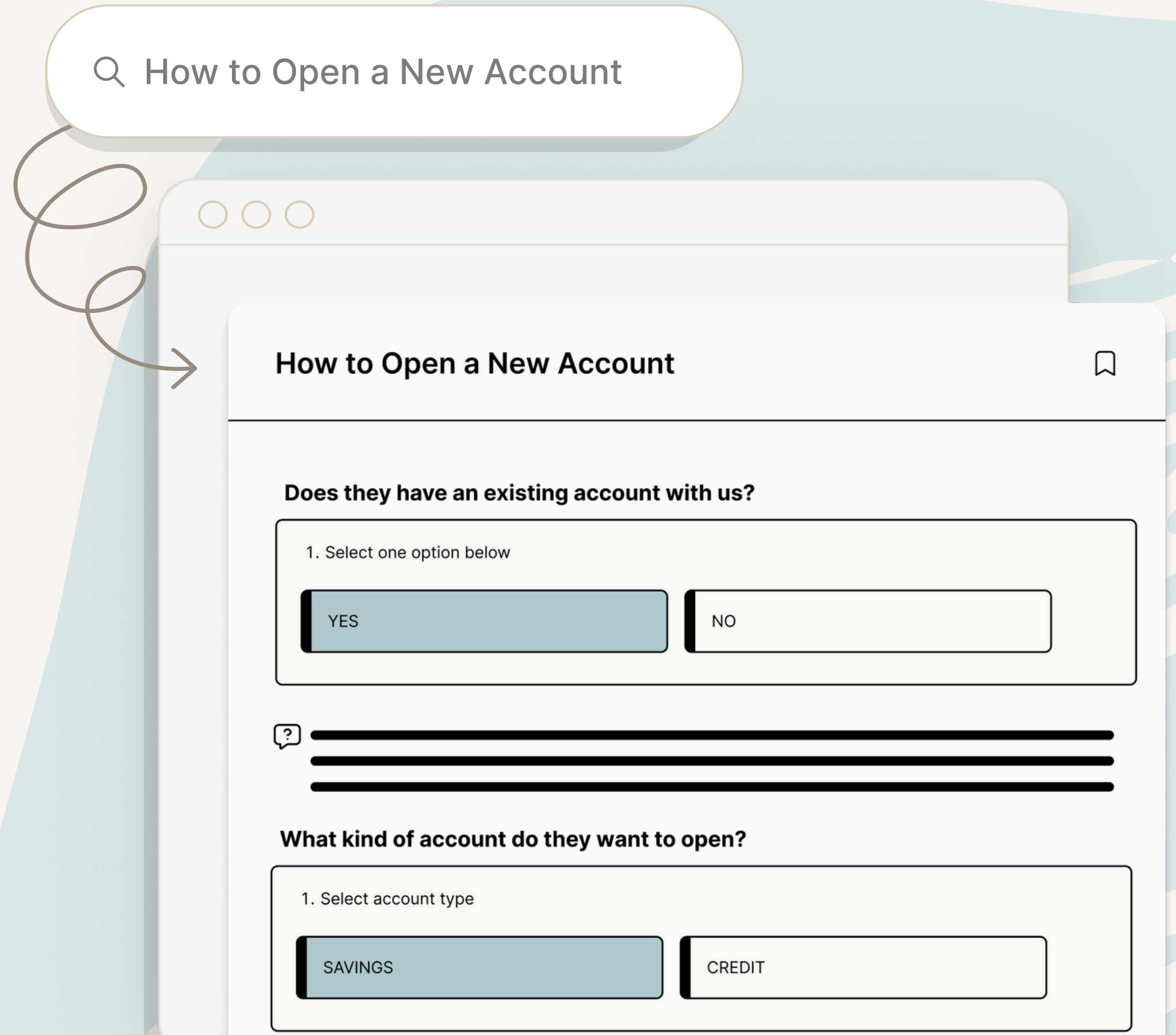
More
Confidence

More
Knowledgeable

**In Order to become a Find & Follow
Organization You Have to be Able to
Find the right guides**

Current Approach: Keywords

- + ScreenSteps indexes all of the text in an article
- + If you know the keywords or the title you're looking for, it works well



Q How to Open a New Account

How to Open a New Account

Does they have an existing account with us?

1. Select one option below

YES NO

?

What kind of account do they want to open?

1. Select account type

SAVINGS CREDIT

Challenge:

- + End-users may not know which keywords to search for
- + You end up adding tags or additional search terms trying to guess what they want
- + You can get a lot of results back because ScreenSteps is returning articles that contain those keywords

🔍 How do I change the look of this site

What they want:

How to modify the template

VS

What they get:

How do I change sites?

What is a site?

How do I change a user?

How do I log into a site

300 more results...

We Explored a Lot of Options

The Result is Smart Search

How it works

keyword search

If you only search 1-3 words, it will do a keyword search



🔍 Policy 17384

***Keyword Search**

AI to match context

If you type in a phrase, it will use AI to find an article that matches the context



🔍 What are the requirements for replacing a Card?

***Use AI to Match Context**

Suprising Learnings

“No results” is actually a goal

It's now faster to find duplicates

People expect search to read their mind →
They need be taught to add context

What's Next?

Next Webinar

11/13/2025 @ 1:00 PM ET

How to Optimize Your Existing Guides with Clarity AI Transform

Get more out of the content you already have using Clarity AI Transform. Convert existing guides to be clearer, easier to follow, and more effective.

<https://www.screensteps.com/webinars>