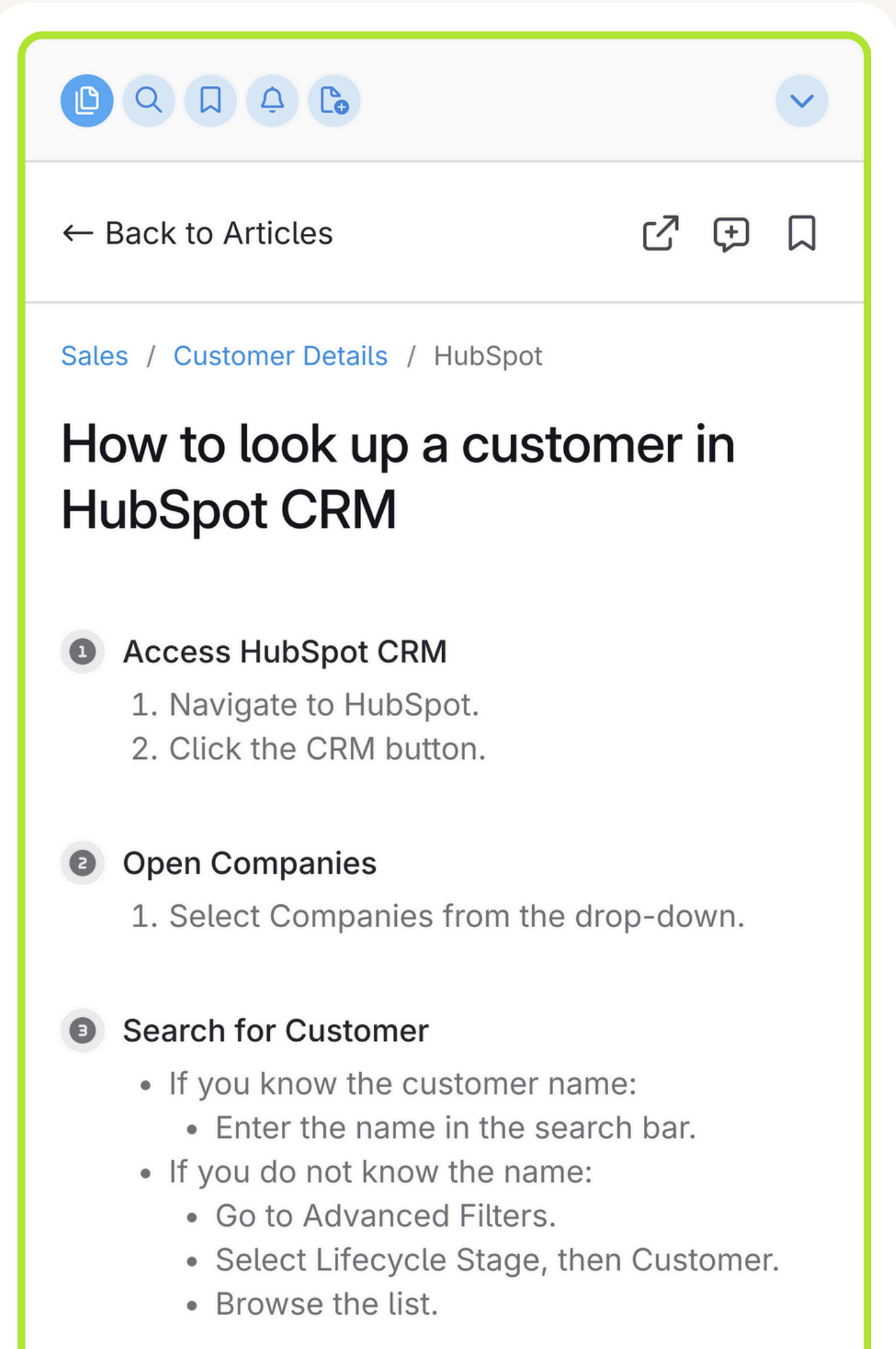


ScreenSteps Platform Walk Through

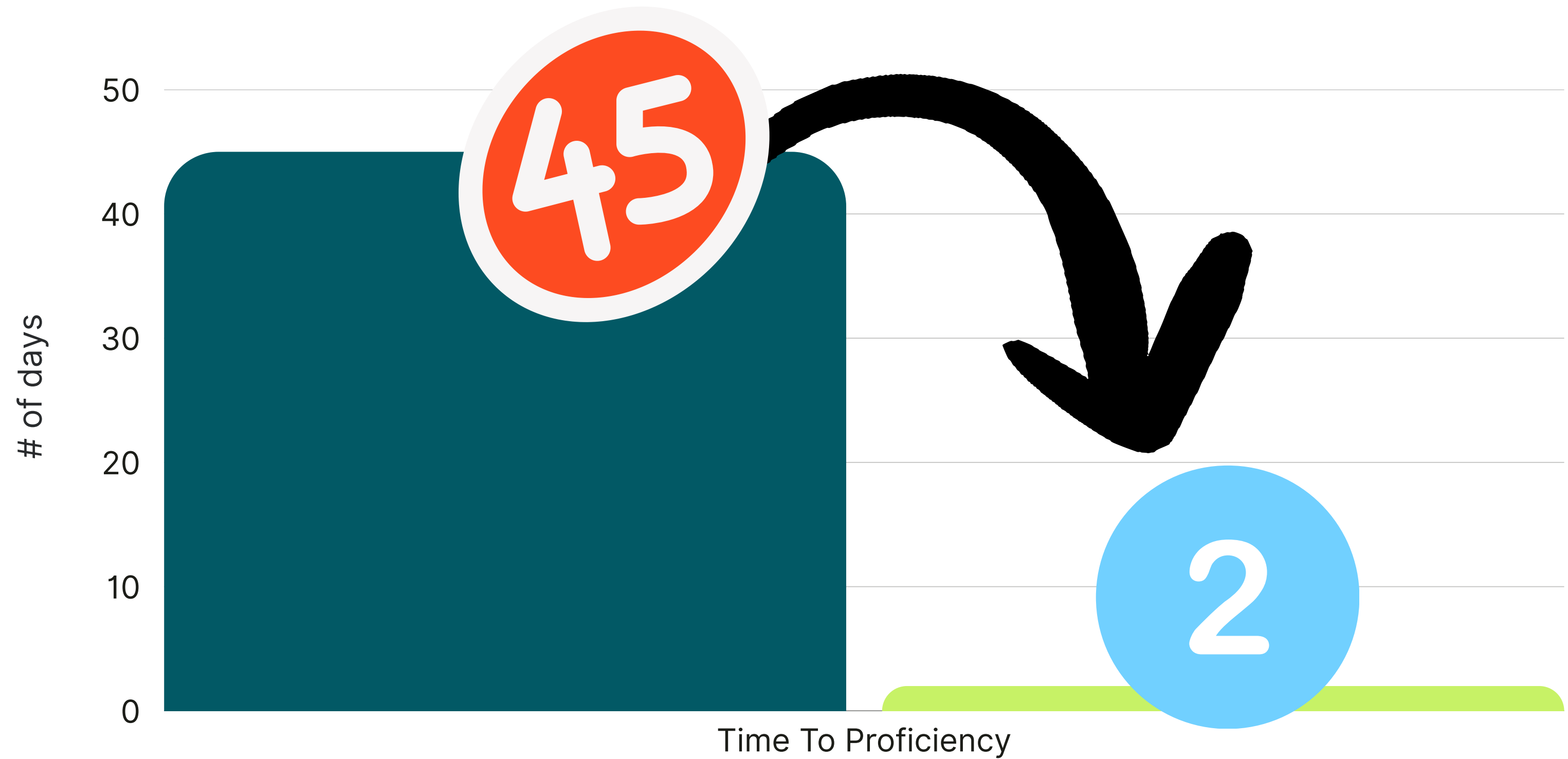
Presentation by : Greg DeVore

Key Component:

Provide Answers Employees Can Trust at Their Fingertips



Time to Proficiency in days



80% Reduction in Escalations



Common Approaches

Approach	Pros	Cons
Knowledge Management	Free, easy to start	Becomes a “junk drawer,” can’t find what you need, difficult to create/update guides
Ad Hoc/ Tribal/ Memorization	Tailored Answers in real-time, trusted	Exhausting, unscalable, tribal knowledge, inconsistent answers
AI “Magic”	Modern, conversational	Garbage in = Garbage Out, takes a long time to train

In a Perfect World, You'd Have a System that...

- ✓ Practically documents procedures for you
- ✓ Automatically formats guides to improve employee performance
- ✓ Tracks validations and feedback from employees
- ✓ Enable employees to perform with answers they can trust



How Do You Get There?

- Rewrite All Your Documentation
- Type New Content From Scratch
- Spend 6-12 Months Training AI



Key Insight

In order to have answers at employees fingertips that they can trust, you MUST have a system in place for:

- Capturing Knowledge
- Converting it to a format that's designed for performance
- Delivering it to your employee's without friction
- Maintaining the validity of that knowledge over time

How Do You Get There?

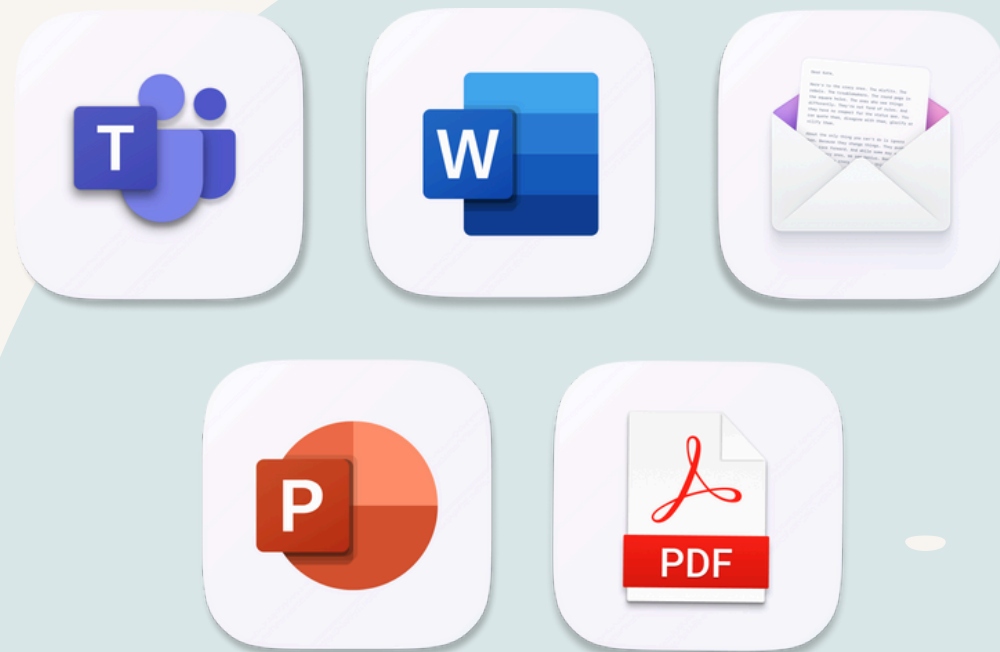
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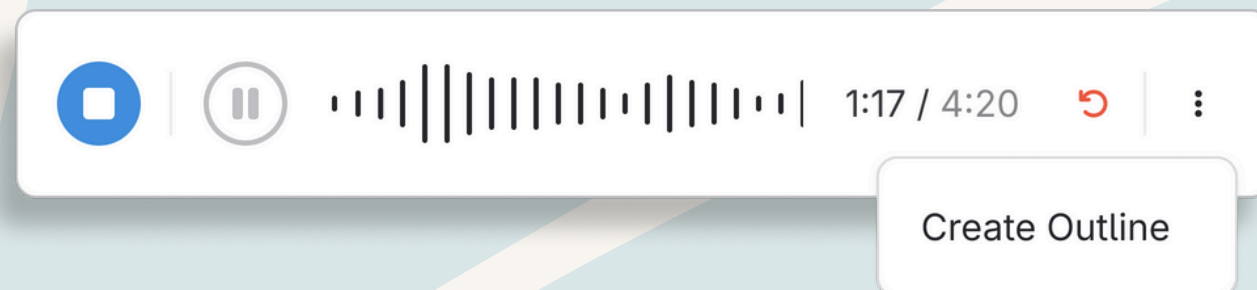
How We Help You Get There

Convert Information Into Recipes

One work day



One work week



Credit Union / Account Management / Opening Accounts

Opening a New Account

Updated on Aug 01, 2025

Verify Prospective Member Meets Criteria

☒	1. Current Driver's License with Address	▼
☒	2. SSN OR TIN	▼
☐	3. Meet Eligibility Requirements	▼
☐	4. \$25 to open account	

Does Prospective Member Meet the Above Criteria?

1. Select one Option Below

What we will show today

Capturing + Optimizing Knowledge

- Capturing Actionable Knowledge
- Capturing Foundational Knowledge
- Advanced Authoring Features

Empowering Performance

- ScreenSteps Sidekick
- Decision Trees
- Change Notifications
- Micro-Courses

