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4 ScreenSteps Use Cases To Deliver Powerful Business Impact for Clients

✦ ScreenSteps

Use Cases

- Escalations

- Employee/agent training

- Digital adoption/Change management

- AI Capture

Escalations

("how do I ....?")

Partner Referral Use Case: Escalations

Company with 30 employees, struggles with finding and accessing procedures stored on a traditional file server system.

- "We are constantly looking for information"

- "There are too few of us and we all wear a lot of hats"

- "We need our employees to be more independent"

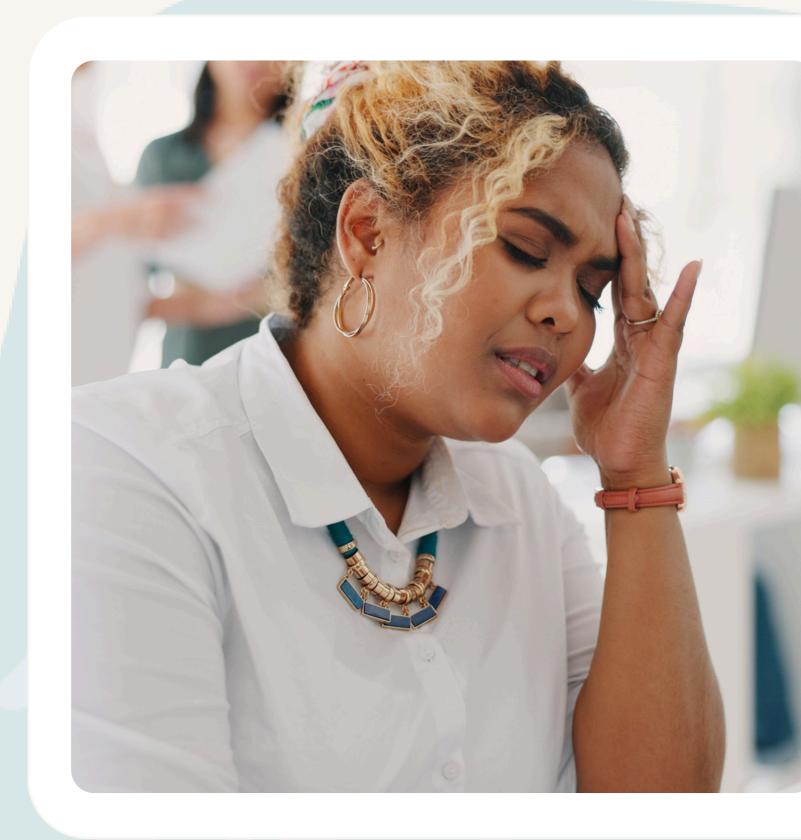| Trigger	Response
We can't even leave the office without our employees blowing up our phones with questions.	We have a partner who has helped decrease "How do I" questions by as much as 80%.
Managers can't manage – they're always getting brought in to put out fires.	That's because they can't transfer their operational knowledge to others. We have a partner that can build a system that empowers employees to handle things on their own.
Everything is scattered everywhere.	We have a partner that can help you create a single source of truth.

Training + Support
(onboarding, training, cross-training, & upskilling)

Use Case : Training

B2B Technical Call Center Trains
New Agents 87% Faster

- Scattered documentation led to 6-month training times and a poor customer experience. "

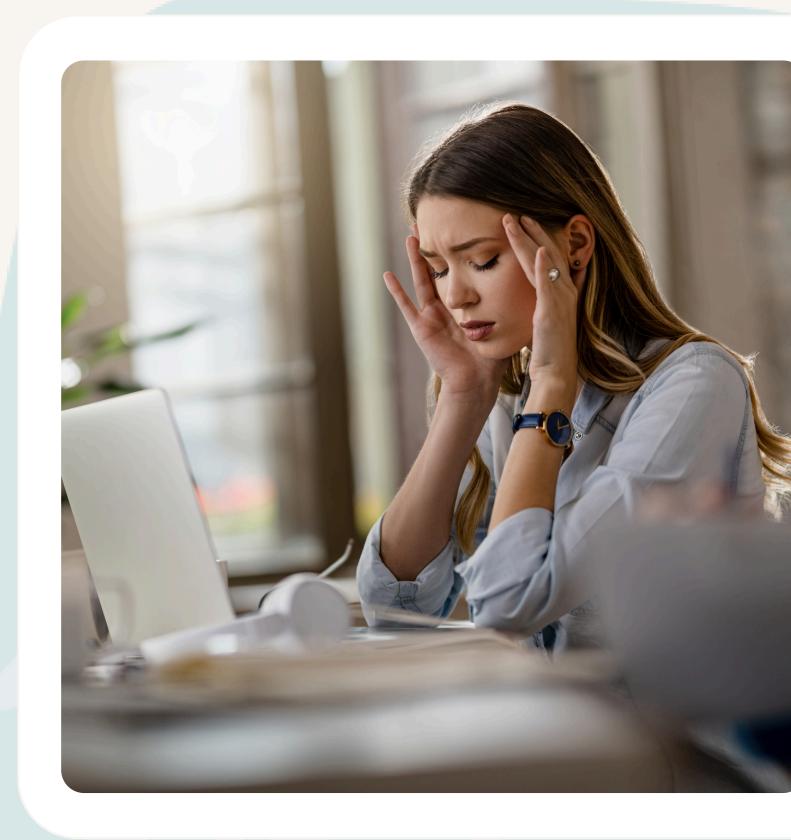- Poor customer experience

- Agent turnover

Trigger	Response
Employees leave becuase their jobs are too complex.	It's becuase you are pouring a gallon of water into a 16 ounce cup. We have a partner who can help.
Training is worthless. Not even sure why we do it.	It's because you're relying on shadowing. We have a partner who can help you build a training program that empowers employees to work independently.
Operations feel chaotic; everyone does things differently.	That's because you don't have a single source of truth that everyone can rely on. We have a partner that can build that for you.

Digital adoption & change management
(New tech, processes, procedures)

Partner Referral Use Case: Browser Extension

- Company has experienced a painful rollout.
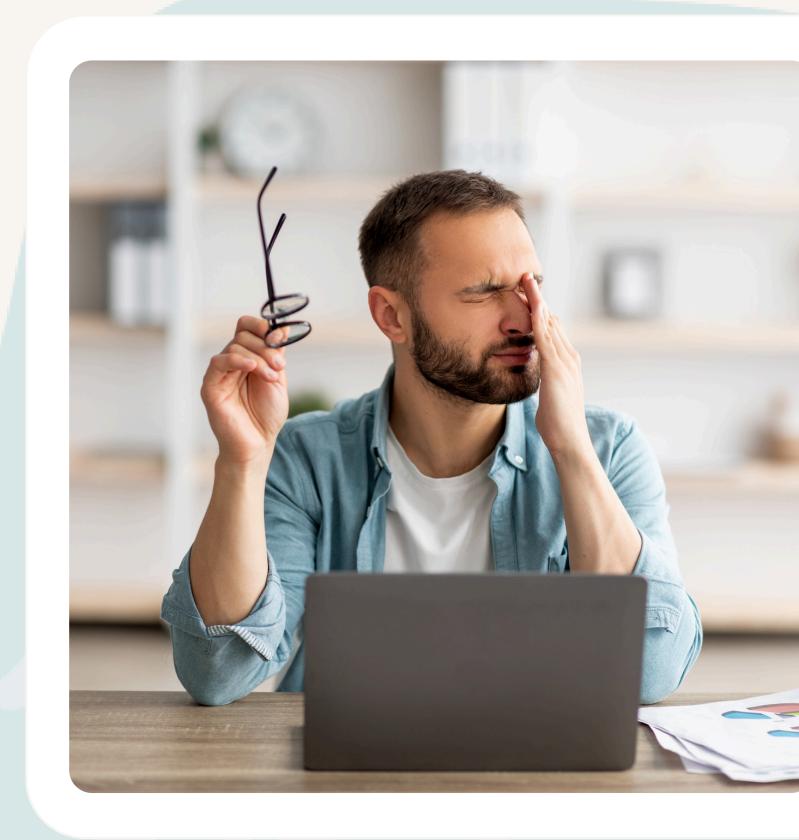
- They want a better plan for the next rollout.

Trigger	Response
The last technology rollout went horribly and everyone is still struggling.	We have a partner that solves this exact problem without you haveing to create training tools.
The last rollout was so bad that people are still scared of more change.	We have a partner who can make this next rollout much smoother.

AI Knowledge capture

Partner Referral Use Case: AI Knowledge Capture

- Need to get information out of people's heads.

- Documentation project is not getting done.

- No one has time to do this even though leadership wants this completed.

"I LOVE the AI tools for getting knowledge out of my head.

It's so easy to just talk through the process and have the ScreenSteps AI create the guide.

What would have probably taken me **a month** to do, I was able to get done **in about a day's worth of work**."

Mandy
Processing Department Manager
Heritage South Credit Union

Trigger	Response
I can't get my team to document our procedures	We have a partner who has AI tools that can help you document things without even having to type.
We know we need to create documentation but we don't have the time.	It's 20X faster than what you are probably doing now.