

**Are you doing a tech rollout in the near future?**

**OR ...**

**Have you recently gone through a tech rollout?**



# Master Technology Rollouts at Your Financial Institution

How to Leverage Micro-Courses & Digital Guides for a Smoother Tech Rollout

PREPARED BY  
ScreenSteps

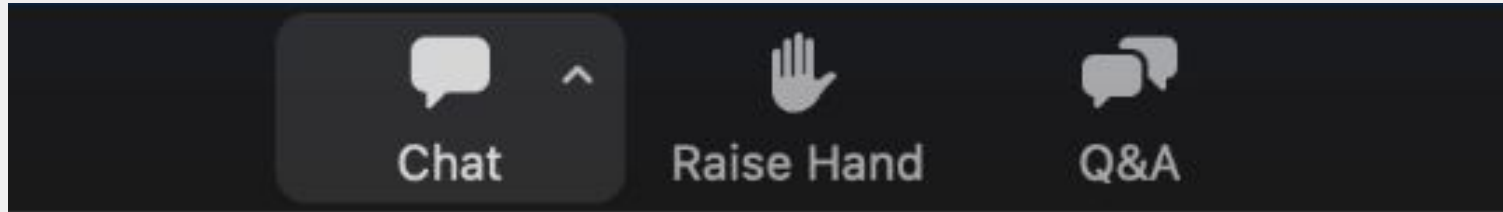
DATE  
July 10, 2024



Chat with us...



...or ask us questions



# Welcome



Greg  
**DeVore**

CEO + Co-founder



Jonathan  
**DeVore**

Director of Implementation

# What are typical results when financial institutions roll out new software?

- Everyone is confused and overwhelmed
- 6 months go by and people still aren't using the new system
- Supervisors and help desks are flooded with questions





# Why are these the results?



Scheduling training is difficult



Learners are often distracted and disengaged during training



There is too much information to learn (memorize)



The system often evolves over time (knowledge becomes outdated)

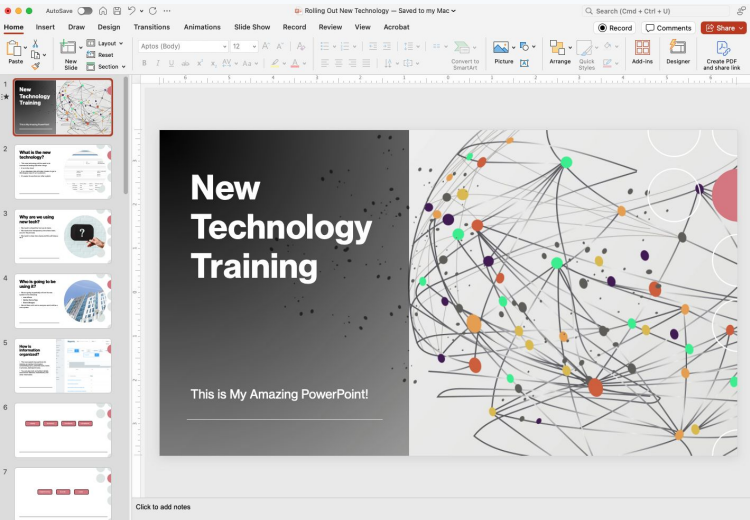
Today you learn **how to  
empower** and not overwhelm

## **Challenge:**

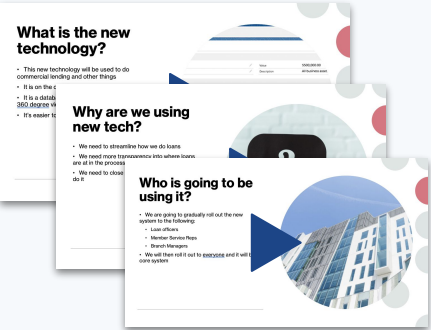
**People need to understand the big picture  
and they need to know the details**



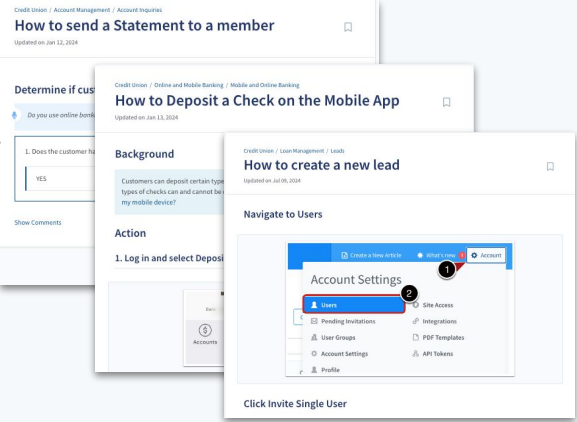
# Foundational



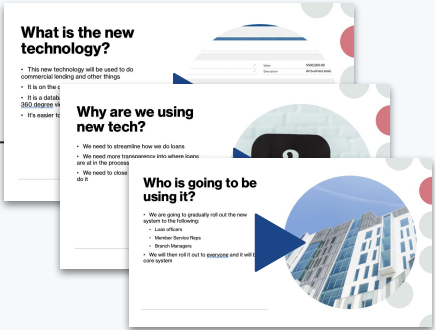
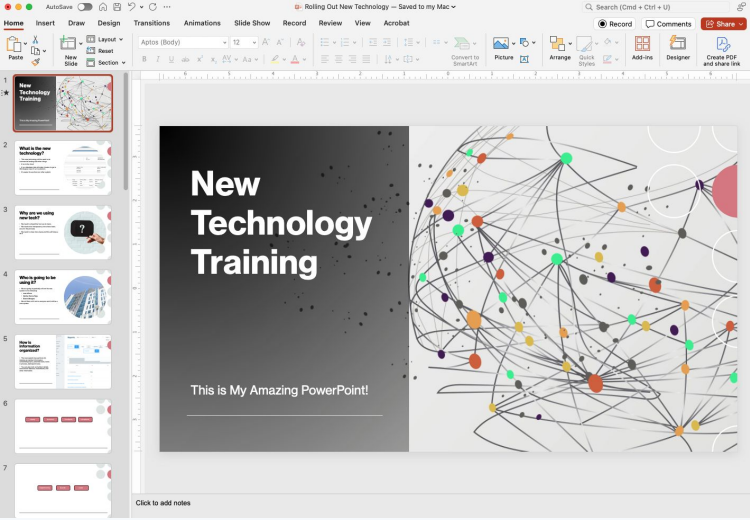
1



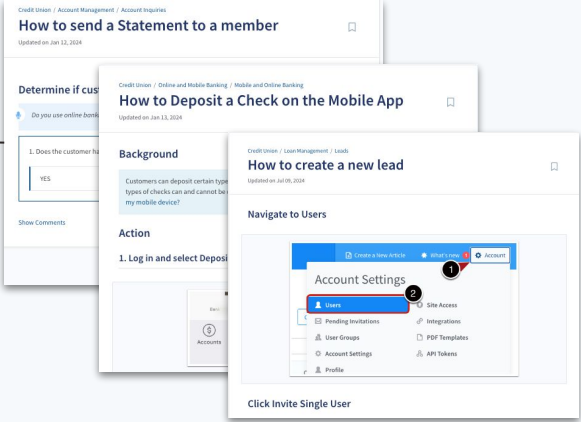
# Actionable



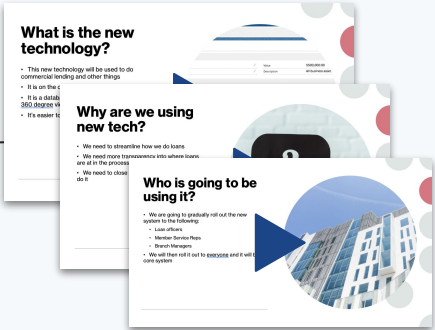
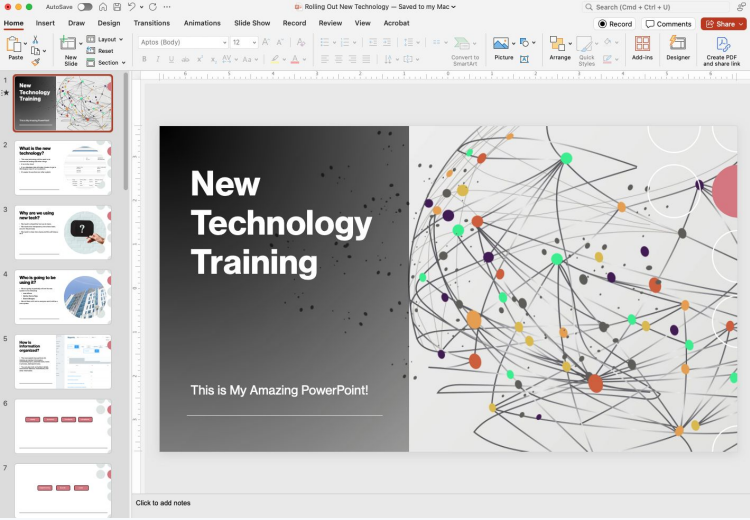
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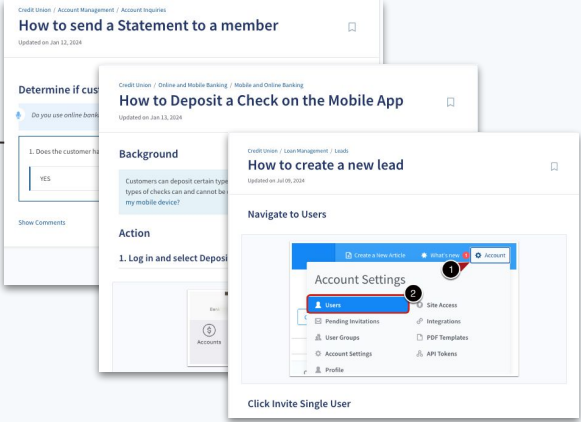
# Actionable



# Foundational



# Actionable



# Foundational

**What is the new technology?**

- This new technology will be used to do commercial lending and other things
- It is on the way
- It is a detail 360 degree
- It's easier to

**Why are we using new tech?**

- We need to streamline how we do loans
- We need more responsiveness into where banks are at in the process
- We need to close

**Who is going to be using it?**

- We are going to gradually roll out the new system to the following:
  - Loan officers
  - Member Service Reps
  - Branch Managers
- We will then roll it out to associates and tell them system



# Actionable

**How to send a Statement to a member**

Updated on Jan 13, 2024

**How to Deposit a Check on the Mobile App**

Updated on Jan 13, 2024

**How to create a new lead**

Updated on Jul 19, 2024

**Navigate to Users**

Account Settings

- Users
- Pending Invitations
- User Groups
- Account Settings
- Profile
- Site Access
- Integrations
- PDF Templates
- API Tokens

Click Invite Single User

4

17% Overview of New Software

2 / 12 COMPLETED

Welcome to this Microlearning!

What is the new technology?

Why are we using new technology?

Who will be using the new software?

How is information organized?

Navigation Basics

Lead Overview

Accounts Overview

Contacts Overview

Opportunity Overview

Overview of Loan Process

What's Next?

### Lead Overview

#### What is a lead?

- Prospect or potential customer who has expressed interest in our products or services, but has not yet been qualified as a sales opportunity.
- Leads can come from various sources such as marketing campaigns, website inquiries, or trade shows.

**Related Procedures & Tasks**

- How to create a new lead
- How to update a Lead
- How to delete a lead
- How to merge a duplicate lead



# Foundational

**What is the new technology?**

- This new technology will be used to do commercial lending and other things
- It is on the X
- It is a really cool device
- It's easier to use

**Why are we using new tech?**

- We need to streamline how we do loans
- We need more transparency into where loans are all in the process
- We need to close the gap

**Who is going to be using it?**

- We are going to gradually roll out the new system to the following:
  - Loan Officers
  - Member Service Reps
  - Branch Managers
- We will train all of our employees and it will save money

# Actionable

**How to send a Statement to a member**  
Updated on Jan 11, 2024

**How to Deposit a Check on the Mobile App**  
Updated on Jan 11, 2024

**How to create a new lead**  
Updated on Jan 10, 2024

**Account Settings**

- Users
- Site Access
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Click Invite Single User

**New Technology Training**

**New Technology Training**

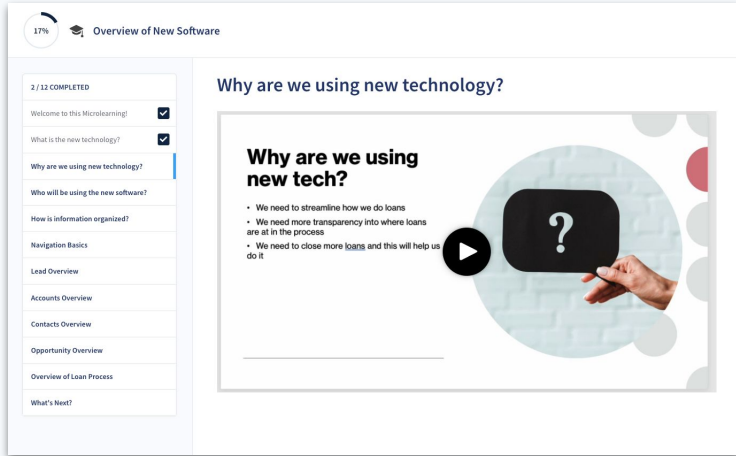
This is My Amazing PowerPoint!

Click to add notes



# Using Courses with Live Training

Complete Course  
on their own



17% Overview of New Software

2 / 12 COMPLETED

- Welcome to this Microlearning!
- What is the new technology?
- Why are we using new technology?
- Who will be using the new software?
- How is information organized?
- Navigation Basics
- Lead Overview
- Accounts Overview
- Contacts Overview
- Opportunity Overview
- Overview of Loan Process
- What's Next?

### Why are we using new technology?


#### Why are we using new tech?

- We need to streamline how we do loans
- We need more transparency into where loans are at in the process
- We need to close more loans and this will help us do it

The screenshot shows a course interface with a progress indicator at 17% and a list of 12 topics. The first two topics are marked as completed. The main content area displays a slide titled 'Why are we using new technology?' with a sub-heading 'Why are we using new tech?' and three bullet points. A play button icon is visible on the slide.

5

Run Practice  
Scenarios together



### An existing member becomes interested in getting a new loan

- What do you need to create?
- How will you create it?

The image shows a man in a suit and a woman in a black dress shaking hands in a professional setting. The background is a blurred office environment.



Summary of what we did:

# Find & Follow Microlearnings



Separate Foundational +  
Actionable Knowledge



Prepare Foundational Videos



Prepare Actionable Guides



Put them in a course



Prepare Practice Activities

# Results



People learn on their own  
schedule



They are less overwhelmed



They adapt to change without  
mountains of questions



# Testimonial

## Lori

Training & Development Manager

"This training approach is a lifesaver! These guides are giving me a lot more confidence in using Salesforce and training others on how to use it. And it's giving others confidence in how to use Salesforce. Specifically, the customer care team LOVES them. They've told me how much these training guides have helped them do their job."



**Q & A**

# Find & Follow

How to learn more:



[Get your copy on Amazon](#)

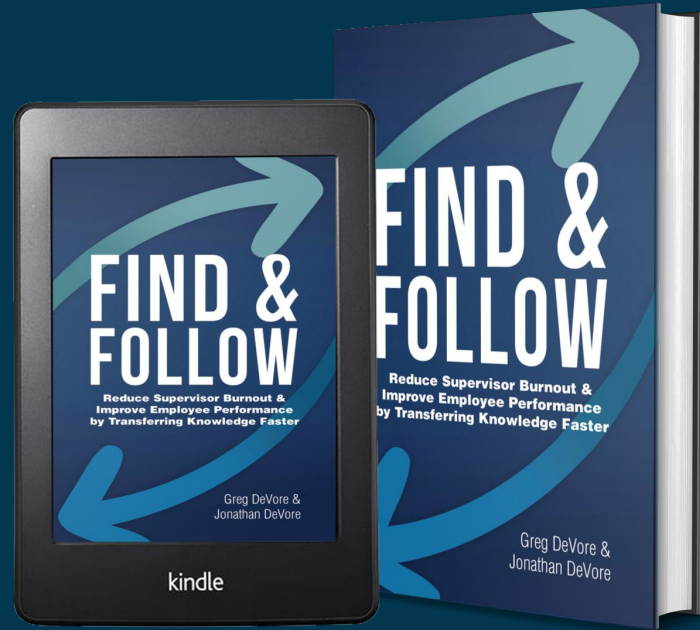
*(available in Kindle, paperback, and audio)*



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Download our free [Find & Follow](#)  
[playbook](#)



# Join us for our next webinar

“How to Build an Onboarding  
Program at Your Financial  
Institution”

Aug. 1 at 1 pm EST

**[CLICK HERE TO REGISTER](#)**



**Q & A**

# Contact Us



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ja@screensteps.com

**SCHEDULE A DEMO →**



## Set up a demo account

Try out the foundational courses in the ScreenSteps knowledge ops platform.



## Develop a plan

Develop a plan for implementing mini-courses and practice activities in employee training.



## Get your questions answered

Will this work for your financial institution? Meet with Greg or Jonathan to discuss your institution's situation.

**Thank You**