

The one-afternoon rollout, at a glance

SAMPLE · FICTIONAL COMPANY

Meridian Dental Group (Sample Company) · Run by Dana Reyes, Office Manager, October 5-16, 2026 (illustrative). This overview condenses the full step-by-step guide in the pack: three steps for the admin, about an hour per employee (splittable across sessions), no logins to manage, no software to install.

STEP 1 · ~10 MIN

Adopt the policy

Put the company name on the training policy template, have the owner sign it, circulate it to staff. The questionnaire sentence about a training program is now true in writing.

STEP 2 · ~1 H / EMPLOYEE

Run the videos

Share the training player. Each module is 3-5 minutes with a short quiz; people finish between patients. Spread it over any schedule; the log tracks who's done.

STEP 3 · ~30 MIN

File the evidence

Fill the completion log, file each completion record employees send in, put everything behind the register. At renewal, attach. Don't scramble.

THE ADMIN CHECKLIST, AS COMPLETED IN THIS SAMPLE

☒ Adopt & sign the policy: owner signature, date, circulate to all staff	OCT 5 · 10 MIN
☒ Announce the rollout: one email to the team, what, why, and the two-week window	OCT 5 · 5 MIN
☒ Share the training player: everyone opens the same offline file; no accounts, no seats to provision	OCT 6 · 10 MIN
☒ Track completions weekly: tick the log as employees send in their completion records; nudge stragglers once	OCT 6-16 · 5 MIN/WK
☒ Collect completion records: one dated record per employee per finished module, produced by each passing quiz	OCT 16 · 10 MIN
☒ File the register: policy, log, records behind the one-page register; folder named and dated	OCT 16 · 5 MIN
☐ Before next renewal: re-issue the register, close any gaps, hand the single page to the broker	ANNUAL

What this illustrates. Dates show a fictional company's one-afternoon rollout (the pack itself downloads at checkout). The full step-by-step guide (EV-05) ships with the pack; this page is the at-a-glance version an office manager actually pins up.