



Training Content Checklist

Use this checklist when creating and revising all training material decks.

Content Accuracy

Before formatting or design, verify the content itself is correct.

- ☐ All provided source content is included
- ☐ Screenshots match the written instructions
- ☐ No steps are missing
- ☐ All screenshots referenced in the instructions are present
- ☐ Screenshots appear in the correct order
- ☐ Each step clearly matches what the screenshot shows
- ☐ If something is mentioned in the text, it needs to be visible in the screenshot
- ☐ Where does the information come from?
- ☐ Has the box been automatically filled out or does it need to be manually filled in?

Grammar & Writing Quality

- ☐ Spellcheck completed
- ☐ Grammar reviewed
- ☐ Sentences are clear and easy to understand
- ☐ Long sentences are simplified
- ☐ Unnecessary paragraphs are converted into bullet points where appropriate
- ☐ Instructions are written in a clear step-by-step format

Instruction Formatting Rules

Follow these rules whenever instructions tell the user to take an action.

- ☐ Only actions are bolded (examples: Click Save, Type Customer Name)
- ☐ Do NOT bold entire sentences or paragraphs
- ☐ Do NOT use all bold text for regular content
- ☐ Only the words the user must click or type are bold
 - **Correct:** Type **My Password** in the password field and click **Login**.
 - **Incorrect:** Click the **Login button** or **Type My Password**.



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Notes Formatting (Teal Text)

- ☐ Teal text appears ONLY for notes
- ☐ All teal text is located at the bottom of the slide
- ☐ All teal notes begin with "Note:"
- ☐ Teal text is never used within regular instructions

Screenshot Placement & Image Rules

- ☐ Images stay inside the white content area
- ☐ Images never overlap borders or margins
- ☐ Images are clear and readable
- ☐ Images correspond to the correct step
- ☐ If multiple images exist:
 - Align vertically **or** Align horizontally
- ☐ Images are consistently spaced
- ☐ Images do not appear randomly placed

Arrows and Visual Indicators

Use arrows when the viewer needs help locating something. This is especially important on detailed screenshots.

- ☐ Add teal arrows when an element may be difficult to see or difficult to find quickly
- ☐ Arrows point directly to the correct item
- ☐ Arrows should not block important content
- ☐ Arrows are used consistently across slides

Layout & Alignment Standards

- ☐ Text begins at the **1 inch** alignment mark
- ☐ Images begin at the **1.5 inch** alignment mark
- ☐ General text is left aligned
- ☐ Page headers are center aligned
- ☐ Spacing between text and images is consistent
- ☐ Slides look balanced and not crowded



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Font Standards

- ☐ **Use Poppins on ALL Fonts**
 - 40 Pt. on Page Headers
 - 20 Pt. on all Page Content
 - 10 Pt. on all Captions

Image Captions

Use captions when the screenshot needs explanation.

- ☐ Captions are placed below the image right-aligned
- ☐ Caption font size is **10 pt**
- ☐ Captions clearly describe what the user is seeing
- ☐ Captions are concise

Slideshow View Check

Always review the slides in presentation mode.

- ☐ Open slideshow mode
- ☐ Confirm all images are fully visible
- ☐ Ensure nothing is cut off
- ☐ Verify arrows and callouts appear correctly
- ☐ Check readability from slide view

Final Quality Check (Before Submission)

Before sending the training material:

- ☐ All instructions match screenshots
- ☐ Formatting rules followed
- ☐ Grammar checked
- ☐ Notes formatted correctly
- ☐ Images aligned properly
- ☐ Arrows added where necessary
- ☐ Fonts and sizes correct
- ☐ Slides checked in presentation mode