

Your role as an UpToDate Clinical Advocate is important. To assist, we've provided best practices for driving registration and usage.

### Phase One: Develop a communication plan

- ☐ Visit the [Customer Success Center](#) and become familiar with the communication templates
- ☐ Bookmark the Customer Success Center for easy access to materials
- ☐ Review UpToDate product information in the [Training Resource Center](#)
- ☐ Identify a list of five opportunities to build awareness
- ☐ Set dates to conduct awareness and registration events

### Phase Two: Build awareness and hold registration events

- ☐ Send an announcement from an executive promoting the benefits of UpToDate (template provided in Customer Success Center)
- ☐ Conduct registration events to facilitate staff registration. (pre-written emails in Customer Success Center.) Events held at large meetings or near a cafeteria during mealtimes work well. Hospitals experience large spikes in their registration numbers by holding registration events.
- ☐ Include Information about UpToDate in your newsletters, social media, and other vehicles
  - ☐ Encourage downloading of mobile apps
  - ☐ Drive usage through the EHR (if available)
  - ☐ Promote continuing education accrual and redemption, as appropriate
  - ☐ Encourage colleagues to submit success stories and/or testimonials
- ☐ Use the PowerPoint slides and UpToDate videos to demonstrate the easy registration process and mobile app download (slides and video links available in the Customer Success Center and [User Academy](#))

### Phase Three: Continue to build awareness and promote registration

- ☐ Endorse UpToDate at staff meetings, in the lunchroom and during training events
- ☐ Invite colleagues to Live Online Learning sessions
- ☐ Enlist the support of your educational group to drive CME/CE/CPD accrual and redemption (where available)
- ☐ Send follow up emails with success stories such as number of CME/CE/CPD's earned, number of mobile devices connected and your clinicians' testimonials regarding how they use UpToDate

### Promote consistency in care:

- ☐ Demonstrate key UpToDate benefits to clinicians during lounge trainings, medical staff meetings, and "Lunch and Learn" events
- ☐ Include UpToDate in your orientation and ongoing training programs
- ☐ Share success stories and usage numbers