

Boost Manager/Supervisor Productivity  
by 25% by  
Reducing Your Reliance on  
Tribal Knowledge



## Insight

# What we have heard

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- Managers and Supervisors spend all day answering questions -> Especially from new hires
- They end up doing their real work after hours
- Adapting to change feels impossible



**What does that lead to?**

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Employee Attrition

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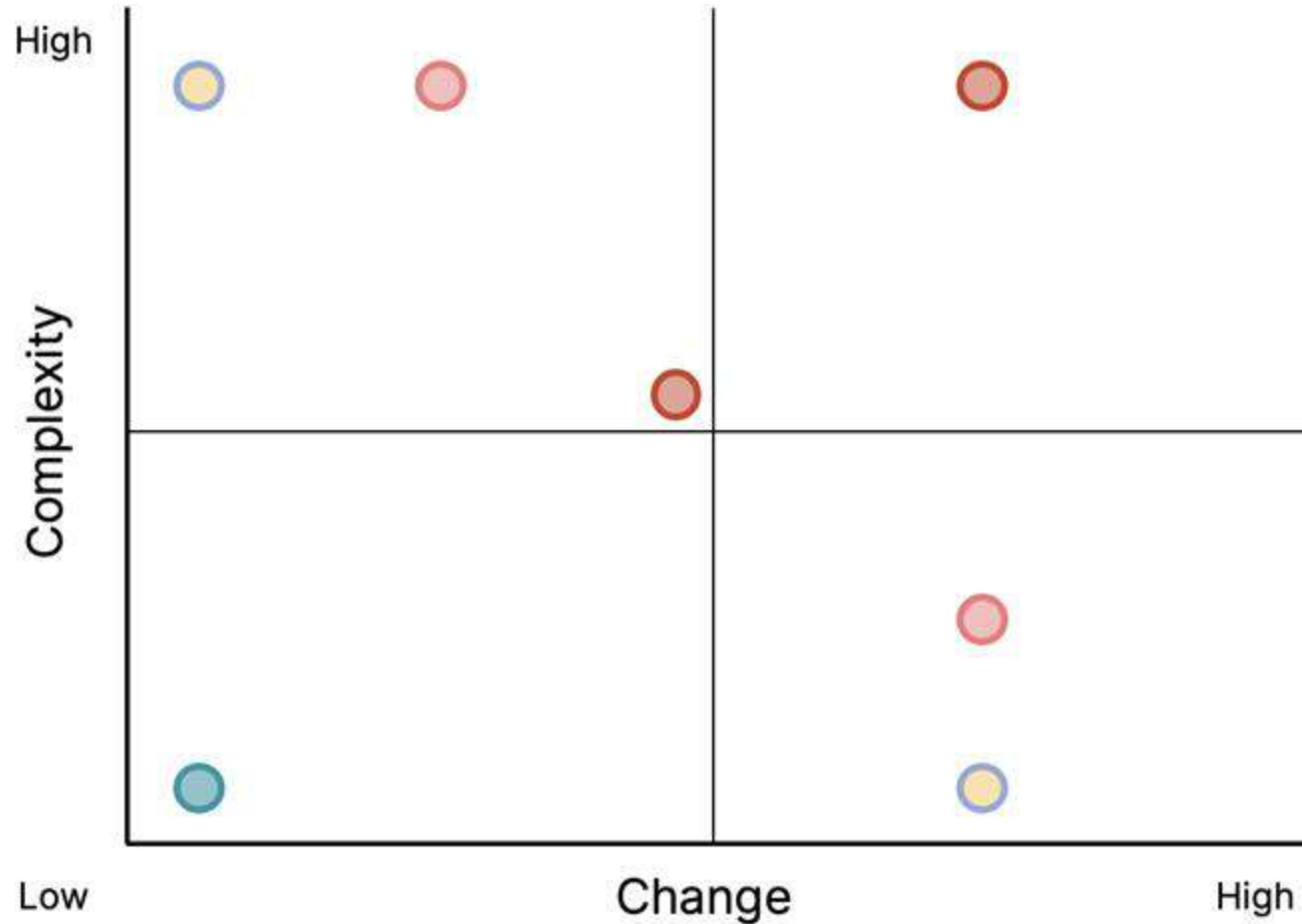
Poor and Inconsistent Member  
Service

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Burnt Out Managers and Supervisors

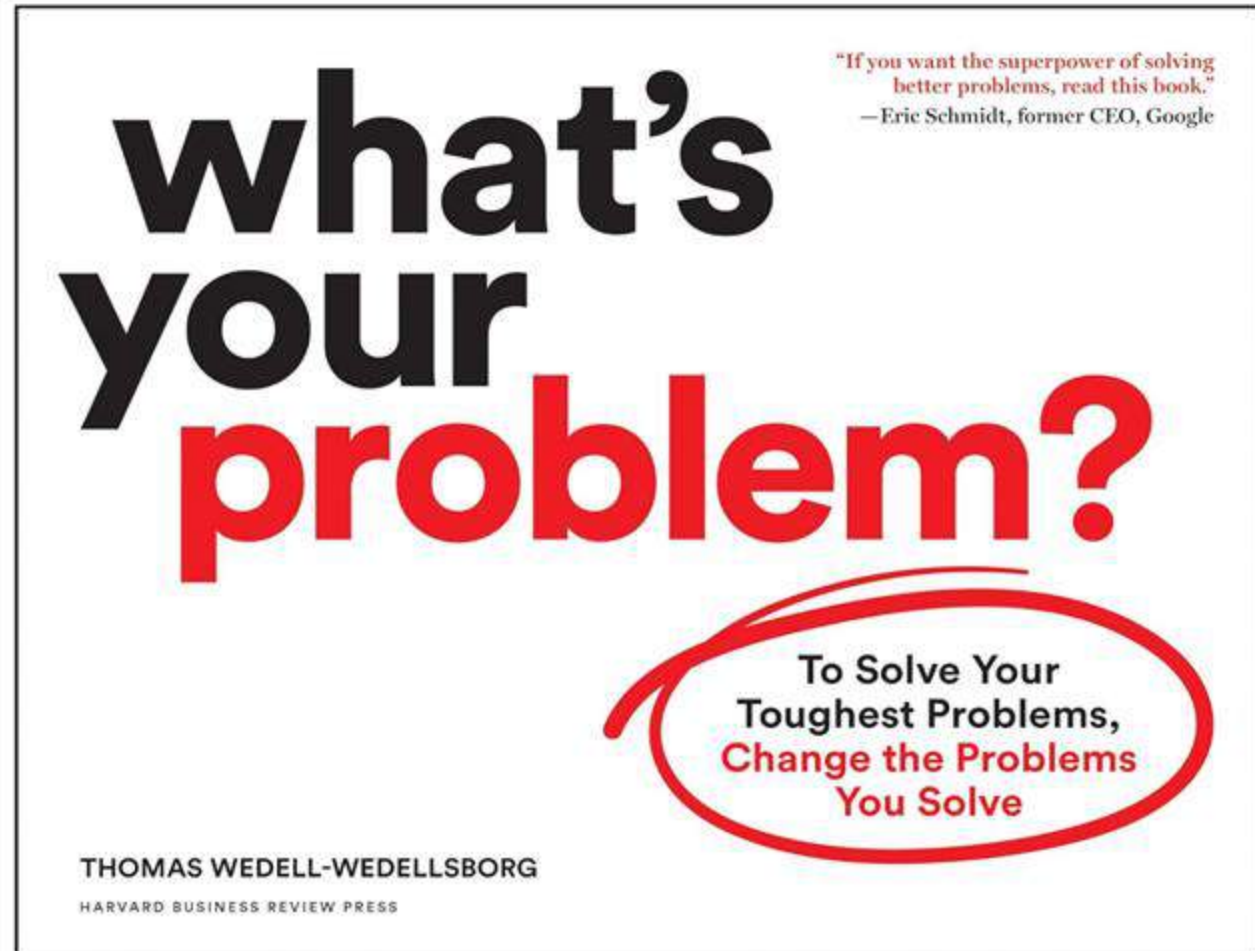
What's the solution?  
“Better Training”

# Why “Better Training” Can Never Work



*“The way you frame a problem determines which solutions you come up with.*

*By shifting the way you see a problem—that is, by reframing it—you can sometimes find radically better solutions.”*



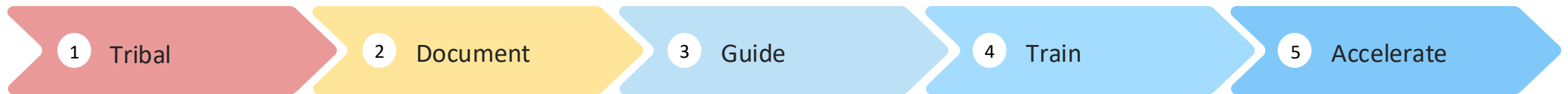
It's Not About Training –  
It's About **Knowledge Transfer**



Model

# Knowledge Ops Maturity Model

Employee Independence



All training happens through shadowing, nesting, and asking your supervisor or co-worker. No documentation exists.

Some documentation is created but it isn't regularly used. Documentation is not designed with the end-user's needs in mind.

Digital guides are designed to guide employees when completing tasks, solving problems, and making decisions. Employees use the digital guides each time they perform a task.

Digital guides are used during the new hire training process. Training consists of very little classroom time or lecture-based training. Most training is done by going through practice exercises that allow employees to practice using the digital guides.

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# Real Results



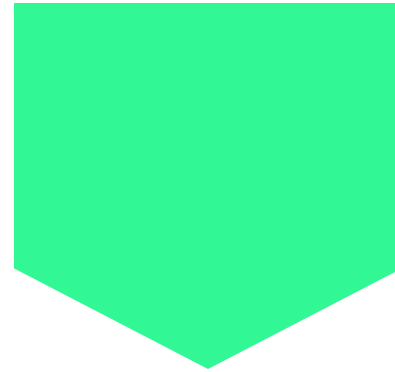
**87%**

Reduction in onboarding  
time



**75%**

Reduction in time to  
proficiency



**90%**

Reduction in cross-  
training time



**79%**

Reduction in new  
employee attrition  
during training

# Typical Training



PowerPoint Decks



SharePoint



Lots of Lectures, Questions,  
and Shadowing



# The Find & Follow Approach

Separate  
Actionable and Foundational Knowledge

# Actionable Knowledge

Actionable knowledge is knowledge that **helps employees DO something** such as:

- Respond to a question or request
- Perform a procedure
- Troubleshoot a problem

Can I...?



How do I?



Information



Why doesn't  
this work?



## Opening Accounts

### Actionable

- How to open a new account
- How to identify the required documents for opening an account
- How to add joint owners to a new account
- Can you add beneficiaries to this type of account?
- How to add beneficiaries to a new account
- Can I become a member (i.e. what are the eligibility requirements?)
- How to scan a license
- How to run a CIP
- How to run an OFAC check
- I'm seeing an error – what do I do?

# Foundational Knowledge

Foundational knowledge is knowledge that provides context and background. It's information employees need to understand.

## 5 Types of Questions to Answer for Foundational Explanations

- What?
- Why?
- When?
- Who?
- High-level how?

Can I...?



How do I?



Information



Why doesn't this work?



**Connections (Who? High-level How?)**

**Concepts (Why? When?)**

**Definitions (What?)**

## Opening Accounts

### Actionable

- How to open a new account
- How to identify the required documents for opening an account
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- How to add beneficiaries to a new account
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- How to run a CIP
- How to run an OFAC check
- I'm seeing an error – what do I do?

### Foundational

- What is a SSN and how is it used?
- What is an ITIN and how is it used?
- What is Eligibility and when does it come up in the process?
- What is an Initial Deposit and why is it needed?
- What is CIP and why is it important?
- What is OFAC and how does it come up during the process?
- What are Savings Accounts and how do members use them?
- What is a Share Draft and how do members use them?
- What is ChexSystems?

## Activities

What Kind of  
Knowledge Gap Is it?



# Scenario 1: ACH

**Member asks,** “Can you help me set up an ACH transaction?”

**Teller turns to you and asks,** “What is an ACH again?”

**What kind of knowledge does the teller lack?**



# Scenario 2: ACH

**Member asks,** “Can you help me set up an ACH transaction?”

**Teller turns to you and asks,** “What information do I need in order to help set up an ACH transaction?”

**What kind of knowledge does the teller lack?**



# Scenario 3: Loan

**Member asks, “I’d like to take out a loan to purchase a motorcycle.”**

The member is 17 years old.

**The MSR messages you, “How old do you have to be to get a loan for a vehicle?”**

**What kind of knowledge does the teller lack?**



# Scenario 4: CIP

**Individual asks, “I’d like to set up a new account.”**

**The MSR messages you, “Why do we need to run CIP when setting up a new account?”**

**What kind of knowledge does the teller lack?**



# Worksheet - Delegation



Value Delivered

## How do you move up the model?

### Findable

Can an employee find the digital guide they need in 5 seconds or less?

### Followable

Can an employee follow the guide, without needing help from a supervisor?

### Scannable

Can an employee use the guide while interacting with a customer?





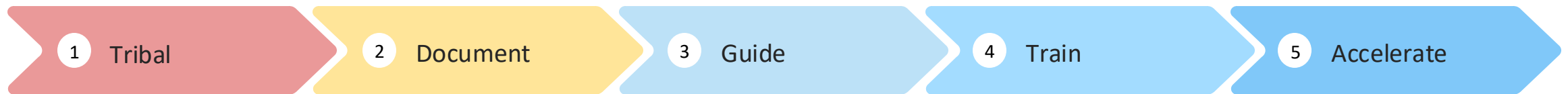
## Is it findable, followable, and scannable?

1. A woman calls and says here mother passed away and had an account at your CU
2. A man comes in and wants to create a join account with his father
3. A member wants to close their account
4. A member asks why their credit card purchase is being denied

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Rethink

## Tools in a Knowledge Operations Platform

- Single, Searchable, Source of Truth
- Knowledgebase Articles, Interactive Checklists, Decision Trees
- Custom Courses
- Rapid Authoring/Updating
- Change Notifications

# Software Examples



# Search

Credit Union  
Here When You Need Us

Knowledge Hub Courses

What is your question?

send a statement



Opening Accounts



Is it Fraud?

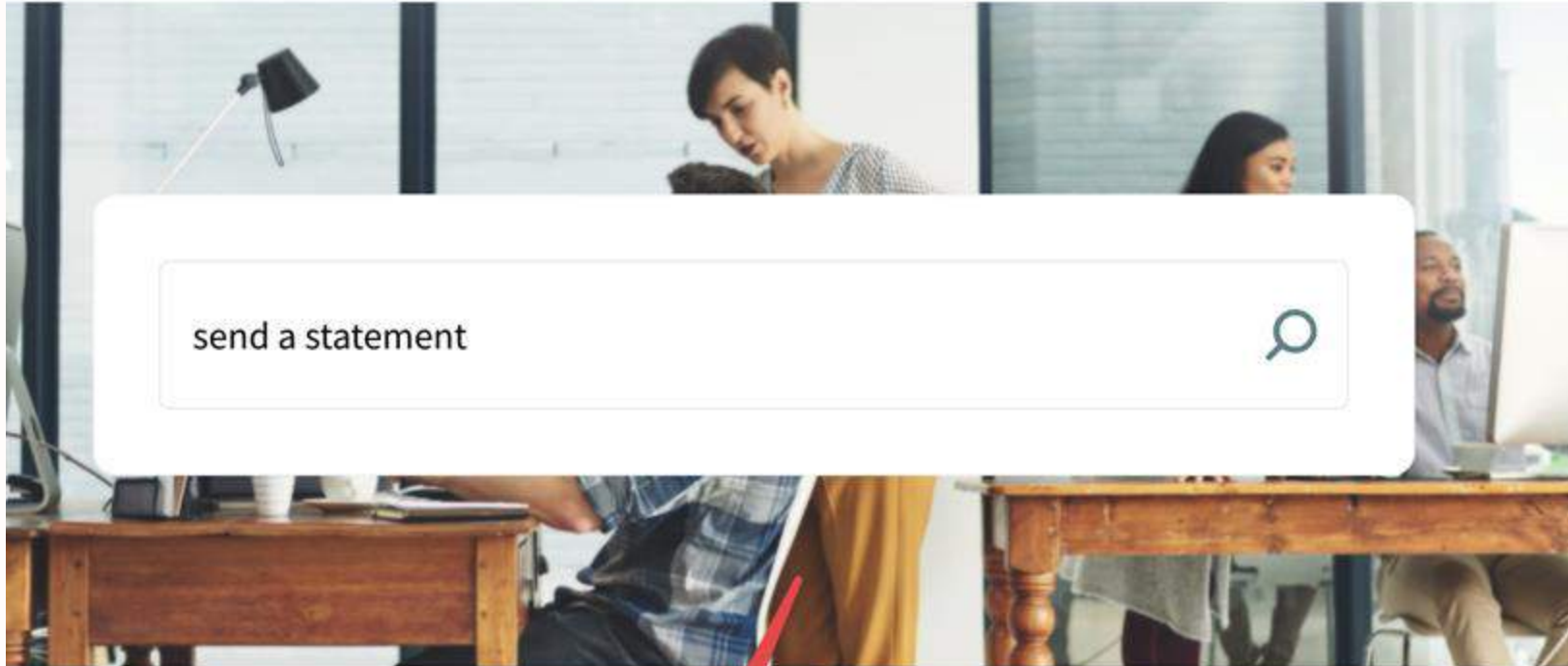


Identifying counterfeit cash



Branch Information

# Search



lit

## Search Results (1)

How to send a Statement to a member

Updated on Jan 12, 2024

Does customer want you to **send statements** ?

[Knowledge Hub](#) / [Account Management](#) / [Account Inquiries](#)

 *Workflow*

# Opening a New Account

Updated on Aug 01, 2024

## Verify Prospective Member Meets Criteria

1. Current Driver's License with Address

2. SSN OR TIN

3. Meet Eligibility Requirements

4. \$25 to open account



## Does Prospective Member Meet the Above Criteria?

1. Select one Option Below

YES

NO

# Decision Trees and Checklists for Complex Procedures

# AI Recording of Procedures

### Create a new article in site: My Company

Manual or Uncategorized Aricles (required) ⓘ Chapter (required)

Sales Team Lead Management

**– Create an article from an audio recording** ✨

Record yourself describing the process you want to document. Using the article title you entered above as a guide, ScreenSteps will convert the audio recording into a scannable, followable outline which you can then edit.

Record voice Upload audio file

00:05 [Audio waveform] [Download icon]

Start recording Stop recording Delete

Cancel Create article from audio file



## Clarify AI Assistant: Create a followable, scannable outline

What question should the outline answer?

Opening an Account

In the field below, enter the instructions you would like to analyze. Using the question you entered above as a guide, the Clarify AI Assistant will convert the text into a scannable, followable outline which you can then edit.

First, verify that the member meets the criteria for a new account. Ensure that they have a current driver's license with an address, that you have their social security number or TIN, taxpayer identification number. Make sure that they meet our eligibility requirements and that they have at least \$25 to open the account.

If the member meets the criteria, if the member doesn't meet the criteria, then let them know that because they don't, for whatever reason, meet that criteria, we can't proceed with opening the account. If they do meet the criteria, then we need to complete the CIP. So, perform the following identity verification tasks: Run a credit report or a soft credit check. Check against databases to verify identity and detect potential fraud. Use third-party services to confirm the validity of identification documents.

If they don't pass the CIP, then you have to go check with a manager. If they do pass the CIP, then you can go and check the OFAC. So, navigate to OFAC in the system,

Create Outline

Followable, scannable outline

### Opening an Account

- Verify that the member meets the criteria for a new account:
  - Do they have a current driver's license with an address?
  - Do they have a social security number or TIN (taxpayer identification number)?
  - Do they meet our eligibility requirements?
  - Do they have at least \$25 to open the account?
- Does the member meet the criteria?
  - No: Inform them that they do not meet the criteria and cannot open an account.
  - Yes: Complete the CIP (Customer Identification Program):
    - Run a credit report or a soft credit check.
    - Check against databases to verify identity and detect potential fraud.
    - Use third-party services to confirm the validity of identification documents.
- Does the member pass the CIP?
  - No: Check with a manager.
  - Yes: Check the OFAC (Office of Foreign Assets Control):
    - Navigate to OFAC in the system.
    - Look up the member.

Cancel

Add Outline to Article

# Opening a New Account

Updated on Aug 01, 2024

## Verify Prospective Member Meets Criteria

1. Current Driver's License with Address

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## Does Prospective Member Meet the Above Criteria?

1. Select one Option Below

YES

NO

# Decision Trees and Checklists for Complex Procedures

# Custom Courses and Integrated Video Recording

Credit Union  
Here When You Need Us

Knowledge Hub

Courses

11%

Zelle

1 / 9 COMPLETED

Welcome to the Course!

What is P2P Payment Service?

Overview of Zelle

Steps of Using Zelle

Main Features of Zelle

Main Security Features of Zelle

Zelle Process

Common Member Questions

That's it!

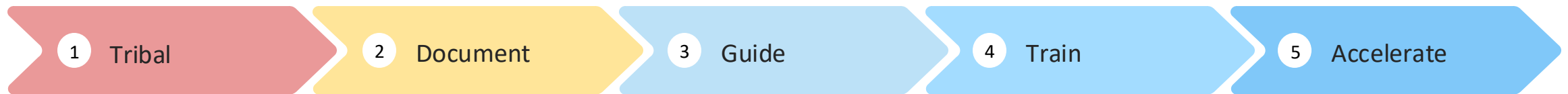
Related Resources

- [How to make a payment in Zelle](#)
- [How to request a payment in Zelle](#)
- [How to see payment history in Zelle](#)
- [Can you request a refund in Zelle?](#)

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Solution

## Two Parts to the Solution

### Framework

Find & Follow Framework for  
Training and Performance



### Software

ScreenSteps Knowledge  
Operations Platform



# Schedule a Demo For Your Team

## What we will discuss

- 45-minute meeting
- Discuss how tribal knowledge is impacting your team
- Explore how a Knowledge Operations Platform could help





	B	C	D	E	F	G	I	J	K
2	[Company Name] Task Tracker								
3	Topic	Activity	30/ 60/ 90/ 180	Start Date	Duration	End Date	Import/Scratch?	Status	Responsible
4	Checking/Share Draft	How to open a simple checking account	60	11/1/24	10	11/15/24	Scratch	Not Started	Jim
5	Checking/Share Draft	What is the fee for ordering checks?	60	11/1/24	10	11/15/24	Scratch	Not Started	Jim
6	Checking/Share Draft	How to obtain temporary checks if a credit union member has run out of their	60	11/1/24	5	11/8/24	Scratch	Not Started	Jim
7	Checking/Share Draft	How to remove a joint owner from a member's account to ensure they are no	60	11/1/24	5	11/8/24	Scratch	Not Started	Jim
8	Checking/Share Draft	How to exclude a phone number from appearing on a credit union member's	60	11/1/24	5	11/8/24	Scratch	Not Started	Jim
9	Checking/Share Draft	How to arrange for the shipment of checks to a specific branch	60	11/1/24	10	11/15/24	Scratch	Not Started	Jim
10	Checking/Share Draft	How to allow a member to select their preferred starting number for their che	60	11/1/24	10	11/15/24	Scratch	Not Started	Jim
11	Checking/Share Draft	How to request a copy of the official check that a member withdrew from their	60	11/1/24	5	11/8/24	Scratch	Not Started	Jim
12	Checking/Share Draft	How to check the clearance status of an official check for a member	60	11/1/24	5	11/8/24	Scratch	Not Started	Jim
13	Checking/Share Draft	How to assist a member who has not received the requested check by mail	60	11/1/24	10	11/15/24	Import	Not Started	Jim
14	Checking/Share Draft	How to determine the expiration period of an official check issued to a memb	60	11/1/24	10	11/15/24	Import	Not Started	Jim
15	Checking/Share Draft	How to guide a member in handling an unwanted official check they withdrew	60	11/1/24	5	11/8/24	Import	Not Started	Jim
16	Checking/Share Draft	How to initiate a stop payment on an official check FOR a member	60	11/1/24	5	11/8/24	Import	Not Started	Jim
17	Checking/Share Draft	How to provide verification for an official check	60	11/1/24	5	11/8/24	Scratch	Not Started	Sarah
18	Checking/Share Draft	How can a member place a stop payment on a check?	60	11/1/24	10	11/15/24	Scratch	Not Started	Sarah
19	Checking/Share Draft	What is the fee for doing a stop payment on a check?	60	11/1/24	10	11/15/24	Scratch	Not Started	Sarah
20	Checking/Share Draft	How to identify when the fee for a stop payment on a check will be withdrawn	60	11/1/24	5	11/8/24	Scratch	Not Started	Sarah
21	Checking/Share Draft	How to obtain a copy of a check that was returned from a member's account	60	11/1/24	5	11/8/24	Import	Not Started	Sarah
22	Checking/Share Draft	What to do when a member cannot retrieve a copy of a check from their onlin	60	11/1/24	10	11/15/24	Import	Not Started	Sarah
23	Checking/Share Draft	Why did a check clear for a different amount than what was written, and how	60	11/1/24	10	11/15/24	Import	Not Started	Sarah
24	Checking/Share Draft	What steps should a member take if their check or checkbook is stolen?	60	11/1/24	5	11/8/24	Scratch	Not Started	Sarah
25	Checking/Share Draft	How can a member see the checks that have cleared their account?	30	9/27/24	5	10/4/24	Scratch	In Progress	Sarah
26	Courtesy Pay	What is courtesy pay and how would a member use it?	30	9/27/24	5	10/4/24	Scratch	In Progress	Sarah
27	Courtesy Pay	Which accounts are eligible for Courtesy Pay?	30	9/27/24	10	10/11/24	Scratch	In Progress	Sarah
28	Courtesy Pay	What is the maximum amount a member can use for Courtesy Pay?	30	9/27/24	10	10/11/24	Scratch	Completed	Jim
29	Courtesy Pay	What to do if Courtesy Pay did not cover a member's check or ACH transacti	30	9/27/24	5	10/4/24	Scratch	Completed	Jim
30	Courtesy Pay	What are the fees associated with Courtesy Pay and can they be refunded?	30	9/27/24	5	10/4/24	Scratch	Delayed	Sarah
31	Courtesy Pay	How to establish the maximum amount that will be charged in one day for Co	30	9/27/24	10	10/11/24	Scratch	In Progress	Sarah

## Time to Confidence, Independence, and Proficiency

With F&F

Without F&F

8 weeks

12 months

