

**We will start soon**



**It will be worth the wait...**

**It is worth the wait**

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

Greg DeVore

**What is the question that kills  
Productivity,  
Consistency, and  
Confidence?**

**"How do I...?"**



# What we have heard

- Managers and Supervisors spend all day answering questions → Especially from new hires
- Younger workers quit before they are fully trained
- Compliance officers struggle to get people to follow procedures consistently

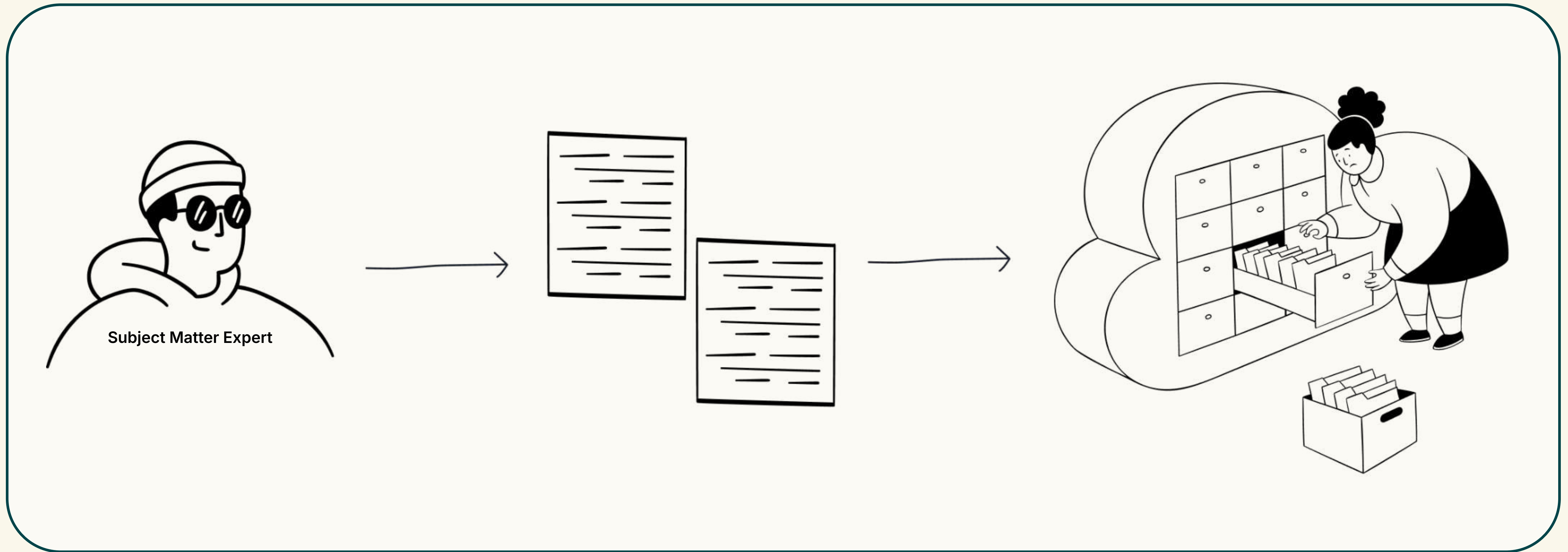


# The Cause: Shadowing

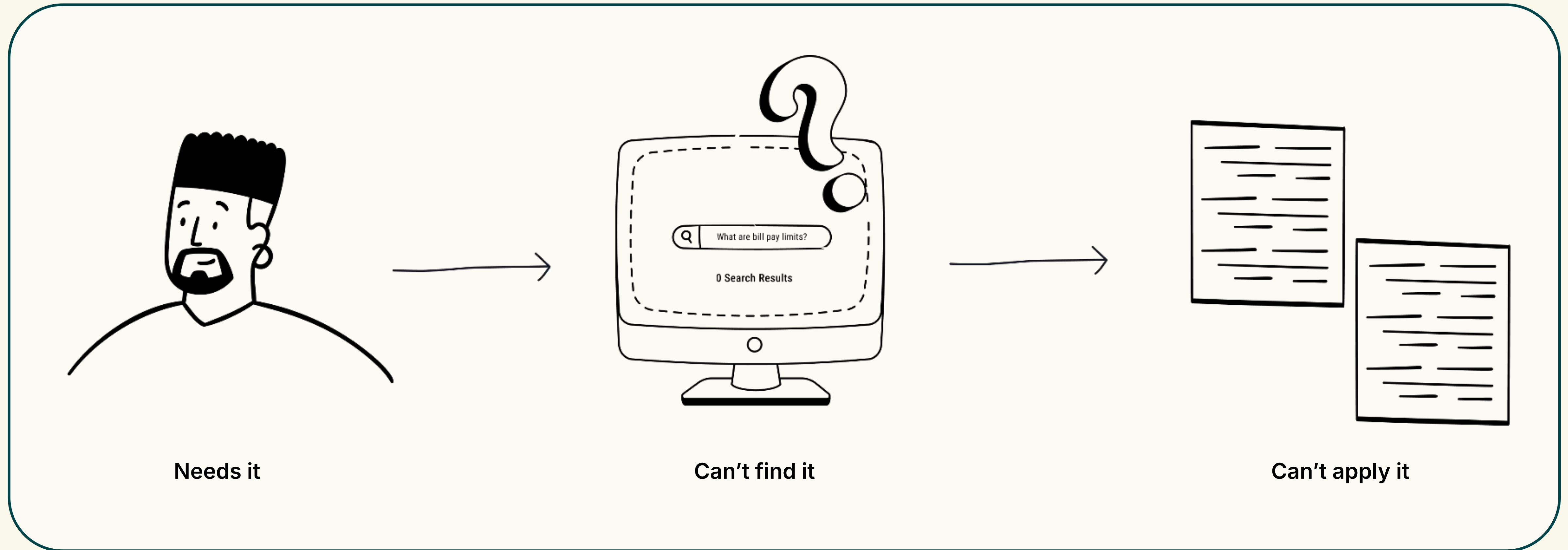


Subject Matter Expert

# Teams Try to Capture Operational Knowledge in SharePoint

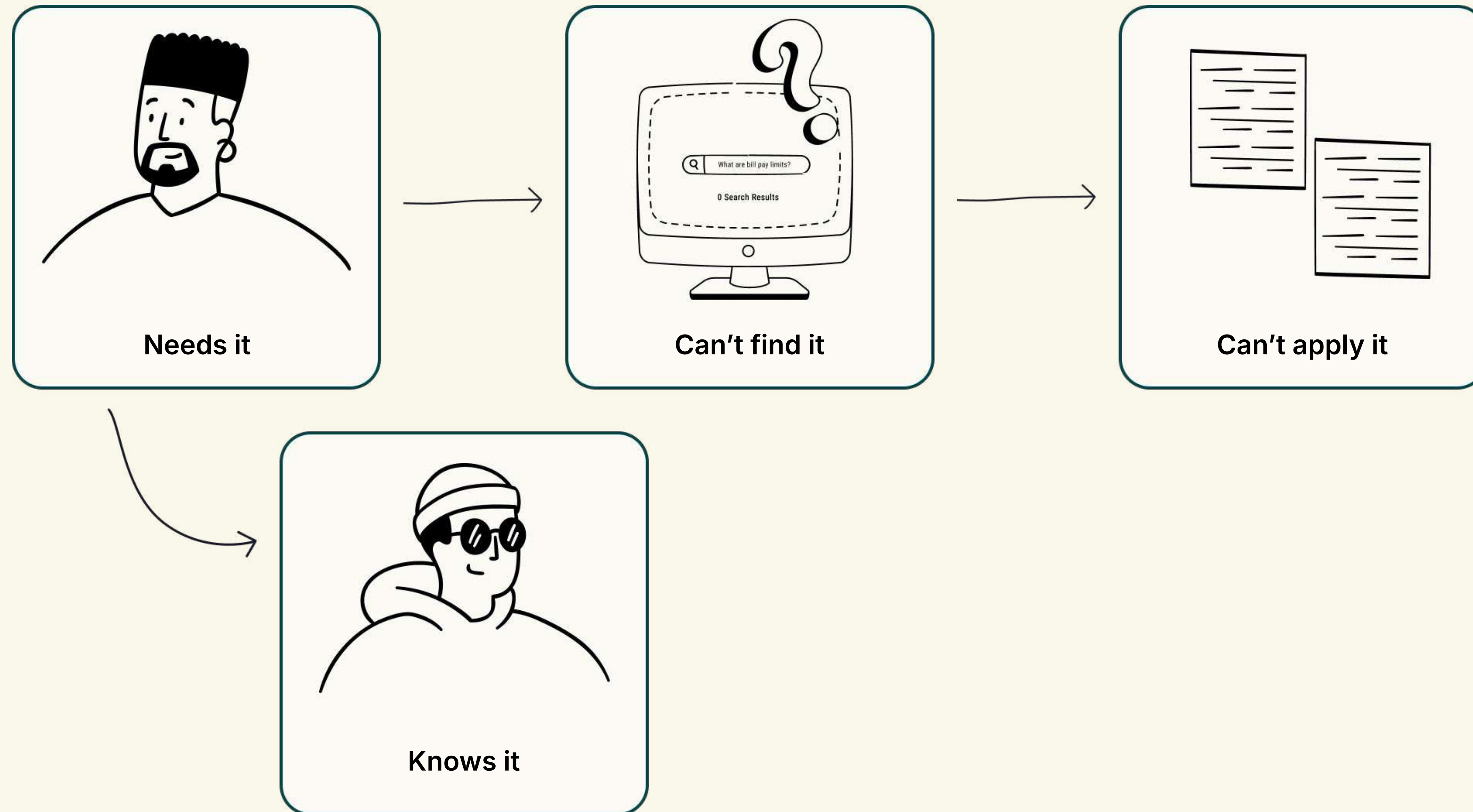


# Teams Try to Capture Operational Knowledge in SharePoint

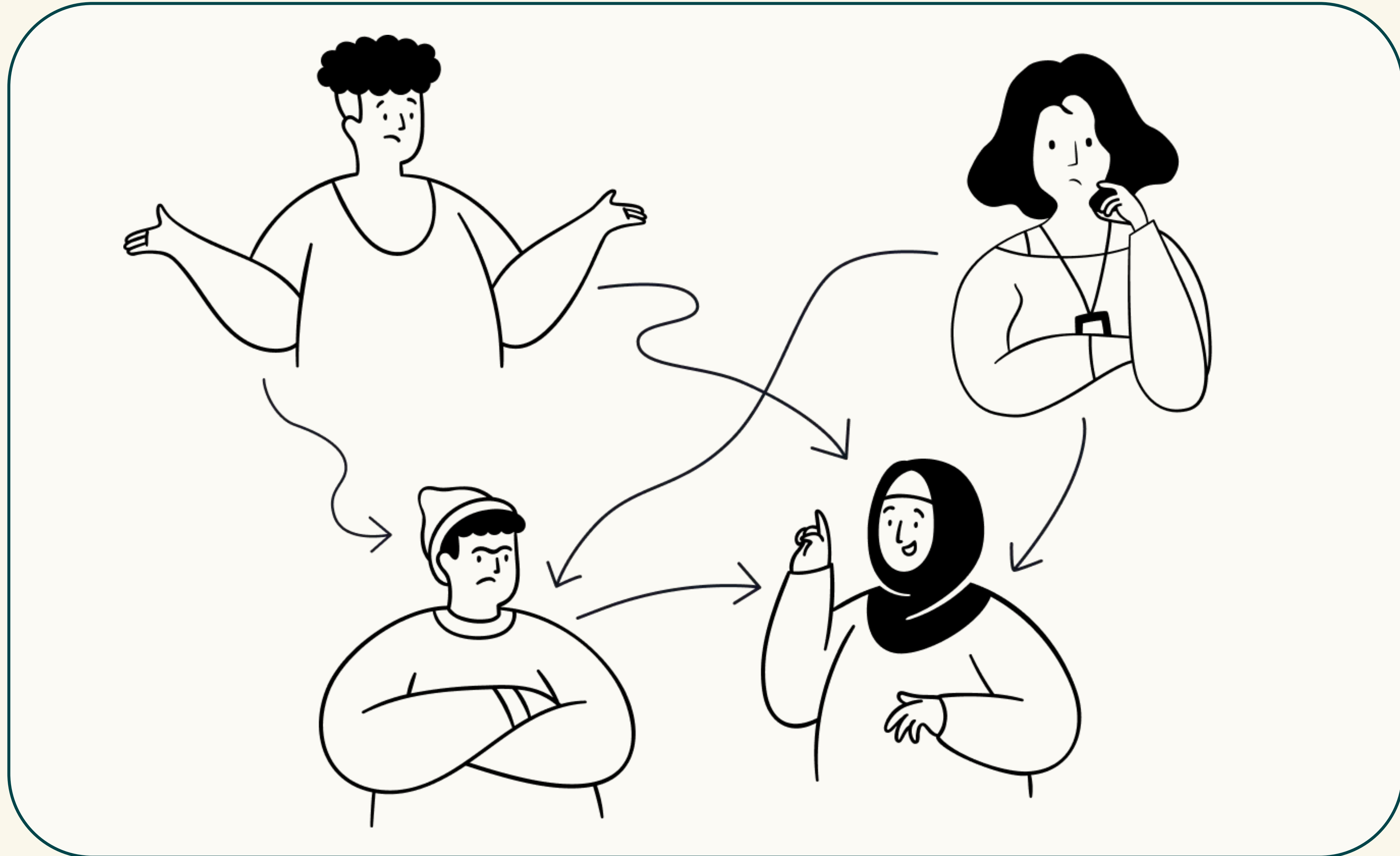




# Teams Try to Capture Operational Knowledge in SharePoint



# Tribal Knowledge



"Seeing a new loan officer close a loan entirely on their own was incredibly exciting!

It's a game-changer for branch managers, allowing their teams to work independently and reducing pressure on leadership."

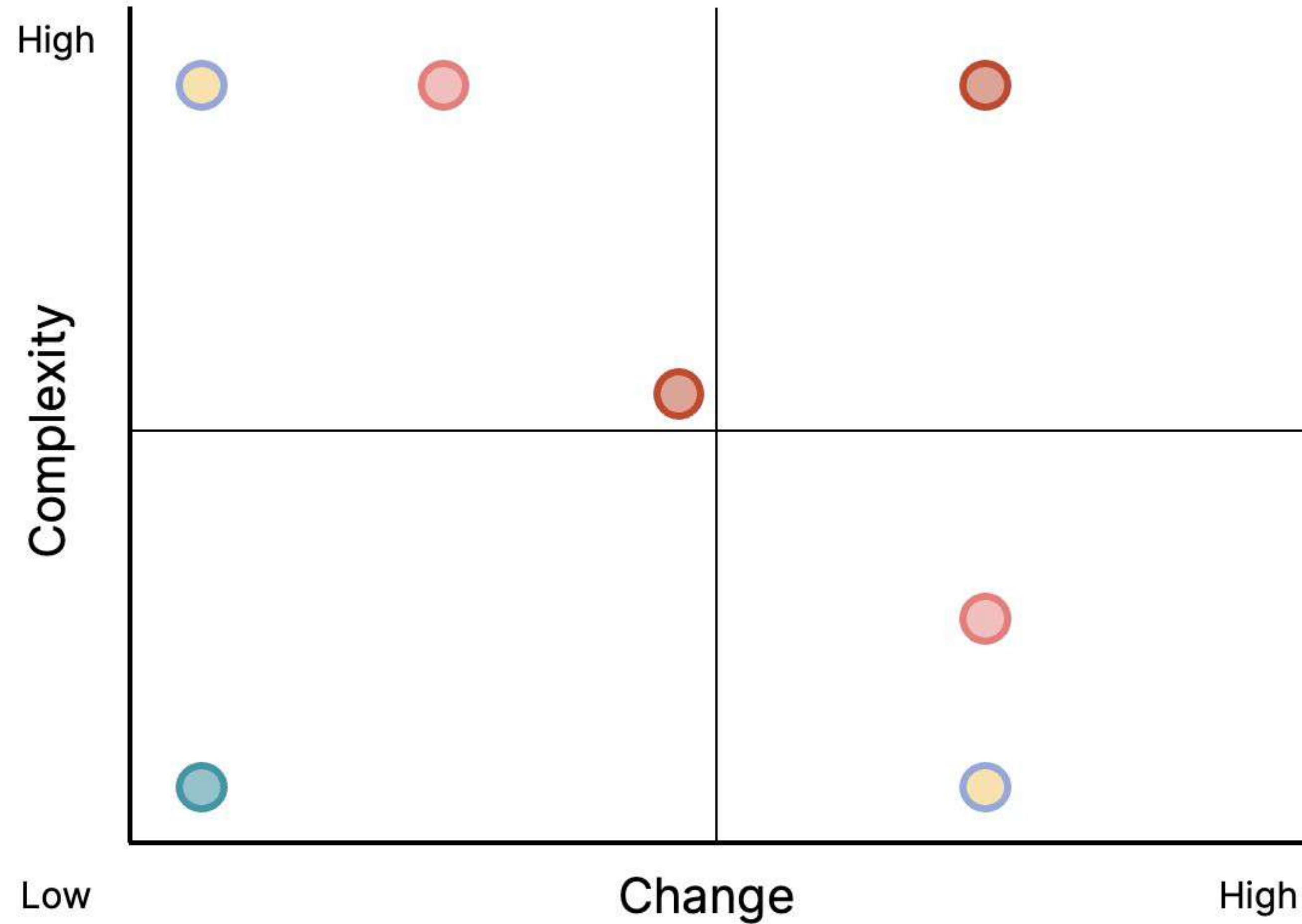
*Jill Jones*

*Desert Rivers Credit Union, Director of Branch Operations*

**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.”*

# what's your problem?

“If you want the superpower of solving better problems, read this book.”

—Eric Schmidt, former CEO, Google

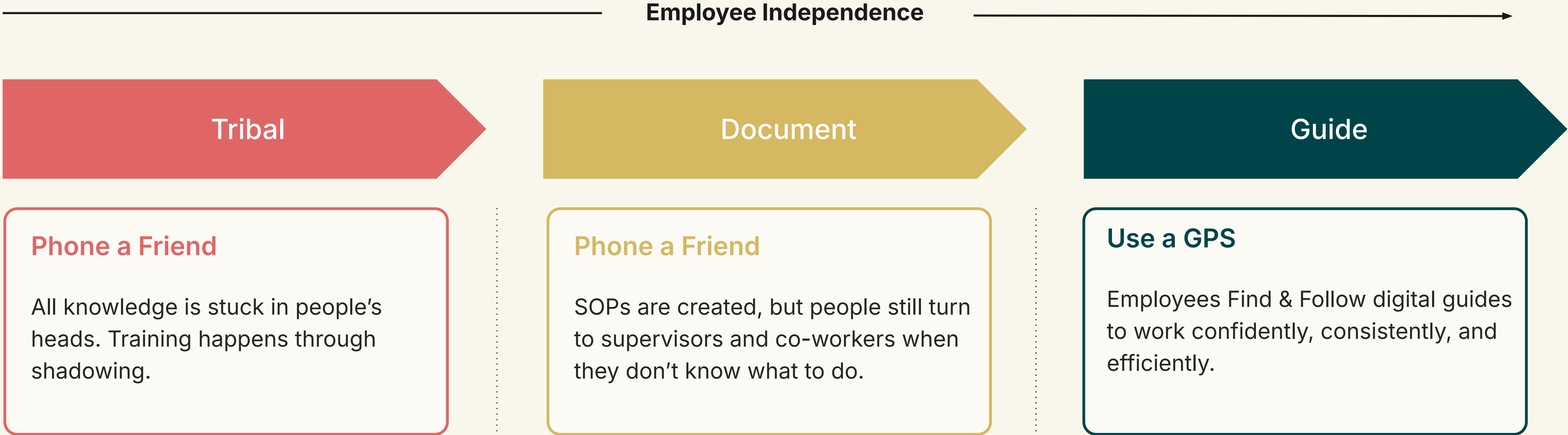
To Solve Your  
Toughest Problems,  
Change the Problems  
You Solve

THOMAS WEDELL-WEDELLSBORG

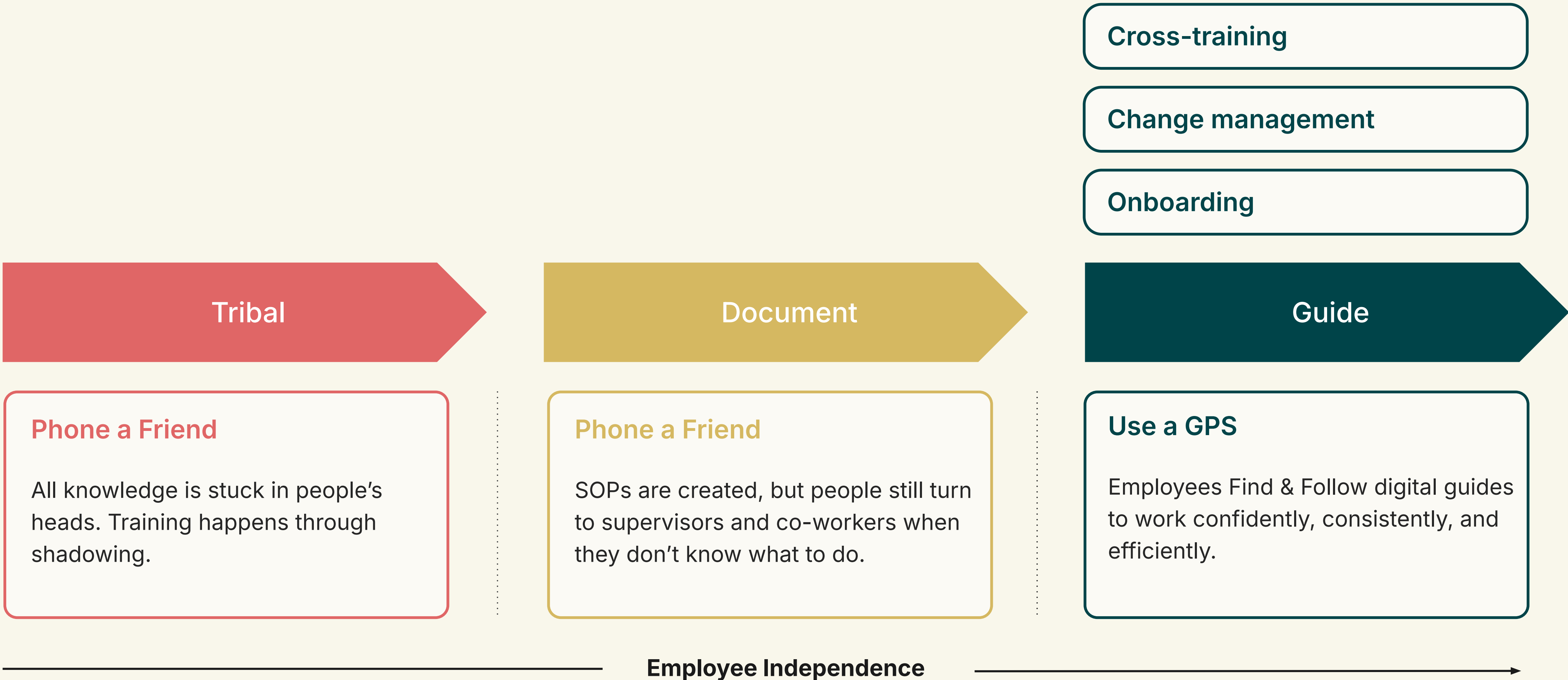
HARVARD BUSINESS REVIEW PRESS

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

# Knowledge Ops Maturity Model



# Knowledge Ops Maturity Model



**How do we move up the model?**

**How do we change *behaviors* ?**



**Find & Follow is a  
Knowledge Transfer  
Methodology that helps you  
move up the model**

# What really happens

WHAT STEPS DO I TAKE  
WHEN A LOAN GOES INTO  
DEFAULT?

INPUT

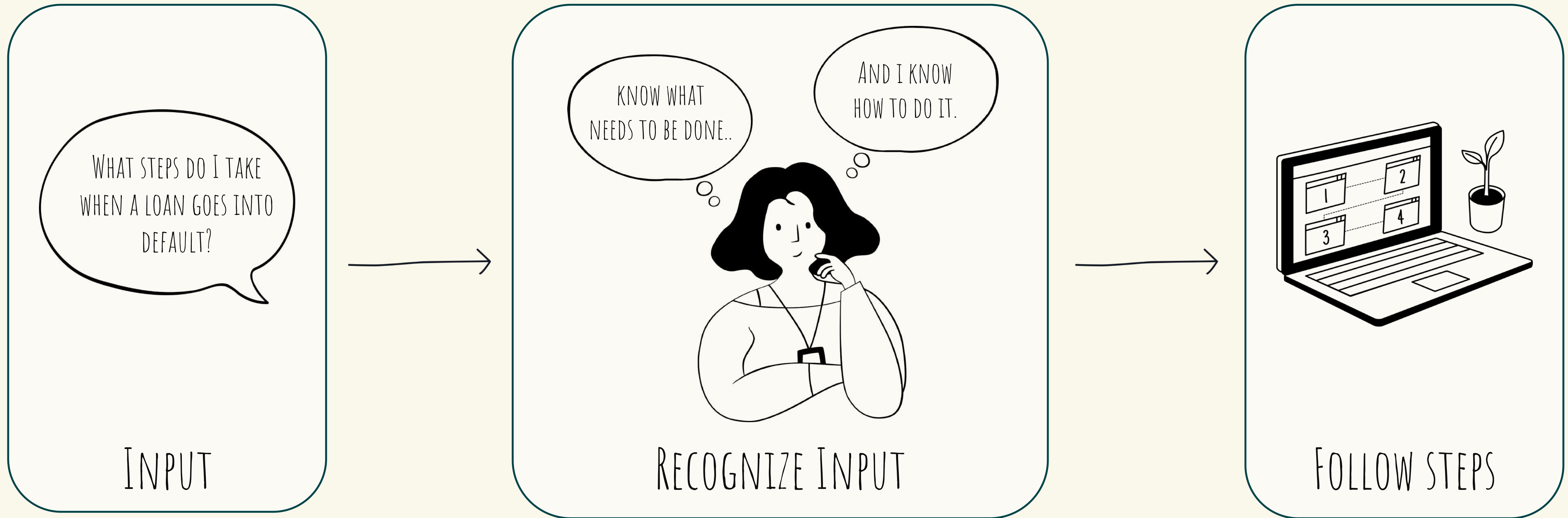


DOESN'T RECOGNIZE INPUT  
OR DOESN'T KNOW STEPS

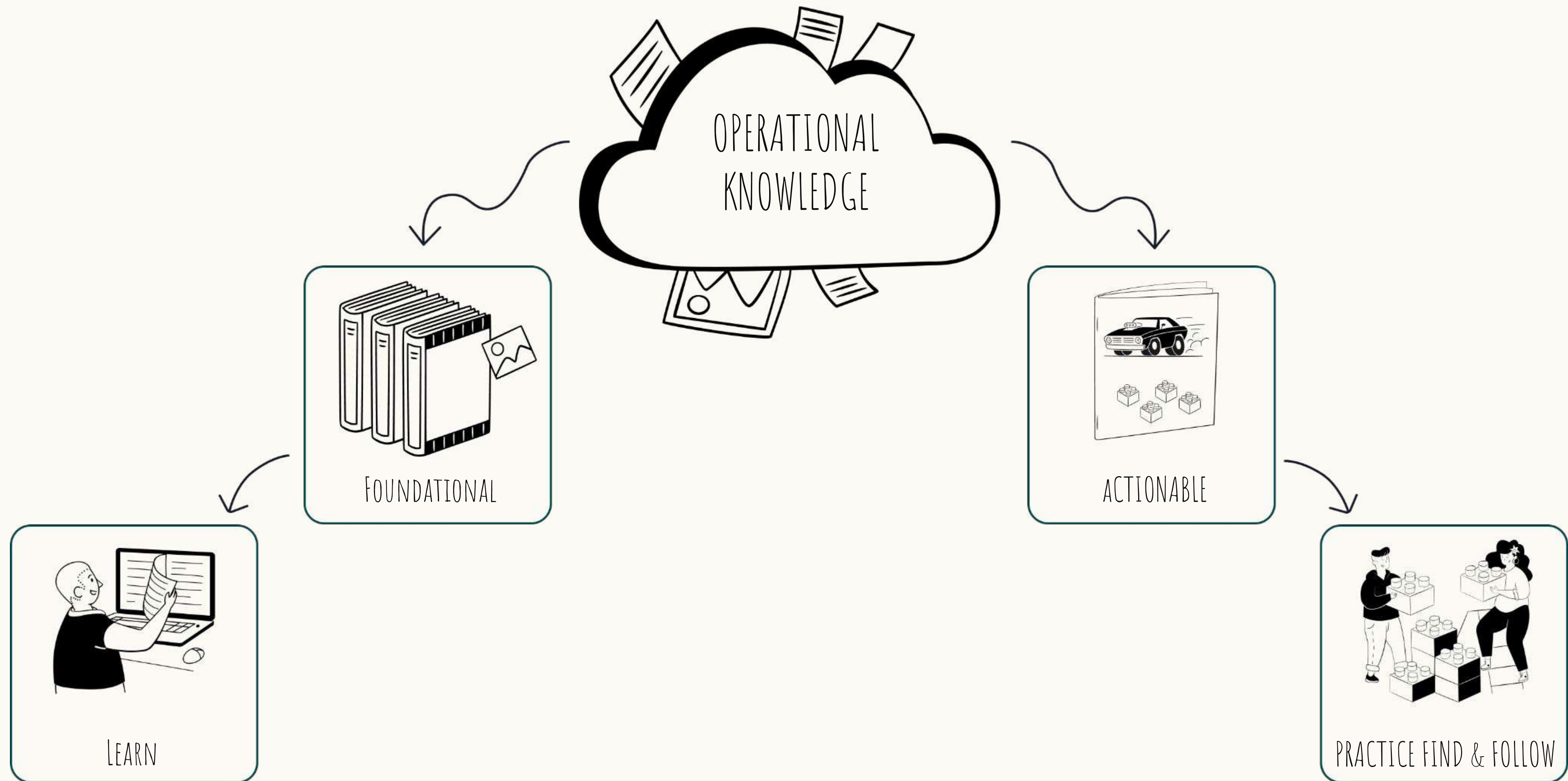


ASK FOR HELP

# What we want to happen



# Find & Follow is a Knowledge Transfer Methodology



# The Standard We Need to Meet



**Findable**



**Followable**



**Scannable**



# Knowledge Ops Platform

Single Source of Truth for Operational Knowledge



MICRO-COURSES



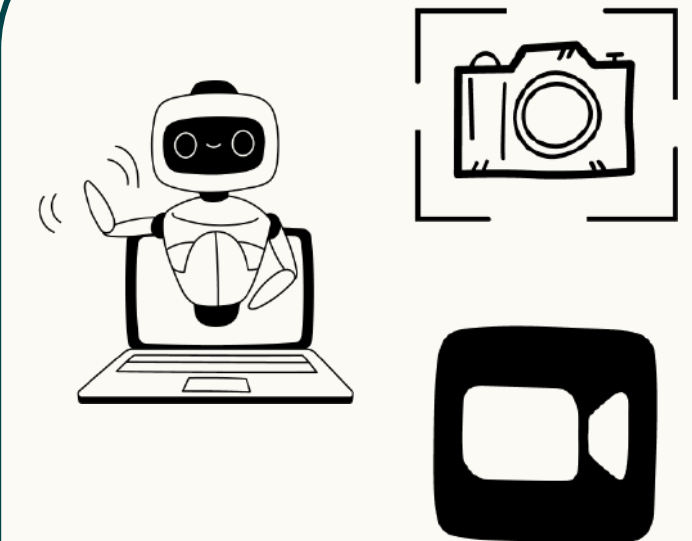
ARTICLES, CHECKLISTS, AND  
DECISION TREES



CHANGE NOTIFICATIONS



PUSHED INTO THE  
WORKFLOW



INTEGRATED  
KNOWLEDGE CAPTURE

# Search

Credit Union  
Here When You Need Us

Knowledge Hub Courses

What is your question?

send a statement



Opening Accounts



Is it Fraud?



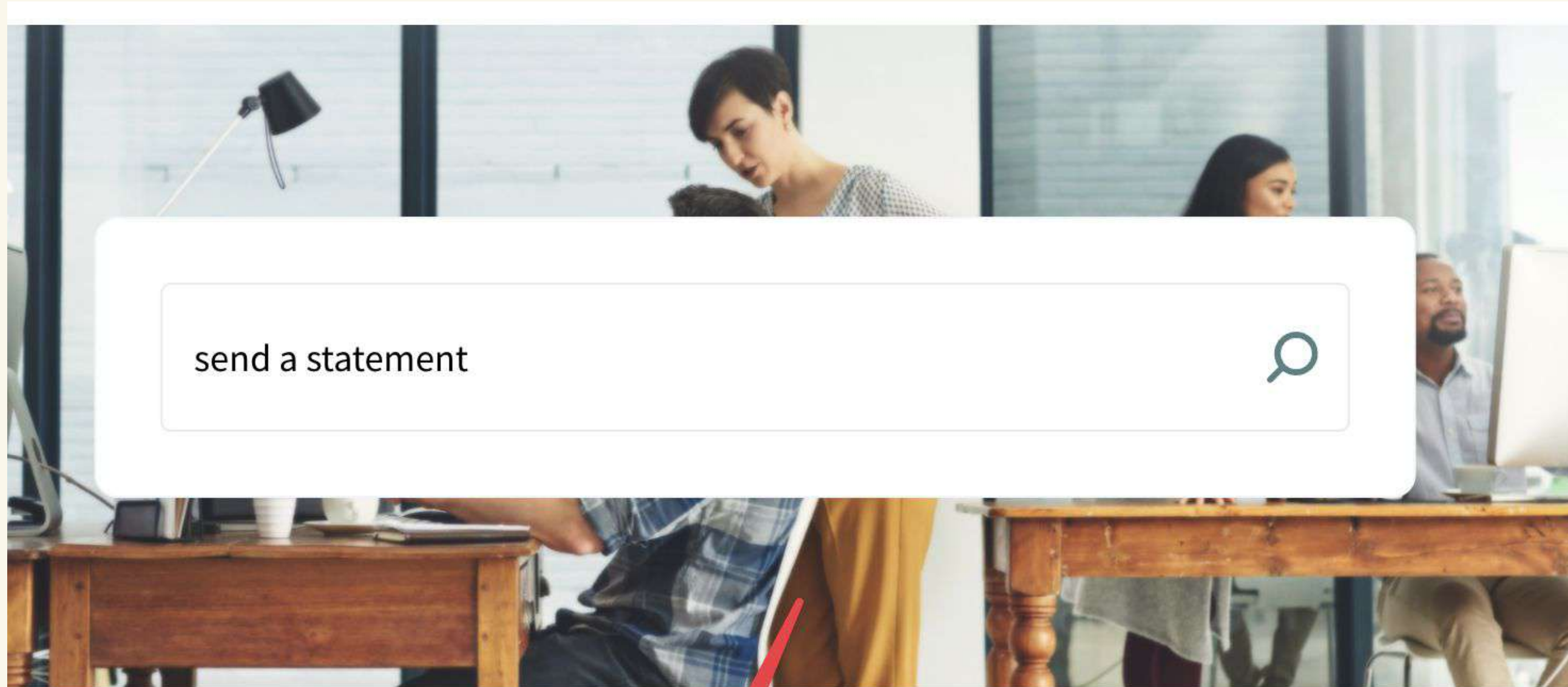
Identifying counterfeit cash



Branch Information



# Search



send a statement



## 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 Articles (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  

 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 ▼
- 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

# 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!

1.20

# STEPS TO USING ZELLE

ZELLE FOUNDATIONAL COURSE

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?](#)

# Questions





# Next steps



**Get in touch!**  
[greg@screensteps.com](mailto:greg@screensteps.com)

SLIDES + BOOK + COURSE



[screensteps.com/NMS](https://screensteps.com/NMS)

# Knowledge Ops and AI

# Typical AI Implementation Plan (using RAG)



**Gather  
Documentation**



**Import it into a  
Data Lake**



**Train the Model or  
use RAG**



**Test and Refine**





# Typical AI Implementation Plan (using RAG)



**Gather  
Documentation**



**Import it into a  
Data Lake**



**Train the Model or  
use RAG**



**Test and Refine**



# Typical AI Implementation Plan (using RAG)



**Gather  
Documentation**



**Import it into a  
Data Lake**



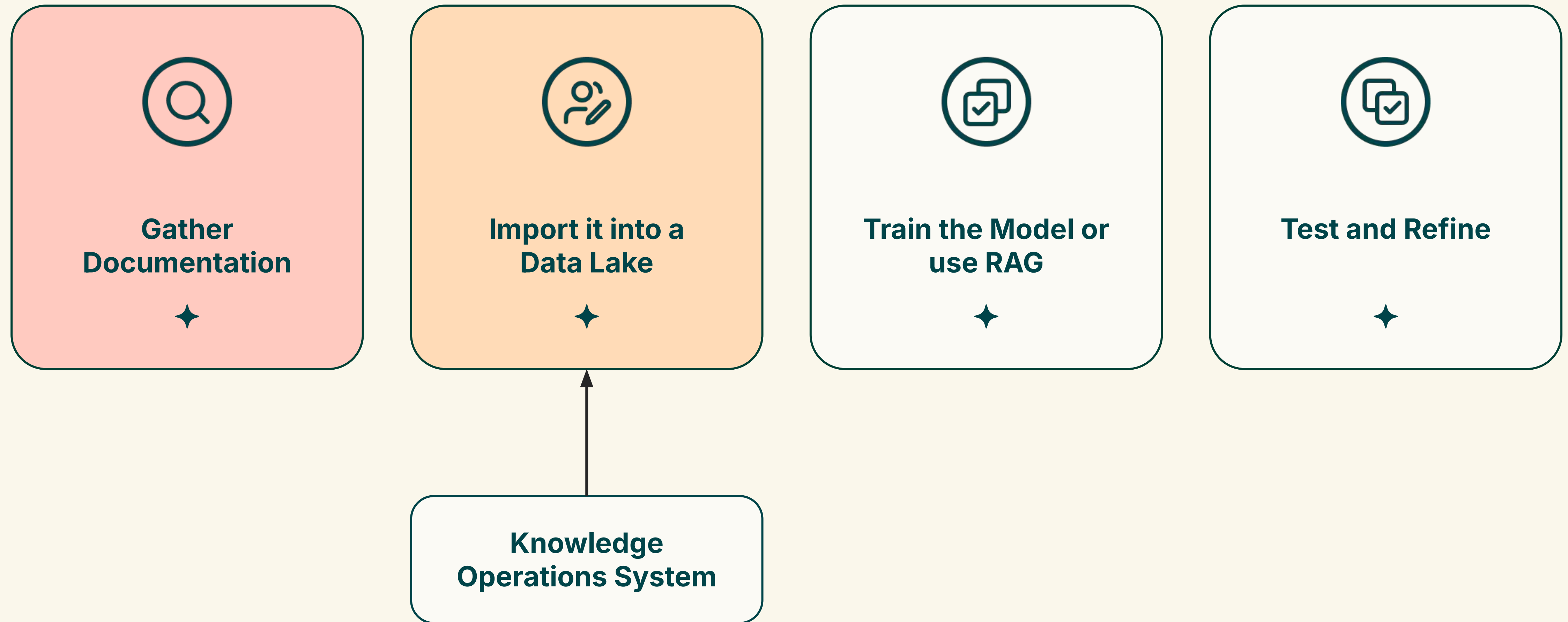
**Train the Model or  
use RAG**



**Test and Refine**



# Typical AI Implementation Plan (using RAG)



# A Knowledge Operations System

