Eliminate Escalation

Eliminate Unnecessary Escalations At Your Credit Union

Create an internal Google for your frontline workers so they have answers at their fingertips

SCREENSTEPS

Table of Contents

Eliminate Escalation

Introduction

Escalations cost credit unions valuable time and money — not to mention that they don't lend themselves to a quality member experience.

If your credit union has an escalation problem, then you know employees have to escalate questions to co-workers and managers because there's no other option.

Now, there is another option. This illustrated playbook will help your credit union:

- Identify the root cause of escalations
- Understand why your current tools aren't helping
- Learn how a Knowledge Operations Platform helps you decrease escalations

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Here's how people describe the problem:

"New hires take forever to learn the job."

"Nobody can find the information they need. Employees are constantly asking others for help."

"Everybody does things differently."

"There's no clarity around how we do things...it feels chaotic."

"Things are always changing around here and it's not clear what to do."

"You can never truly move on from your previous role because people are always asking for help."

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Here's what the problem looks like for frontline employees...
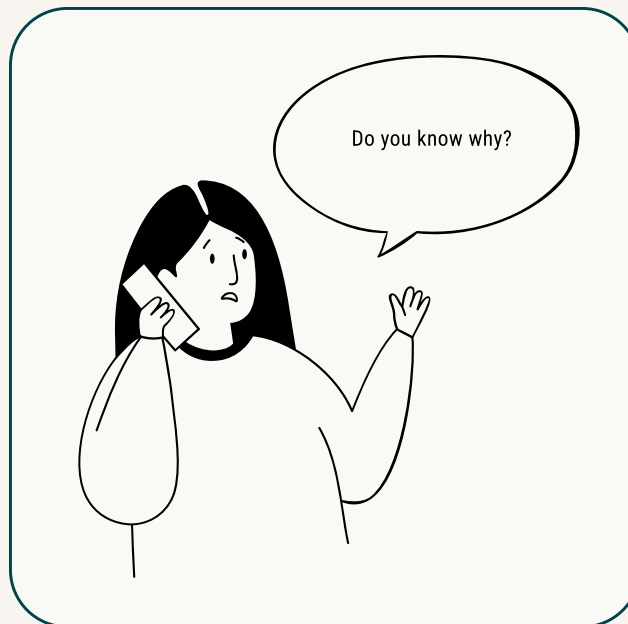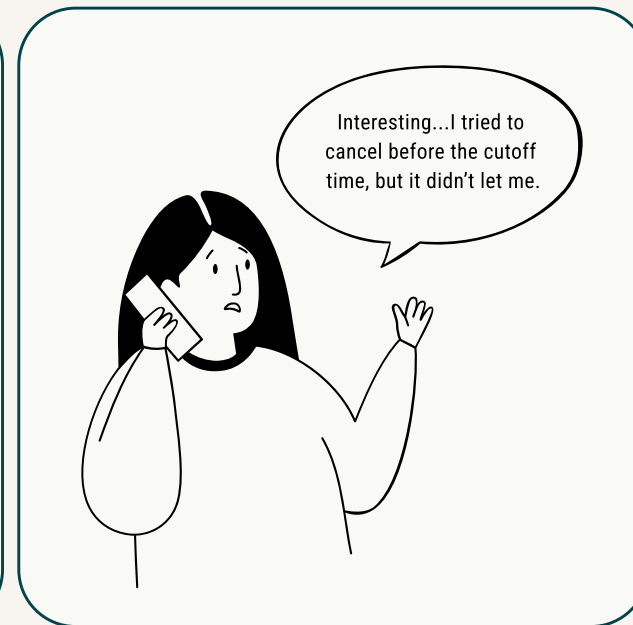
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Here's the thing:

Frontline Employees could handle more interactions on their own if they could easily access the right information in the moment they needed it. But since they can't, they have to escalate and ask others for help.

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This behavior leads to tribal knowledge.

Tribal knowledge is the information that resides in employees' heads. It is knowledge that isn't captured anywhere, so it is transferred via word of mouth.

* If you don't know what Tribal Knowledge is, ask your neighbor.

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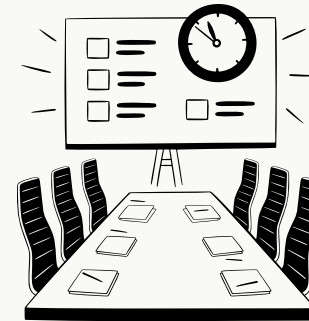# Running on tribal knowledge results in...

Confusion

Stress

Interruptions

Long Training

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But wait!

We have a knowledge base! People just don't use it!

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Have you ever wondered why nobody uses your knowledge base?

The 3 main reasons are...

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01

Search Stinks
Employees can't find the correct steps they need in the moment they need to respond to the question or request. Your intranet, SharePoint, the wiki — it doesn't search your content very well.

What are bill pay limits?

0 Search Results

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Guides are Difficult to Use

02

The truth is, even if employees could find the procedure, often times they would still struggle to read them in the moment they're dealing with a member.

The fact is, Word, PDF, and PowerPoint are not designed for creating guides that frontline employees can easily use and reference.

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03

You Don't Have Guides for Everything
In our experience, credit unions typically only have guides for about **30-40%** of the possible inputs that frontline employees respond to.

Not only are they NOT in place, but credit unions don't have a process in place for identifying gaps and filling them in.

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Employees do what's easiest

Your knowledge base acts like a wall and is actually making it **MORE DIFFICULT** to get help — which is why employees don't bother using it.

They go directly to somebody who can help because they trust that approach (and it's faster).

As long as co-workers are the fastest and most convenient source of knowledge, employees will always escalate questions and requests.

But wait!

Employees can just memorize everything!

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Nope. They can't.

There are 3 big problems with relying on memory.

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01

There are a LOT of Inputs

Each day, frontline employees will have to handle over **30 different** transactions. But that may come from a pool of **100 to 500** questions and requests. Remembering the steps for all of those inputs is not realistic — especially when employees are tired, hungry, or stressed.

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02

There is a LOT of Complexity
Some questions and requests may be simple, but there are several inputs that are complicated to process correctly.

The steps you take to process the request may change depending on several variables, and it's not easy to remember what all of those are.
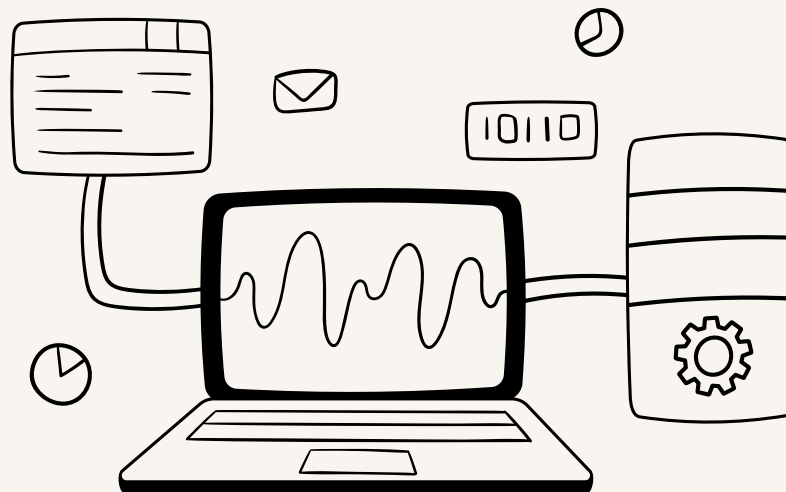
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03

There is a LOT of Change
Whether it's a new system, a new regulation, or a new policy you need to implement, change is pretty constant at a credit union.

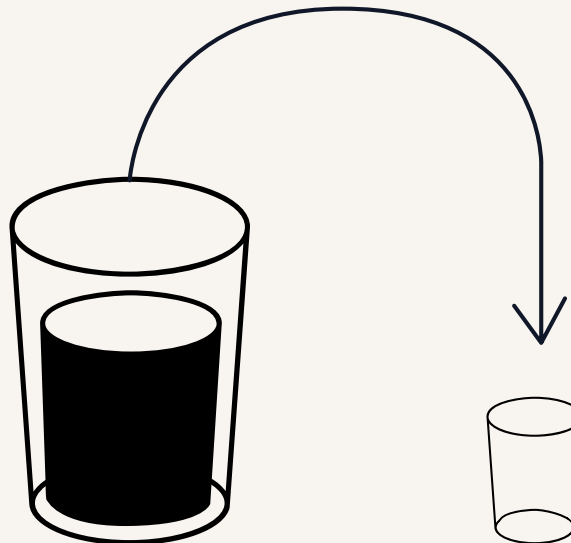Having to remember the new ways of processing inputs is difficult.

We can't remember all the details

Trying to get employees to remember all of the different inputs, steps, clicks, variables, and changes is like trying to pour a gallon of water into a 16 oz. glass.

It's not going to fit.

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How do you escape escalation and tribal knowledge pains?
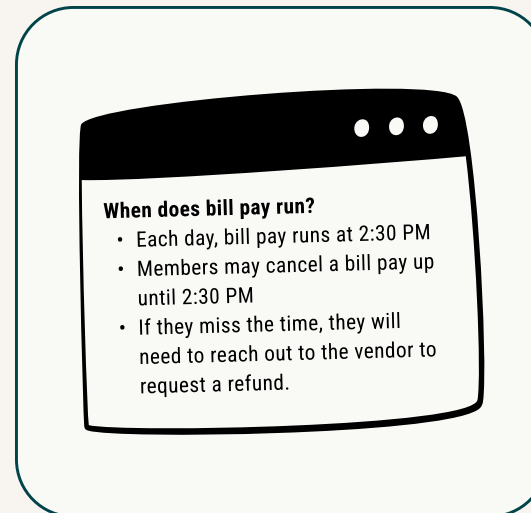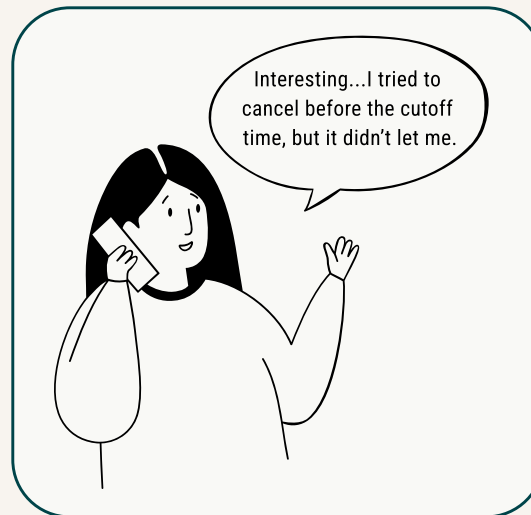
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To eliminate escalations and escape tribal knowledge, you need to break down the barriers and make it easier for employees to get information in the moment they need it. That means having findable, followable, and scannable digital guides.
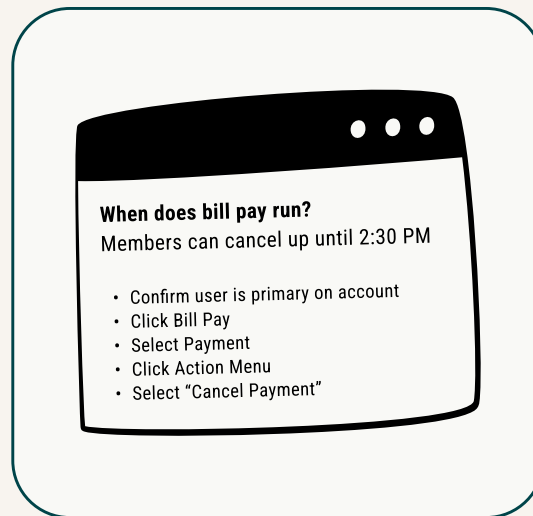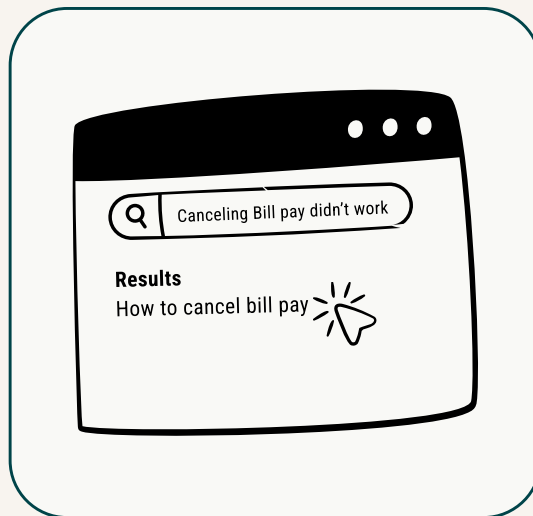
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What does that look like?

Let's revisit our credit union scenario from a new perspective.

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How do we provide a Google-like experience for employees?

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Follow these 3 steps

You can create resources that employees will use each and every time they perform a transaction as long as you do these three things.

1. Identify	**2. Capture**	**3. Optimize**

NOTE: You will need a system to help you do these things. I'll elaborate on what we recommend and other options later.

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01 **Identify the Inputs Employees Need to Process**
What are all the different questions and requests they have to respond to? Before you start creating any guides, you must first identify what it is that employees are doing!

What's my account balance?

Why did I get charged a fee?

How can I see my account history?

Process an instant issue

Remove a joint owner from my account

Why start with identifying the inputs?

Instead of focusing on what information you want to write down (supply-driven), you begin by identifying **what information employees will need** (demand driven).

Old Way—Supply Driven	New Way—Demand Driven

I'm going to write down everything I know!

What inputs are people responding to? What would be most helpful to them in those moments?

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To identify what people need, do these 3 things...

1st — Pick a specific role

2nd — Identify the topics for that role
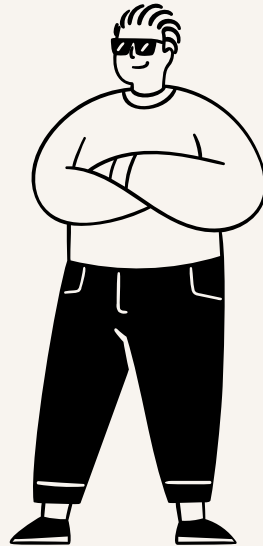
3rd — Write down all the inputs for each topic

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1st – Pick a specific role
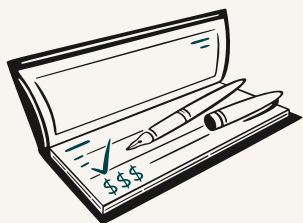

Call Center Rep

Loan Officer

Member Service Rep

Teller

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2nd – Identify the topics for that role

Share Draft/Checking

Mobile App

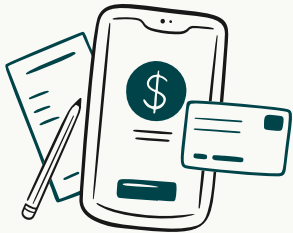**Credit Card**

CDs

Cash

Bill Pay

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3rd – Write down all the inputs for each topic

- How can I open a CD?

- What are the rates?

- How can I add funds to CD?

- How can I add somebody to the existing CD?

- How do I set up bills for payment?

- Is Bill Pay Service Free?

- Vendors said they didn't receive payment

- How do I delete a vendor?

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02

Capture the Information

Most people have PTSD when it comes to writing procedures. **The truth is, we overcomplicate this**. All you need to do is start with the input and write down how you would respond if you were answering the question or request.

What is the Bill Pay Service Fee?

- First 10 vendors are free
- Over 10, pay 2% transaction fee

You also need better tools to capture knowledge

Use better tools for capturing knowledge

If I were building a house, I would purchase a nail gun and a power saw. There's no way I would try to build it with a hammer and a handsaw.

The same goes for when you're creating an internal Google. Use tools that will make the job easier and faster for capturing your guides.
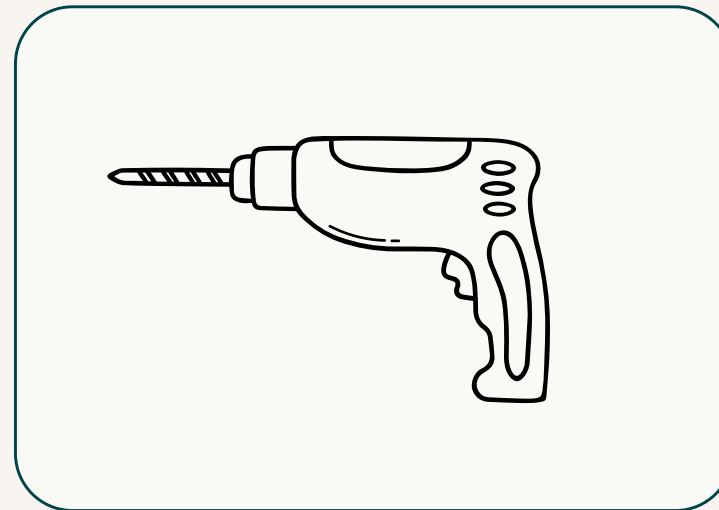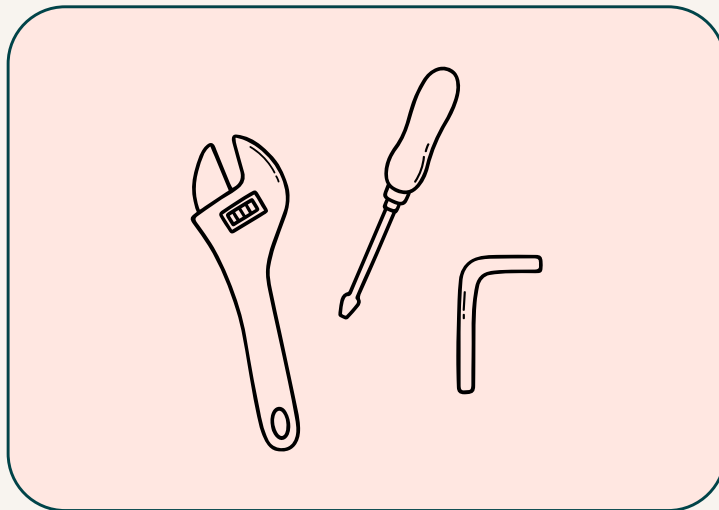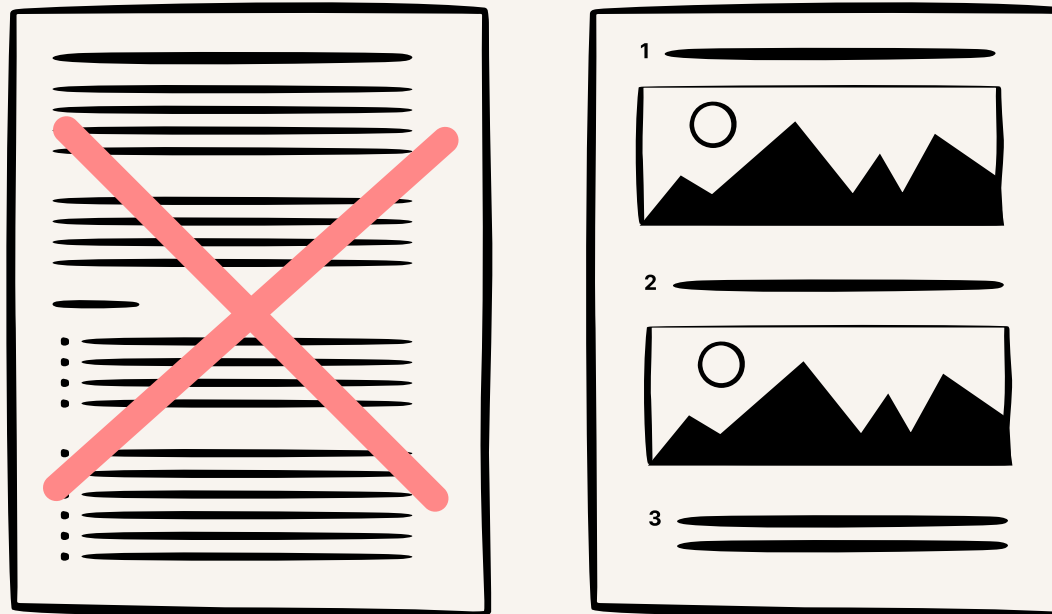
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03

Optimize Guides for Frontline Employees
You must format your guides so that frontline employees can quickly scan them and follow them.

Employees now have a resource everyone can reference

When employees can find what they need and immediately get the information they need in the very moment they need it, they will use it instead of always escalating questions and bringing in others.

Employees now have a resource they can turn to, thousands of times a day, without interrupting anybody else's workflow.

Knowledge Ops Platform

If you want to eliminate escalations in your credit union, you need an agile tool that helps you caption, share, and maintain your digital guides quickly. That's why we recommend using a Knowledge Ops Platform.

While tools like SharePoint, Word, PowerPoint, or even a wiki or an Intranet provide you a way to write down your procedures, they are **not** designed to build the resources you need at the speed that you need them.

A Knowledge Ops Platform is the fastest way to capture knowledge, format it, and organize it so that employees have answers at their fingertips.
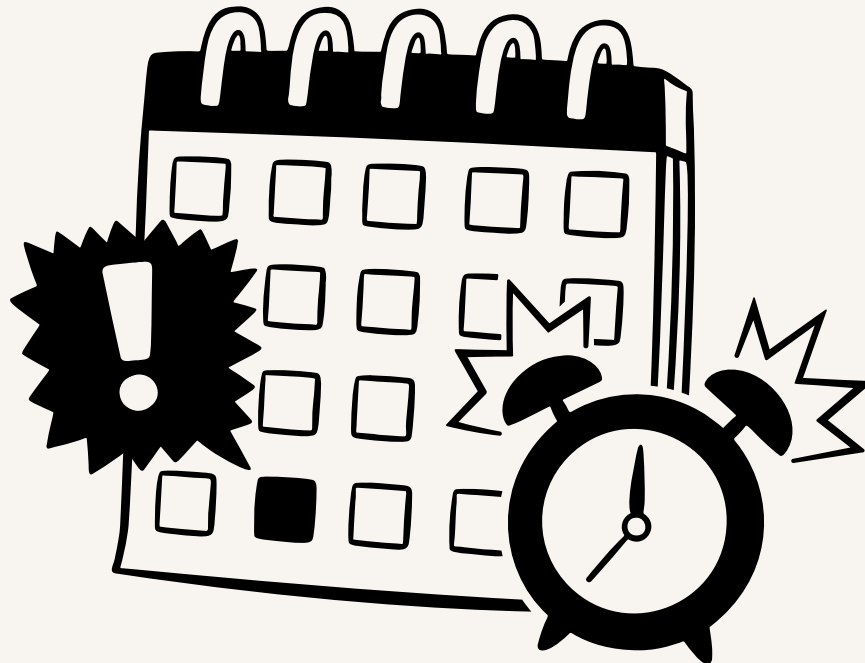
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What are you waiting for?

Visit **www.screensteps.com** to learn more about a Knowledge Ops Platform and how it empowers employees to work more independently and confidently.

Schedule a free demo and consultation to see how a Knowledge Ops Platform could enhance your credit union.

Learn more!

Want to learn more about the framework for building an internal Google?
Check out our book, Find & Follow.

Get the book