

Operational Knowledge

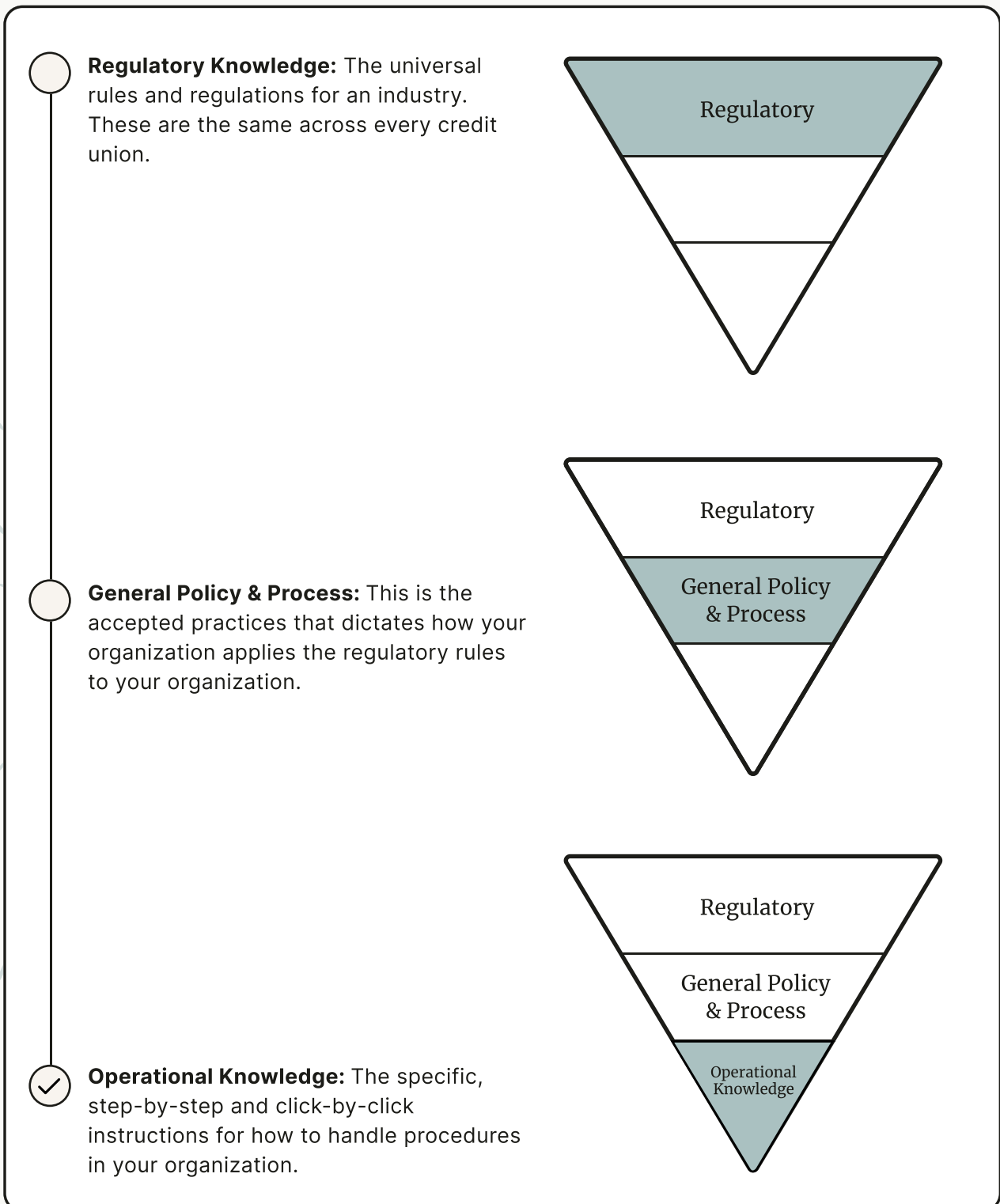
Discover the ins and outs of operational knowledge transfer — the key to a better member and employee experience.



SCREENSTEPS

DEFINING OPERATIONAL KNOWLEDGE

As opposed to industry, regulatory, or policy knowledge, **operational knowledge** is the company-specific information employees need to perform tasks, answer questions, and troubleshoot problems. How does it compare to different types of knowledge? Compare three knowledge types below.

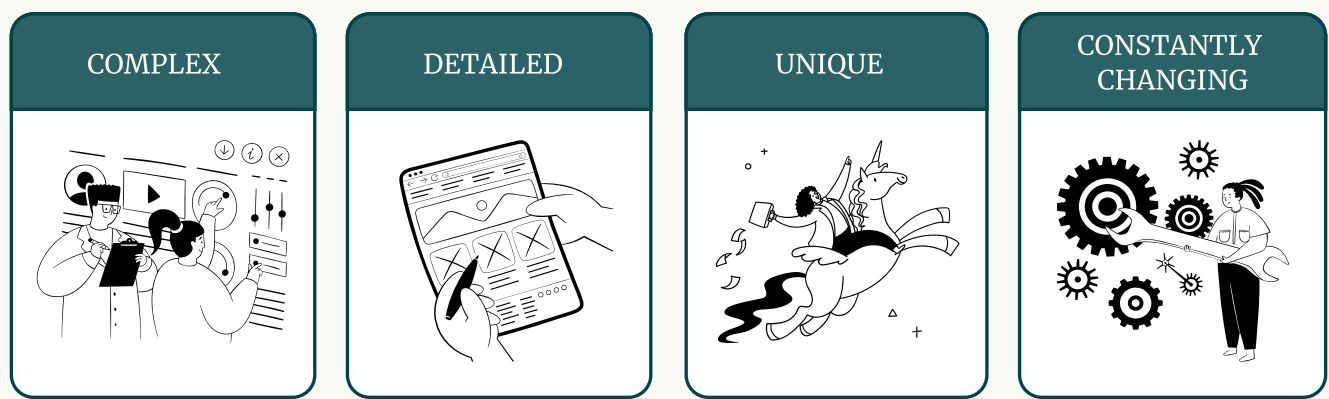


CHALLENGES & IMPACT OF OPERATIONAL KNOWLEDGE

Operational knowledge requires more from employees than memorizing facts. It requires your employees to take the information from the general policies and processes and translate them into click-by-click instructions. When employees don't have easy access to operational knowledge, training and operations can feel chaotic.

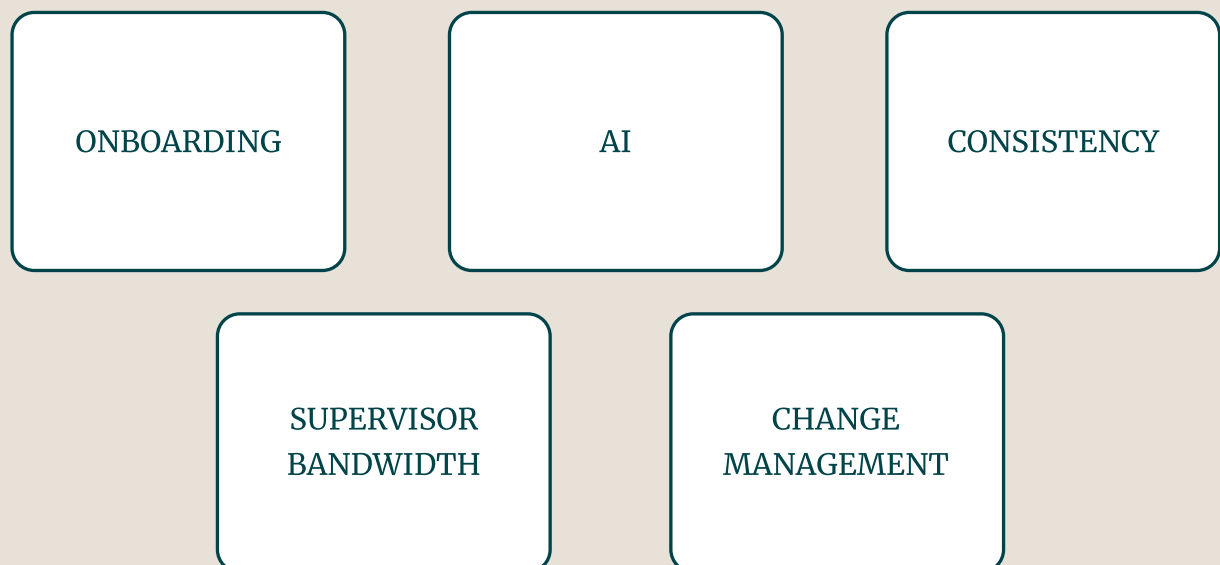
What is different about operational knowledge?

It is difficult to keep operational knowledge in your head. Why? Because of the nature of the information. Operational knowledge is:



What does operational knowledge impact?

When you don't have operational knowledge captured, it makes many business projects more challenging. Some of those areas include:



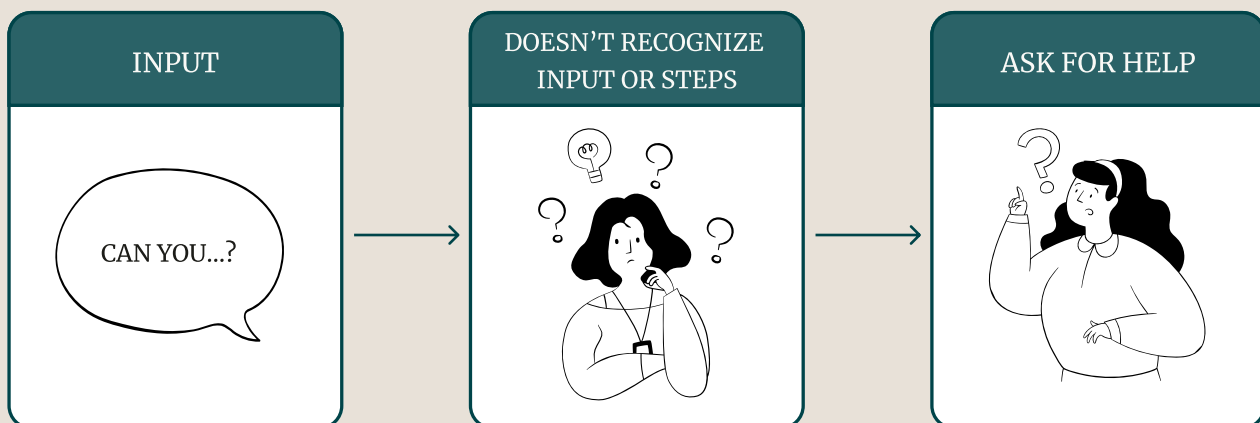
HOW TO THINK ABOUT OPERATIONAL KNOWLEDGE

Every task and project in your credit union, has a procedure. That requires an input (*member question or request*), a process (*tools and steps you use to handle the input*), and an output (*the result the member wants*).



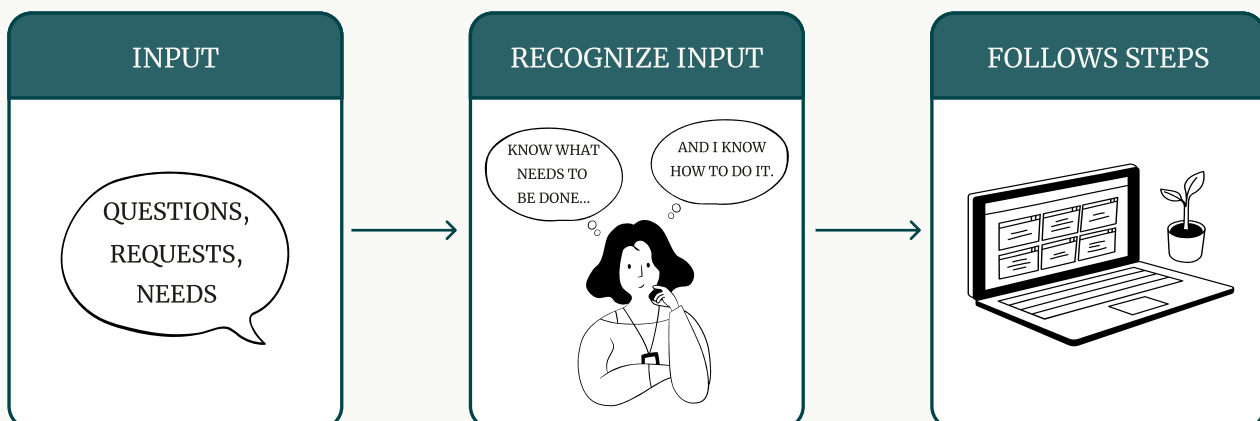
TYPICAL CREDIT UNION SITUATION

The scenario below is how most businesses handle operational knowledge. Employees are dependent on supervisors and experienced co-workers.

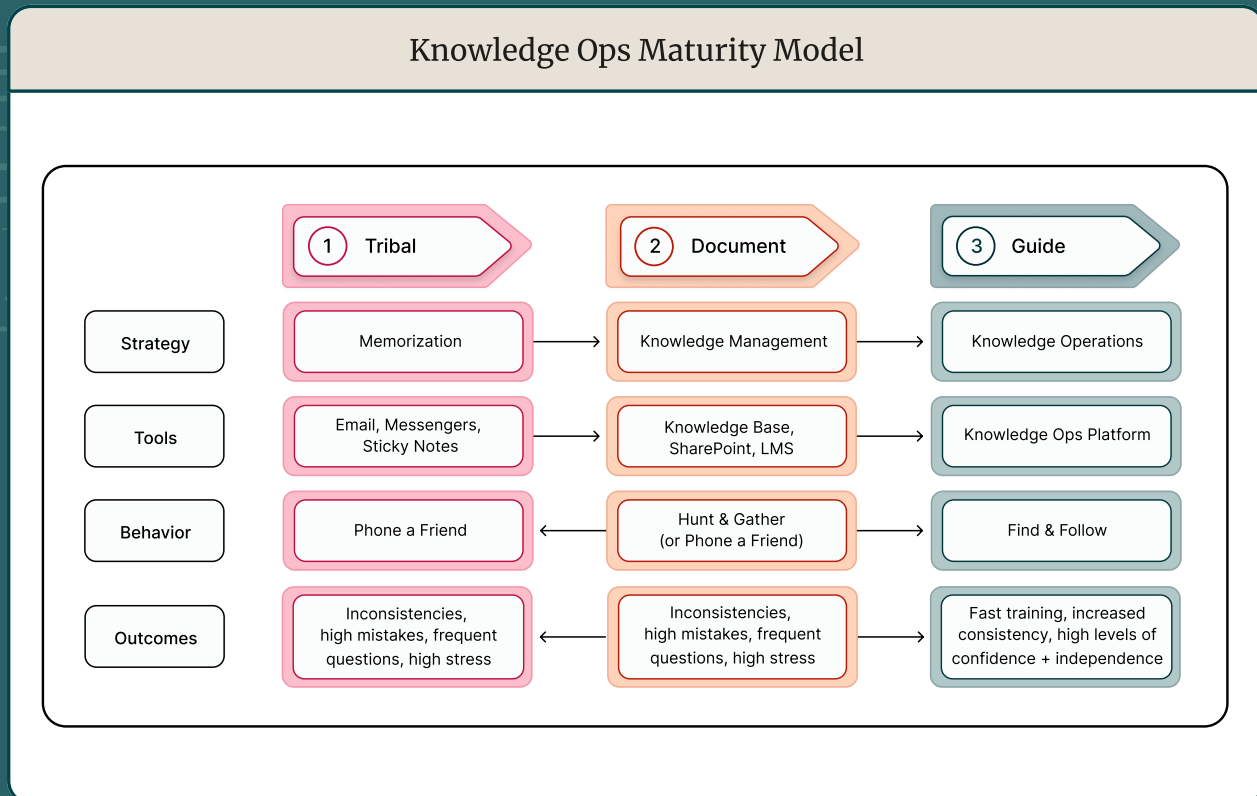


IDEAL CREDIT UNION SITUATION

A credit union with high-functioning knowledge operations looks more like the below scenario. Every employee knows how to access answers and handle requests independently.



TRANSFERRING OPERATIONAL KNOWLEDGE



THE KNOWLEDGE OPS MATURITY MODEL

The Knowledge Ops Maturity Model is a resource to help credit unions measure how efficiently it transfers operational knowledge.

It examines the strategy, tools, behaviors, and outcomes surrounding your company's training approach and employee support resources.

The three phases on the Model starts in the **Tribal Stage** where credit unions are ineffectively transferring operational knowledge. Knowledge is stuck in experts' heads, which means employees seek out the experts for support.

Moving into the **Document Stage**, credit unions begin capturing operational knowledge. However, it is difficult to access and guides are too confusing to follow, so behavior inevitably replicates the Tribal Stage.

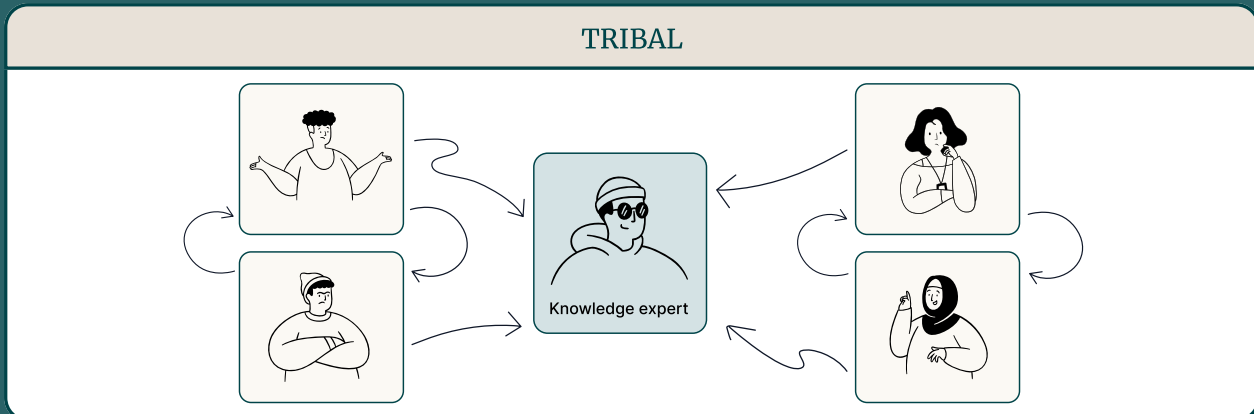
At the **Guide Stage**, employees can work confidently and independently. Onboarding new hires, cross-training employees, and change management projects are easier.

Where does your credit union fit on the Knowledge Ops Maturity Model?

WHAT THE DIFFERENT STAGES LOOK AND FEEL LIKE

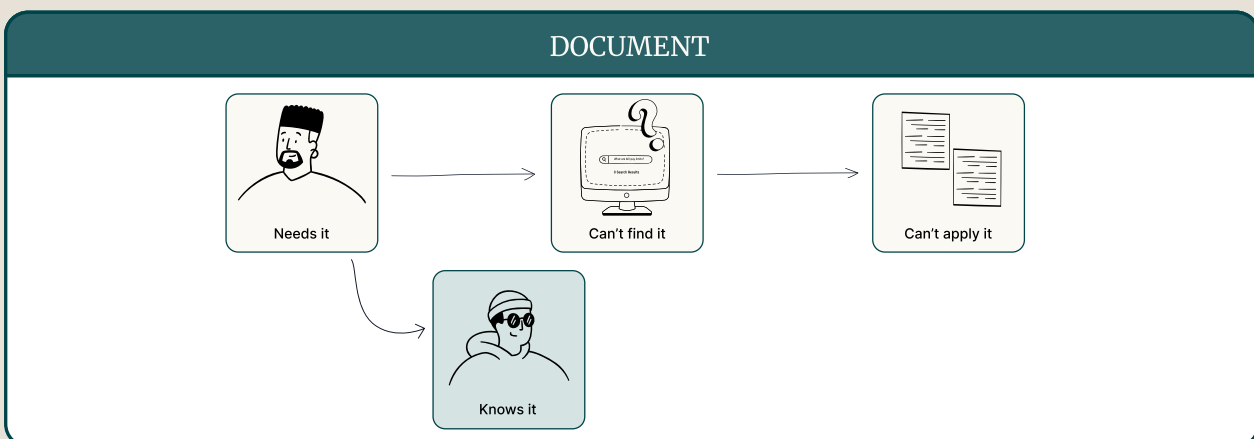
TRIBAL STAGE

All knowledge is stuck in people's heads. Training and support happens through shadowing.



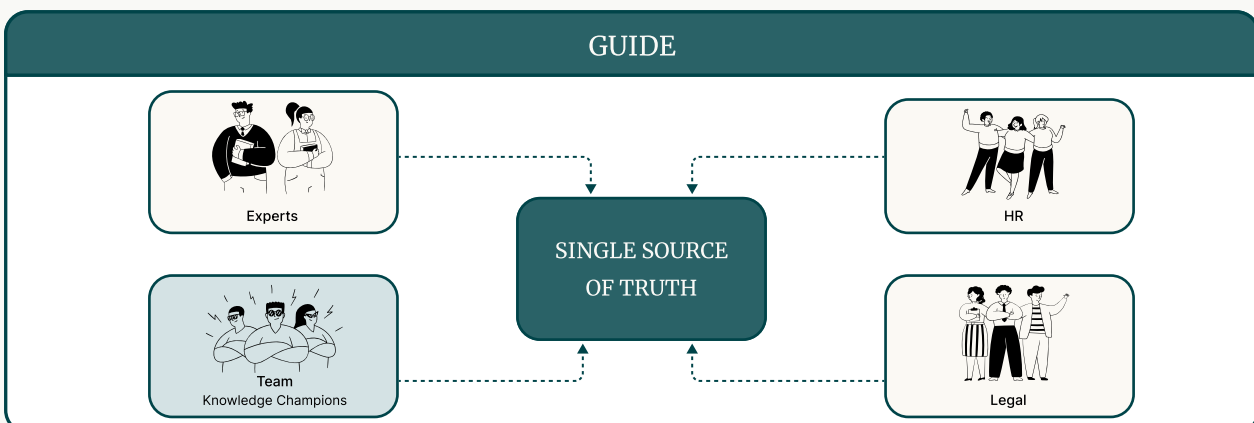
DOCUMENT STAGE

You've documented SOPs, but people still turn to supervisors & co-workers when they're stuck.

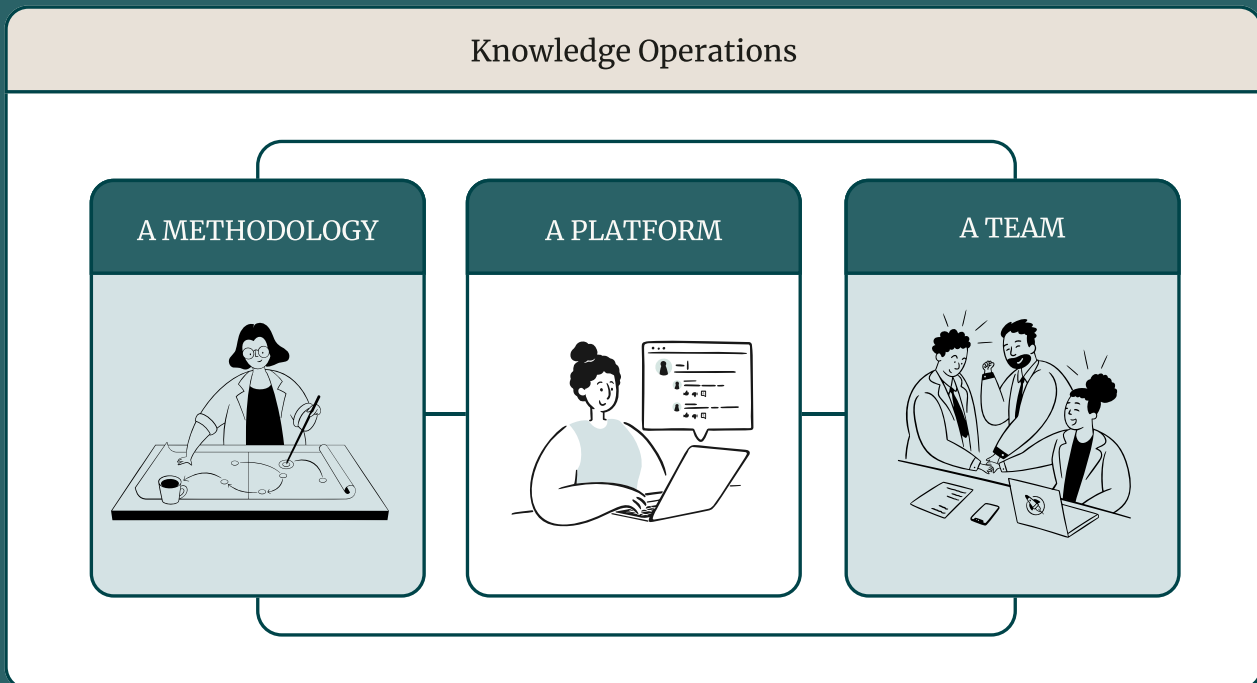


GUIDE STAGE

Employees find and follow digital guides to work confidently, consistently, and efficiently.



THE SOLUTION: A KNOWLEDGE OPERATIONS STRATEGY



SCREENSTEPS – THE WORLD’S FIRST KNOWLEDGE OPS PLATFORM

ScreenSteps is the world’s first Knowledge Operations Platform, an AI-powered software designed to help teams capture, transfer, and maintain operational knowledge.

The Knowledge Ops Platform — paired with the Find & Follow Framework (*methodology*) and Knowledge Operations Team — helps businesses escape tribal knowledge and deliver findable, followable, and scannable knowledge resources. This combination empowers employees to handle any process, no matter the complexity or pace of change.

The result is independent and confident employees, fewer mistakes, increased supervisor bandwidth, smoother change management, and increased consistency across the organization.

BENEFITS OF A KNOWLEDGE OPS PLATFORM



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"This platform has been a real game-changer in transforming the way we create and transfer knowledge. It's helped us grow employee expertise and create a remarkable member experience."

ALASKA DELAIRE,

INFORMATION TECHNOLOGY SUPPORT SPECIALIST, CONNECTFIRST CREDIT UNION



SCHEDULE A SCREENSTEPS DEMO

Reduce supervisor burnout, improve member consistency, and empower confident employees with a Knowledge Ops Platform.