

# Boost employee confidence & enhance member satisfaction

Learn how ScreenSteps can help you reduce employee questions, mistakes, and training time at your credit union.

[www.screensteps.com](http://www.screensteps.com)



# ScreenSteps is a knowledge ops solution for better employee training & performance



## A better member experience begins with more confident employees

ScreenSteps is a knowledge ops solution that helps teams empower every employee to act and feel like an expert, regardless of their experience, background, or tenure.

The knowledge ops solution gives your team the technology, framework, and habits to transfer knowledge faster and more efficiently, reducing employee questions, mistakes, and training time. The results? Fewer questions and mistakes, consistent performance, faster training time, reduced stress, and a better member experience.

This packet is designed to help credit unions diagnose the root cause of employee performance and training challenges – tribal knowledge. Then, we'll explain what the ScreenSteps knowledge ops solution is and how it can help make dramatic improvements in your training & operations.



# Table of Content

## 01

### Diagnosing Training & Operations Challenges

Impact on credit unions	4
What is tribal knowledge?	4
6 signs of tribal knowledge	5
Cost of tribal knowledge	5
What does it look like?	6

## 02

### Level Up Your Knowledge Transfer Strategy

Knowledge Ops Maturity Model	7
Benefits of moving up	8
Continue exploring	8
Why your current training and documentation has you stuck	9

## 03

### ScreenSteps Knowledge Ops Solution

Hello guided knowledge	10
Knowledge ops solution	11
What you can achieve	12
What does it look like?	14

## 04

### Schedule a Discovery Call to Learn More

Take the first steps	15
Introduction overview	15



## Diagnosing Training & Operational Challenges

# The Impact Tribal Knowledge Has on Credit Unions

One of the most common knowledge management strategies credit unions rely on is tribal knowledge. And yet, it can be the most detrimental to a credit union's well-being. From chaotic operations to never-ending training, a reliance on tribal knowledge prevents credit unions from growing.

## So, what is tribal knowledge?

Tribal knowledge is all the organizational information that resides in employees' heads. It is unwritten and typically transferred from one person to another via word of mouth, messaging systems, or the infamous binder.

# 6 signs of tribal knowledge reliance in credit unions

- Overwhelmed supervisors
- Stressed and unconfident employees
- Inconsistent member service
- Lengthy training times
- Slow proficiency achievement for new hires
- Slow and painful change adoption



## What are the costs of tribal knowledge?

### Mental Health

One of the greatest impacts of tribal knowledge is your employees' mental health. Mental health affects employee performance, employee retention, and, consequently, the member experience.

### Mental health costs include:

- Stress and burnout
- Anxiety about mistakes
- Lack of confidence and mental energy

### Financial Costs

Tribal knowledge has a huge impact on your bottom line. When you rely on tribal knowledge, you have to hire more people to serve the same number of members.

### Financial costs include:

- High employee and supervisor count
- Long wait times and low member satisfaction
- High training and onboarding costs

### Opportunity Costs

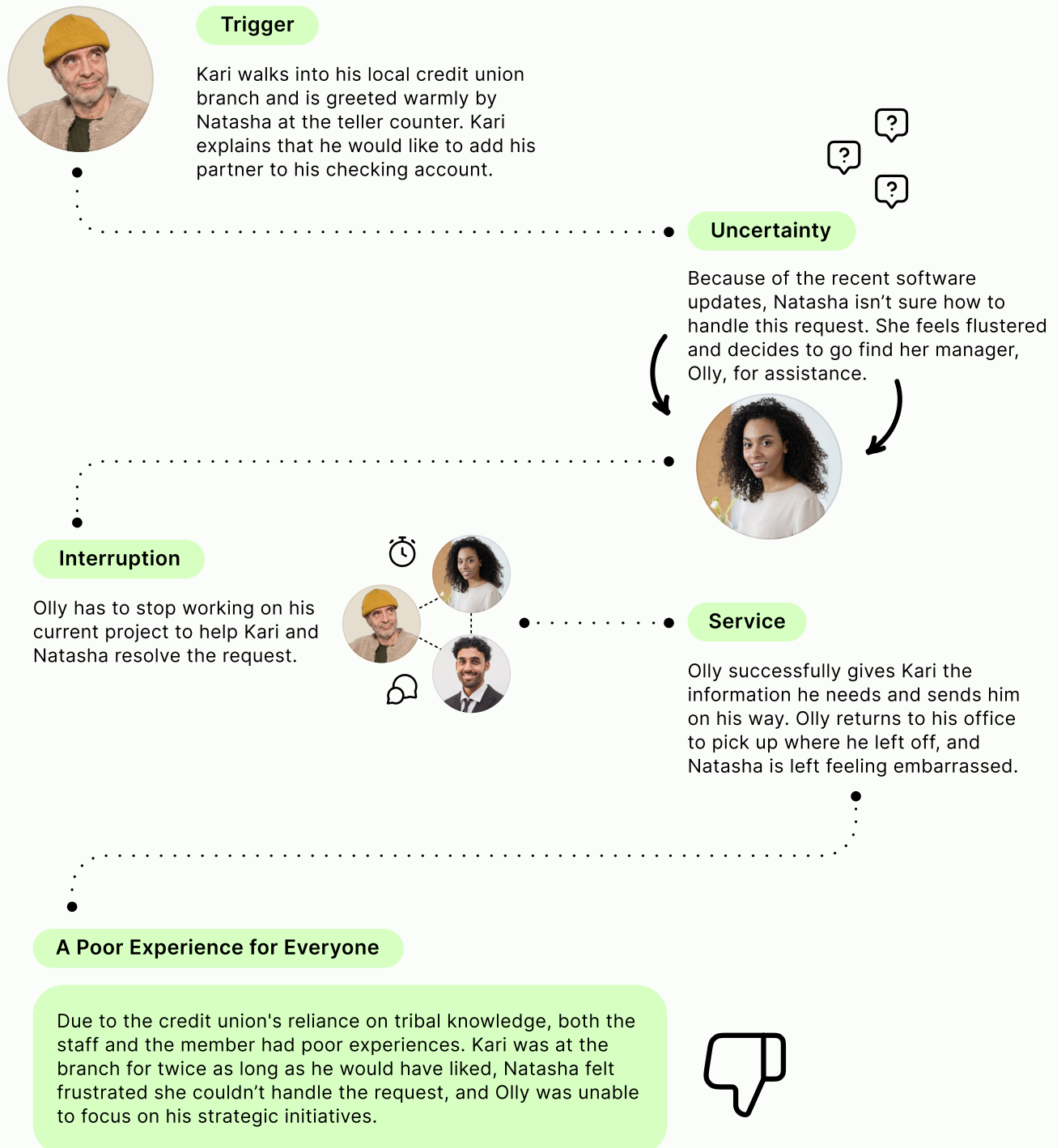
When your credit union operates on tribal knowledge, you lose out on other strategies that can propel your credit union forward.

### Opportunity costs include:

- Delayed opening of new branches
- Slow technology adoption
- Difficult adaptation to changes

# What does tribal knowledge look like?

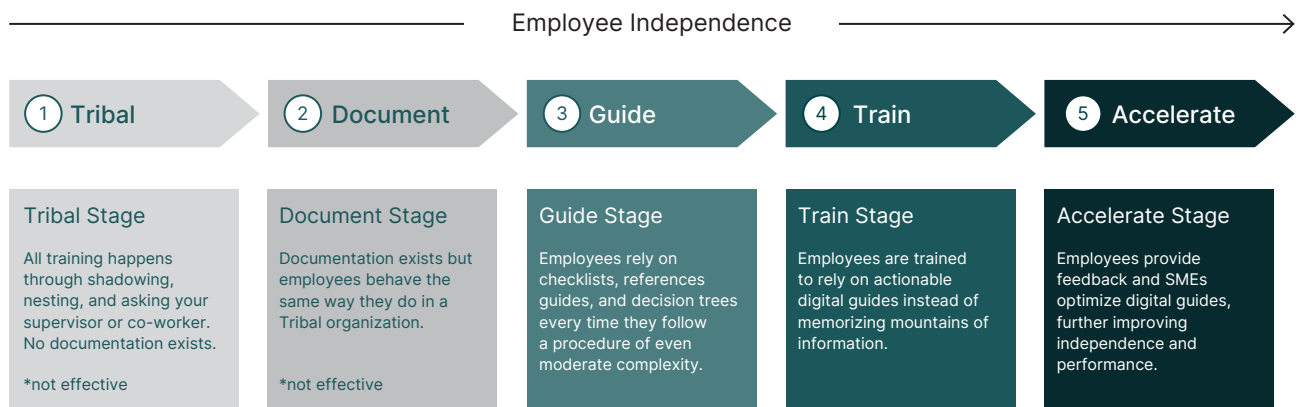
In tribal knowledge-dependent credit unions, employees either try to work from memory (and make mistakes) or escalate to their neighbor or manager. Here's an example of what a tribal knowledge interaction might look like at a local branch.





# The Knowledge Ops Maturity Model

The Knowledge Ops Maturity Model helps credit unions evaluate and improve their knowledge transfer strategy. The model is divided into five stages, each representing a different level of effectiveness in transferring knowledge.



Credit unions that operate in the Tribal and Document Stages feel chaotic and impossible to scale. Employees and supervisors are always scrambling to find answers.

As credit unions move up the Maturity Model, they can empower more confident employees and provide a better member experience.

## Benefits of Moving Up the Model

- Less stress
- Increase confidence
- Increase consistency
- Supervisor freedom
- Faster training
- Simple change management
- Faster member service
- Increase span of control

## Continue Exploring the Knowledge Ops Maturity Model

Learn more about the Knowledge Ops Maturity Model's different stages and the benefits of moving up the model.

[screensteps.com/maturity-model](https://screensteps.com/maturity-model)







## Why Your Current Training and Documentation Has You Stuck in Tribal Knowledge

Against their best efforts, most credit unions stay stuck in the Tribal or Document Stage of the Knowledge Ops Maturity Model.



### **Pitfall #1: Knowledge resources aren't designed to actually help the employees**

When credit unions create training resources and documentation, they often forget to think about the most important aspect: the employee. Employees sit through hours and hours of training only to forget 99% of what they learned. When an employee needs to know how to perform a task, they have to search through 20-page PDFs or binders just to find the step-by-step instructions.



### **Pitfall #2: Knowledge resources aren't designed to deal with complexity and change**

As soon as a procedure changes or a member has a rare problem, the training and documentation resources they have become obsolete. This is because traditional knowledge management practices aren't designed in a flexible, easy-to-update way.

**What happens in all of these situations?**  
Employees revert back to tribal knowledge.

# Goodbye Tribal Knowledge, Hello Guided Knowledge

A better member experience begins with more confident employees. ScreenSteps is a knowledge ops solution that helps credit unions move up the Knowledge Ops Maturity Model and implement a successful knowledge operations strategy. The solution gives your credit union the technology,

framework, and habits to transfer knowledge faster and more efficiently, reducing employee questions, mistakes, and training time.

## Trusted by credit unions big and small





## The ScreenSteps Knowledge Ops Solution



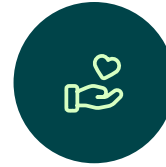
### Knowledge Ops Platform

A centralized knowledge hub for employee training & performance support resources



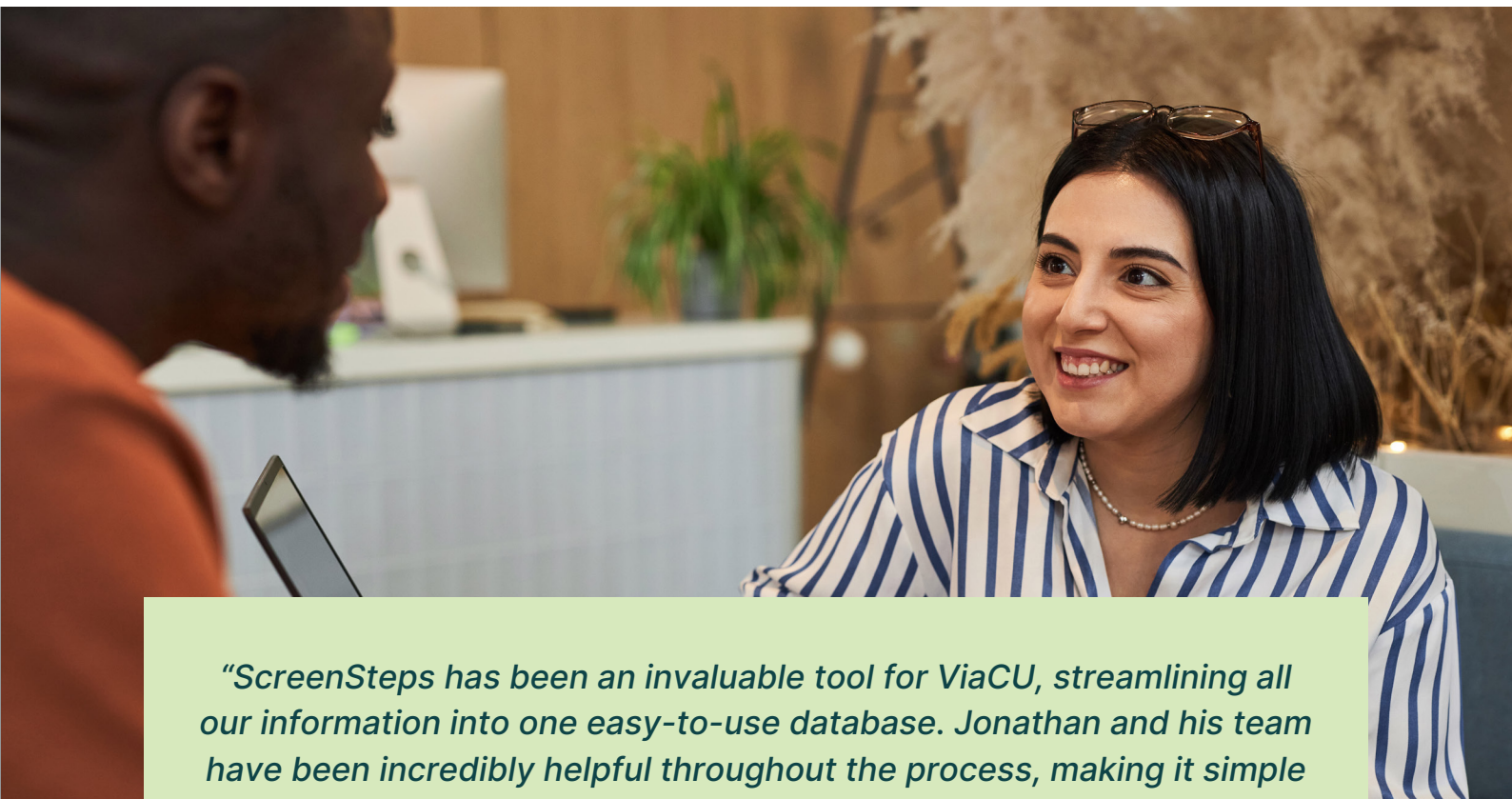
### Find & Follow Framework

A methodology for simplifying how employees work & train by transferring knowledge more efficiently



### Coaching + Workshops

Get expert support every step of the way for a successful knowledge operations implementation



*"ScreenSteps has been an invaluable tool for ViaCU, streamlining all our information into one easy-to-use database. Jonathan and his team have been incredibly helpful throughout the process, making it simple to create articles and increase efficiency. I found the entire process to be well-organized and straightforward from start to finish."*

– Julia Monts, VP of Member Services at Via Credit Union



## What you can achieve with a knowledge ops solution

**90%**

Faster  
cross-training

**75%**

Reduction in time to  
proficiency for new hires

**>50%**

Decrease in  
employee attrition



### Boost employee confidence

With a knowledge ops solution, every employee can act and feel like an expert, regardless of their background, experience, or tenure. Anytime an employee needs to perform a task or solve a problem for a member, they simply find and follow the digital guide they need. The results? Expert-level service, every time.



### Streamline employee training

Traditional training methods, such as classroom-style lectures and shadowing, are dead. They rely too heavily on memorization, which results in never-ending time to proficiencies. A knowledge ops solution simplifies training to self-paced foundational courses and just-in-time digital guide support.



### Provide exceptional member services

A knowledge ops solution takes the problem-solving cognitive load off employees' shoulders. This gives them the time and headspace to focus on what really matters: the member. Since every employee follows the same guide, members receive the same level of service, regardless of the branch they walk into and the employee they interact with.



### **Adapt to change seamlessly**

Whether it's changes to policies, procedures, technology, or people, a knowledge ops solution empowers credit unions to adapt to change, without missing a beat. For small changes, simply update your digital guides. For large changes, utilize custom courses and digital guides for faster training.



### **Free up time to focus on what moves your credit union forward**

A knowledge ops solution eliminates nearly all employee questions and mistakes. Now, managers, supervisors, and directors can stop spending their time jumping in to answer questions and fix mistakes, and instead focus their time on strategic initiatives to move the credit union forward.



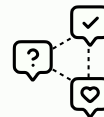
# What does guided knowledge look like?

In credit unions with a culture of guided knowledge, employees no longer need to rely on their memory to perform tasks or solve problems. Instead, they reference informational digital guides, empowering them to provide members with the most accurate and consistent service possible. Here's an example of what a guided knowledge interaction might look like at a local branch.



## Trigger

Kari walks into his local credit union branch and is greeted warmly by Natasha at the teller counter. Kari explains that he would like to add his partner to his checking account.



## Confidence

Because of the recent software updates, Natasha isn't sure how to handle this request. Thankfully, she knows she has ScreenSteps to assist.



## Find & Follow

Natasha searches the credit union's knowledge base to find and follow the digital guide with the information she needs.



## Service

Natasha quickly and easily gives Kari all the information he needs and sends him on his way.

## A Seamless Experience for Everyone

Due to the culture of guided knowledge, everyone involved with this interaction has a great experience. Natasha felt confident helping Kari with any problem or request he had, and Kari was able to get in and out quickly. Olly, the manager, was able to stay focused on his project, knowing Natasha was empowered to serve every member.



Schedule a Discovery Call to Learn More

# Take the first steps towards more confident employees & a better member experience

Schedule a discovery call with the ScreenSteps team to learn how your credit union can reduce employee questions, mistakes, and training time with the ScreenSteps knowledge ops solution.



During this introduction, we'll show you how a knowledge ops solution can help your team:



Eliminate employee questions & mistakes



Boost employee confidence & independence



Reduce supervisor stress & burnout



Cut new hire training time by 90%



Adapt to change, without missing a beat

Schedule now: [screensteps.com/discovery](https://screensteps.com/discovery)





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## Let's Connect!

Connect with us online for tips, insights, and best practices about how to reduce employee questions, mistakes, and training time with better knowledge operations.

 [screensteps.com/learning-center](https://screensteps.com/learning-center)

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