SCREENSTEPS

Boost employee confidence & enhance member satisfaction

Learn how ScreenSteps can help you reduce employee questions, mistakes, and training time at your Farm Credit Association.

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 associations 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

Diagnosing Training & Operational Challenges

The Impact Tribal Knowledge Has on Farm Credit Associations

One of the most common knowledge management strategies Farm Credit Associations rely on is tribal knowledge. And yet, it can be the most detrimental to an association'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 Farm Credit Associations

→ 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

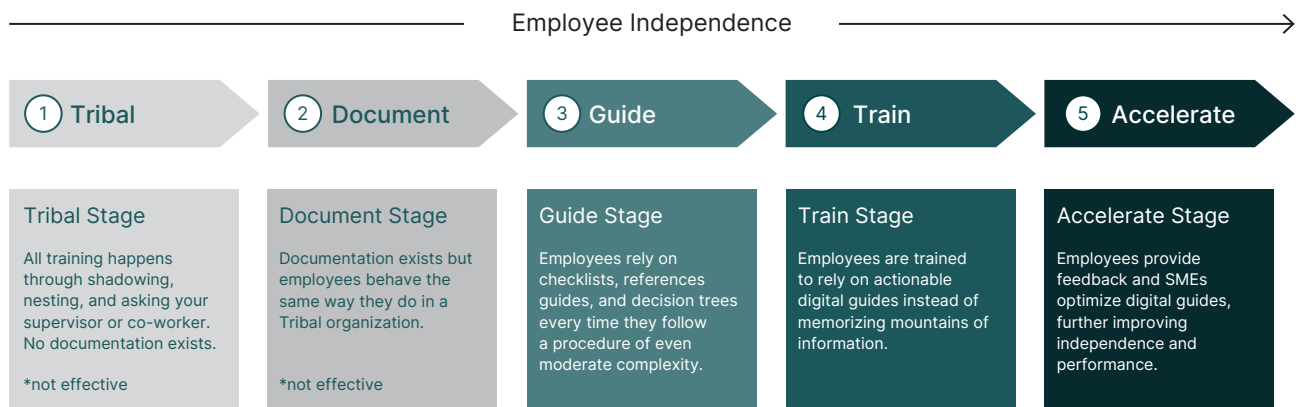→ High training and onboarding costs

Opportunity Costs

When your association 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

The Knowledge Ops Maturity Model

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

Employee Independence →

1 Tribal	2 Document	3 Guide	4 Train	5 Accelerate

Tribal Stage

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

*not effective

Document Stage

Documentation exists but employees behave the same way they do in a Tribal organization.

*not effective

Guide Stage

Employees rely on checklists, references guides, and decision trees every time they follow a procedure of even moderate complexity.

Train Stage

Employees are trained to rely on actionable digital guides instead of memorizing mountains of information.

Accelerate Stage

Employees provide feedback and SMEs optimize digital guides, further improving independence and performance.

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

As an association moves 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

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 Farm Credit Associations 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 Farm Credit Associations move up the Knowledge Ops Maturity Model and implement a successful knowledge operations strategy.

The solution gives your association the technology, framework, and habits to transfer knowledge faster and more efficiently, reducing employee questions, mistakes, and training time.
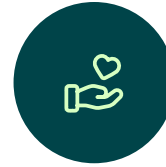
The ScreenSteps Knowledge Ops Solution

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

"The ScreenSteps platform has been a real game-changer in transforming how we create and transfer knowledge. It's helped us grow employee expertise and know-how to create a remarkable member experience."

– Alaska Delaire, Information Technology Support Specialist

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 Farm Credit Associations 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 association 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 Farm Credit Association forward.

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

Schedule a discovery call with the ScreenSteps team to learn how your Farm Credit Association 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

SCREENSTEPS

2024

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

in @screensteps

▶ @screensteps