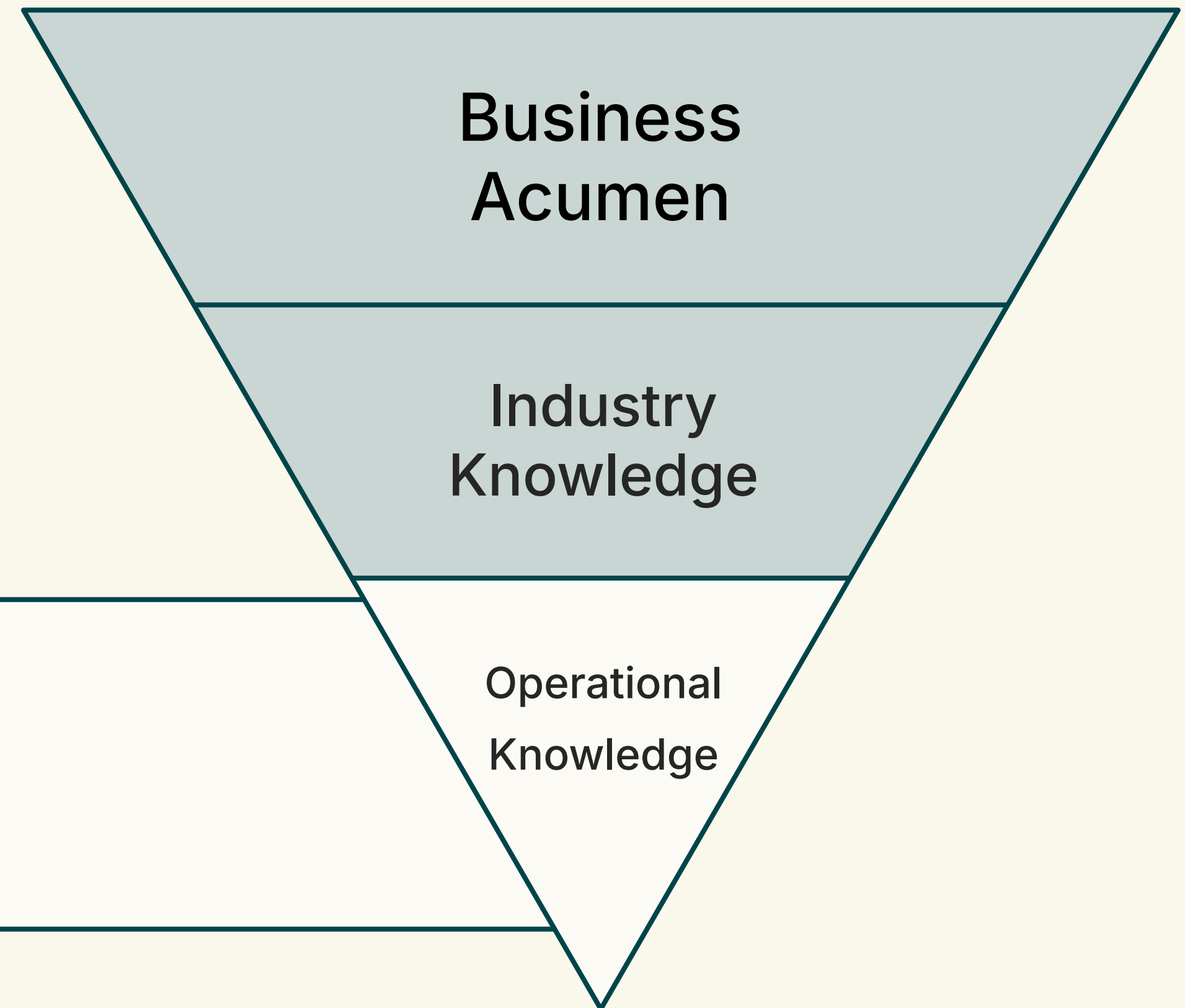


KOPs vs KB

5 Problems a Knowledge Ops Platform
Solves For Your Business That a
Knowledge Base Doesn't

Greg DeVore

Operational Knowledge



1. Open System X
2. Navigate to Account profile
3. Review transactions...

Knowledge Management

Get everything neatly organized



Knowledge Ops

Enable a performance



What is different about Operational Knowledge?

COMPLEX

DETAILED

UNIQUE

CONSTANTLY CHANGING



Knowledge Operations



A Methodology



A Platform



A Team

5 differences in a Knowledge Ops Platform

1. Capture Complexity
2. Communicate Complexity
3. Separate Foundational and Actionable Knowledge
4. Delivering Knowledge in the Workflow
5. Build Onboarding & Cross-Training Programs

1. Capture Complexity

Challenges in capturing complexity

1. Too complex to explain
2. No time to write documentation

We can't simplify everything,

But we can CLARIFY anything

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

Techniques for capturing complexity

1. Identify inputs
2. One-hour web-meetings
3. Use AI to identify critical paths

2. Communicate Complexity

"Seeing a new loan officer close a loan entirely on their own, with only the help of our ScreenSteps guides, 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

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

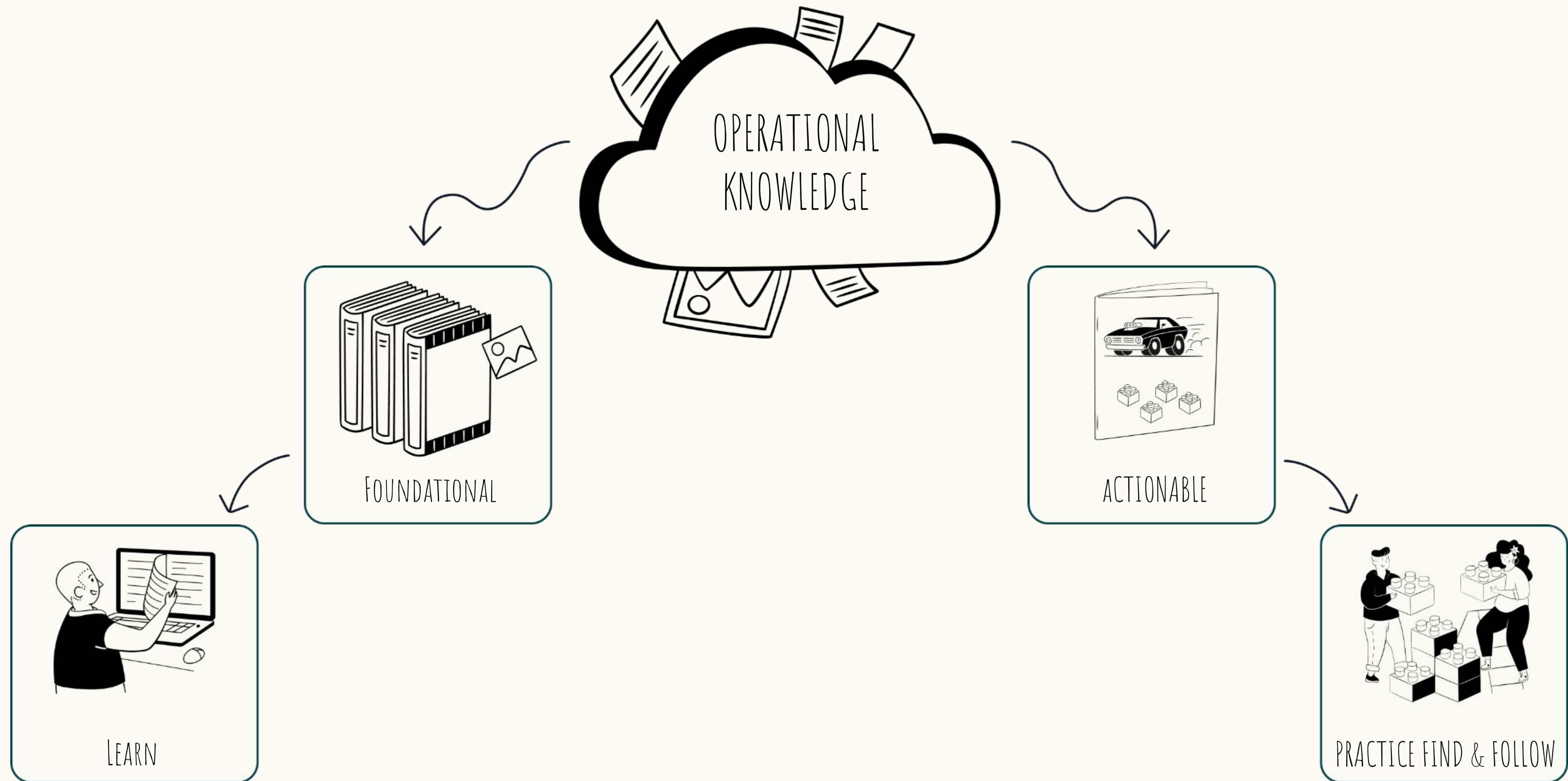
Decision Trees and Checklists for Complex Procedures

Techniques for communicating complexity

1. Use decision trees
2. Use interactive checklists
3. Use inline links
4. Separate foundational (why and what) and actionable knowledge (how)

3. Separate Foundational & Actionable Knowledge

Find & Follow is a Knowledge Transfer Methodology



Clarify AI Assistant

What question should the outline answer?

Creating a Contact in Salesforce

Record yourself describing the process you want to document. Using the question you entered above as a guide, Clarify AI Assistant will convert the audio recording into a scannable, followable outline which you can then edit.

Record voice

Upload audio file



 Start recording

 Stop recording

 Delete

What type of knowledge? [Learn more](#)

Actionable knowledge Foundational knowledge

Back

Create Outline

Use AI to
separate
Foundational
and Actionable
Knowledge

Foundational Courses

Credit Union
Here When You Need Us

Knowledge Hub Courses

Member Service Rep
2 of 6 courses Completed

- Member Accounts Overview (1 of 1 steps completed) ✓
- Welcome to the Course ✓
- Opening Accounts (12 of 12 steps completed) ✓
- Zelle (0 of 9 steps 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 ○

Welcome to the Course!

WELCOME TO THE COURSE

ZELLE FOUNDATIONAL COURSE

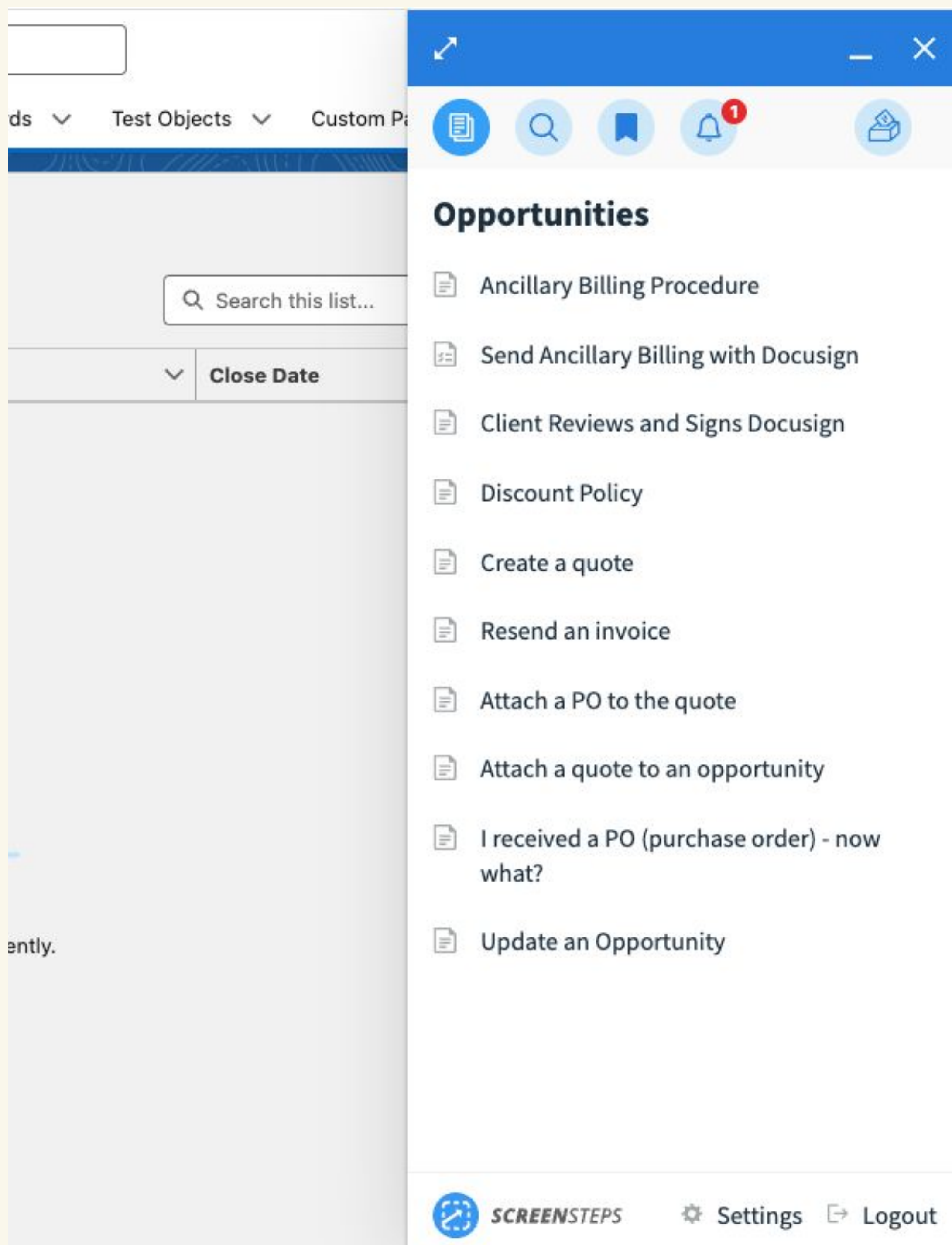
Back to courses

Mark as done

4. Deliver Knowledge in the Workflow

Delivering knowledge in the workflow

1. Browser Extension (Chrome and Edge)
2. Slack
3. Teams



Browser Extension:

- Any web page/app
- Suggest articles
- Bookmark
- Receive notifications
- Request articles

MS Teams

@ScreenS

@ScreenSteps

Search your ScreenSteps Knowledge Base right within Microsoft Teams

 More apps

 ScreenSteps

 Search

 Request an Article

 ScreenSteps > Search

 Deploying desktop installers

 Building desktop installers

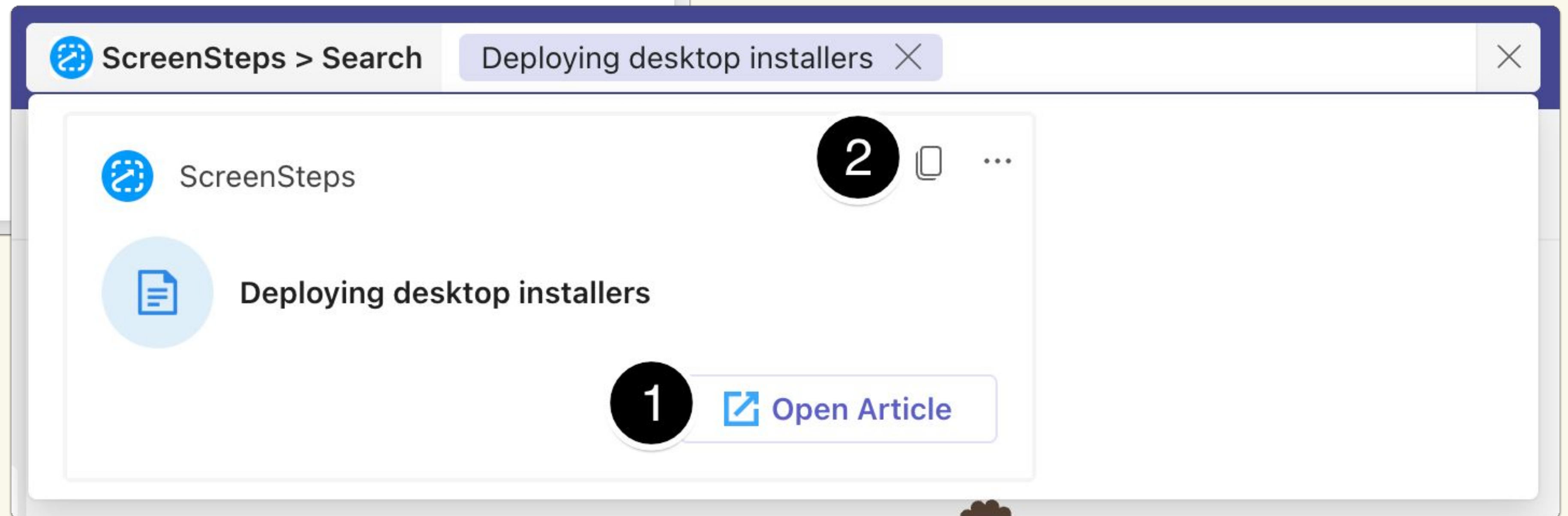
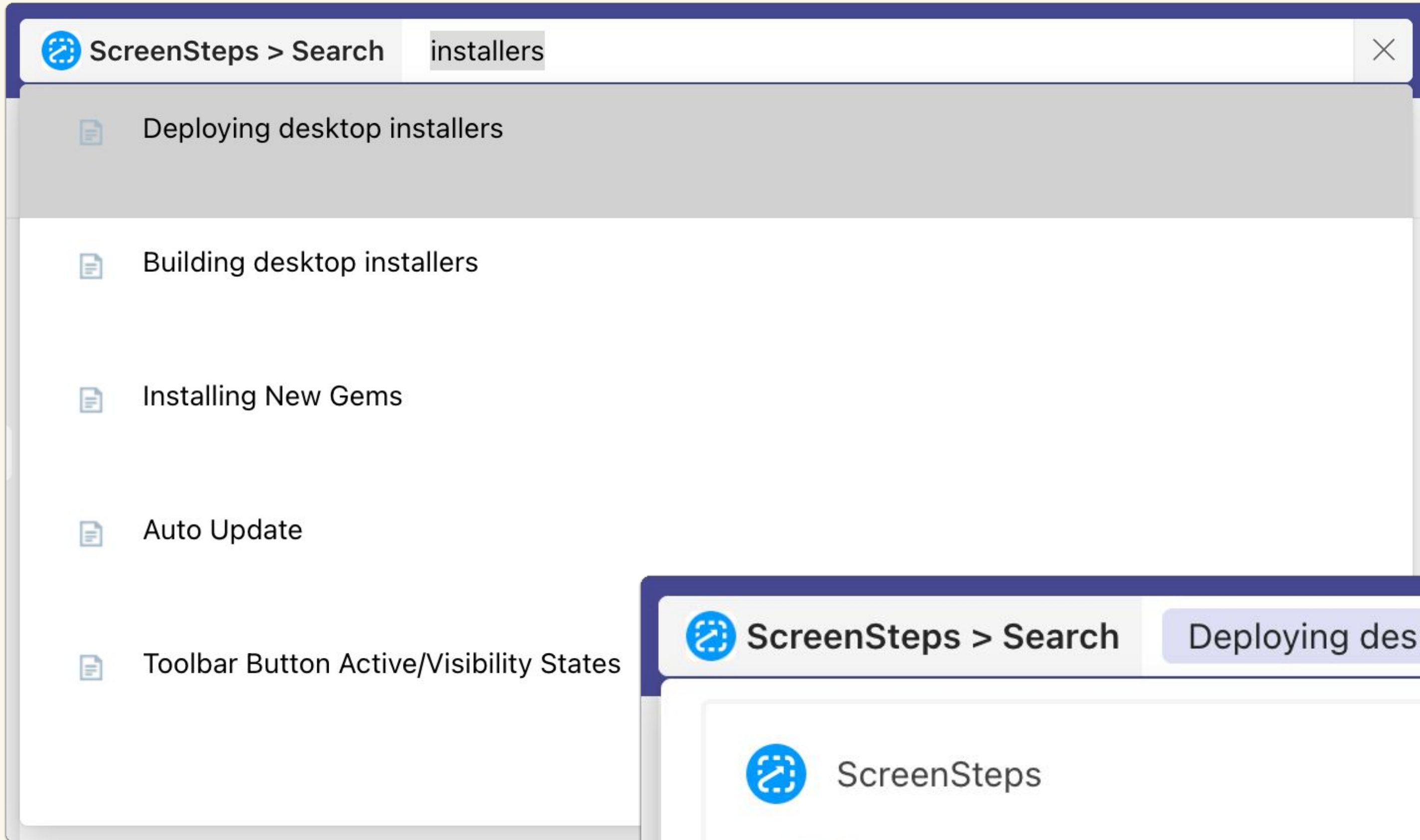
 Installing New Gems

 Auto Update

 Toolbar Button Active/Visibility States

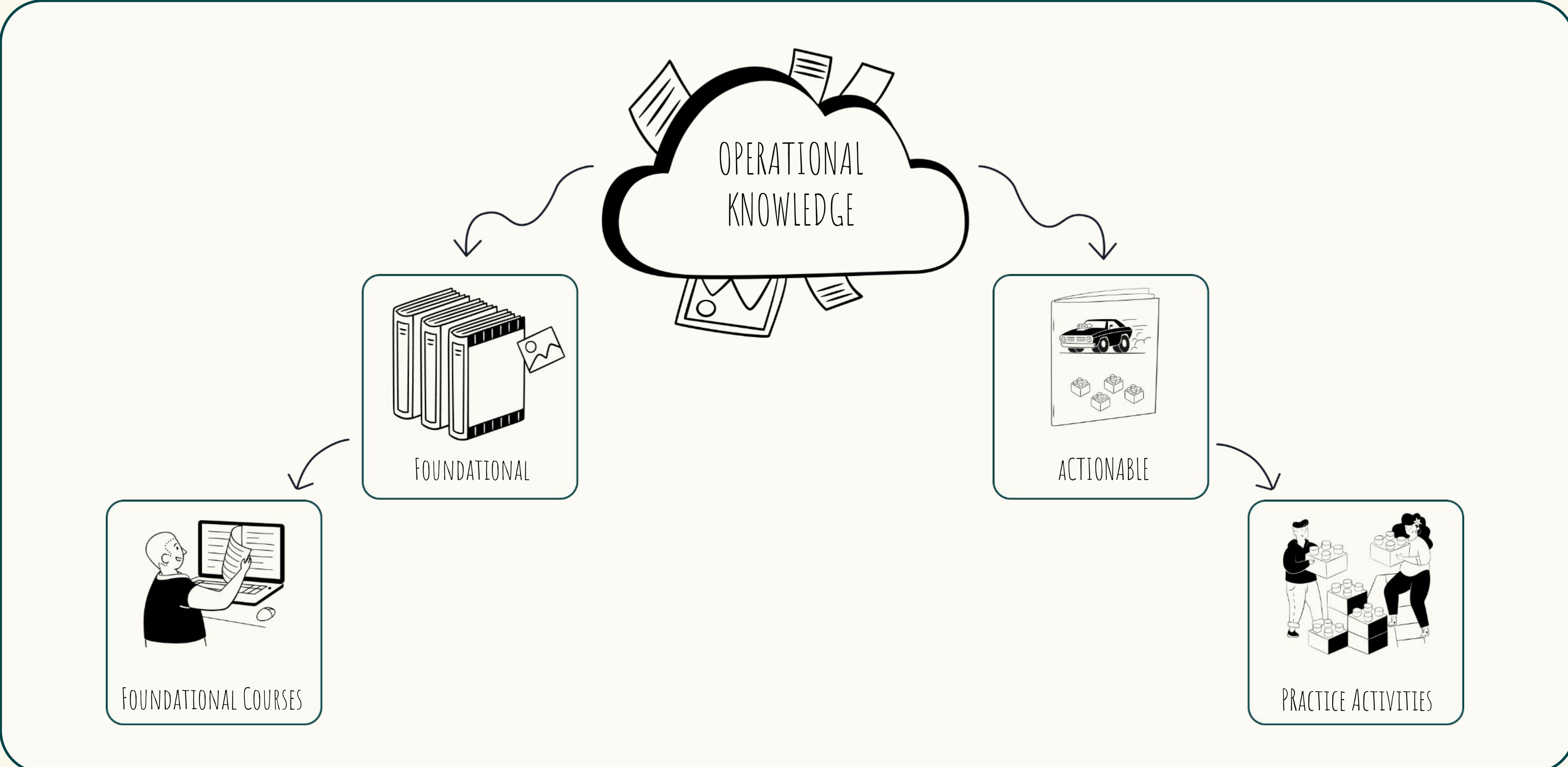
...

MS Teams - Searching



5. Building Onboarding & Cross-Training Programs

Building Onboarding & Cross-Training Programs



Learning Paths

The screenshot shows a web browser window with the following elements:

- Browser Tab:** Zelle | Learning Paths | Trainin
- Page Header:** Credit Union logo with the tagline "Here When You Need Us". Navigation links for "Knowledge Hub" and "Courses" are present, along with user profile, search, and notification icons.
- Progress Sidebar (Left):**
 - Member Service Rep:** 2 of 6 courses Completed (indicated by a green progress bar).
 - Member Accounts Overview:** 1 of 1 steps completed (checked).
 - Welcome to the Course:** (checked).
 - Opening Accounts:** 12 of 12 steps completed (checked).
 - Zelle:** 0 of 9 steps completed (dashed circle).
 - Welcome to the Course!:** (dashed circle, highlighted in grey).
 - What is P2P Payment Service? (dashed circle)
 - Overview of Zelle (dashed circle)
 - Steps of Using Zelle (dashed circle)
 - Main Features of Zelle (dashed circle)
 - Main Security Features of Zelle (dashed circle)
 - Zelle Process (dashed circle)
 - Common Member Questions (dashed circle)

Main Content Area:

- Header:** "Welcome to the Course!"
- Video Player:** A large blue video player with the text "WELCOME TO THE COURSE" in white and yellow, and "ZELLE FOUNDATIONAL COURSE" in light blue below it. A play button is visible in the center.
- Decorative Elements:** The video player background features a hand holding a smartphone in a circular frame, surrounded by various icons like a lightbulb, question mark, smiley face, and thought bubble.
- Footer:** A "Back to courses" link and a "Mark as done" button.

Knowledge Ops Onboarding/Cross-Training Benefits

1. Predictable and repeatable = Improvable
2. Highly modular
3. Higher value Lunch & Learns/Coaching
4. Staff coverage
5. Easier to maintain content

Conclusion + Questions

Knowledge Ops Maturity Model

Employee Independence →

1. Tribal

Phone a Friend

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

2. Document

Phone a Friend

SOPs are created, but people still turn to supervisors and co-workers when they don't know what to do.

3. Guide

Use a GPS

Employees Find & Follow digital guides to work confidently, consistently, and efficiently.

Knowledge Ops Platform

Single Source of Truth for Operational Knowledge



MICRO-COURSES



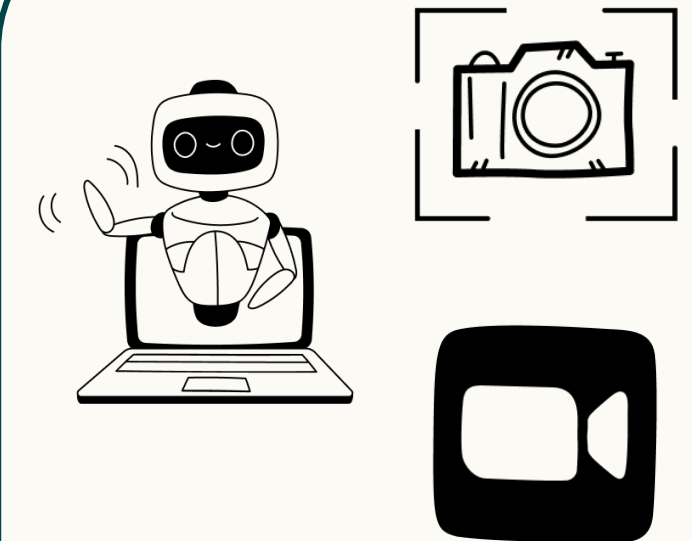
ARTICLES, CHECKLISTS, AND
DECISION TREES



CHANGE NOTIFICATIONS



PUSHED INTO THE
WORKFLOW

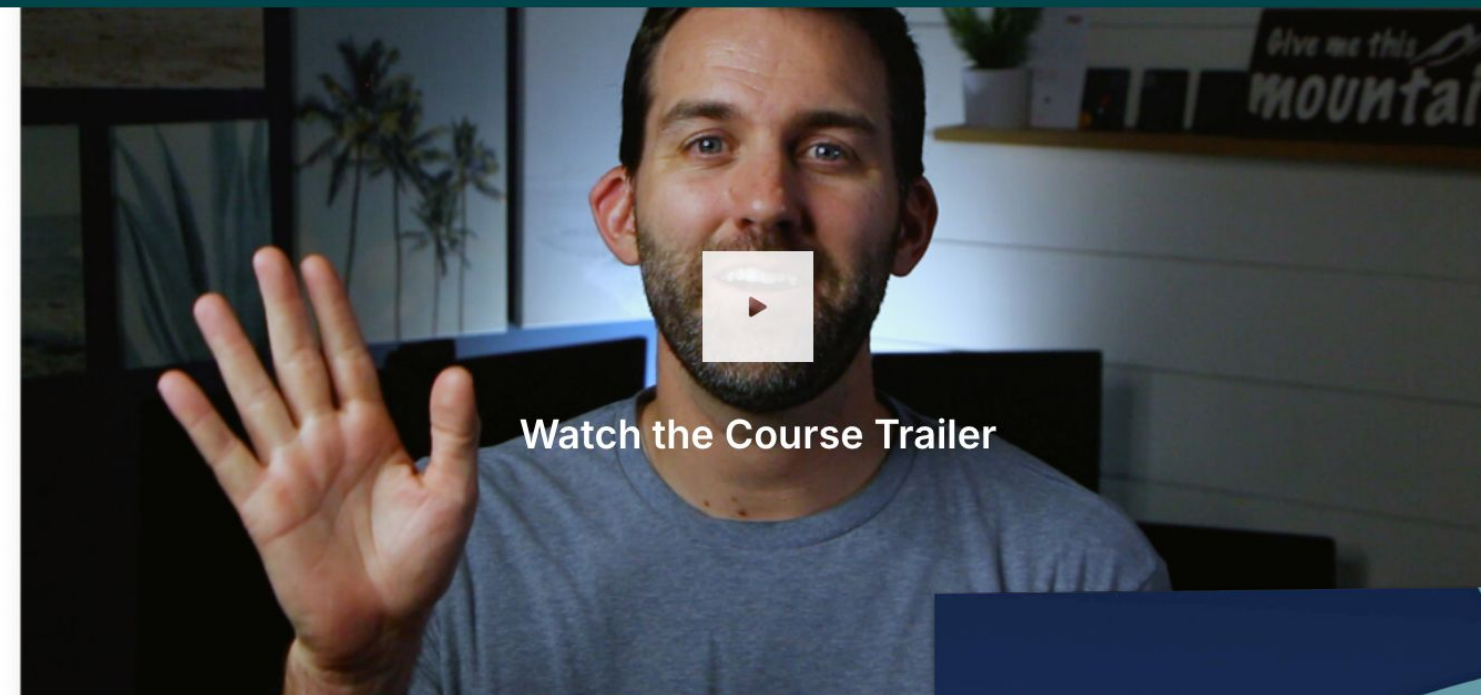


INTEGRATED
KNOWLEDGE CAPTURE

Find & Follow 101

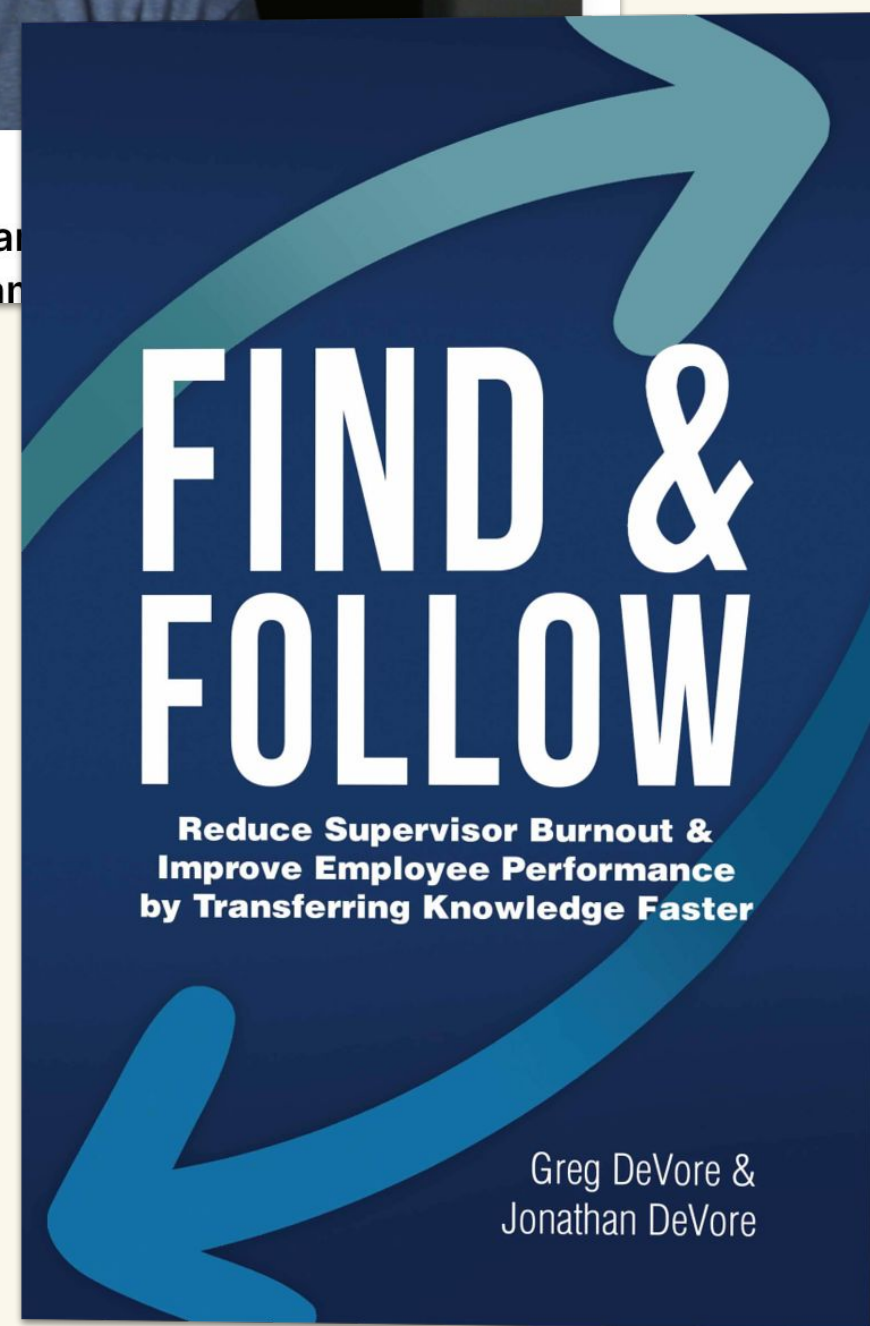
This free 30-minute course includes everything you need to know to get started with the Find & Follow Framework

[Enroll for Free Now](#)

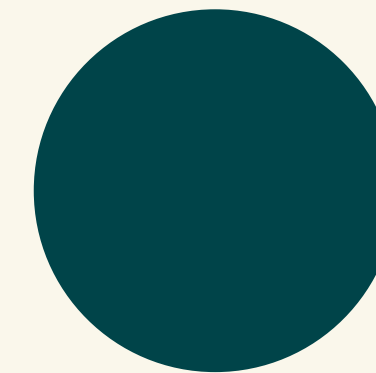


Watch the Course Trailer

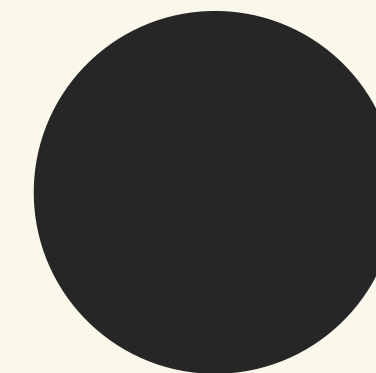
Learn
Frame



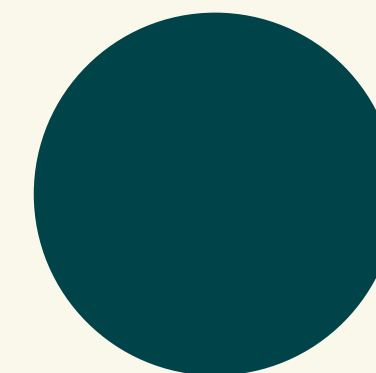
Next Steps



Sign up for a demo or trial
<https://www.screensteps.com/demo>



Intro to Knowledge Ops Course
<https://www.screensteps.com/knowledge-ops-course>



Pick up the book
<https://www.screensteps.com/find-follow-book>