

ScreenSteps Walkthrough For Farm Credit Organizations

Greg DeVore

Regarding FC of the Virginia FISERV DNA migration:

“We knew we had a big lift with the upcoming system upgrades and process changes. We needed to build systems to support this change and minimize the impact on our employees, and ultimately, our customer-owners”

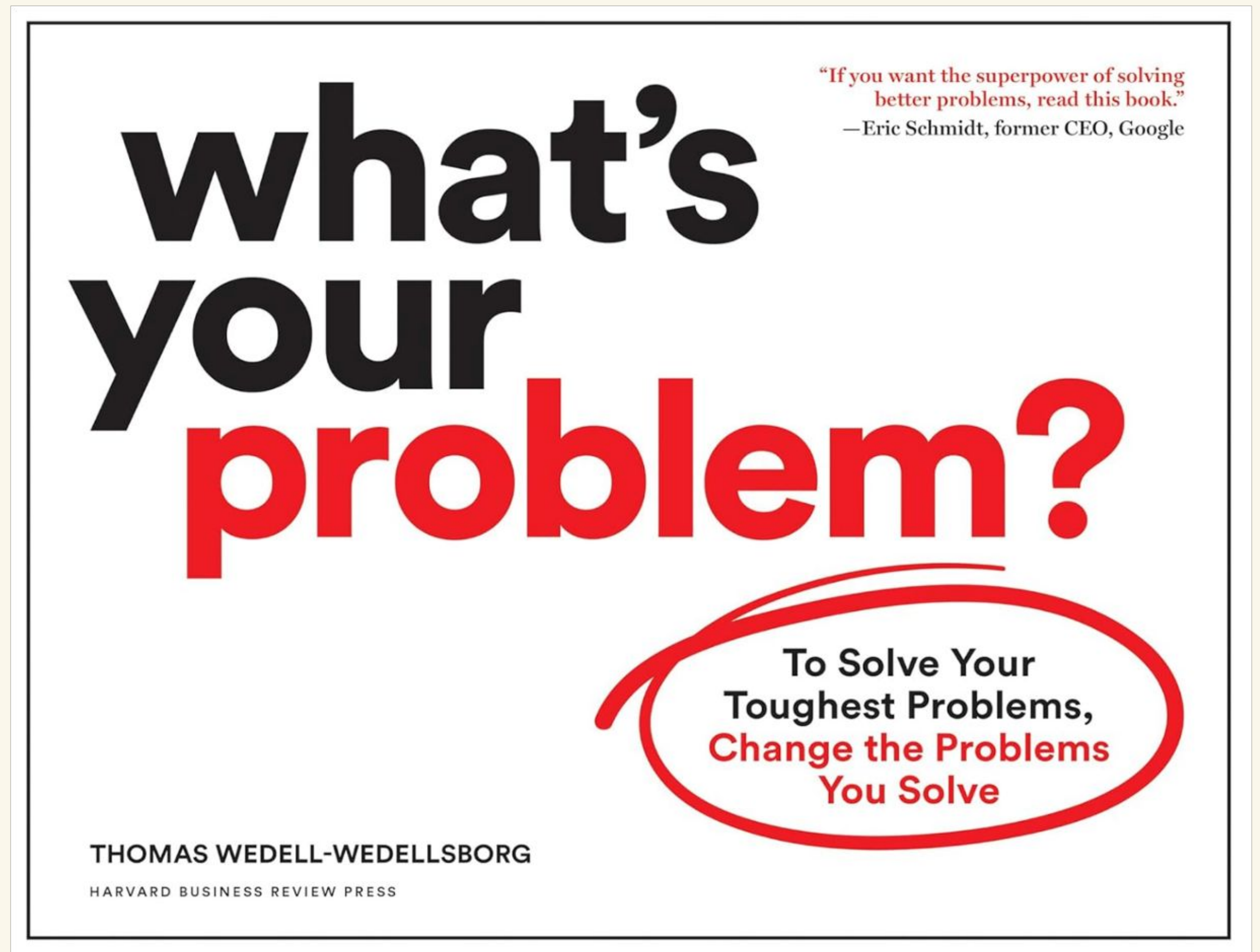
Pete Cypret

Chief Risk Officer, Farm Credit of the Virginias

“We need better training!”

“The way you frame a problem determines which solutions you come up with.

By shifting the way you see a problem—that is, by reframing it—you can sometimes find radically better solutions.”



**It's Not About Training –
It's About Knowledge Transfer**

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

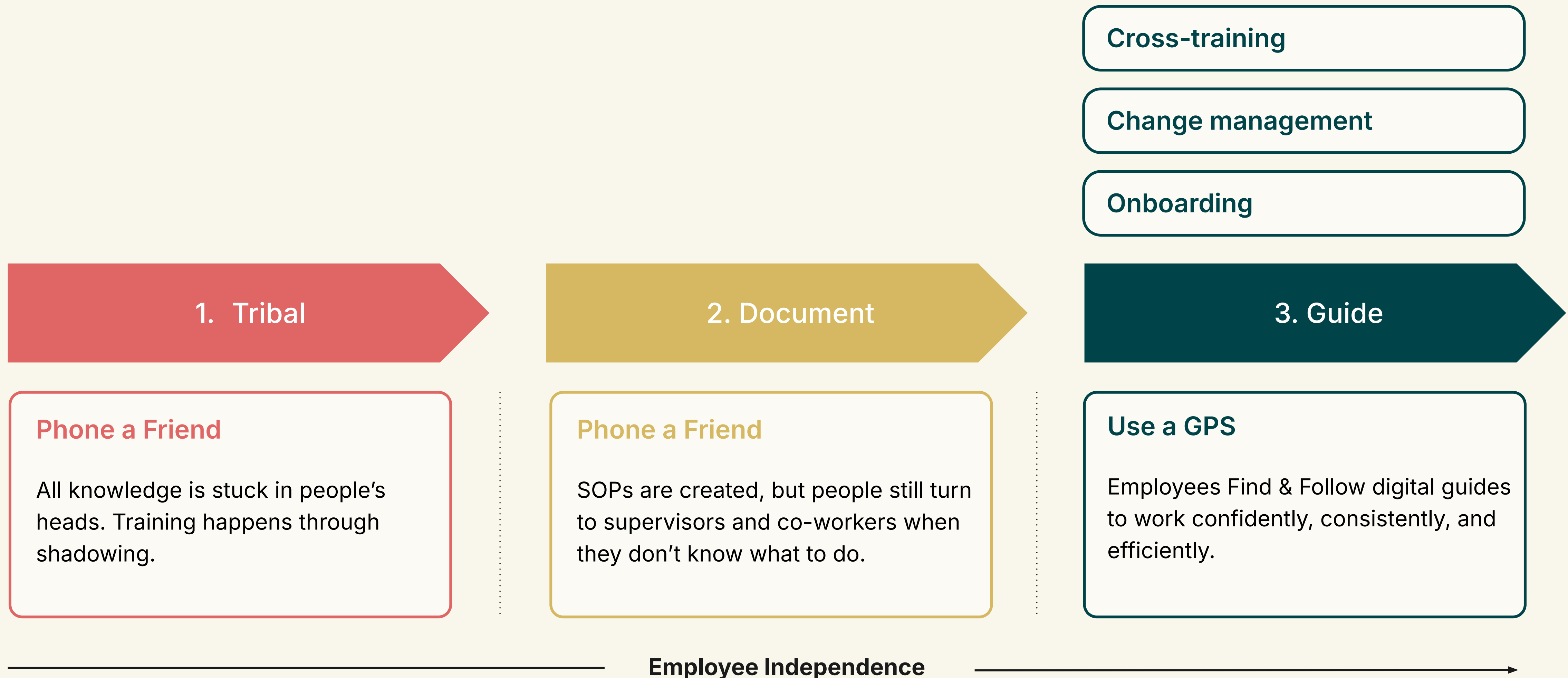
SOPs are created, but people still turn to supervisors and co-workers when they don't know what to do.

3. Guide

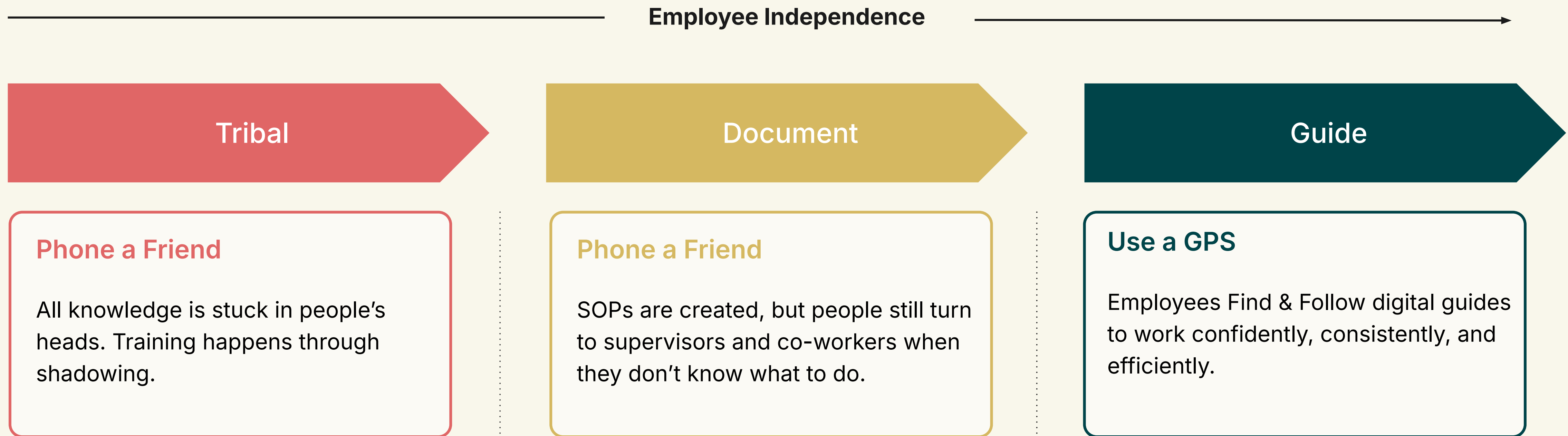
Use a GPS

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

Knowledge Ops Maturity Model



Knowledge Ops Maturity Model



WHY ARE WE STUCK HERE?

What is **Operational Knowledge?**

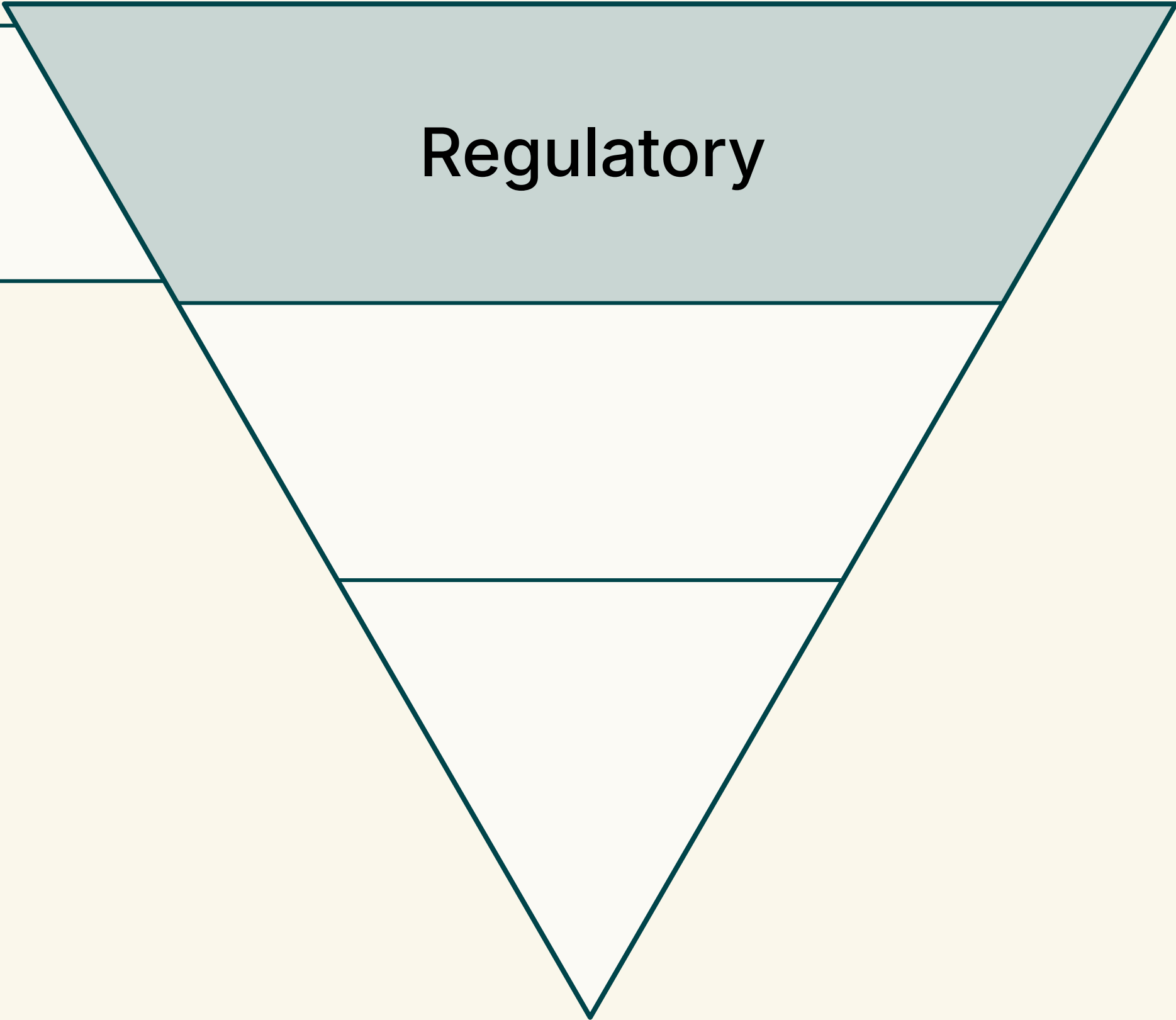
Definition

Operational knowledge is the **actionable** information employees need in order to:

- Perform tasks
- Answer questions
- Troubleshoot problems

Operational Knowledge

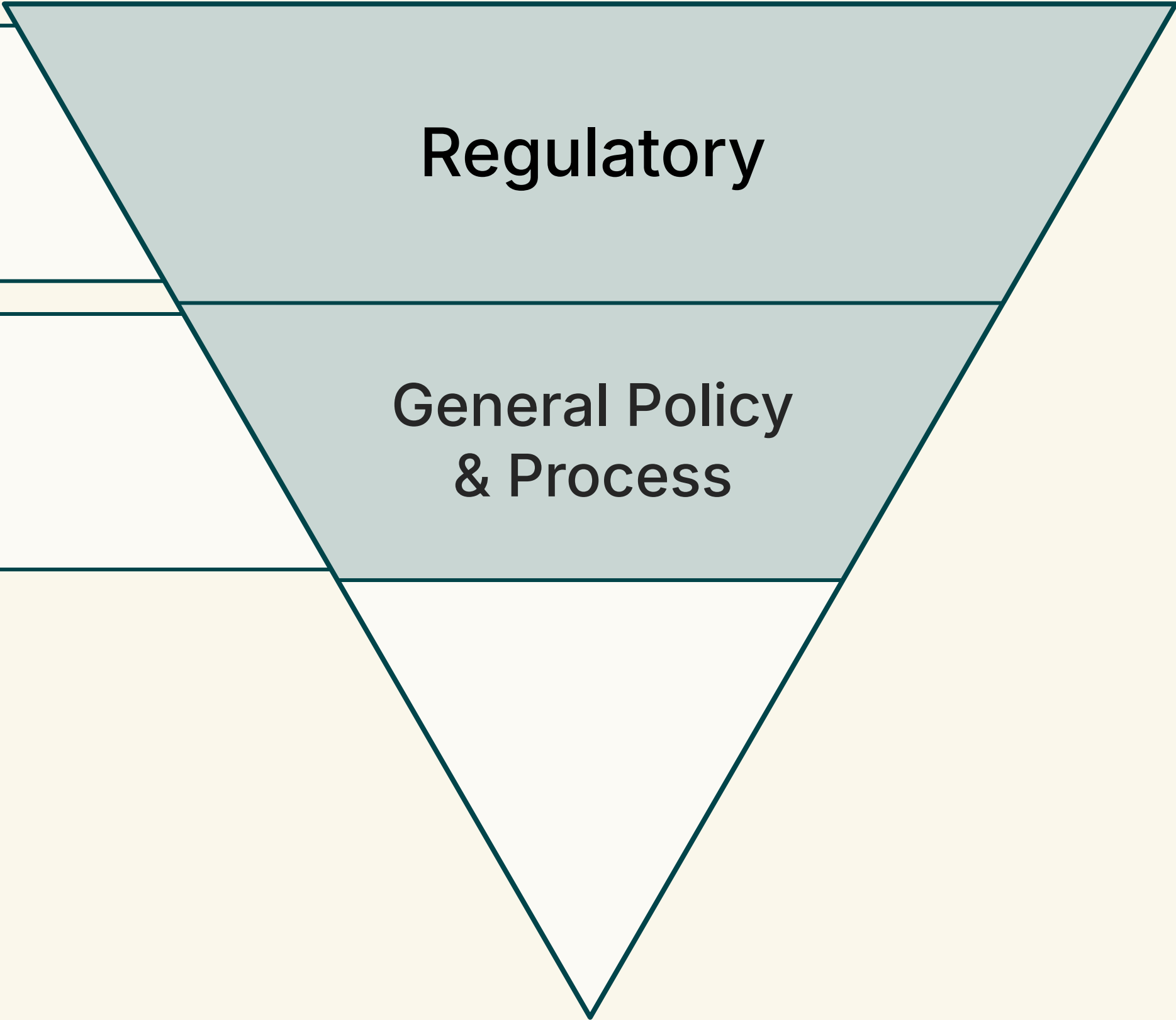
A remittance transfer provider must refund the total amount of funds provided by the sender, including any fees and, to the extent not prohibited by law, taxes imposed in connection with the remittance transfer, within three business days of receiving the sender’s request to cancel the remittance transfer. - 12 CFR § 1005.3



Operational Knowledge

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Customers can cancel a remittance transfer within 30 minutes of payment if they provide a confirmation code.

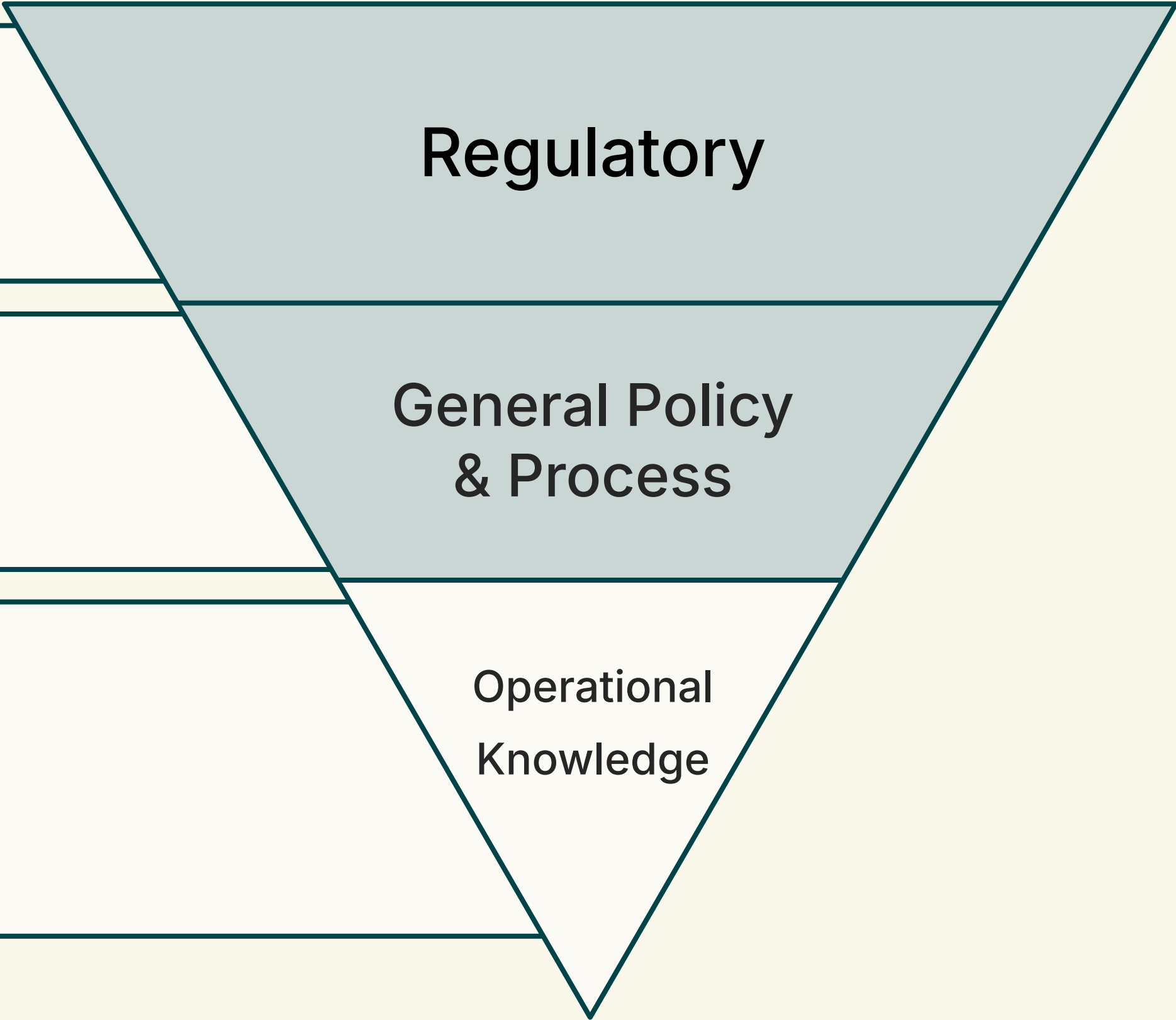


Operational Knowledge

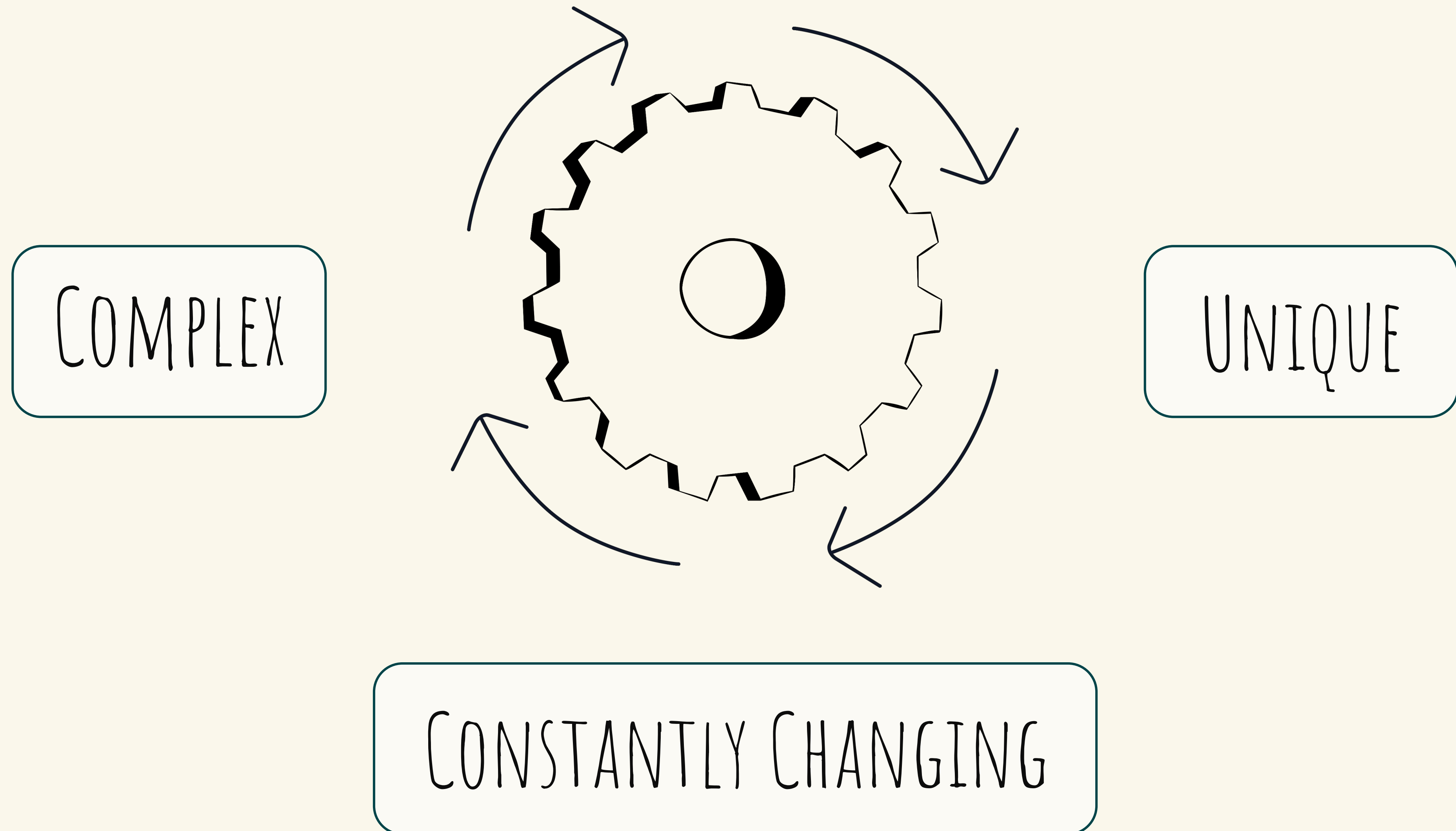
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- 1. Open System X
- 2. Navigate to Account profile
- 3. Review transactions...



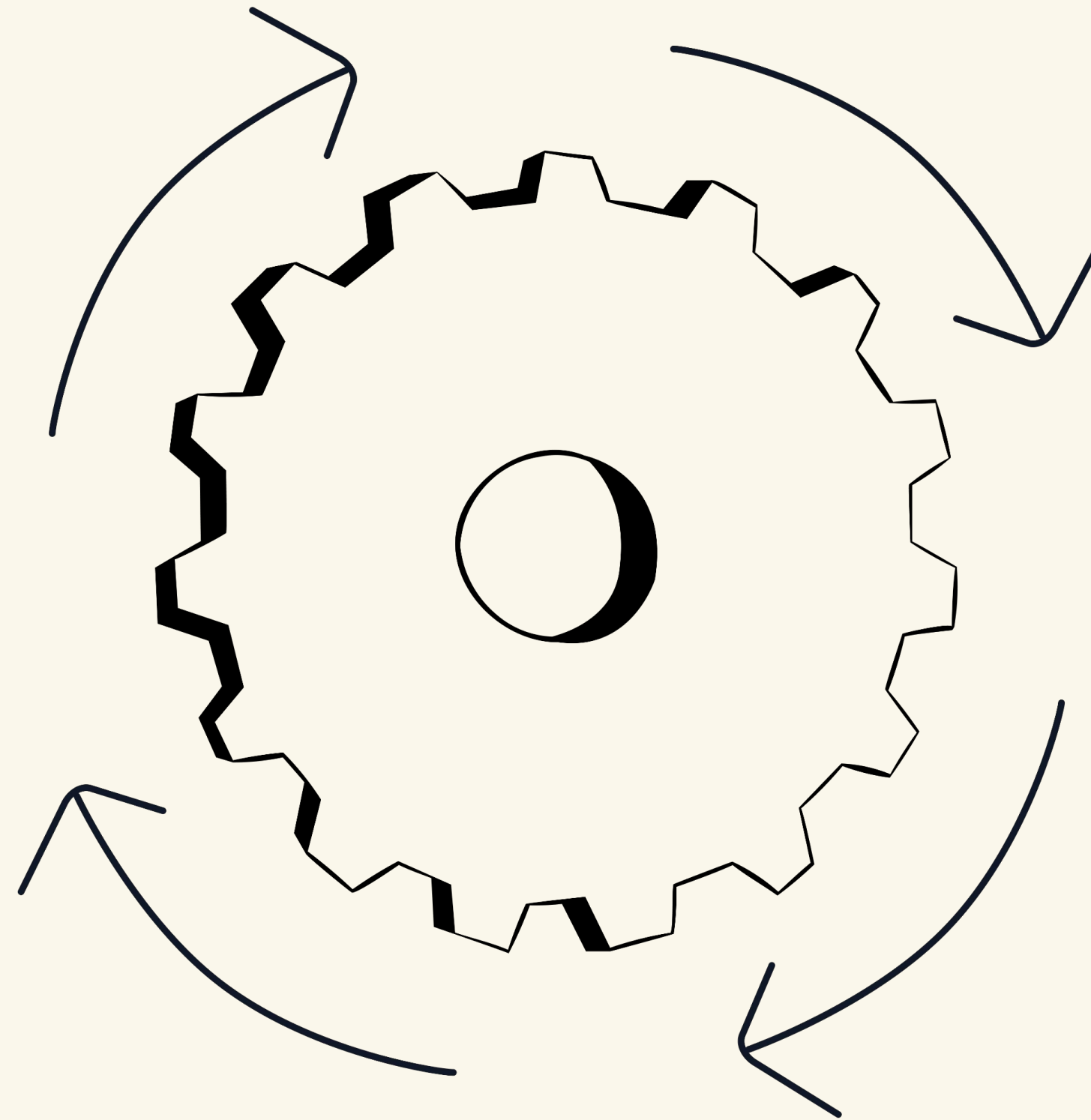
What is different about Operational Knowledge?



What does it impact?

ONBOARDING

SUPERVISOR
BANDWIDTH



CONSISTENCY

CHANGE
MANAGEMENT

How to think about Operational Knowledge



Financial Institution “Input” examples

DO YOU HAVE A
PROGRAM FOR SMALL
FARMERS?

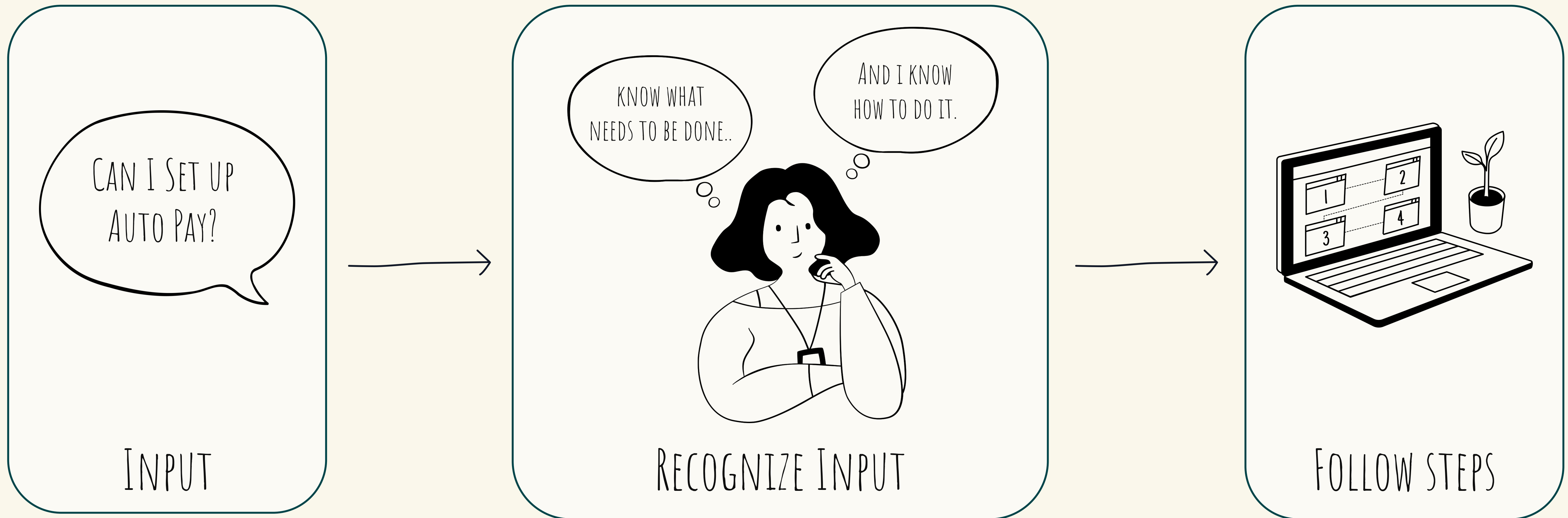
I'D LIKE TO
SET UP AUTO-PAY.

CAN I APPLY FOR A
FLCA LOAN?

I NEED TO UPDATE
MY ADDRESS

I WANT TO INCREASE
MY LOAN SIZE

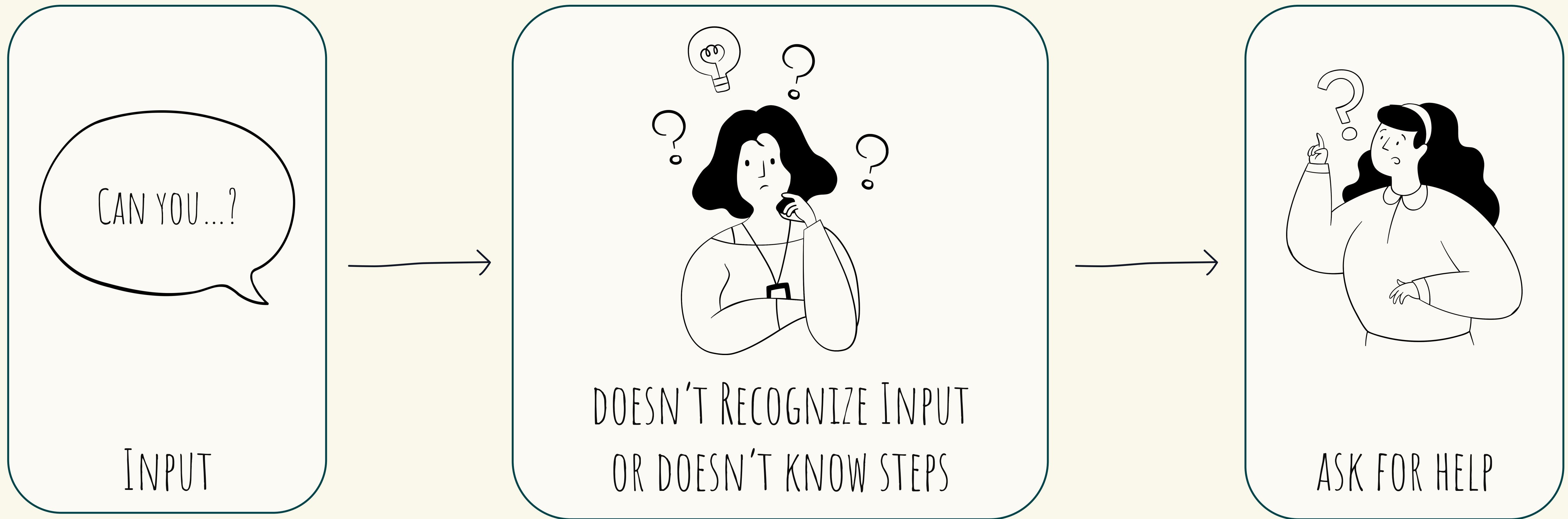
Financial Institution "Input" examples



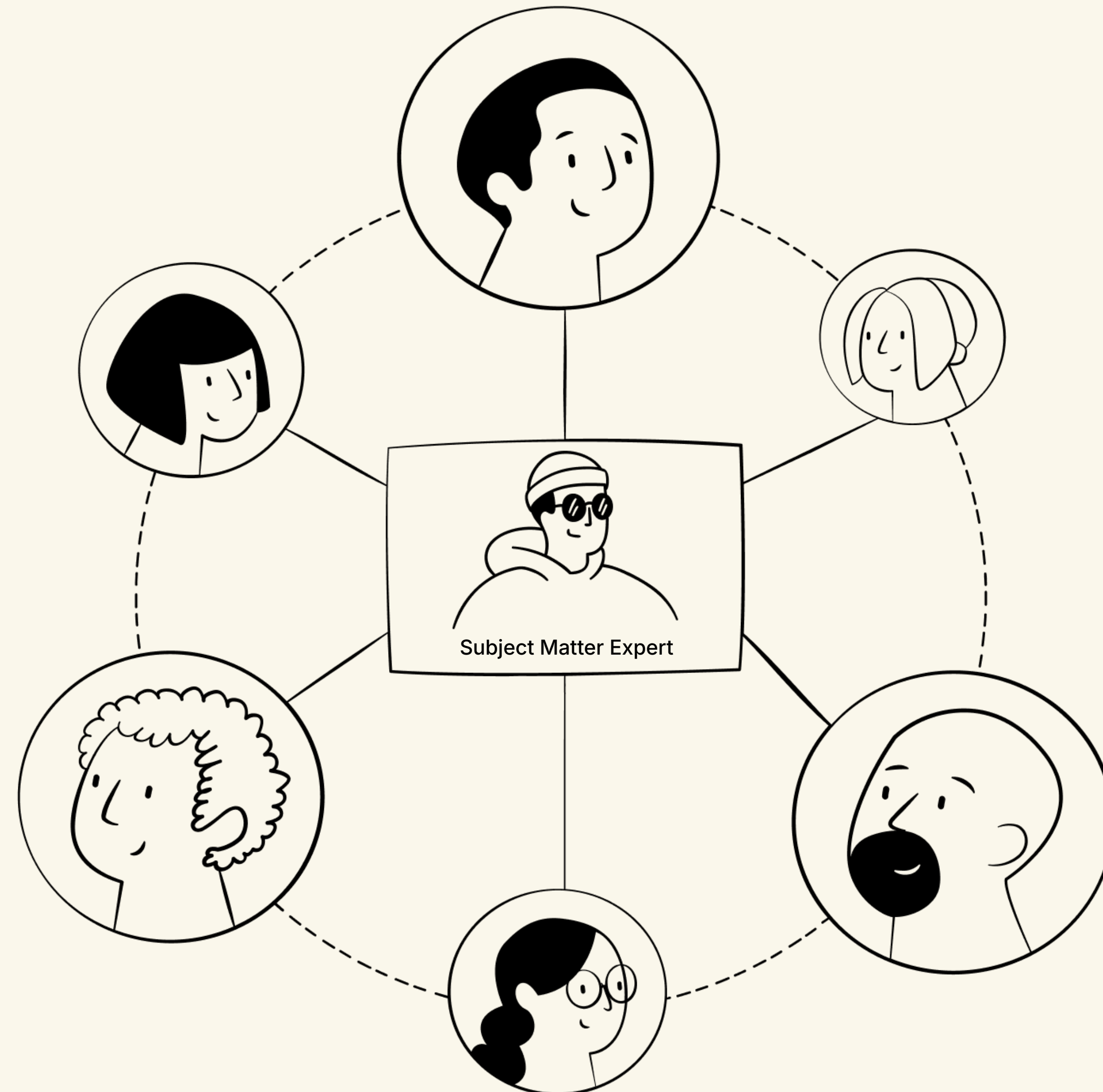
But that isn't what happens



Financial Institution "Input" examples



Teams Rely on Shadowing & Tribal Knowledge



A better way

1

Findable

2

Followable

3

Scannable

What is a Knowledge Ops Platform?

Strategy - Find & Follow

Platform - ScreenSteps

A Modern
Knowledge
Base +

Integrated
Courses

Checklists and
Decision Trees

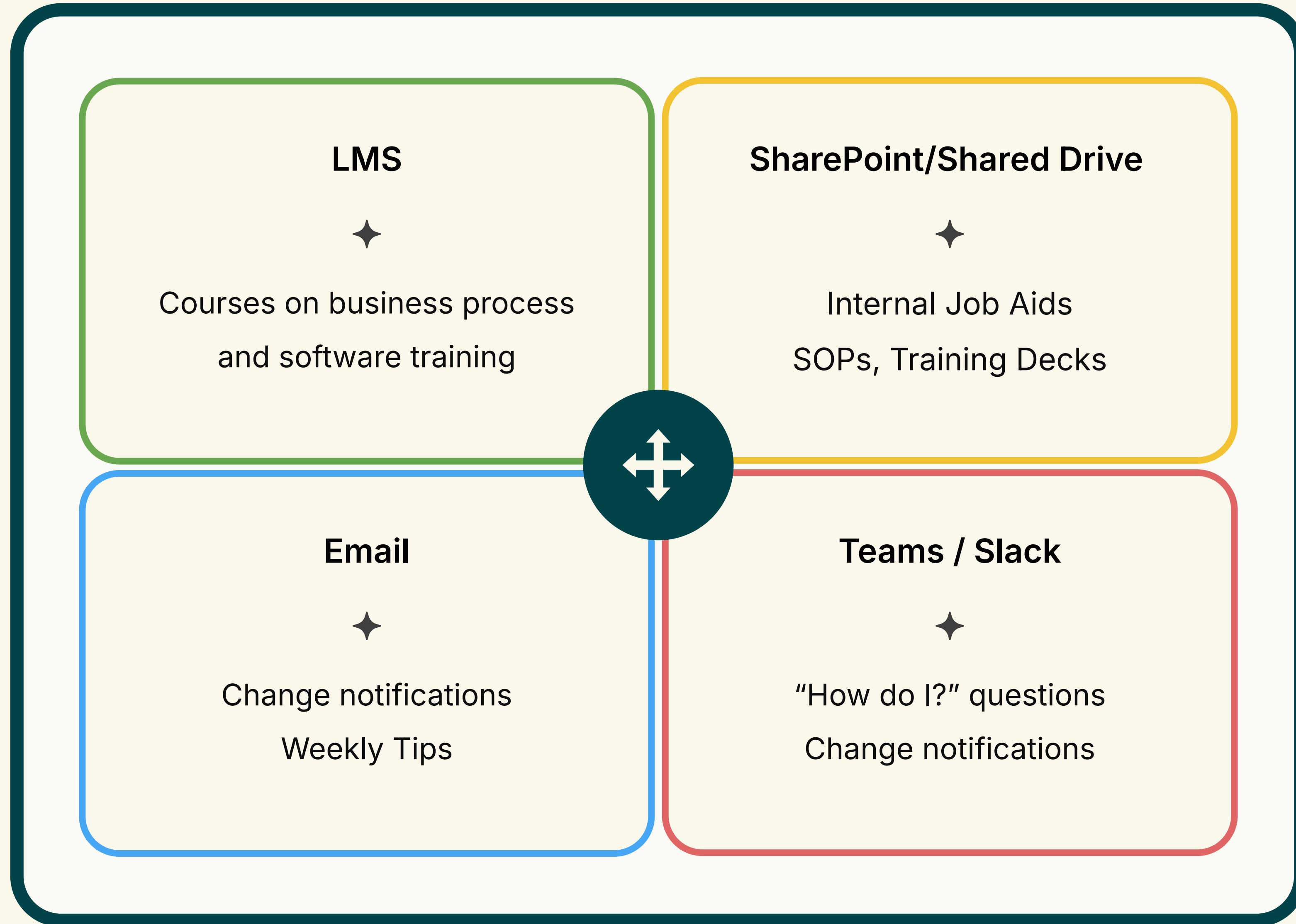
AI Knowledge
Capture and Rapid
Authoring

Change
Notifications

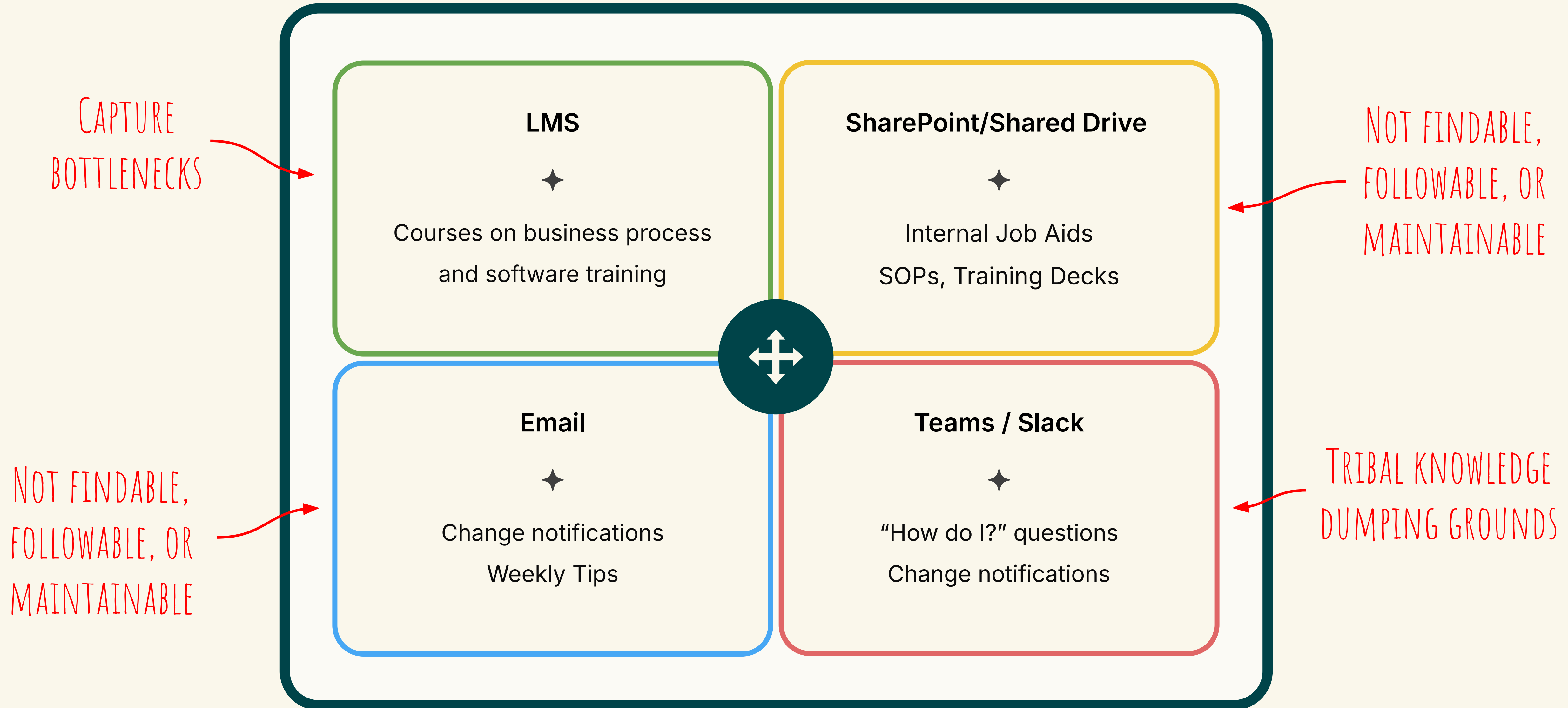
Reporting

Demo

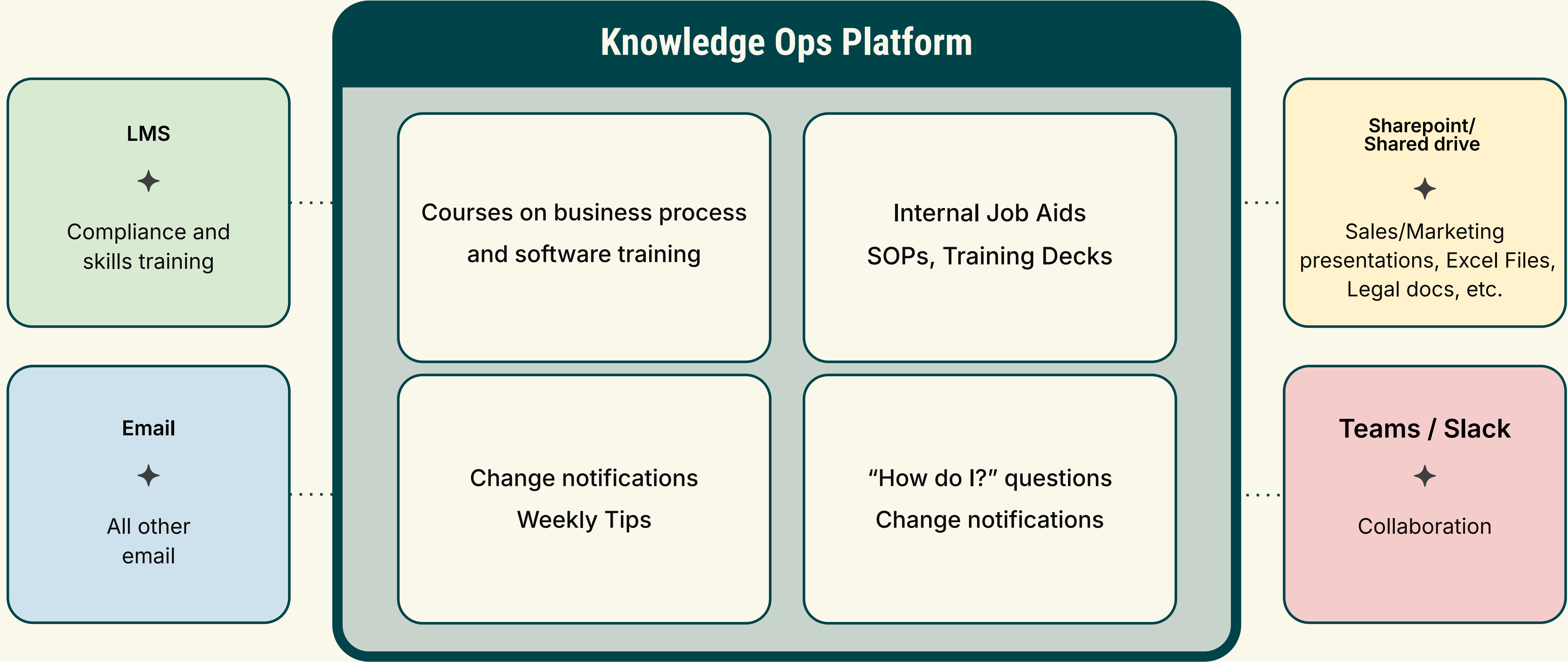
Operational Knowledge Transfer



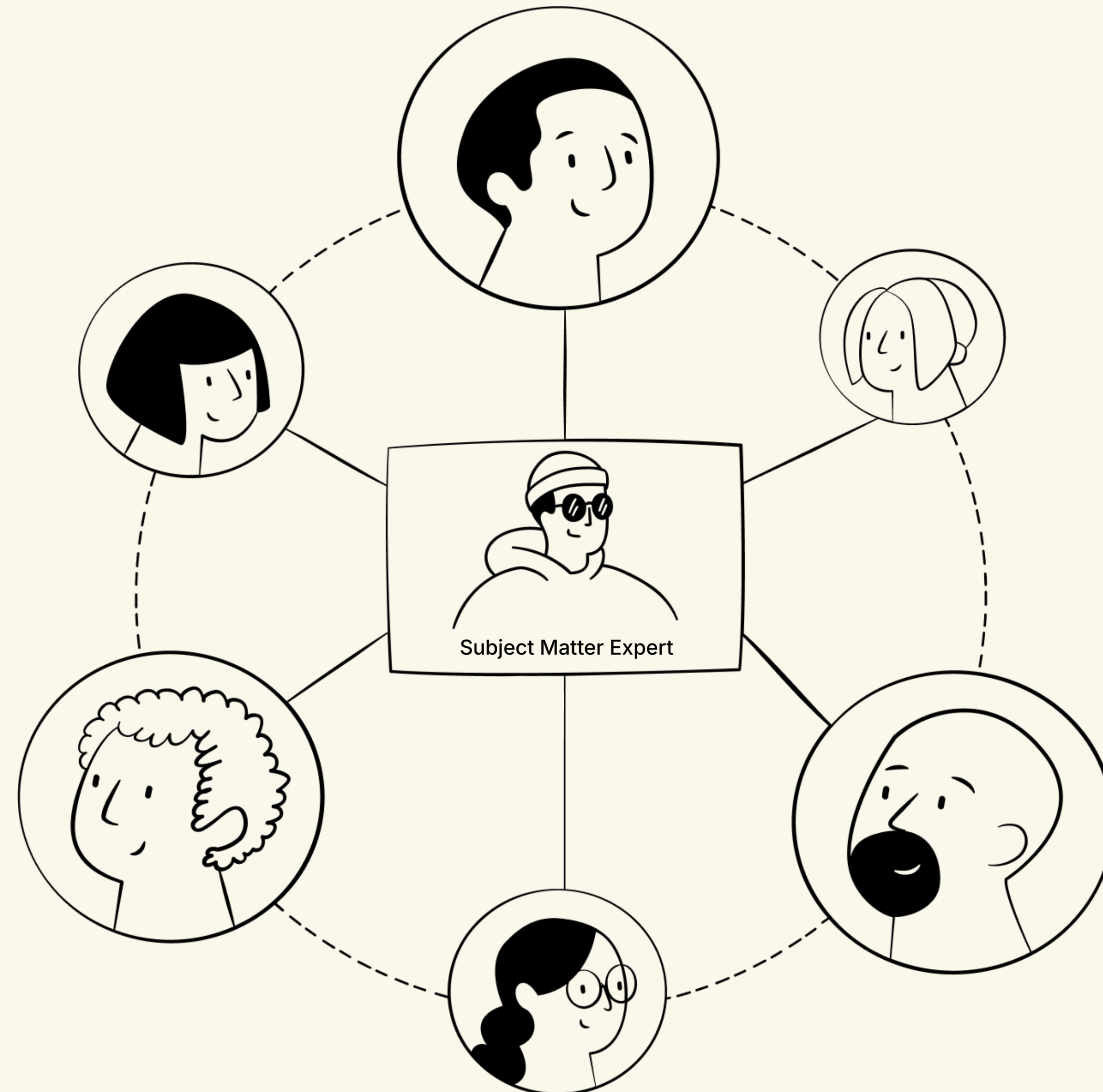
Operational Knowledge Transfer



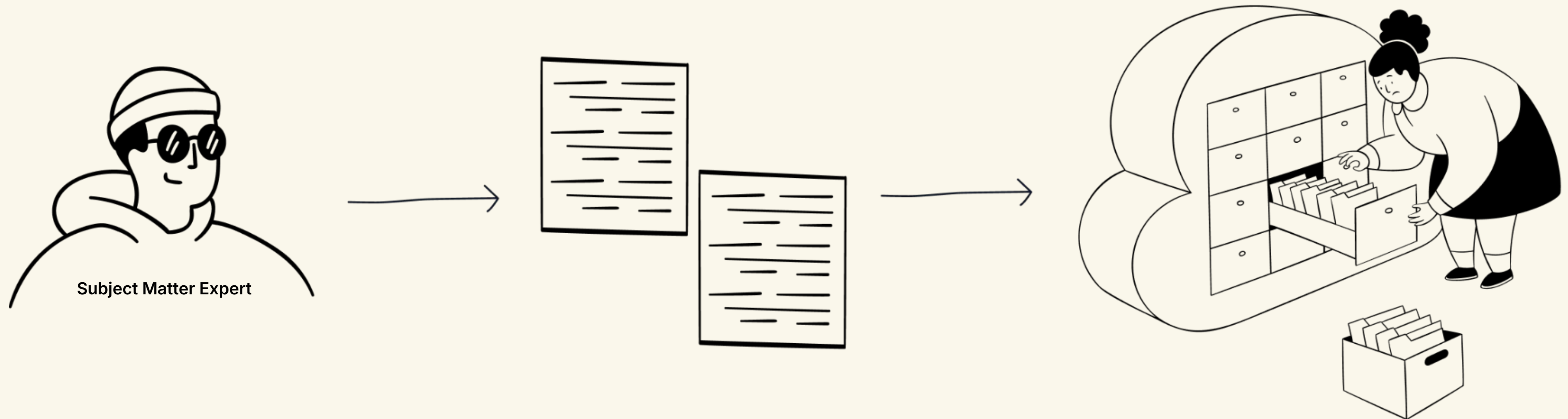
Operational Training



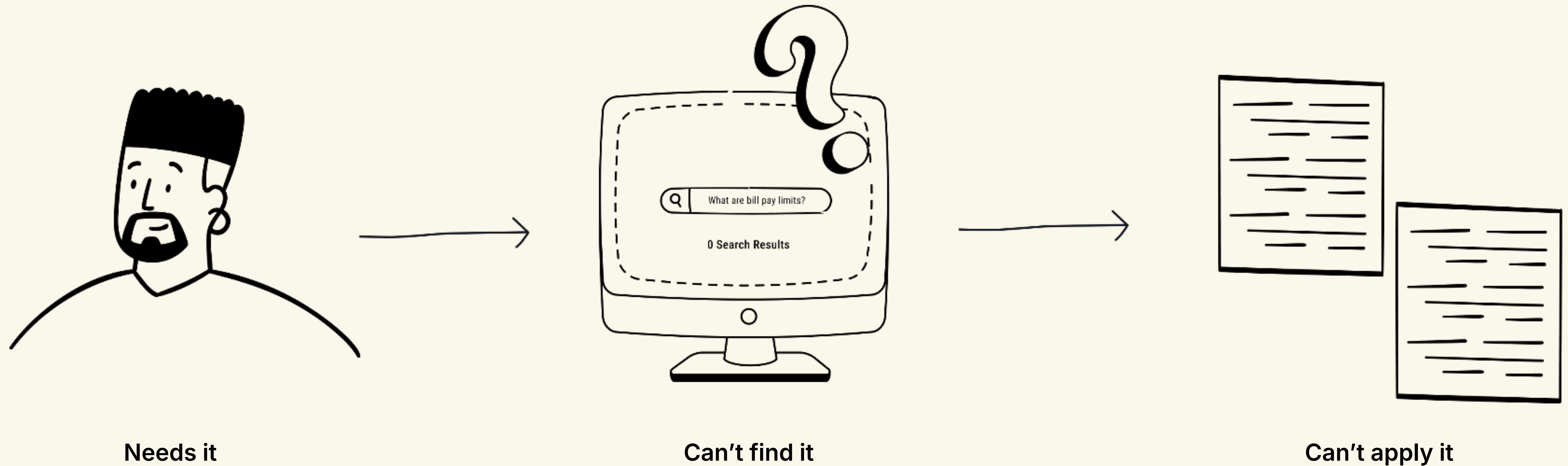
Teams Rely on Shadowing & Tribal Knowledge



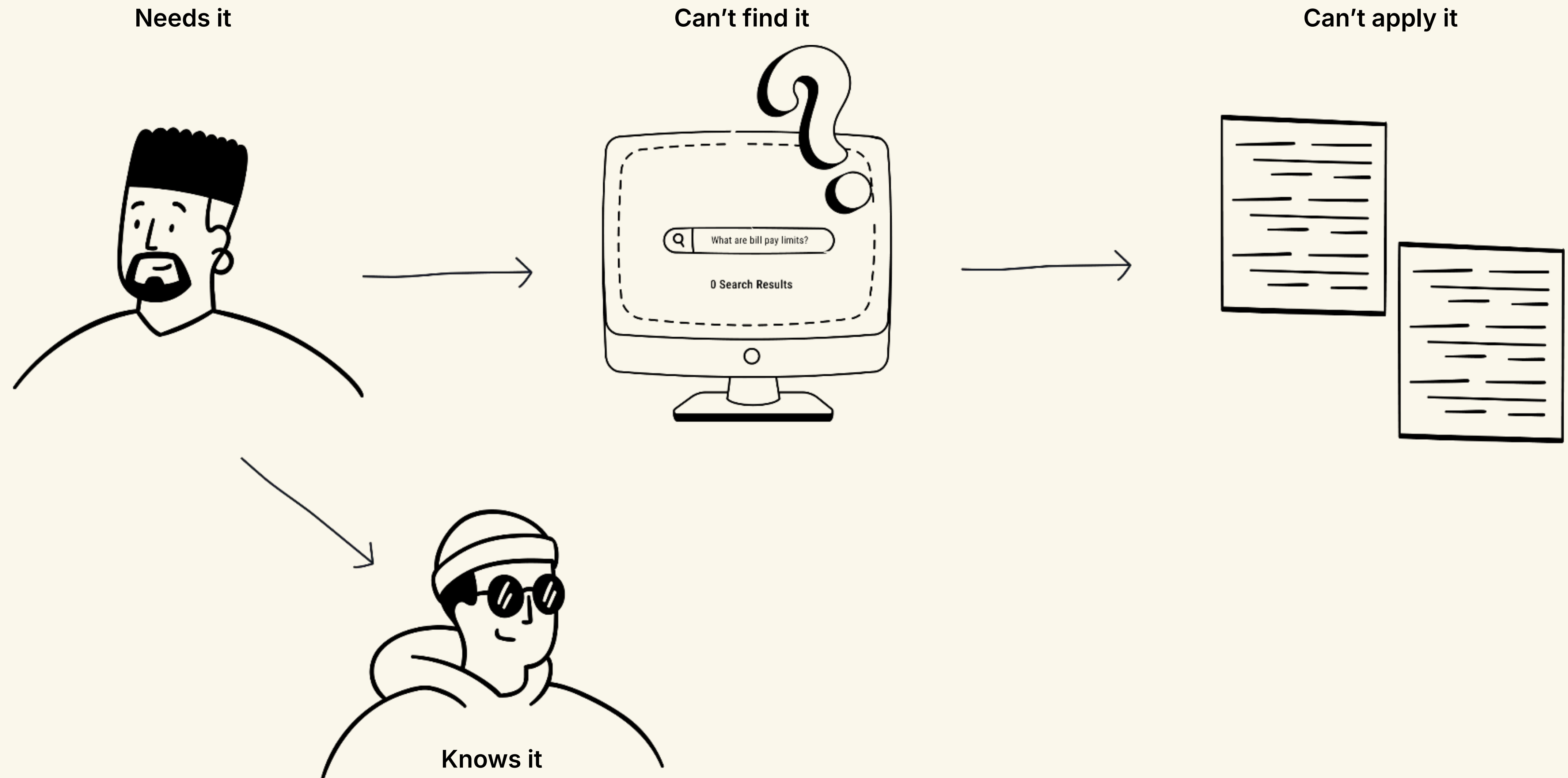
Teams Try to Capture Operational Knowledge in Sharepoint



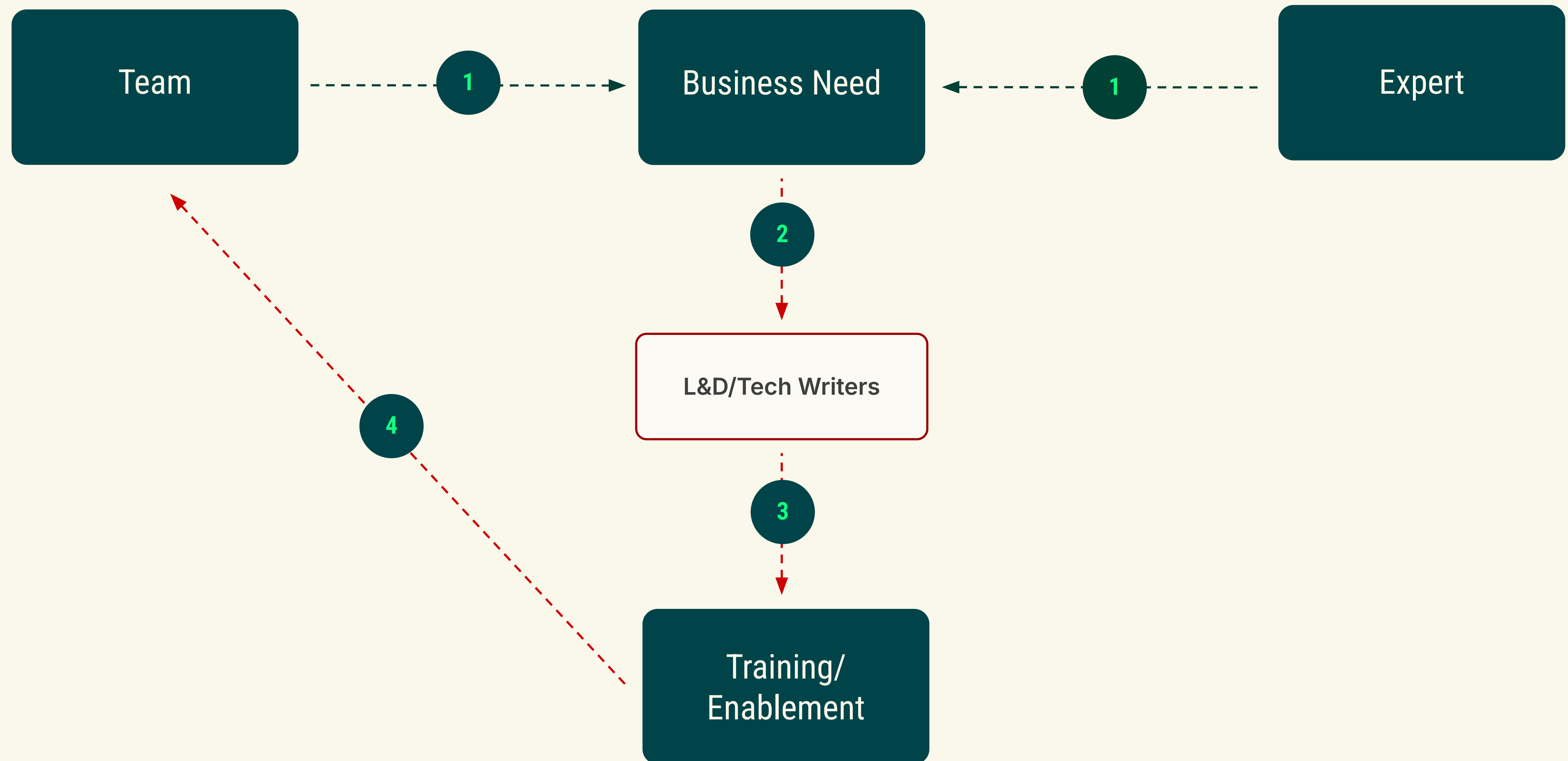
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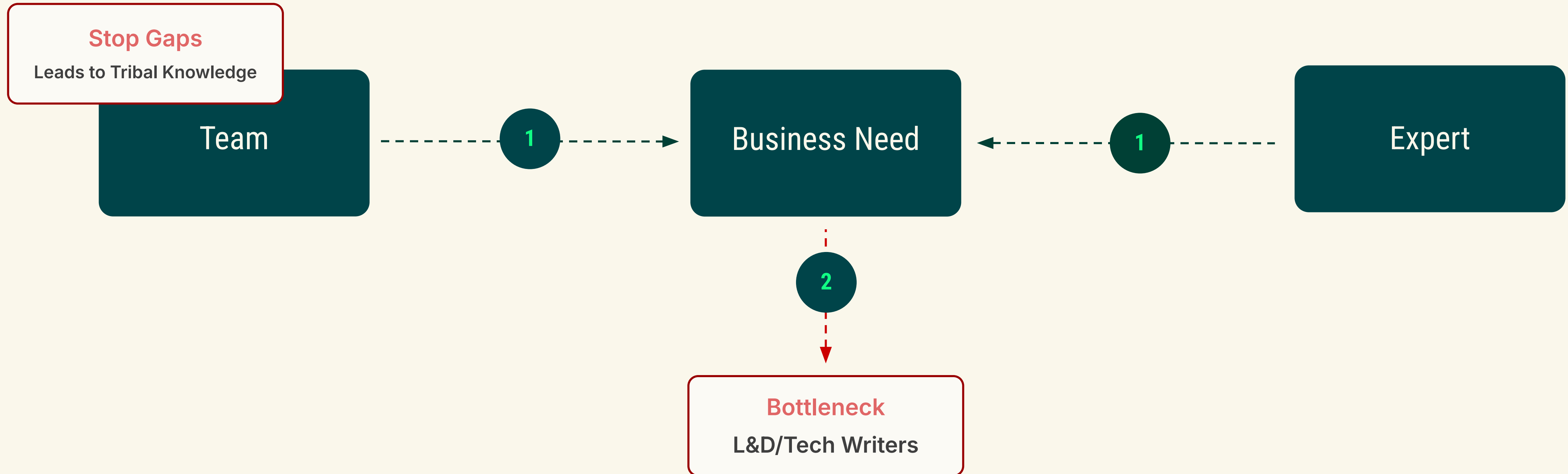
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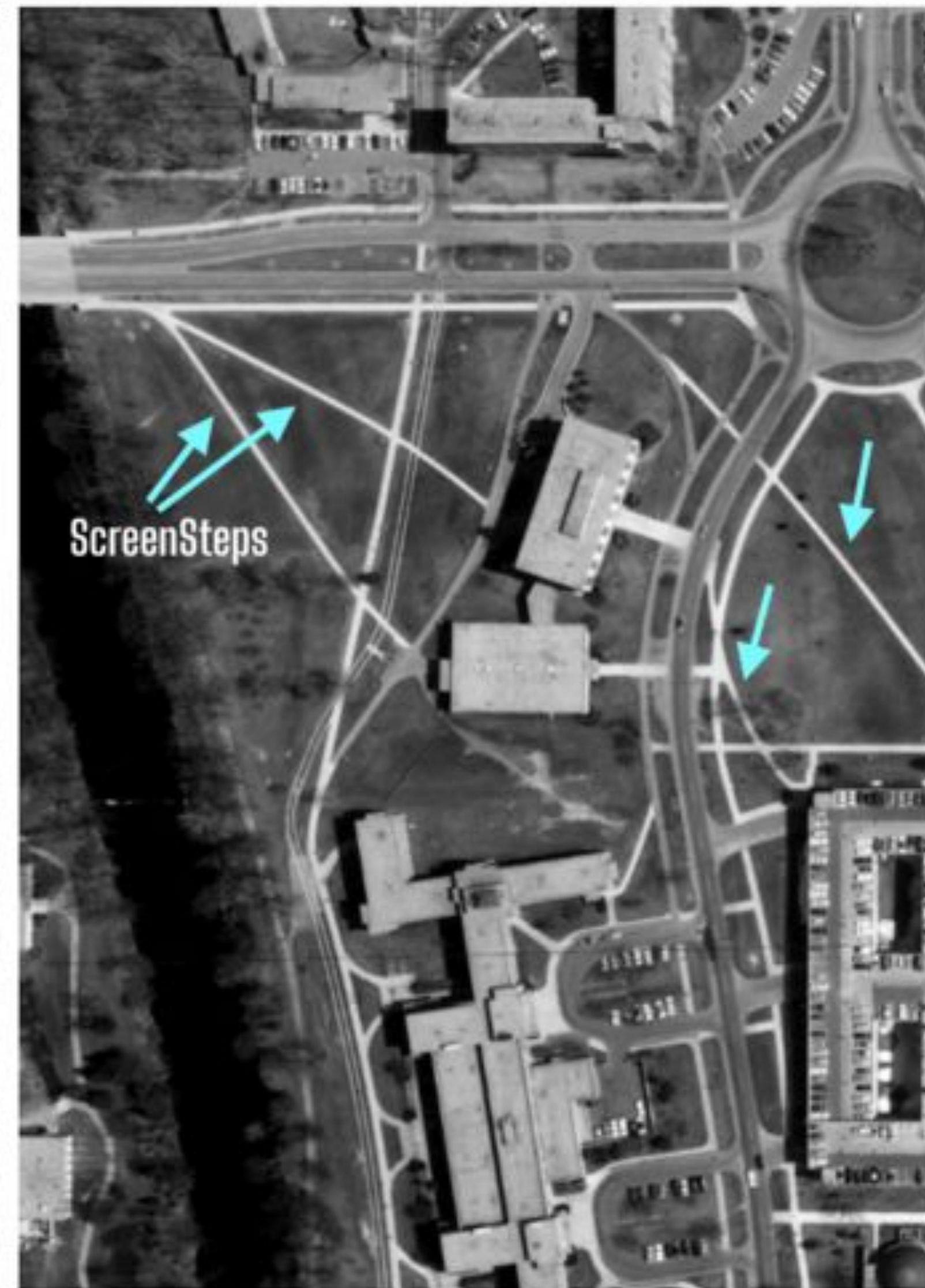
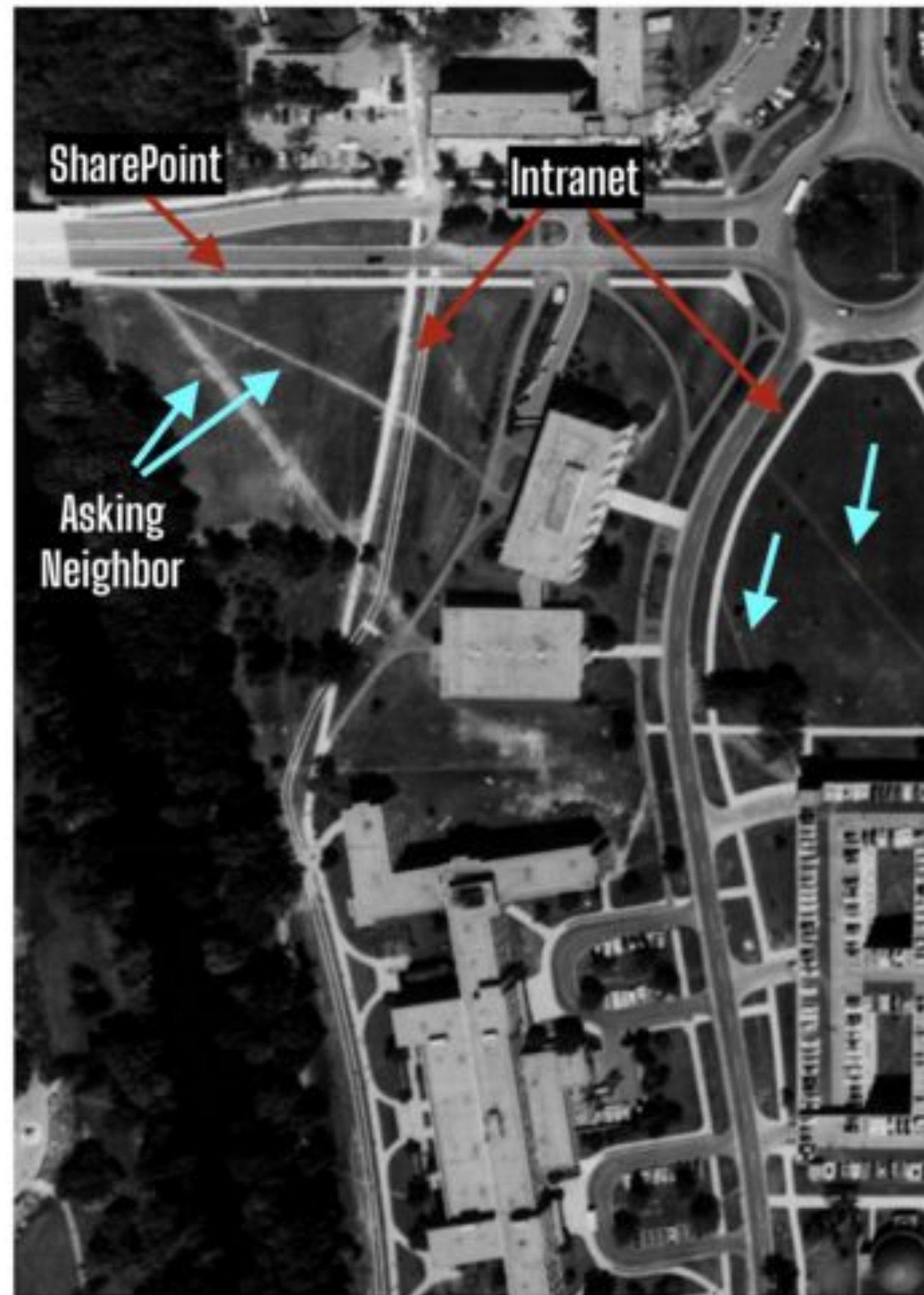
Traditional Setup



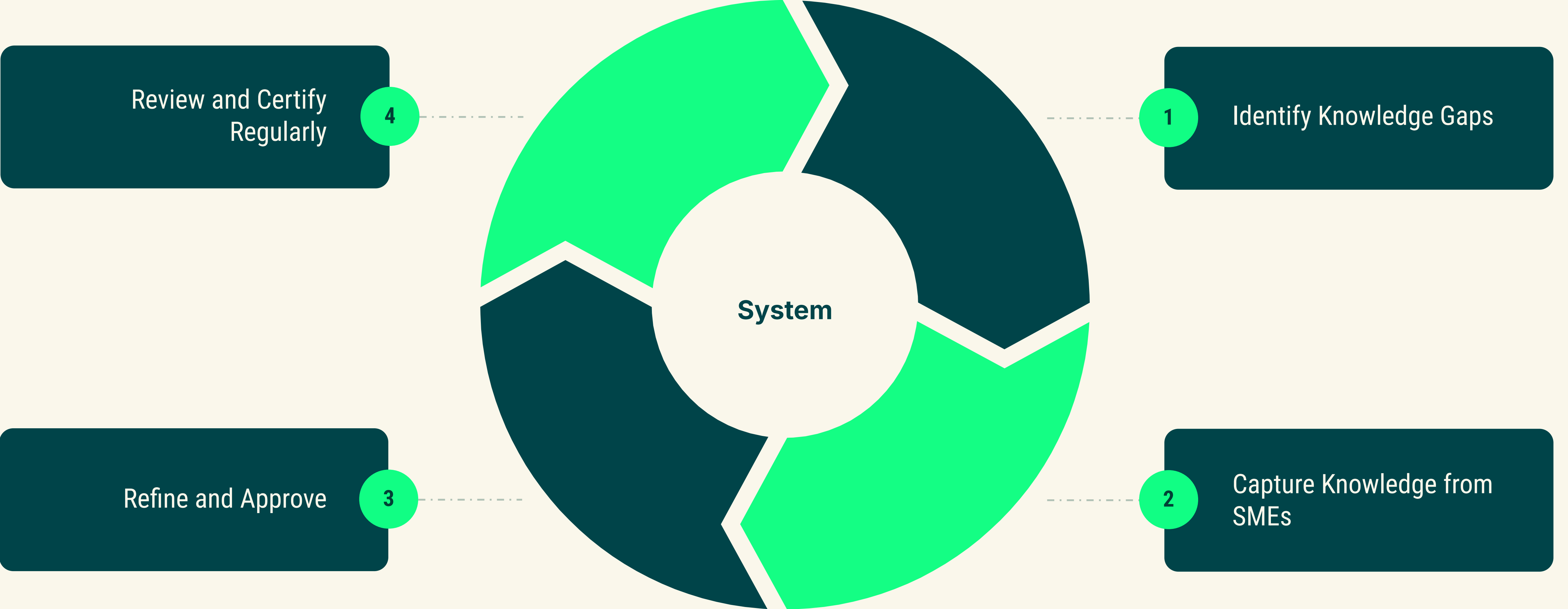
Traditional Setup



Traditional Setup



A Knowledge Operations System



Cost Savings + Case Studies **With Knowledge Ops**

Cost Savings: People

Teams	Reduce required FTEs	Increased Bandwidth
Escalation Teams	✓	✓
Trainers	✓	✓
Support Teams	✓	✓
Supervisors	✓	✓

What does it impact?

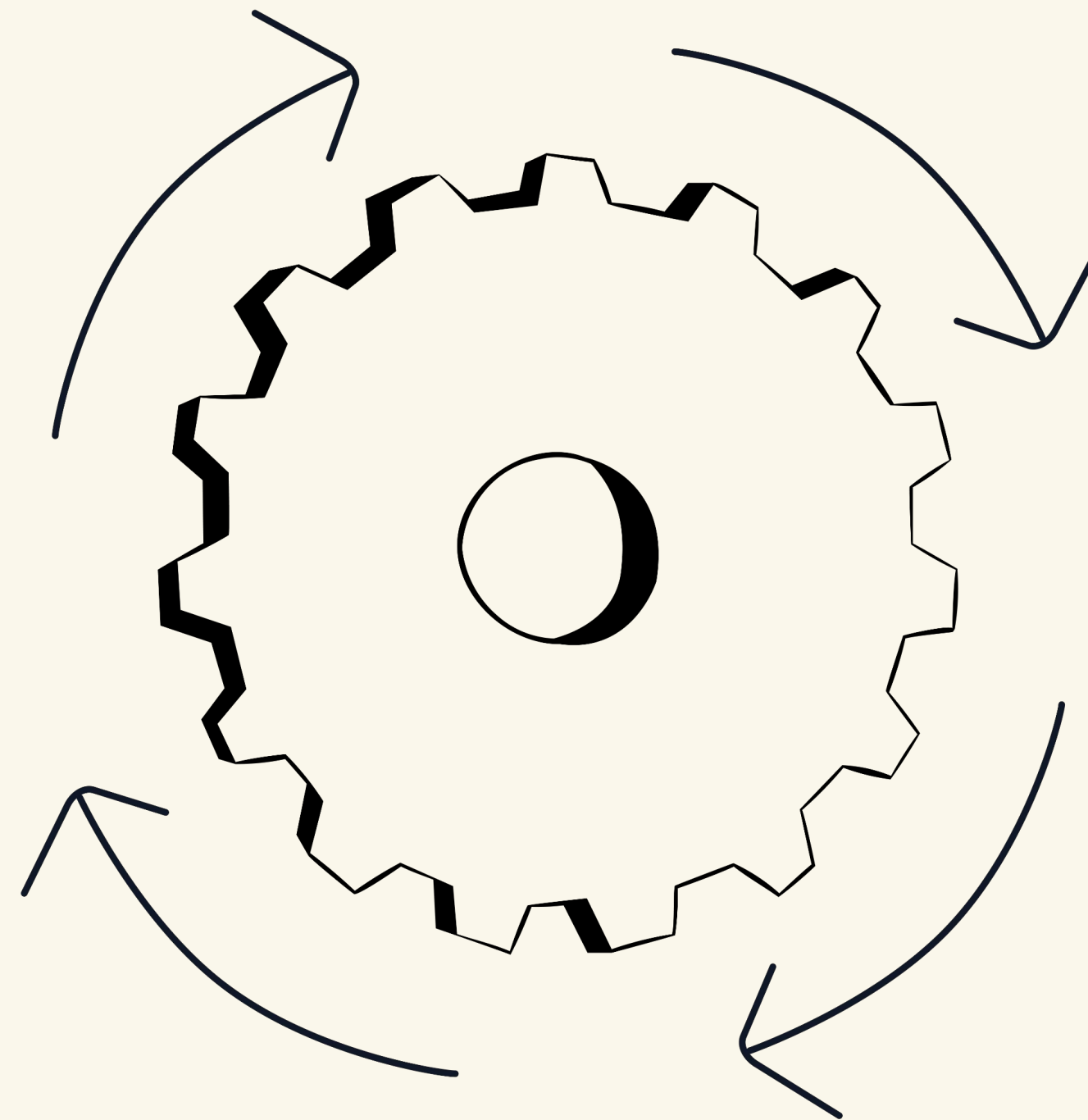
ONBOARDING

CONSISTENCY

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MANAGEMENT

AI



EVENT RECAP

ScreenSteps & West Monroe Knowledge Ops Summit

A day to learn, share, and connect with others aspiring to create a more productive, engaging workplace.



A note from Greg

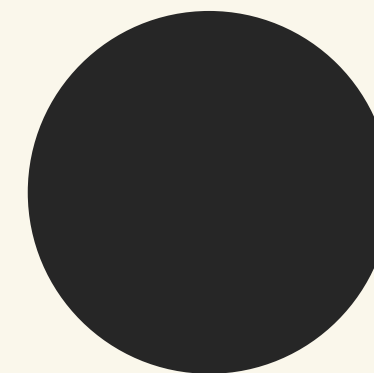
"Thank you to all of our customers who attended the event in Chicago. It was fantastic to meet so many of you in person. Your feedback and excitement energized the whole team. We hope these resources help expand your vision of what is possible when you move towards adopting Knowledge Operations and we look forward to seeing you at our next event (which should be announced in the next few months)."

Greg DeVore

CEO & Co-Founder, ScreenSteps

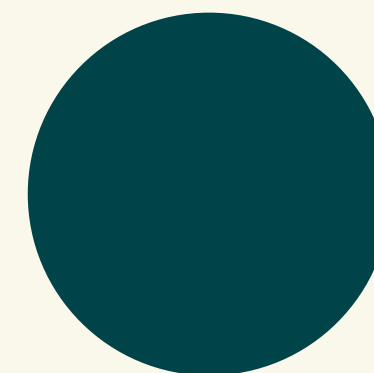
Session Replays

Next Steps



Customer Summit Recordings

<https://www.screensteps.com/events/2024-summit>



Pick up the book

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