

Presentation by :
Greg DeVore

Improve Employee Retention & Training

The Find & Follow Methodology



✦ ScreenSteps



Quote

“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.”



The image shows the front cover of the book 'What's Your Problem?' by Thomas Wedell-Wedellsborg. The title is prominently displayed in a large, bold, sans-serif font. 'what's' and 'your' are in black, while 'problem?' is in a vibrant red. In the top right corner, there is a quote from Eric Schmidt, former CEO of Google, in a smaller red font. Below the title, there is a red oval graphic containing the subtitle 'To Solve Your Toughest Problems, Change the Problems You Solve'. The author's name and the publisher's name, Harvard Business Review Press, are at the bottom in a small, black, sans-serif font.

what's your problem?

“If you want the superpower of solving better problems, read this book.”
—Eric Schmidt, former CEO, Google

To Solve Your
Toughest Problems,
Change the Problems
You Solve

THOMAS WEDELL-WEDELLSBORG
HARVARD BUSINESS REVIEW PRESS

WHAT IS THE QUESTION THAT KILLS
PRODUCTIVITY, CONSISTENCY, AND
CONFIDENCE?

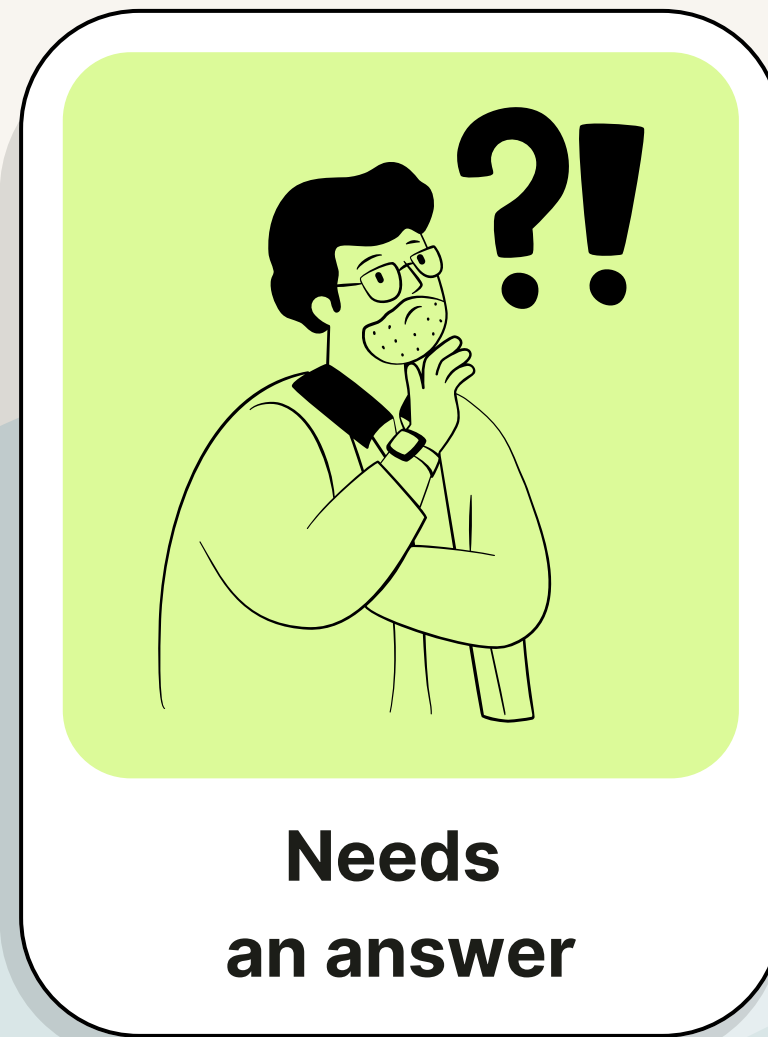
"HOW DO I...?"

What Problems Do Escalations Cause?

- Members have to wait
- Supervisors get interrupted and burned out
- Employees lose confidence
- Consistency is impossible



Typical Escalation



“But We Have Documented Procedures”



**Needs
an answer**

“But We Have Documented Procedures”



**Needs
an answer**



**can't find
the answer**



“But We Have Documented Procedures”



**Needs
an answer**



**can't find
the answer**



**Unable to
apply answer**



It's Still an Escalation!



**Needs
an answer**



**can't find
the answer**



**Unable to
apply answer**



**Knowledge expert
has the answer**





YOUR CU IS
RUNNING ON
TRIBAL KNOWLEDGE!

"Seeing a new loan officer close a loan entirely on their own 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



desert rivers credit union

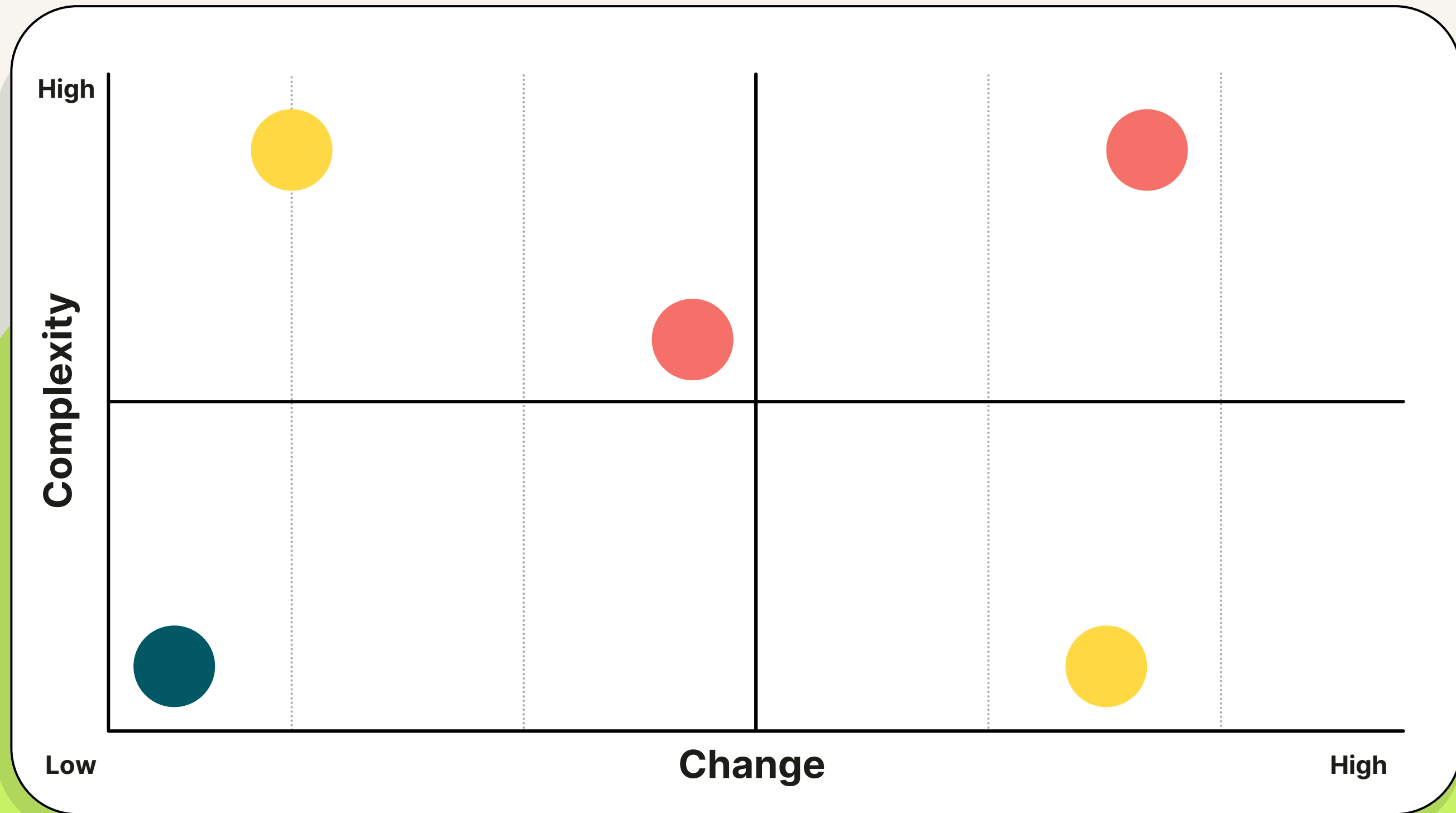
WHAT'S THE SOLUTION?

"BETTER TRAINING"

The Problem



Why “Better Training” Can Never Work



WE NEED TO REFRAME "TRAINING PROBLEMS"
AS "KNOWLEDGE TRANSFER PROBLEMS"

THEIR BRAIN



YOUR
TRAINING

Learn One Skill That Helps You Do 1,000 Things



THE KNOWLEDGE OPS MATURITY MODEL

Knowledge Ops Maturity Model

Employee Independence



1. Tribal

Phone a friend



2. Document

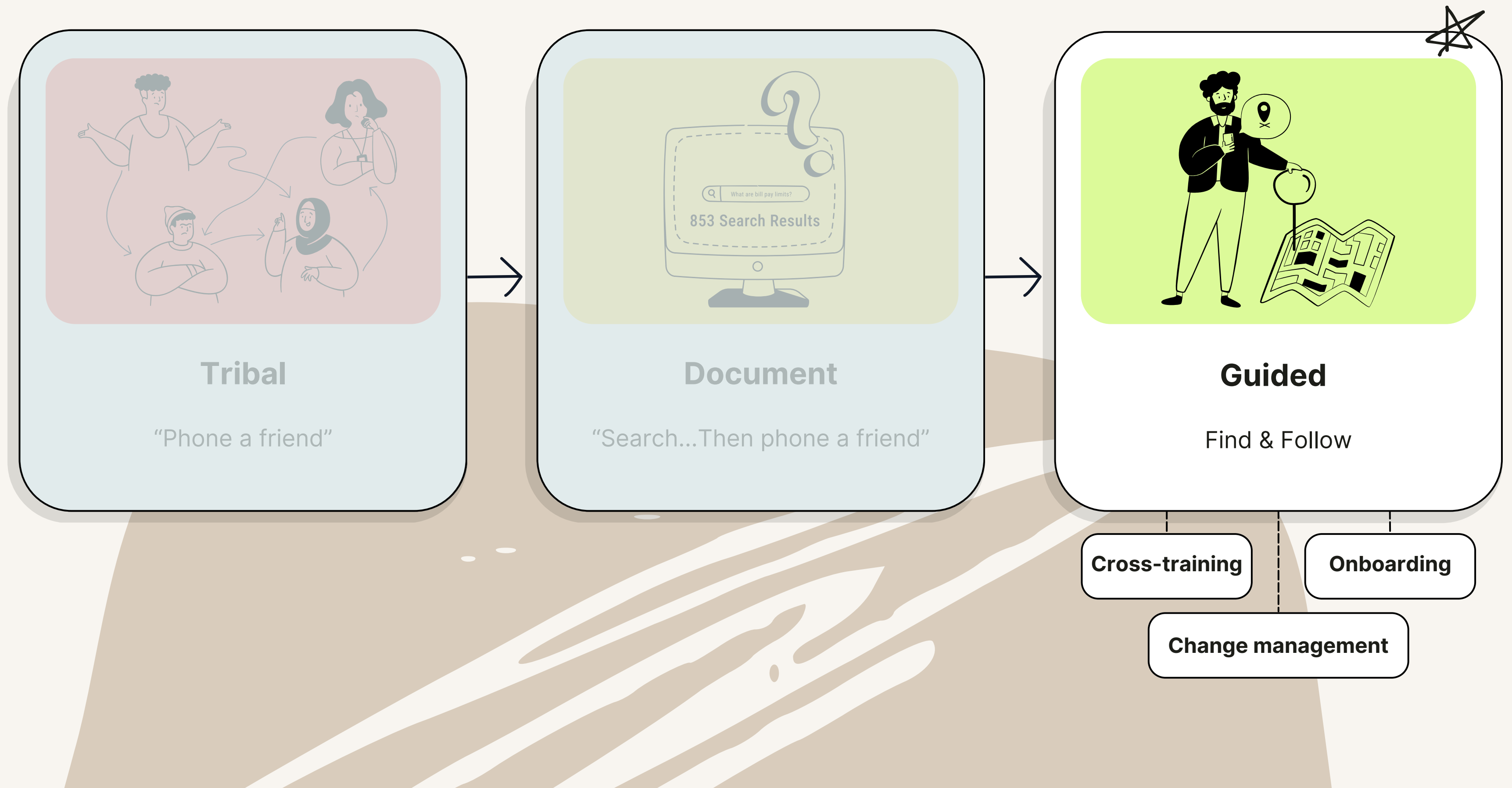
Search...
Then phone a friend



3. Guided

Find & Follow

Employee Independence



HOW DO WE MOVE UP THE MODEL?

HOW DO WE CHANGE BEHAVIORS?

Digital Guides



Findable



Followable



Scannable

FINDABLE, FOLLOWABLE, SCANNABLE =
NO ESCALATIONS

FIND & FOLLOW IS A
KNOWLEDGE TRANSFER METHODOLOGY
THAT HELPS YOU MOVE UP THE MODEL

REMOVING LIMITING BELIEFS

Throwing Away Limiting Beliefs

Limiting Beliefs	Find & Follow Insight
Training needs to focus on what people need to “ know ”	

Throwing Away Limiting Beliefs

Limiting Beliefs	Find & Follow Insight
Training needs to focus on what people need to “know”	Focus on what they need to “do”

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Employees who memorize procedures perform better	

Throwing Away Limiting Beliefs

Limiting Beliefs	Find & Follow Insight
Training needs to focus on what people need to “know”	Focus on what they need to “ do ”
Employees who memorize procedures perform better	Employees perform better by memorizing less procedural information

Throwing Away Limiting Beliefs

Limiting Beliefs	Find & Follow Insight
Training needs to focus on what people need to “know”	Focus on what they need to “ do ”
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Trainers who are subject matter experts and are helpful create better employees	

Throwing Away Limiting Beliefs

Limiting Beliefs	Find & Follow Insight
Training needs to focus on what people need to “know”	Focus on what they need to “ do ”
Employees who memorize procedures perform better	Employees perform better by memorizing less procedural information
Trainers who are subject matter experts and are helpful create better employees	Trainers who are too helpful create <i>dependent</i> employees

Learn One Skill That Helps You Do 1,000 Things



Separate Knowledge



The diagram consists of a large light green rounded rectangle with a black border. Inside the top-left corner of this rectangle is a smaller white rounded rectangle, also with a black border. The white rectangle is offset from the top and left edges of the green rectangle, creating a shadow effect. The text 'Operational Knowledge' is centered within the white rectangle.

**Operational
Knowledge**

Separate Knowledge

**Operational
Knowledge**



Foundational



Learn

Separate Knowledge

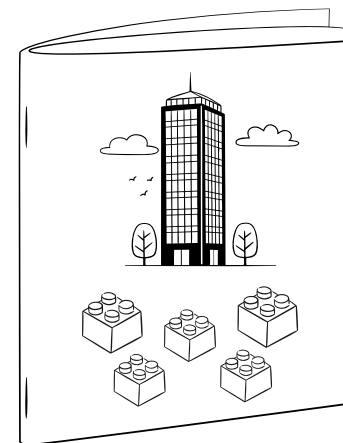
**Operational
Knowledge**



Foundational



Learn



Actionable



Practice Find & Follow

Digital Guides



Findable



Followable



Scannable

Search

Credit Union
Here When You Need Us

Knowledge Hub

Courses

What is your question?

send a statement



Opening Accounts



Is it Fraud?

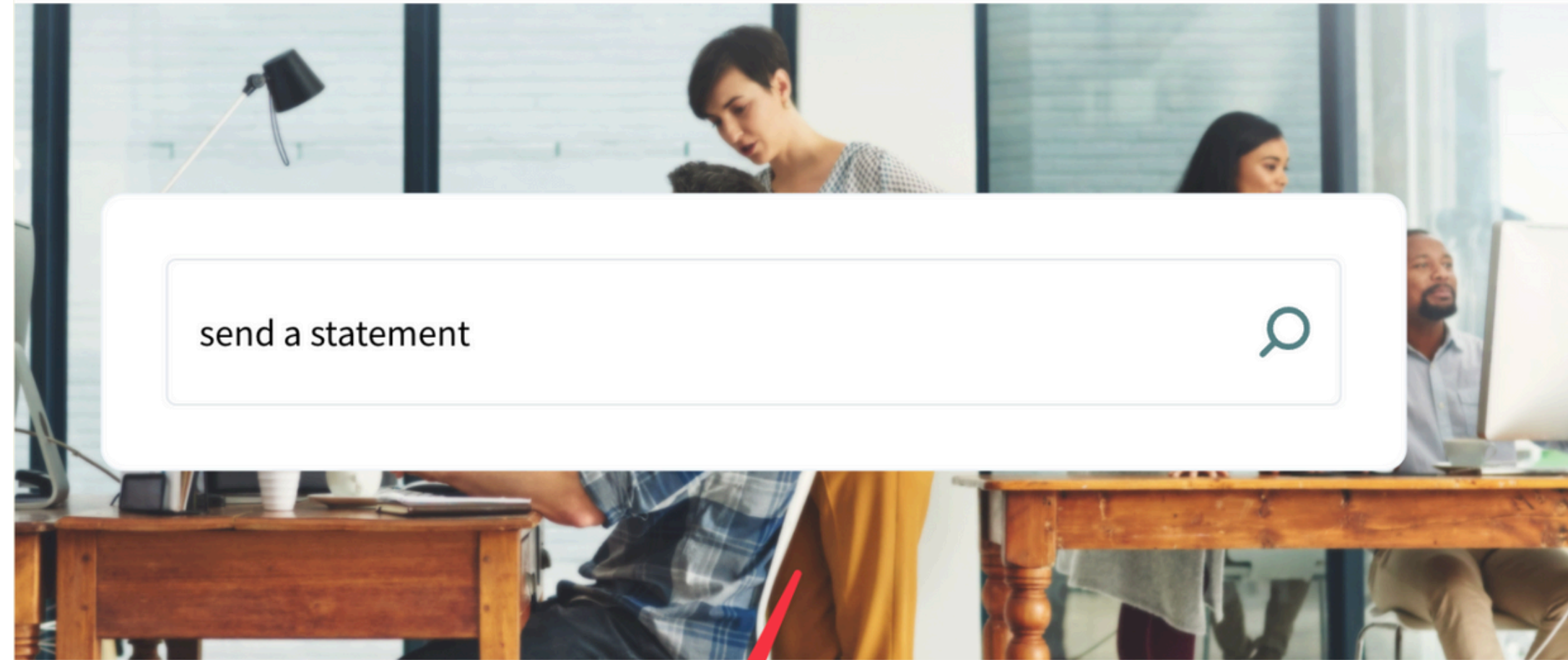
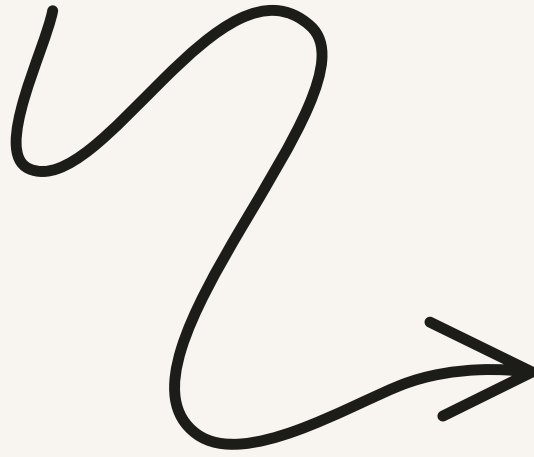


Identifying counterfeit cash



Branch Information

Search



Search Results (1)

How to send a Statement to a member

Updated on Jan 12, 2024

Does customer want you to **send** **statements**?

[Knowledge Hub](#) / [Account Management](#) / [Account Inquiries](#)

 *Workflow*

Decision Trees and Checklists for Complex Procedures

Credit Union / Account Management / Opening Accounts

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

"BUT HOW DO WE CAPTURE ALL OF OUR
TRIBAL KNOWLEDGE?"

AI Knowledge Capture

×

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 voiceUpload 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

Decision Trees and Checklists for Complex Procedures

Credit Union / Account Management / Opening Accounts

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

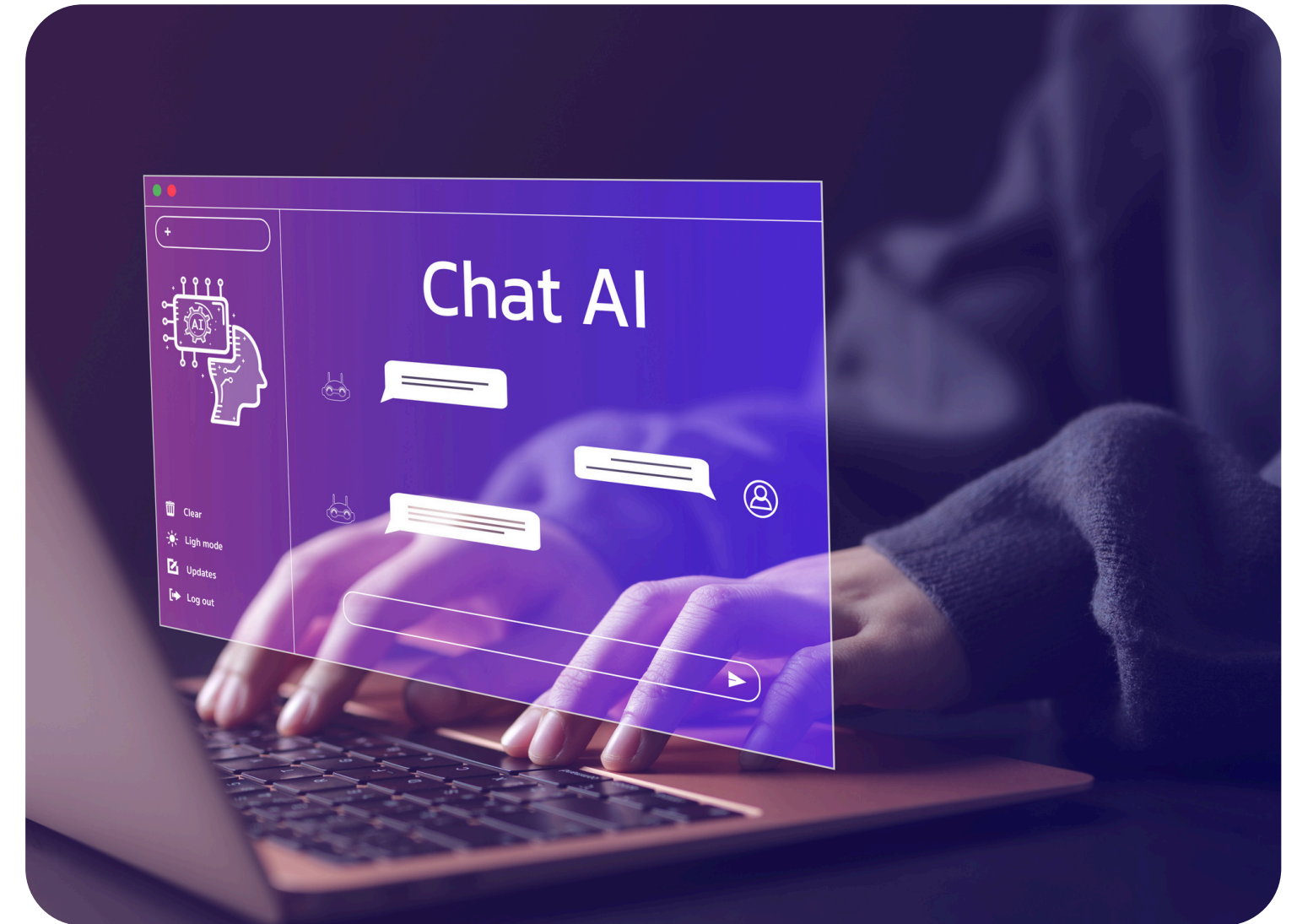
KNOWLEDGE OPS AND AI

Assumptions

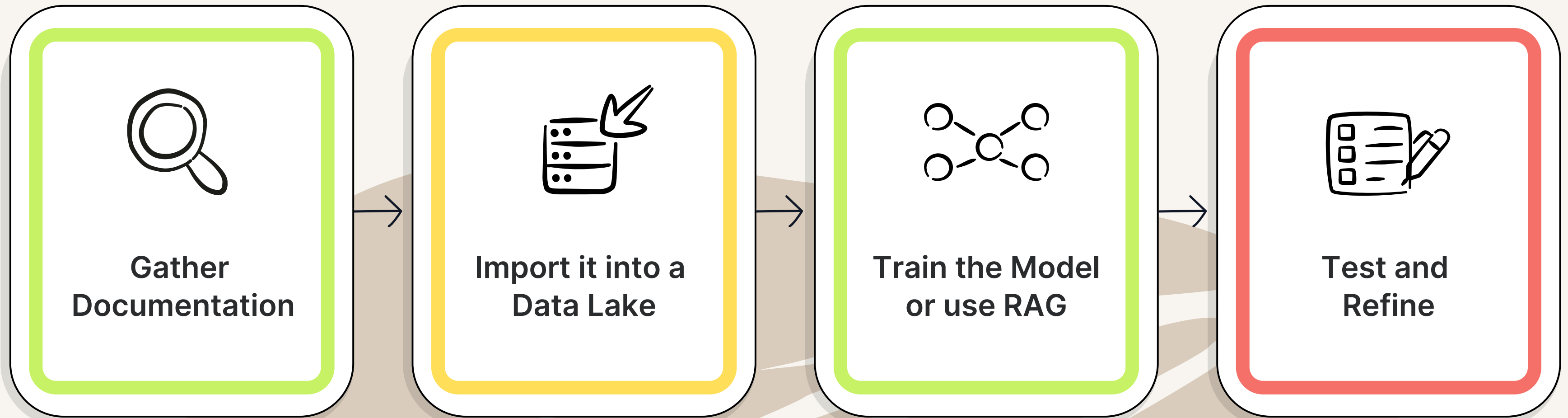
AI will figure out our junk-drawer of knowledge



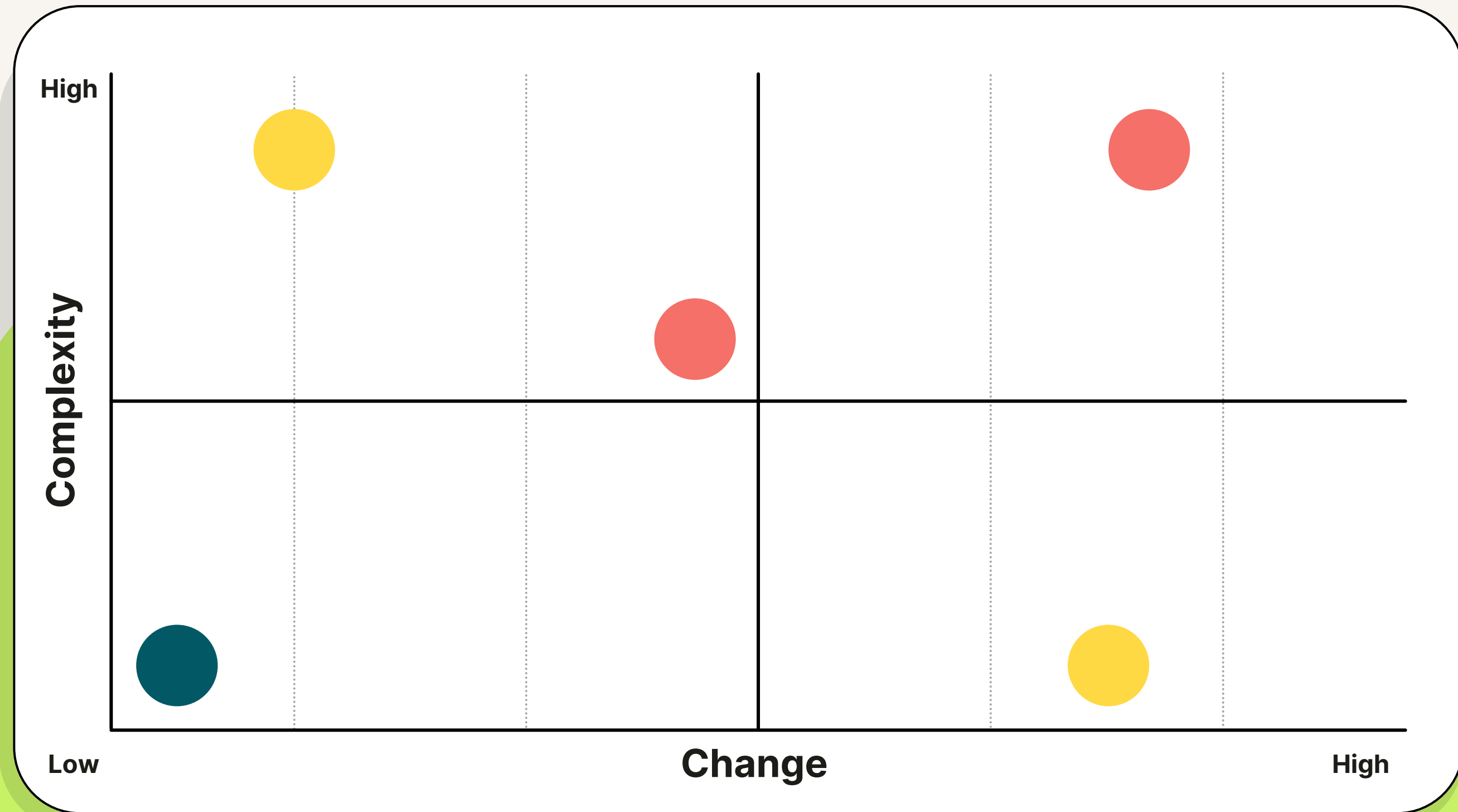
A chatbot is the best way to guide customers and agents



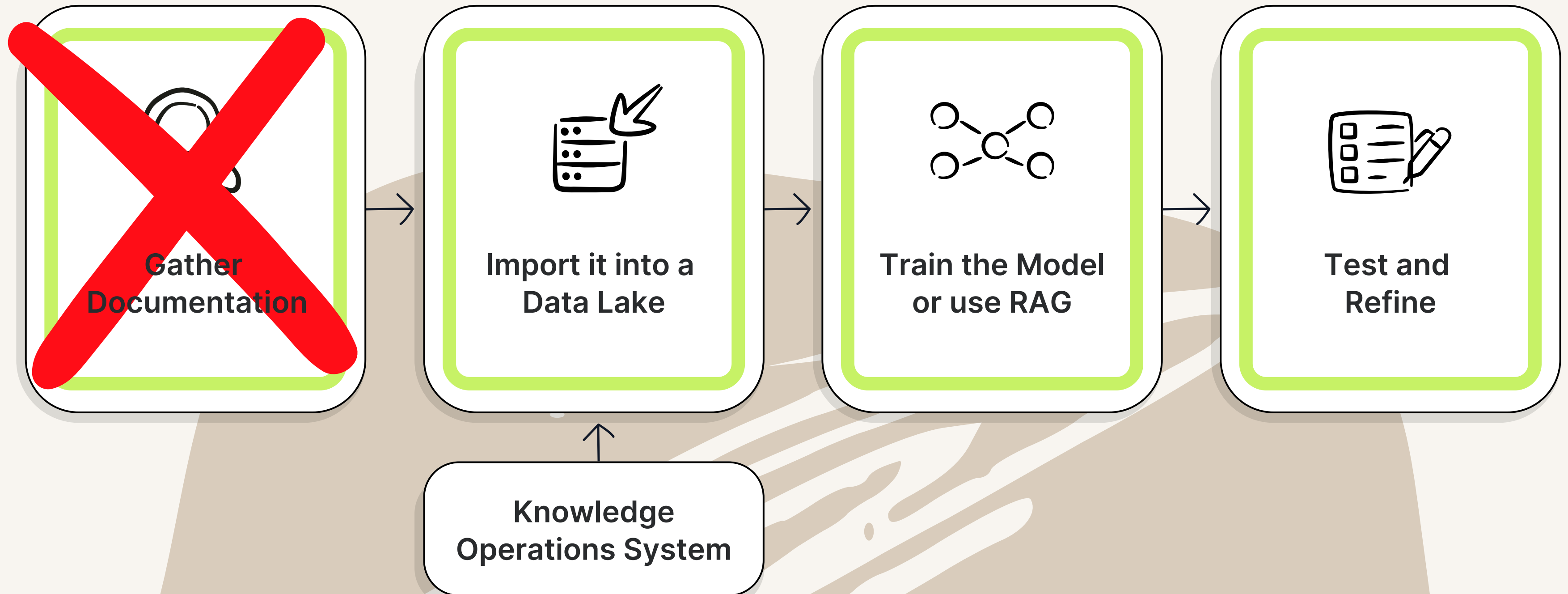
Typical AI Project



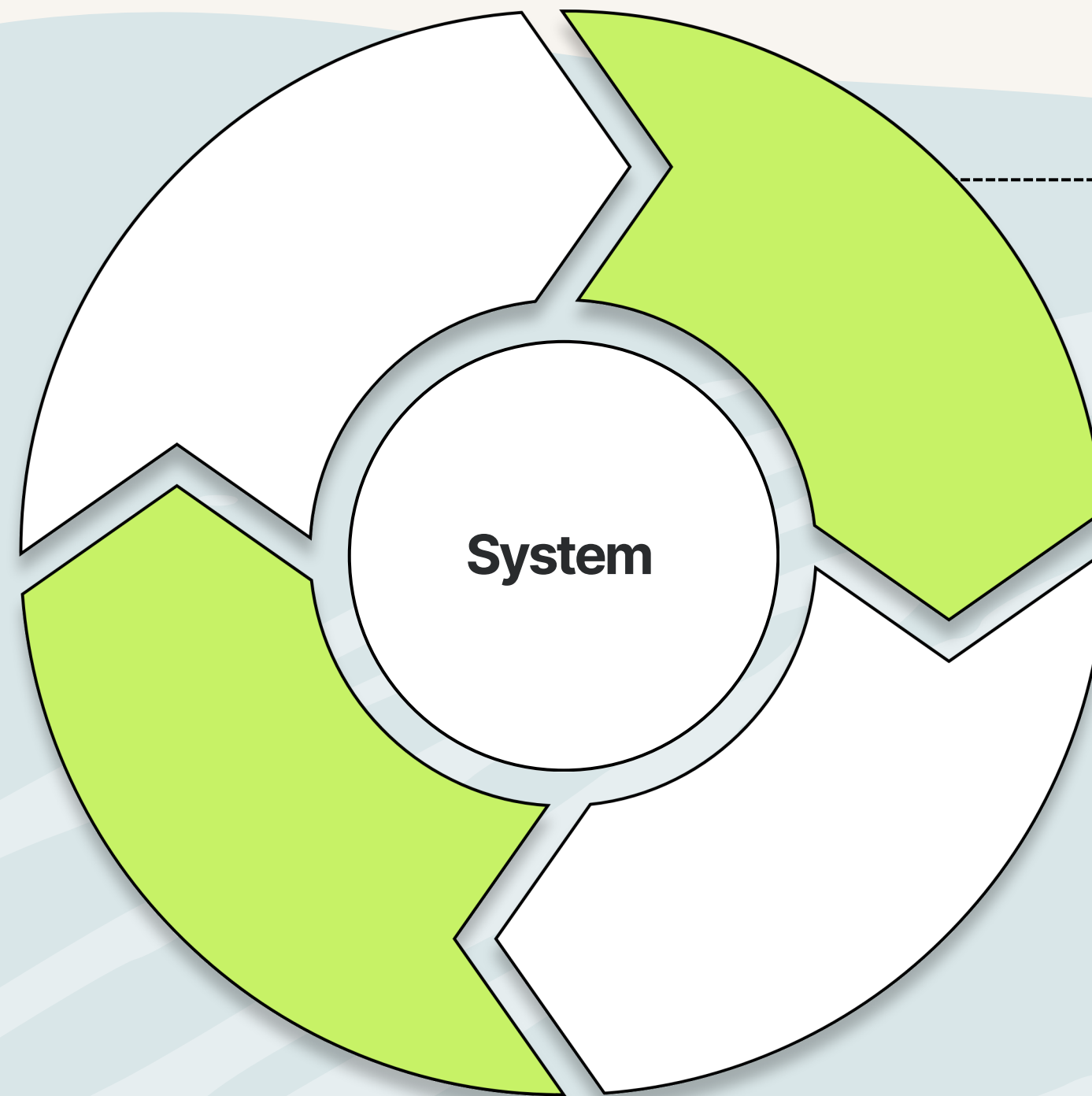
Complexity, Change, and AI



Inserting a Knowledge Ops Platform

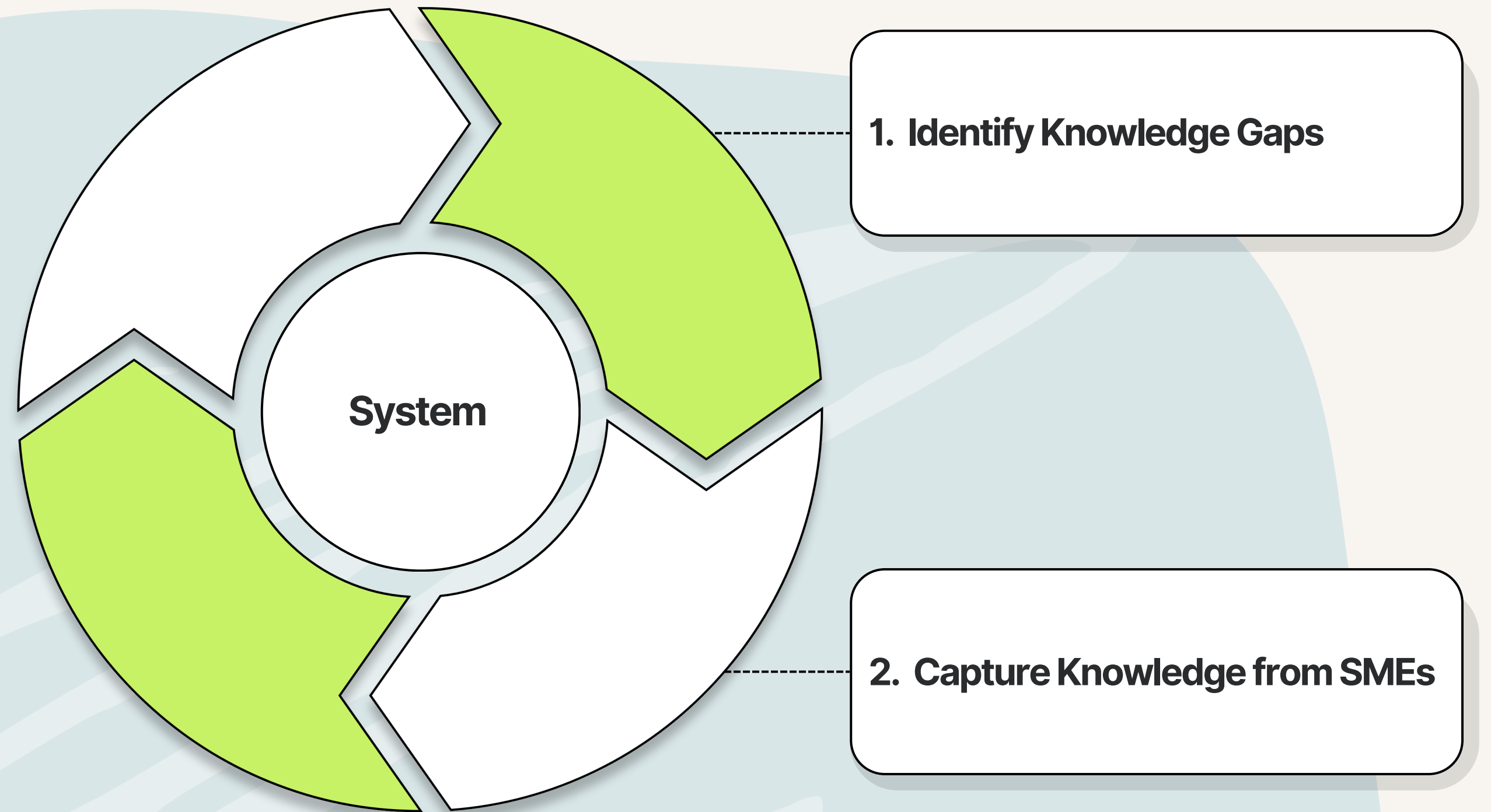


A Knowledge Operations System

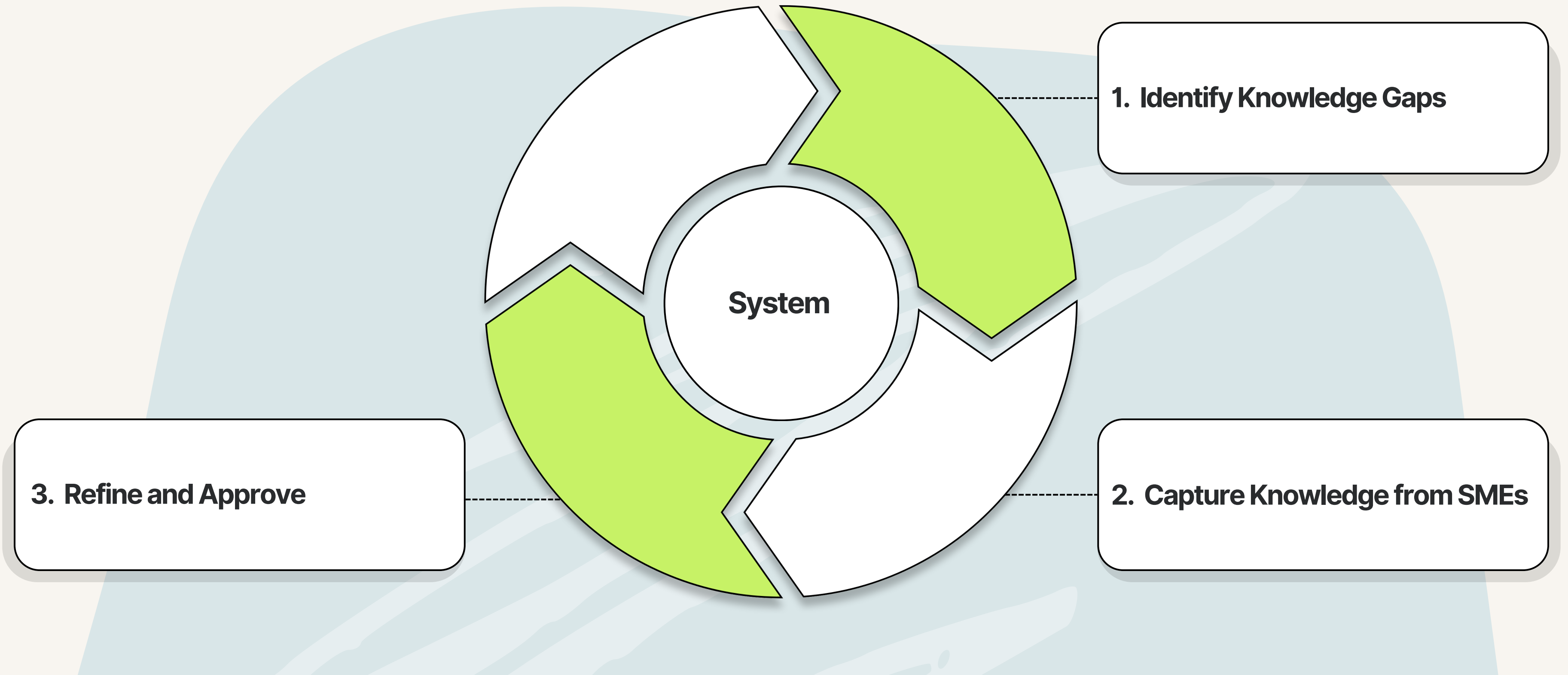


1. Identify Knowledge Gaps

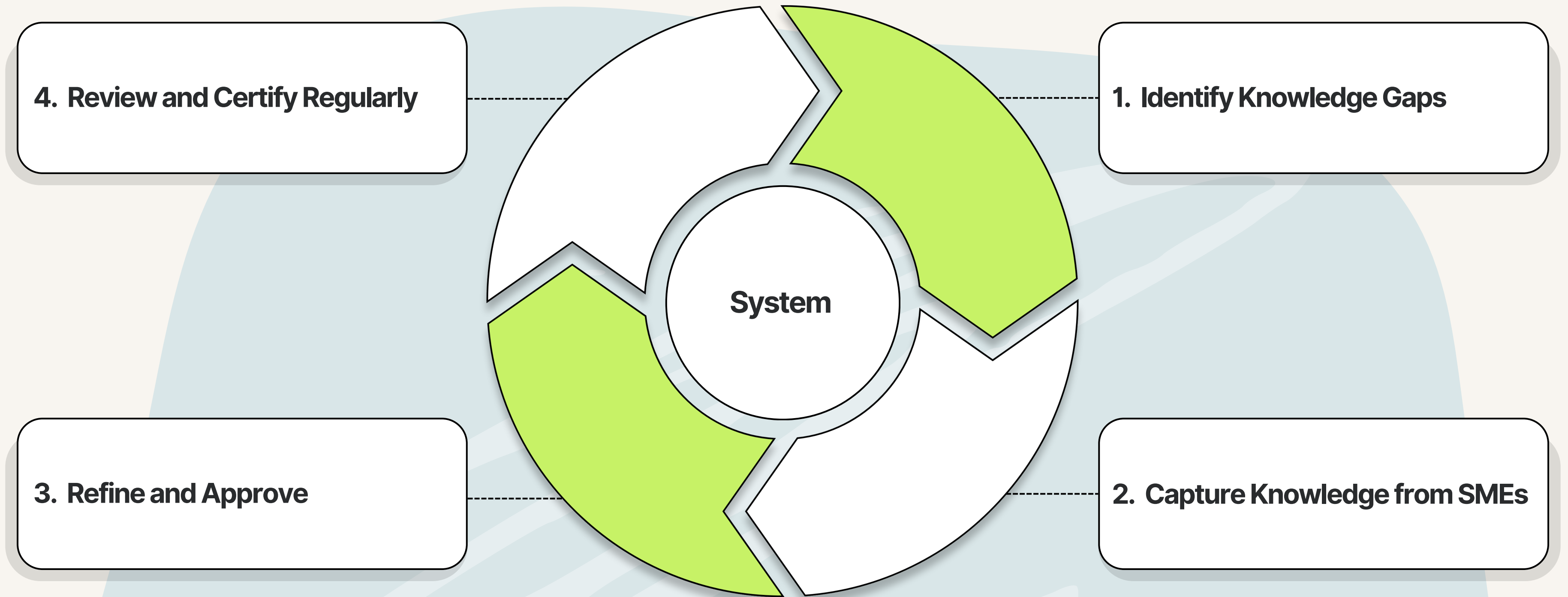
A Knowledge Operations System



A Knowledge Operations System



A Knowledge Operations System

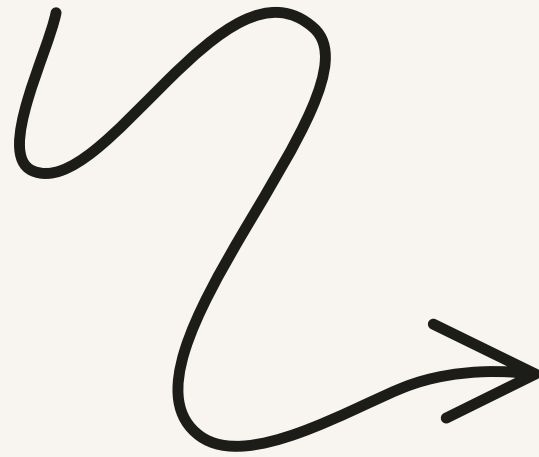


Your Homework

- Find the tribal knowledge moments
- Analyze your procedures:
 - Are you mixing foundational and actionable knowledge?
 - Are they findable, followable, and scannable?

QUESTIONS?

Next steps

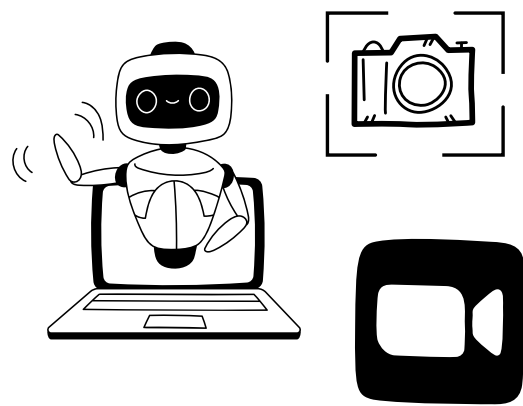


Get in touch!
greg@screensteps.com

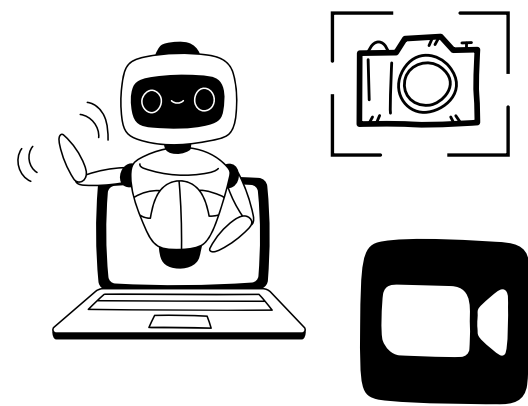
Slides + Book + Course



screensteps.com/utah



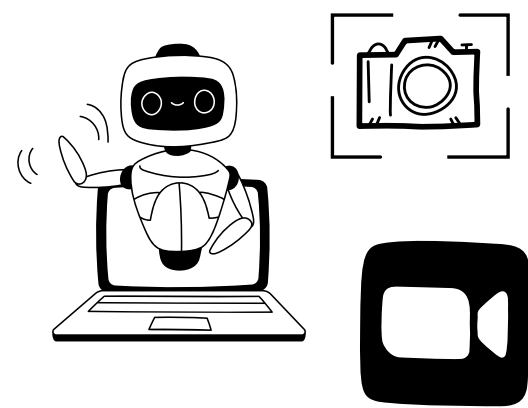
**Integrated
Knowledge
Capture**



**Integrated
Knowledge
Capture**



Micro-Courses



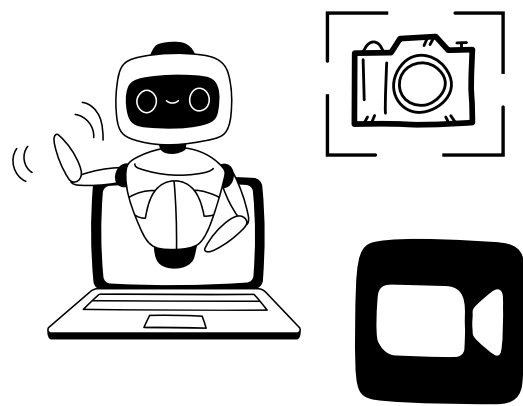
**Integrated
Knowledge
Capture**



Micro-Courses



**Articles,
Checklists, and
Decision Trees**



**Integrated
Knowledge
Capture**



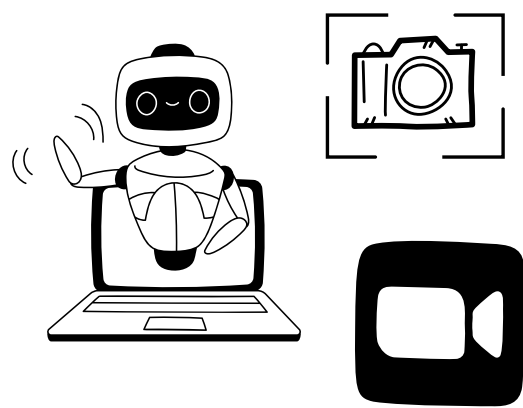
Micro-Courses



**Articles,
Checklists, and
Decision Trees**



**Change
Notifications &
User Feedback**



**Integrated
Knowledge
Capture**



Micro-Courses



**Articles,
Checklists, and
Decision Trees**



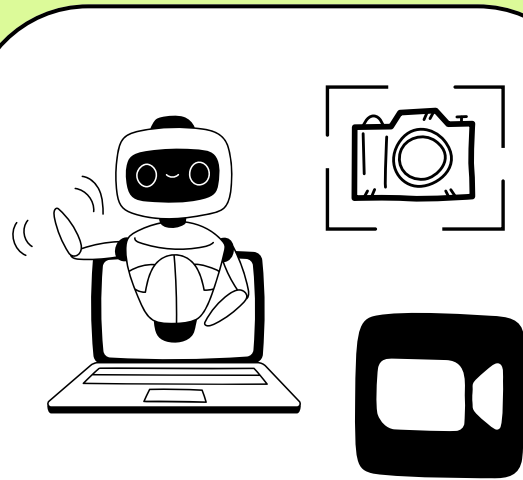
**Change
Notifications &
User Feedback**



**Pushed Into
Workflow**

Knowledge Ops Platform

Single Source of Truth for Operational Knowledge



**Integrated
Knowledge
Capture**



Micro-Courses



**Articles,
Checklists, and
Decision Trees**



**Change
Notifications &
User Feedback**



**Pushed Into
Workflow**

Thank you for joining us!

(PROMISE UPHELD)

