

Boost Manager/Supervisor Productivity by 25% by Reducing Your Reliance on Tribal Knowledge

Greg DeVore



What we have heard

- Managers and Supervisors spend all day answering questions → Especially from new hires
- They do their “real” work after hours
- This leads to:
 - Poor member service
 - Overwhelmed new hires
 - Burnt out supervisors
 - High new hire turnover
 - An inability to adapt to change

"Seeing a new loan officer close a loan entirely on their own was incredibly exciting!

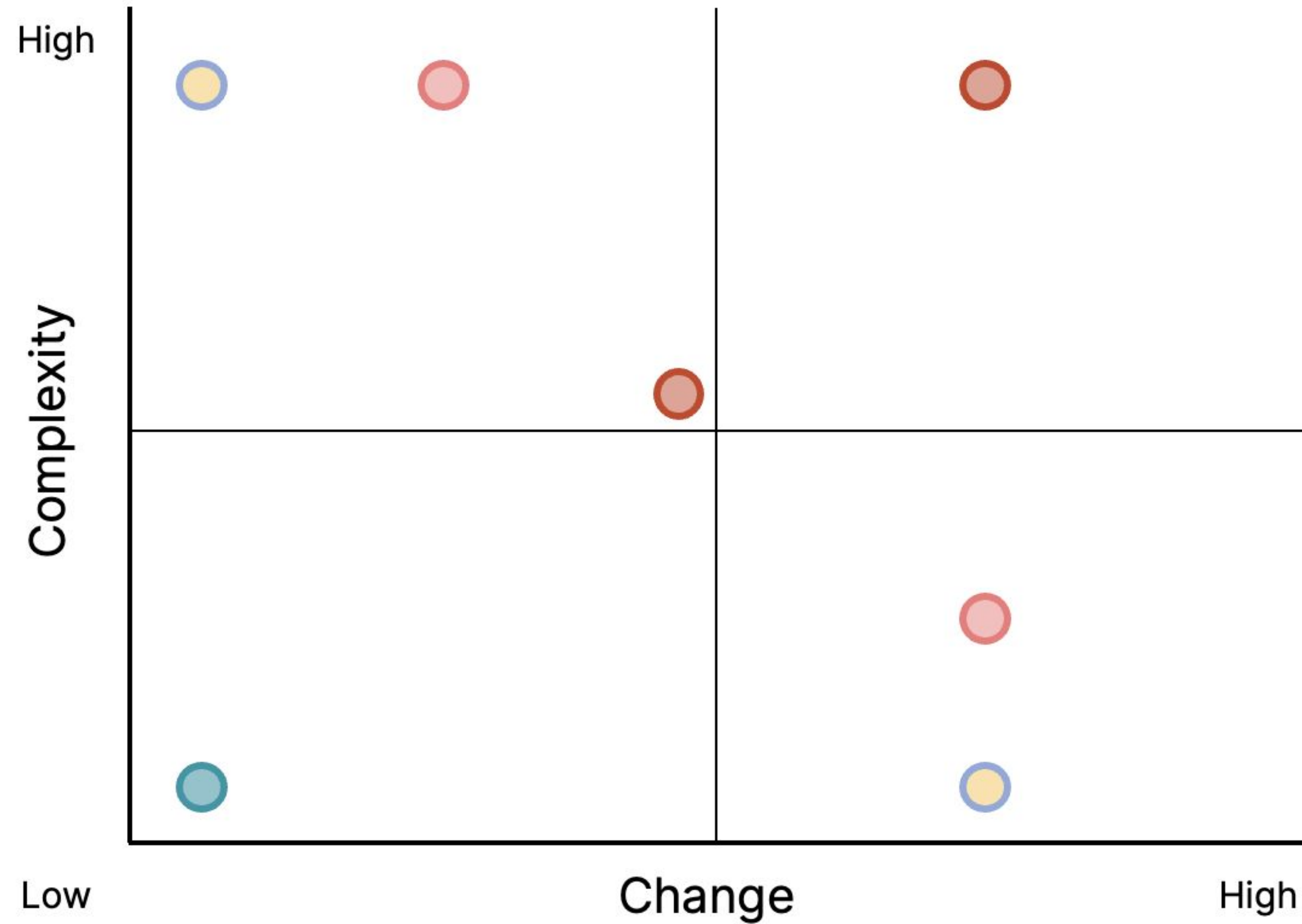
It's a game-changer for branch managers, allowing their teams to work independently and reducing pressure on leadership."

Jill Jones

Desert Rivers Credit Union, Director of Branch Operations

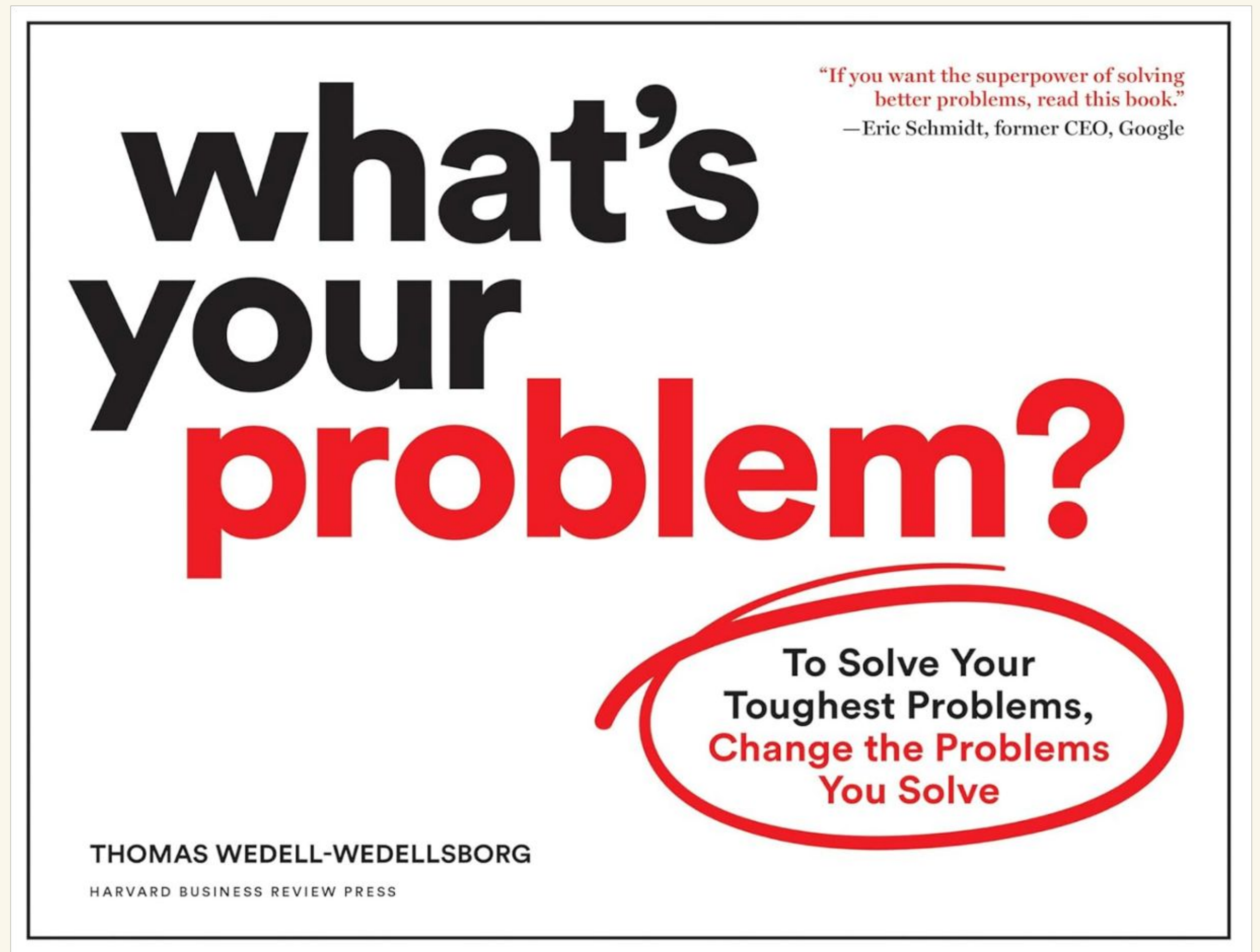
What's the solution?
"Better Training"

Why “Better Training” Can Never Work



“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



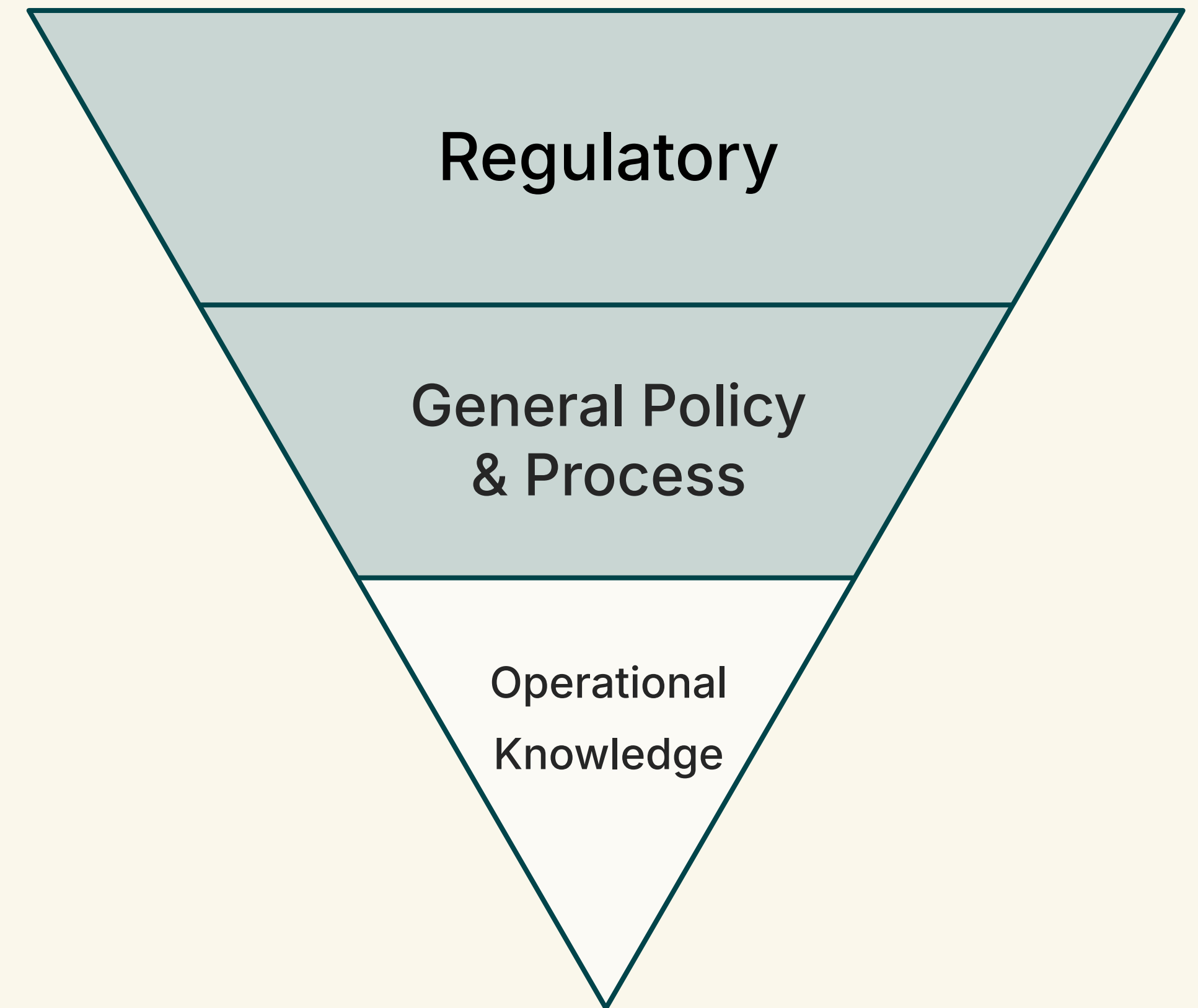
How do we move up the model?

How do we change *behaviors* ?

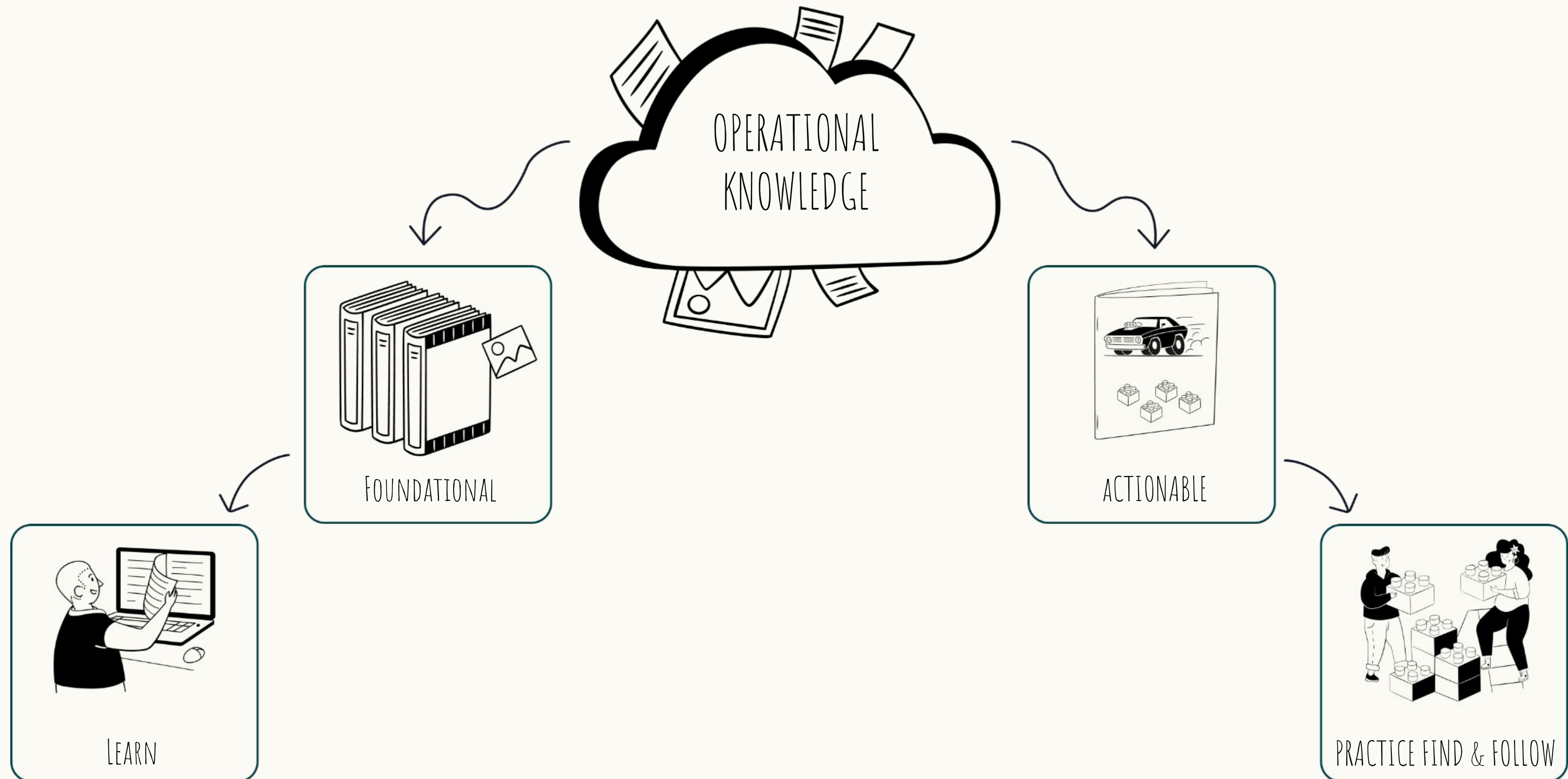
**Find & Follow is a
Knowledge Transfer
Methodology that helps you
move up the model**

Find & Follow is a Knowledge Transfer methodology that:

1. Separates Knowledge (Foundational/Actionable)
2. Optimizes (Findable, followable, scannable)
3. Trains people to do 1 thing that helps them do 1,000 things



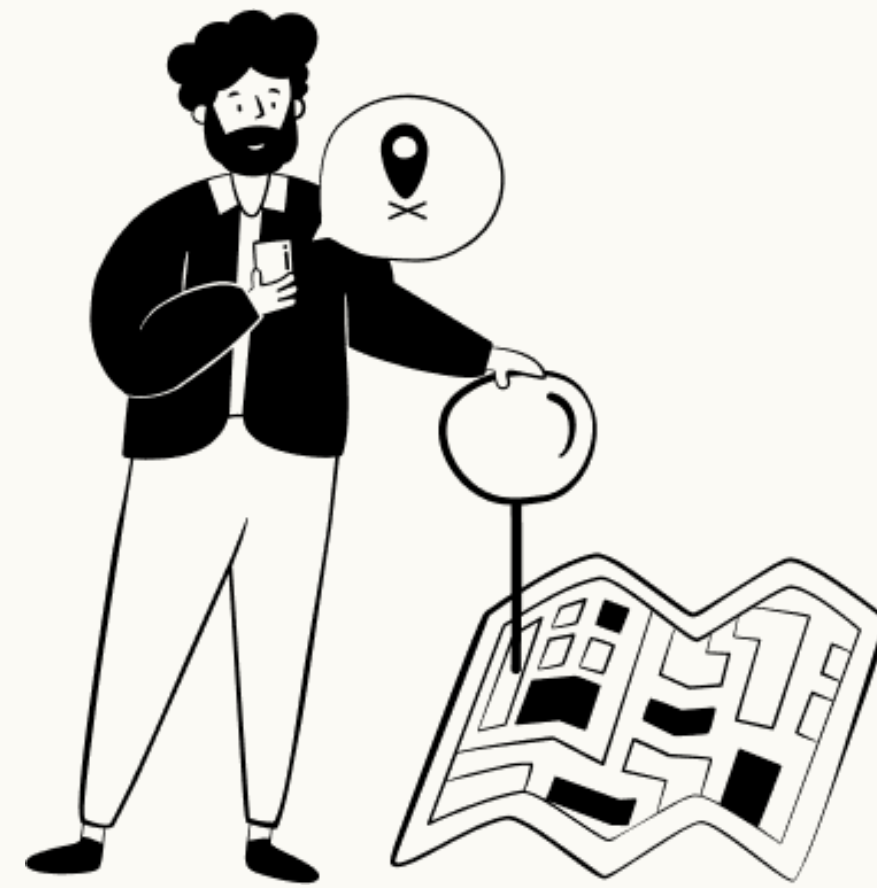
Find & Follow is a Knowledge Transfer Methodology



The Standard We Need to Meet



Findable

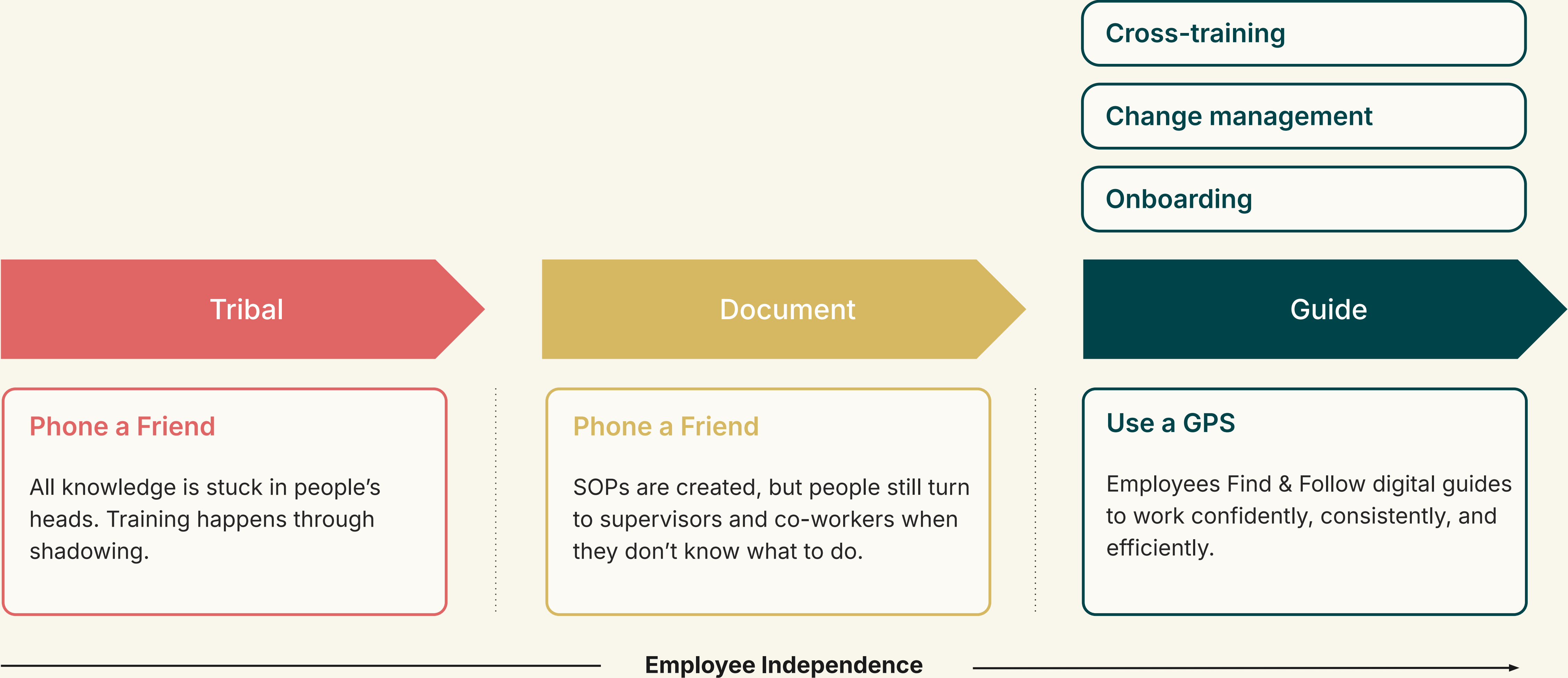


Followable



Scannable

Knowledge Ops Maturity Model



Knowledge Ops Platform

Single Source of Truth for Operational Knowledge



MICRO-COURSES



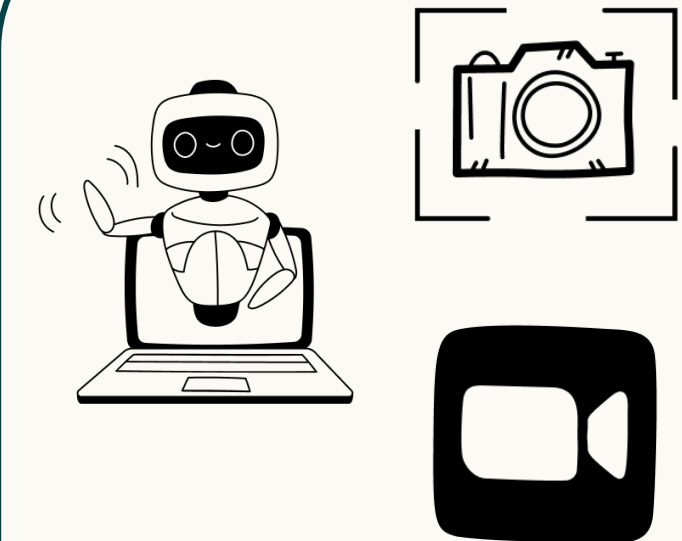
ARTICLES, CHECKLISTS, AND
DECISION TREES



CHANGE NOTIFICATIONS

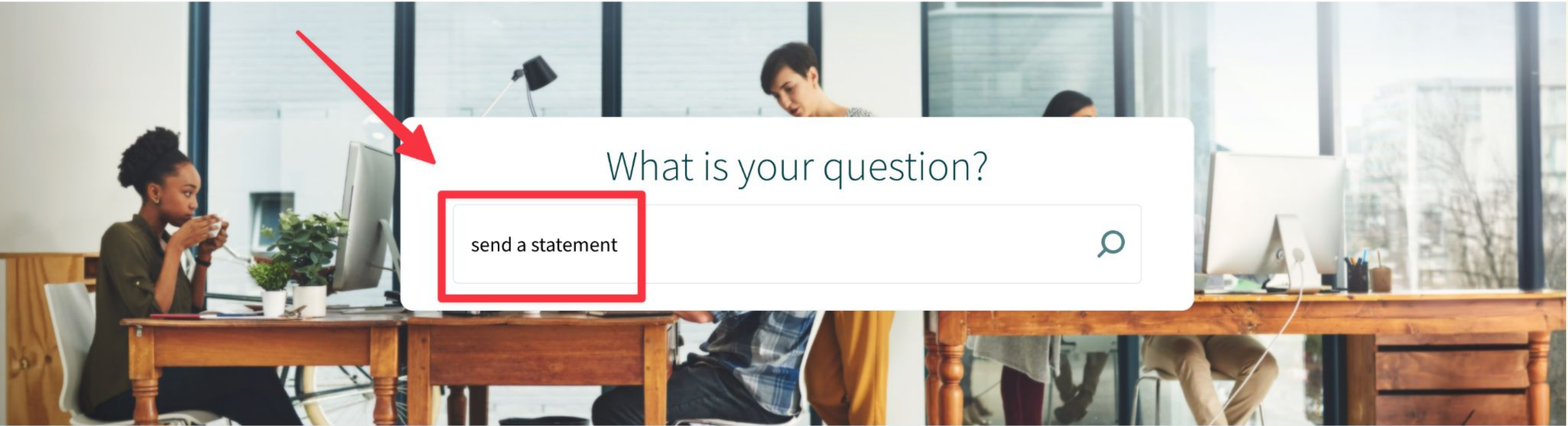


PUSHED INTO THE
WORKFLOW



INTEGRATED
KNOWLEDGE CAPTURE

Search





Opening Accounts



Is it Fraud?

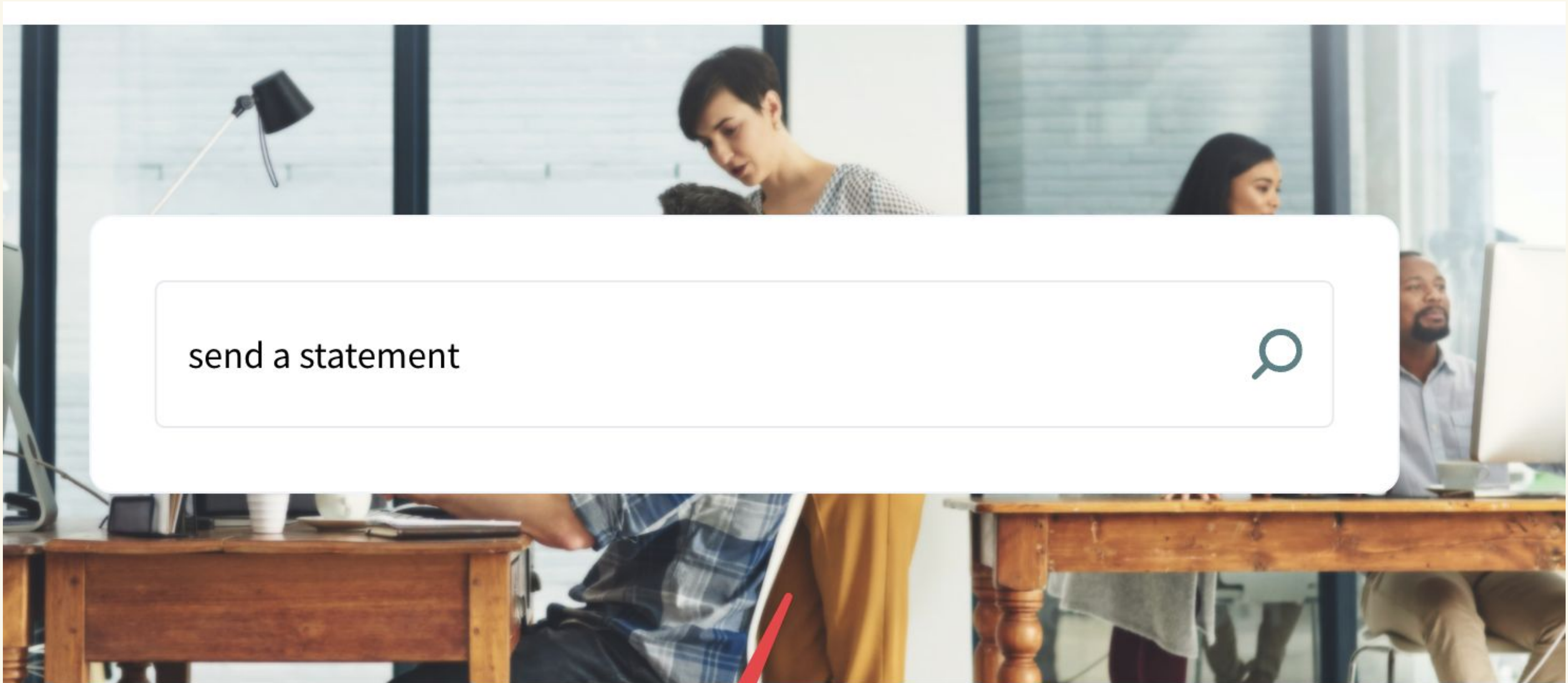



Identifying counterfeit cash



Branch Information

Search





dit


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

Opening a New Account

Updated on Aug 01, 2024

Verify Prospective Member Meets Criteria

<input type="checkbox"/>	1. Current Driver's License with Address	▼
<input type="checkbox"/>	2. SSN OR TIN	▼
<input type="checkbox"/>	3. Meet Eligibility Requirements	▼
<input type="checkbox"/>	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

AI Recording of Procedures

arch articles

ale

ch

ea

ter

Al

3 d

by

4 d

by

5 d

by

2 n

by

25

by

✕

Create a new article in site: My Company

Manual or Uncategorized Aricles (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

Opening a New Account

Updated on Aug 01, 2024

Verify Prospective Member Meets Criteria

<input type="checkbox"/>	1. Current Driver's License with Address	▼
<input type="checkbox"/>	2. SSN OR TIN	▼
<input type="checkbox"/>	3. Meet Eligibility Requirements	▼
<input type="checkbox"/>	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

Custom Courses and Integrated Video Recording

Credit Union
Here When You Need Us

11%

Zelle

Knowledge Hub

Courses

1 / 9 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

That's it!

1.20

STEPS TO
USING ZELLE

ZELLE FOUNDATIONAL COURSE

Related Resources

•

[How to make a payment in Zelle](#)

•

[How to request a payment in Zelle](#)

•

[How to see payment history in Zelle](#)

•

[Can you request a refund in Zelle?](#)

Questions

