



Starting soon and worth the ~~weight~~...wait

(WE PROMISE THIS PRESENTATION IS BETTER THAN OUR SPELLING)



Presentation by :

Bonnie Ortiz and Greg DeVore

Don't Let Change Derail Your Service:

A Strategy for Credit Unions Under \$1B in Assets

✦ O2 Consulting Group and ScreenSteps



What We Will Cover

- The Need to Be Nimble
- Barriers to Consistency When Dealing With Change
- The Role of Strategic Planning
- Executing with Knowledge Operations



**Everything is
Changing**

Nimbleness vs. Consistency



Nimbleness

Consistency

Nimbleness vs. Consistency



Nimbleness

Consistency

Nimbleness vs. Consistency



Nimbleness

Consistency

Nimbleness vs. Consistency



The diagram consists of two vertical rectangular boxes. The left box is a dark teal color and contains the word 'Nimbleness' in white text. The right box is a lighter teal color and contains the word 'Consistency' in white text. The boxes are positioned side-by-side, centered horizontally.

Nimbleness

Consistency

Barriers to Consistency

The Problem

- Less experienced employees feel overwhelmed with information
- Leaders get pulled into the front-lines and get burned out



THEIR BRAIN



YOUR
TRAINING

Organizational Excellence

The Keys to Organizational Excellence

- Training + Tools
- Systems
- Cross-training

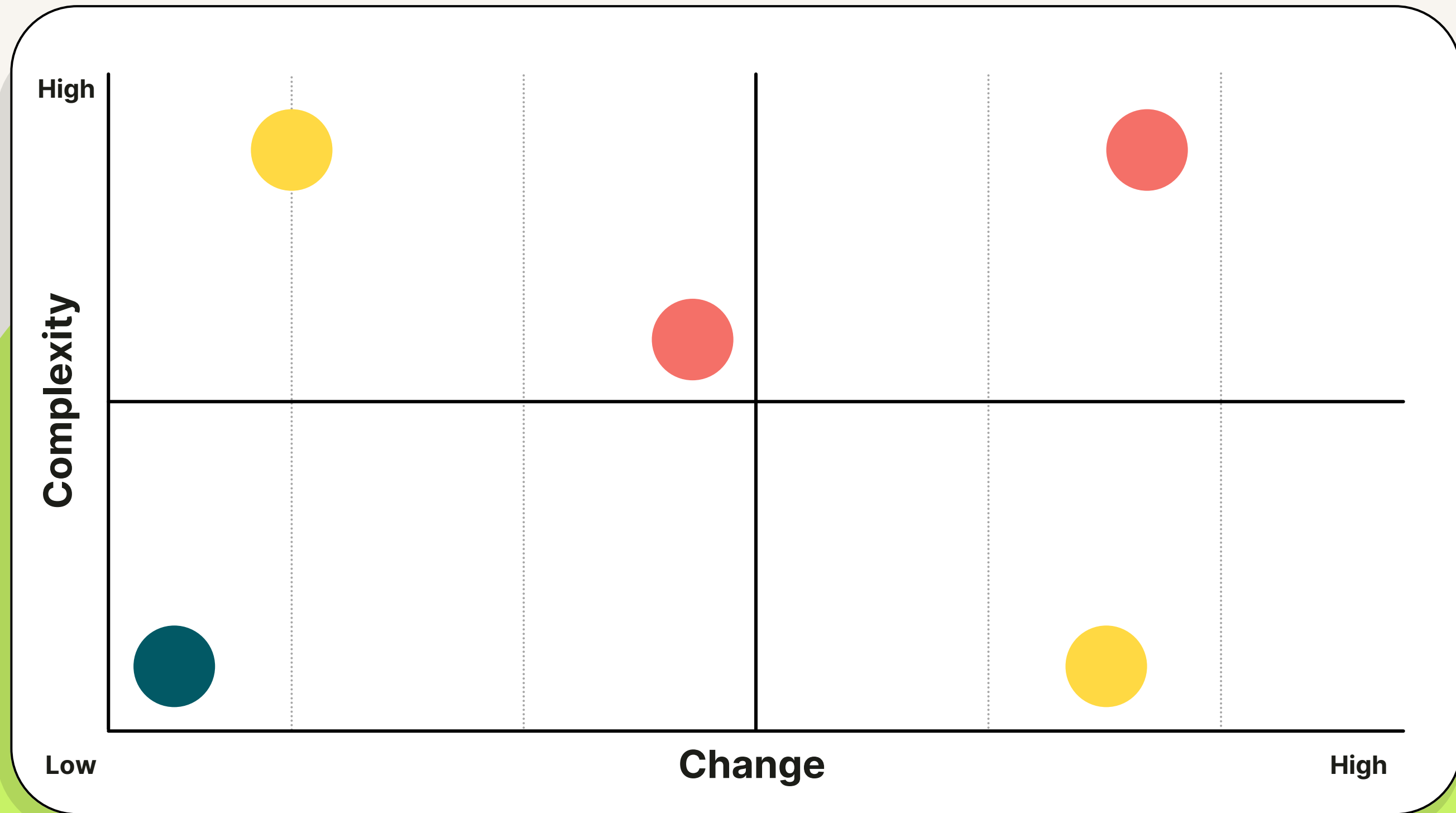


The Strategic Plan



Knowledge Operations

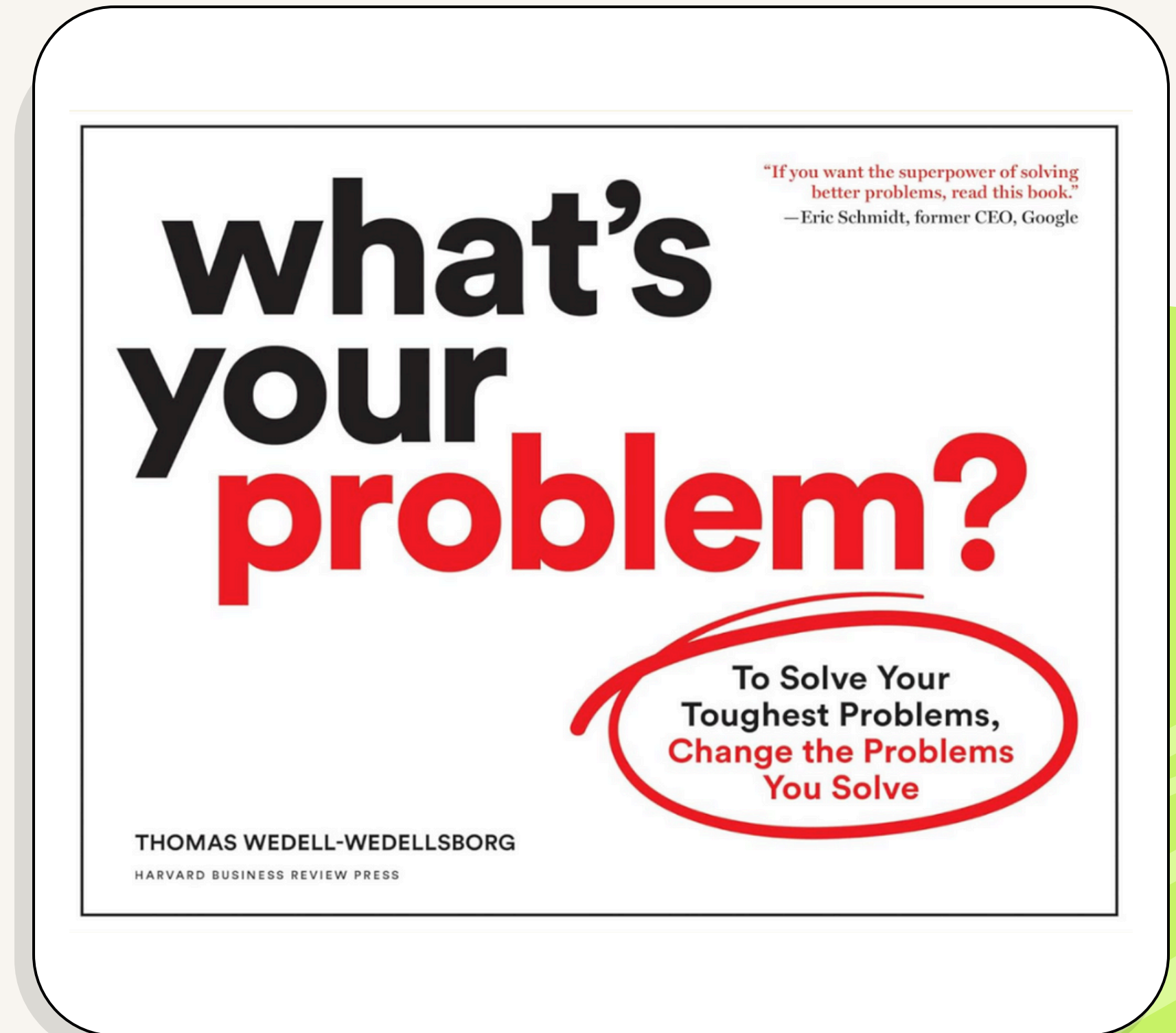
Why “Better Training” Can Never Work



Quote

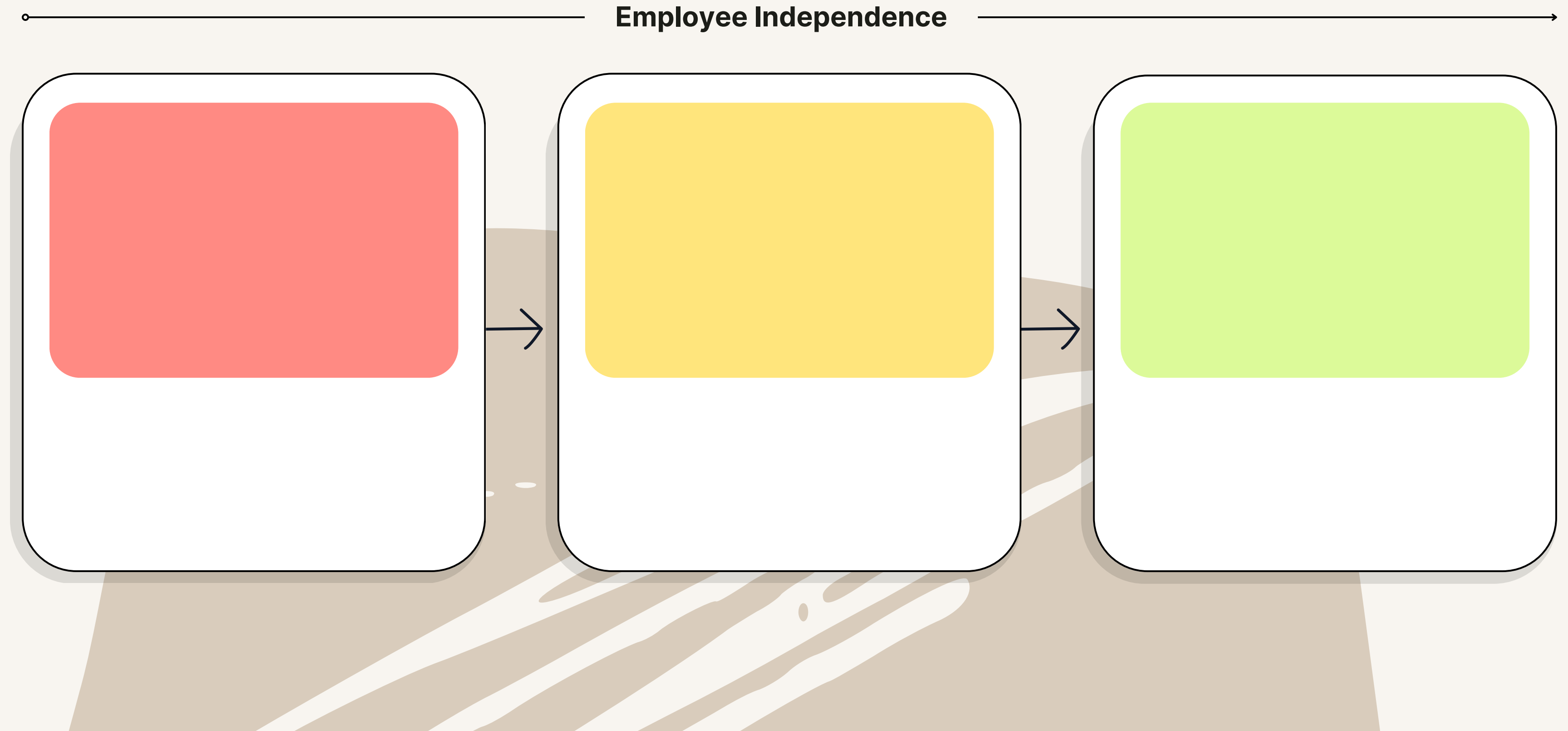
“The way you frame a problem determines which solutions you come up with.

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



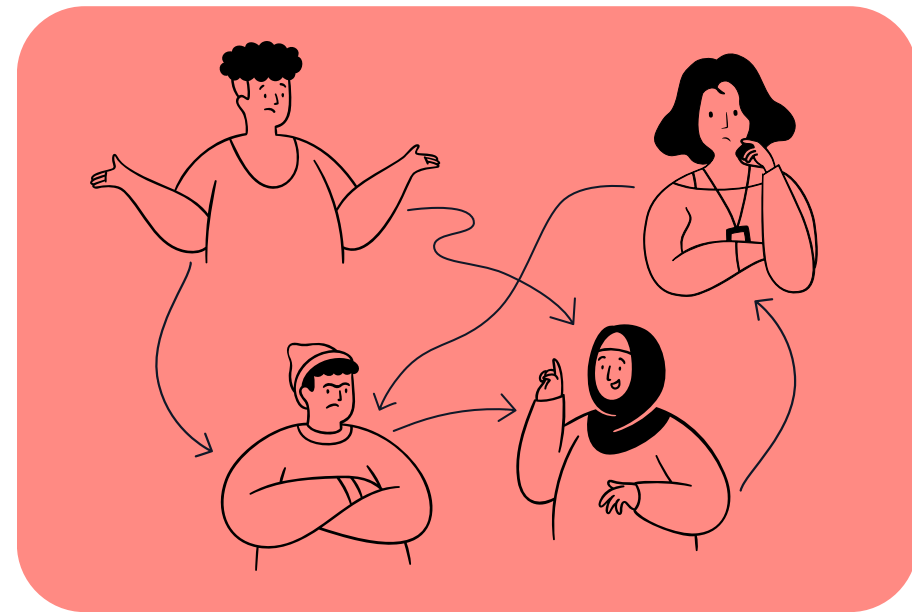
**We Need to Reframe
“Training Problems” as
“Knowledge Transfer Problems”**

Knowledge Ops Maturity Model



Knowledge Ops Maturity Model

Employee Independence



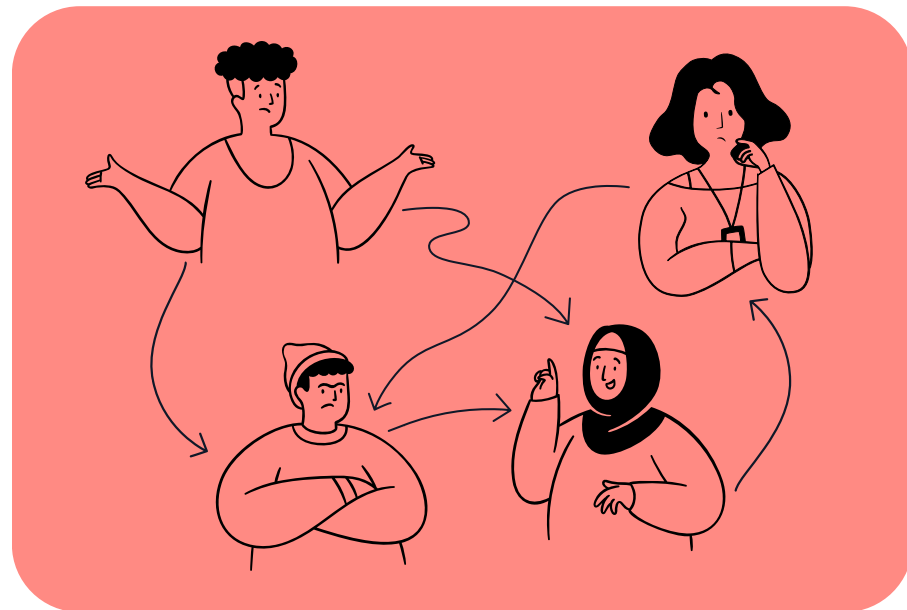
1. Tribal

Phone a friend



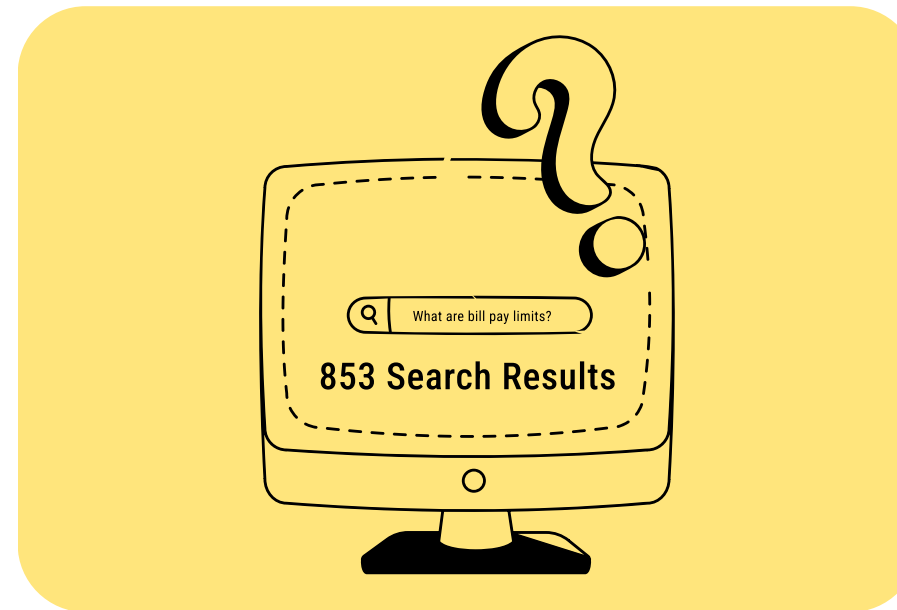
Knowledge Ops Maturity Model

Employee Independence →



1. Tribal

Phone a friend



2. Document

Search...
Then phone a friend



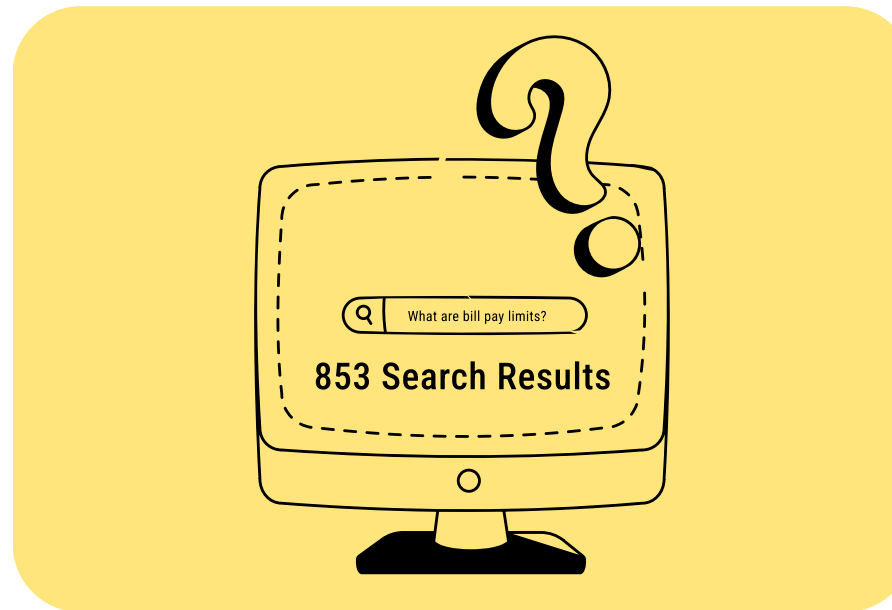
Knowledge Ops Maturity Model

Employee Independence



1. Tribal

Phone a friend



2. Document

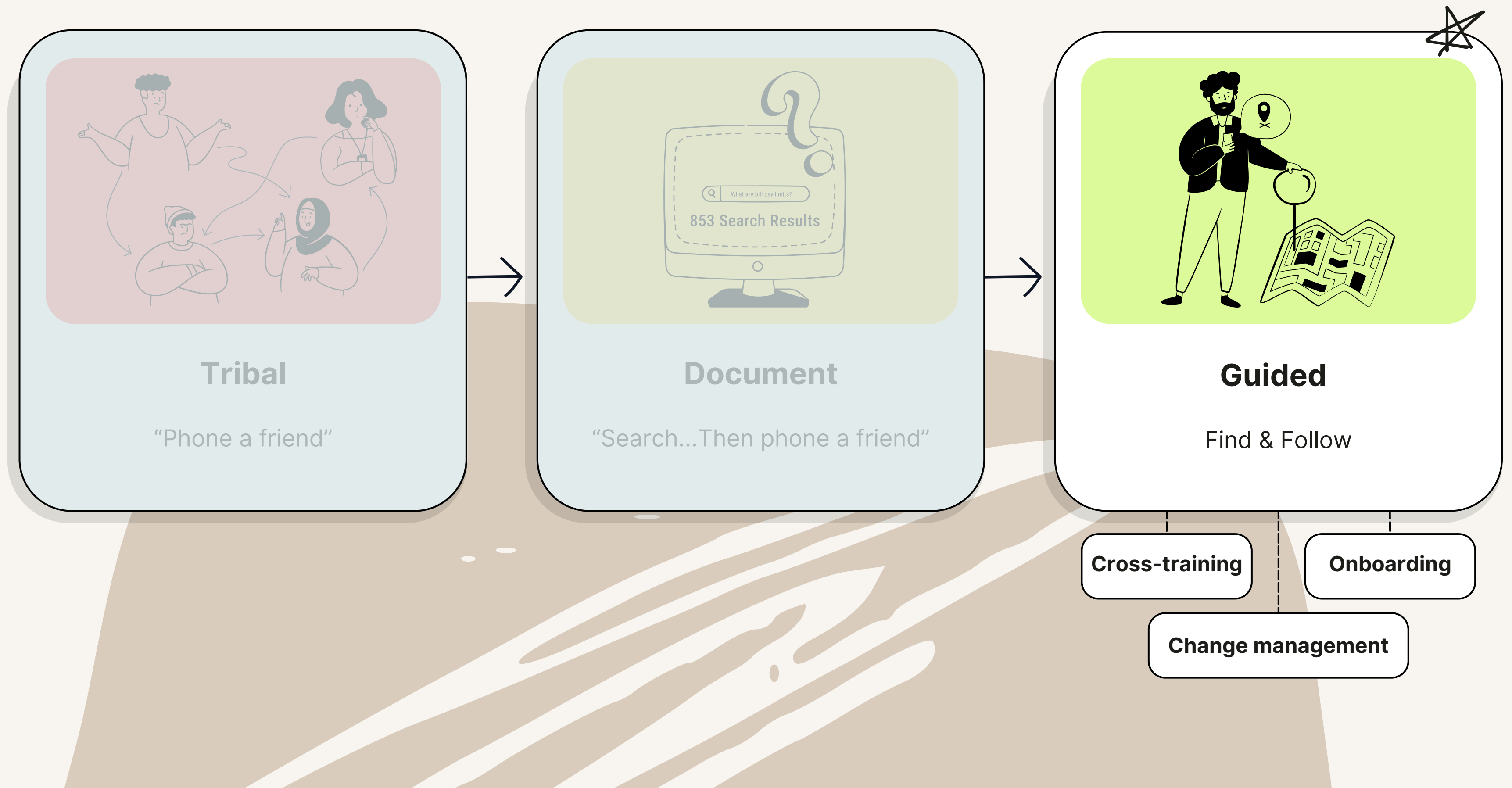
Search...
Then phone a friend



3. Guided

Find & Follow

Employee Independence



Learn One Skill That Helps You Do 1,000 Things



Search

Credit Union
Here When You Need Us

Knowledge Hub

Courses

What is your question?

send a statement



Opening Accounts



Is it Fraud?

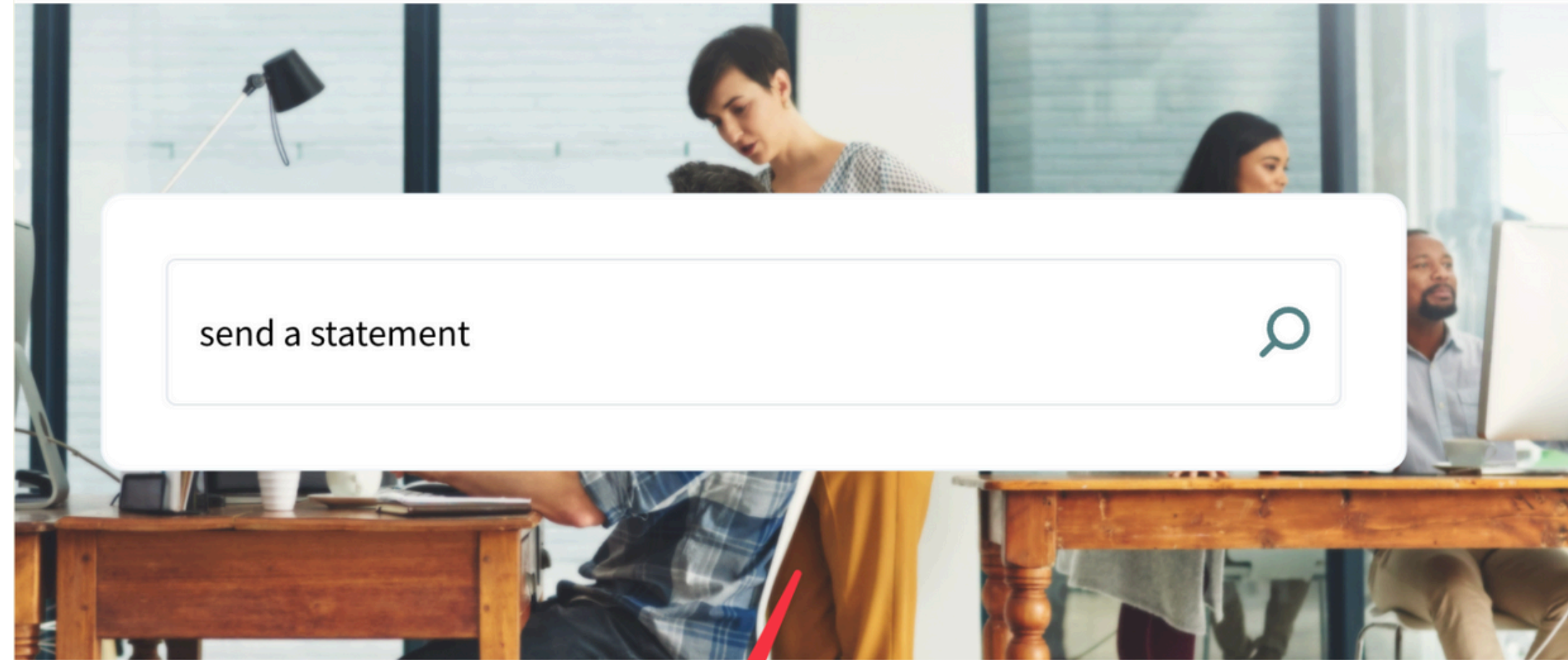
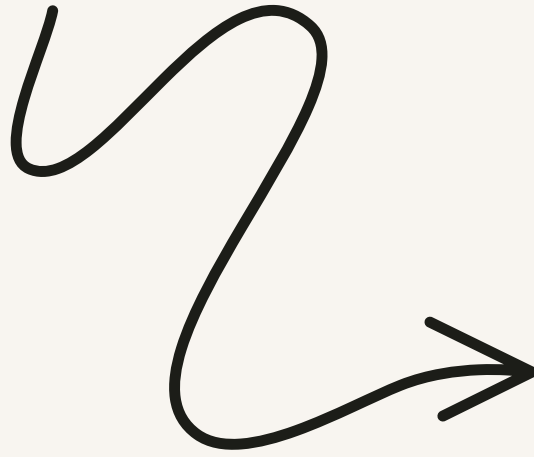


Identifying counterfeit cash



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

Nimbleness vs. Consistency



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Nimbleness

Consistency

Nimbleness vs. Consistency



Nimbleness

Consistency

**“But How Do We Capture All
Of Our Tribal Knowledge?”**

AI Knowledge Capture

×

Create a new article in site: My Company

Manual or Uncategorized Aricles (required) ⓘ
Sales Team

Chapter (required)
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

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?

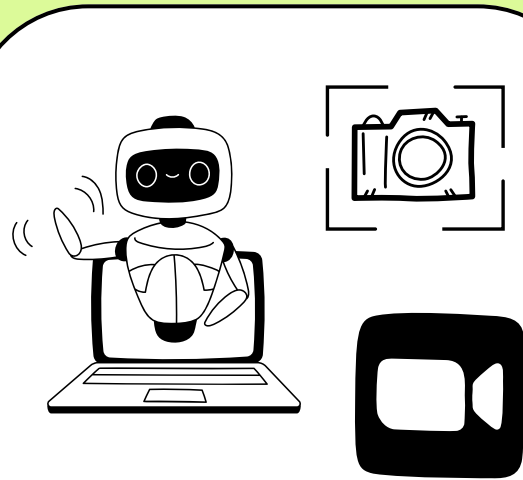
1. Select one Option Below

YES

NO

Knowledge Ops 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**

Questions?

Demo + Book + Trial Account



screensteps.com/learn
greg@screensteps.com

O2 Consulting Group Consultation



o2consultinggroup.com/contact
bonnie@o2consultinggroup.com

Thank you for joining us!

(PROMISE UPHELD)

