

ScreenSteps Platform Walk Through

Presentation by : Greg DeVore

Training and Performance Outcomes for Small But Mighty Teams



80% Reduction in Escalations



In a Perfect World, You'd Have a System that...

- ✓ Practically documents procedures for you
- ✓ Automatically formats guides to improve employee performance
- ✓ Tracks validations and feedback from employees
- ✓ Enable employees to perform with answers they can trust



Knowledge Ops Platform

Single Source of Truth for Operational Knowledge

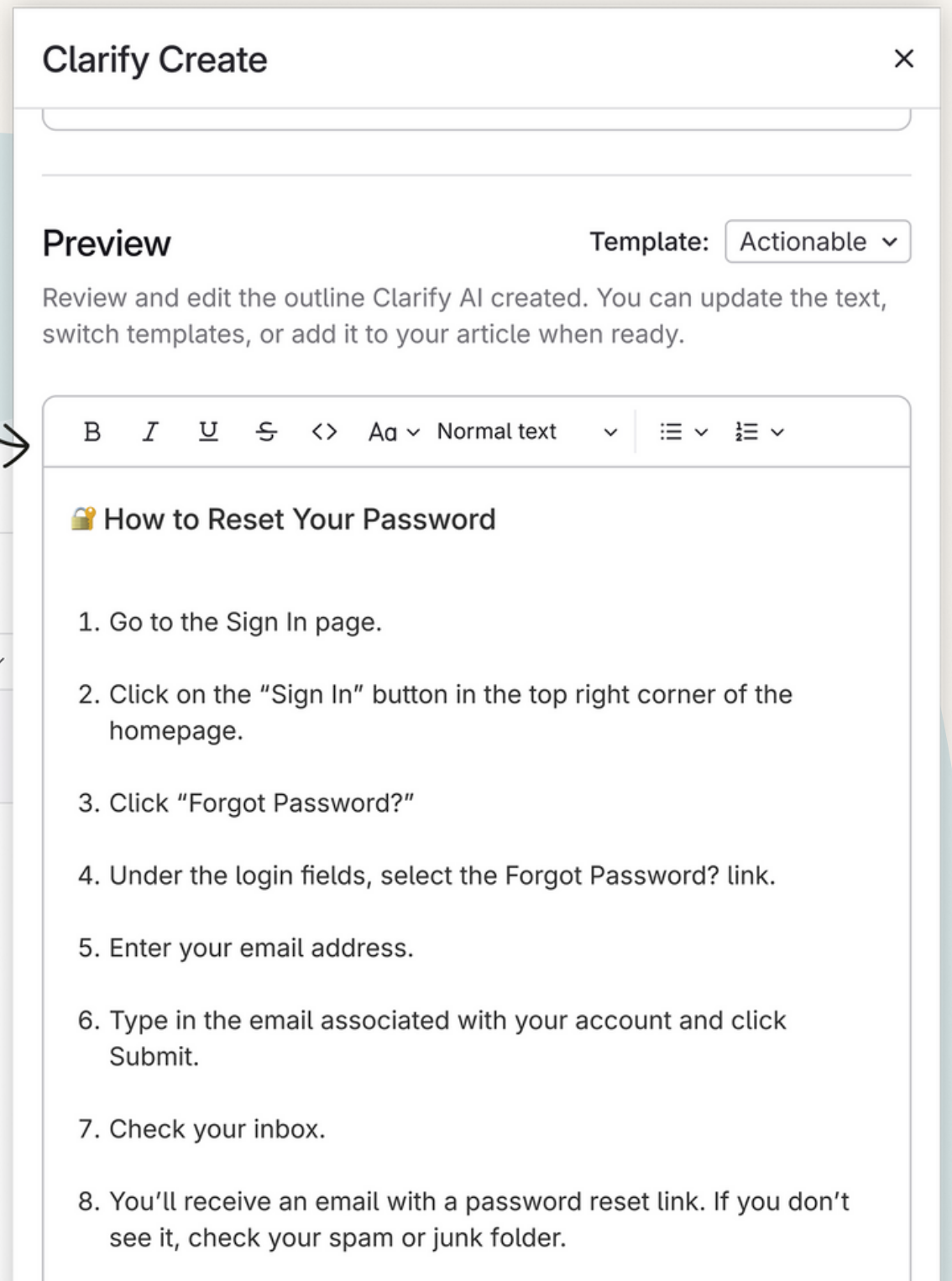
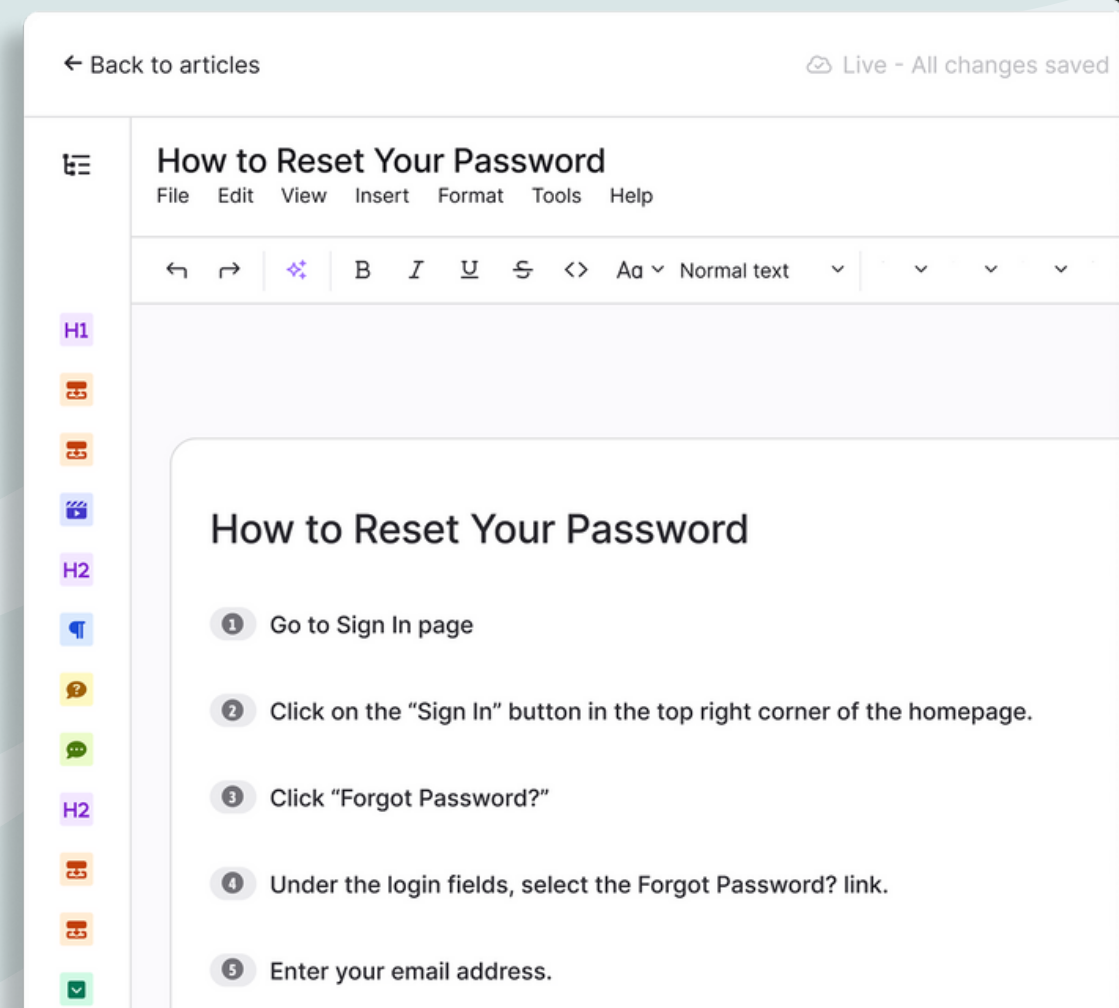
**AI-Assisted
Knowledge Capture**

**Articles, Checklist,
and Decision Trees**

**Change Notifications
& User Feedback**

**Micro-Courses
+ Learning Paths**

Pushed into Workflow



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What to do when you find out a member is deceased

1. What kind of account is this? 

YES

2. Who is it joint with?

Spouse

Other 

Complete the following

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 Notice

Miranda Jacobs

Jul 1

Mobile Billing Article

We've made updates to our mobile billing digital guides. Please review and acknowledge changes.

Read & Acknowledge



 Notice

Miranda Jacobs

Jul 1

New Fraud Detection Checklist Available

Joe has created a new checklist for us to use to detect fraud. Please review and acknowledge.

Read & Acknowledge



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The screenshot displays the 'screensteps' Knowledge Hub interface. On the left, a sidebar lists course topics under the heading 'Online & Mobile Banking', with '0 of 16 steps Completed' indicated. The topics include: 'Welcome to the Course', 'My Accounts', 'Bill Pay', 'Move Money', 'Alerts & Notifications', 'Statements & Documents', 'Mobile Check Deposit', 'Stop Payment', 'Time for Role Play', 'View Account Balance Scenario', and 'Bill Pay Scenario'. The 'Welcome to the Course' item is selected. The main content area shows a video player titled 'Welcome to the Course' with a play button and a duration of 1.00. The video content displays 'Online & Mobile Banking Credit Union Training' with the 'ScreenSteps' logo at the bottom left.

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← Back to Articles



[Credit Union](#) / [Account Management](#) / Account Inquiries

How to send a Statement to a member

- 1 Does the customer have online banking?
| YES
- 2 Does customer want you to send statements?
| YES - they want you to do it
- 3 How does customer want statements
| Hard Copy

Climbing the Mountain

How Do You Get There?

- Rewrite All Your Documentation
- Type New Content From Scratch
- Spend 6-12 Months Training AI



Key Insight

In order to have answers at employees fingertips that they can trust, you MUST have a system in place for:

- Capturing Knowledge
- Converting it to a format that's designed for performance
- Delivering it to your employee's without friction
- Maintaining the validity of that knowledge over time

How Do You Get There?

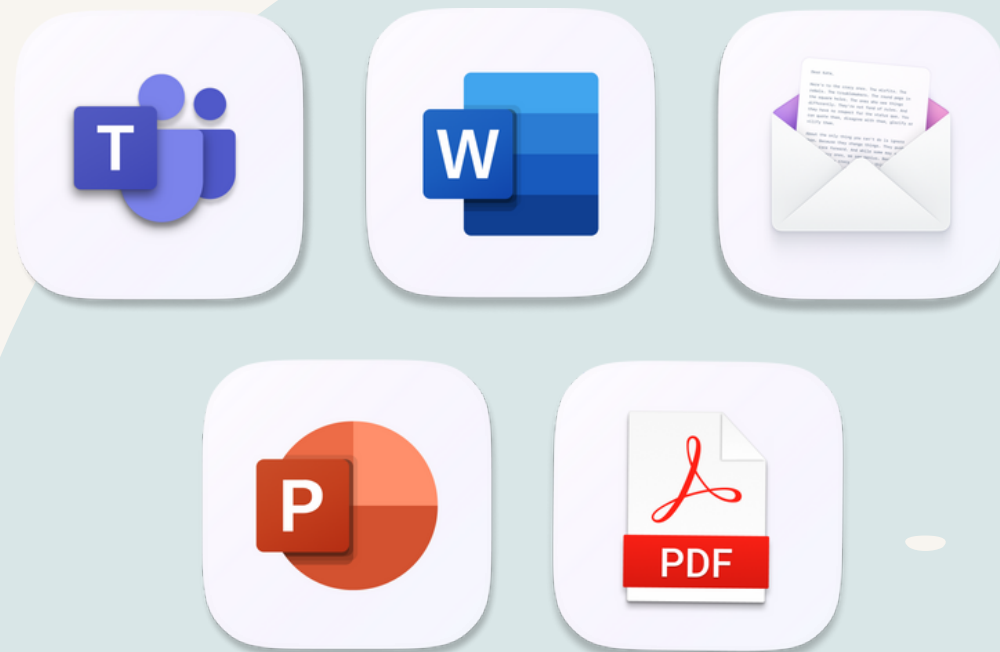
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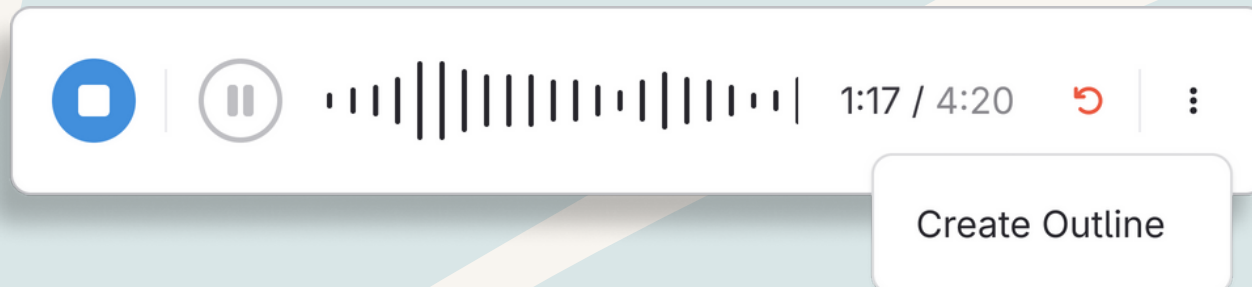
How We Help You Get There

Convert Information Into Recipes

One work day



One work week



Credit Union / Account Management / Opening Accounts

Opening a New Account

Updated on Aug 01, 2025

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

What we will show today

Capturing + Optimizing Knowledge

- Capturing Actionable Knowledge
- Capturing Foundational Knowledge
- Advanced Authoring Features

Empowering Performance

- ScreenSteps Sidekick
- Decision Trees
- Change Notifications
- Micro-Courses

