Presentation by :

Greg DeVore

How to Train Employees 50% Faster With Find & Follow

ScreenSteps

“It used to take us months of undivided one-on-one time to train new hires.

With ScreenSteps, new hires are up and running in just a day or two.”

Kaylee Schiffelbein
High Plains Farm Credit
Operations Manager

High Plains Farm Credit

"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

ScreenSteps has been a game changer for us!

The new employee we have here in our office has built knowledge and confidence much faster than others I've trained in the past. She's in a call queue that receives overflow from multiple call centers, so she handles a wide range of questions and issues that we honestly couldn't have prepared her for in training.

But you'd never know she's new, as members are asking questions, she's already pulling up the relevant articles in ScreenSteps.

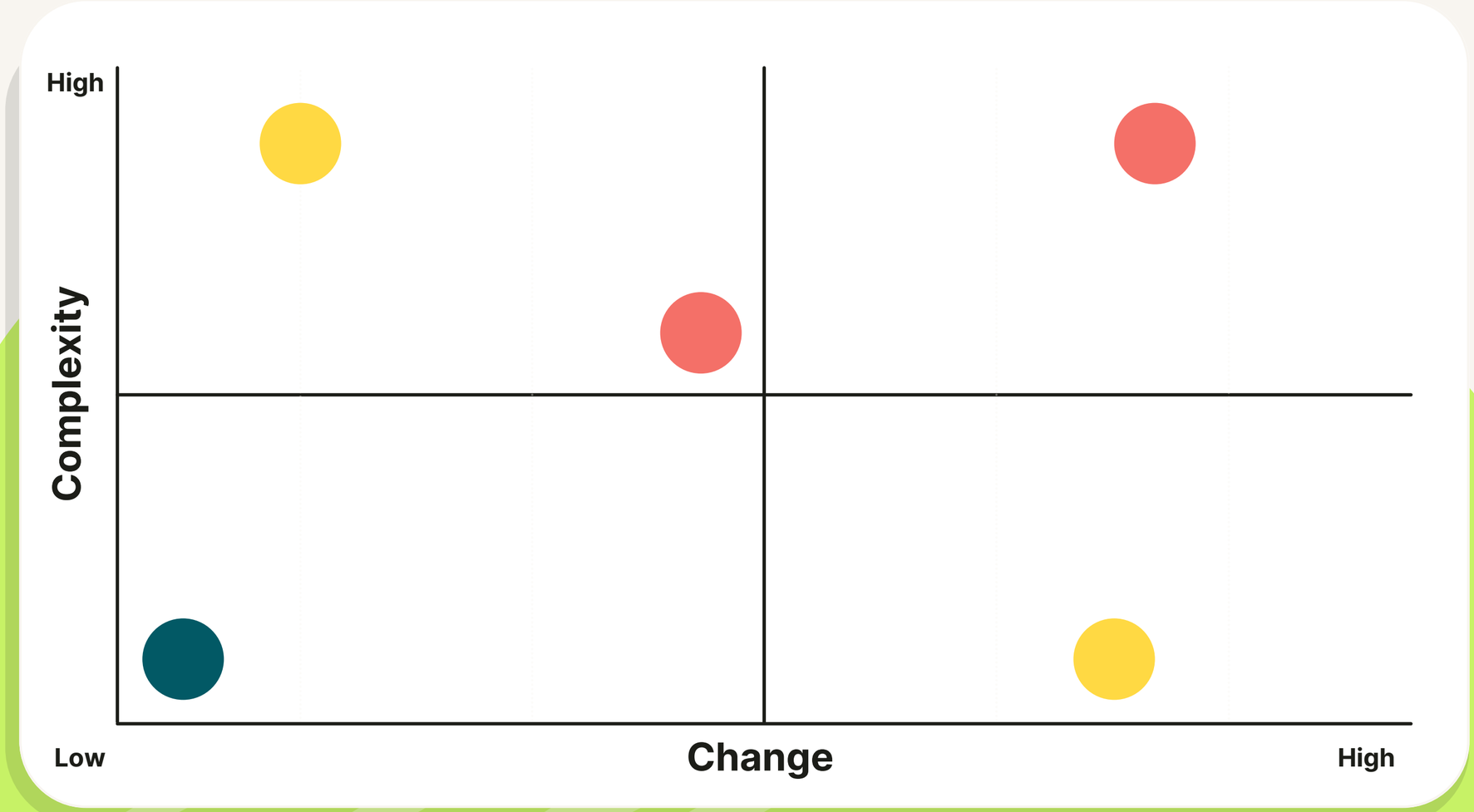
Kasey Hutcherson
CommunityWide Federal Credit Union
Member Service Manager

Your Training

Their Brain

The Problem

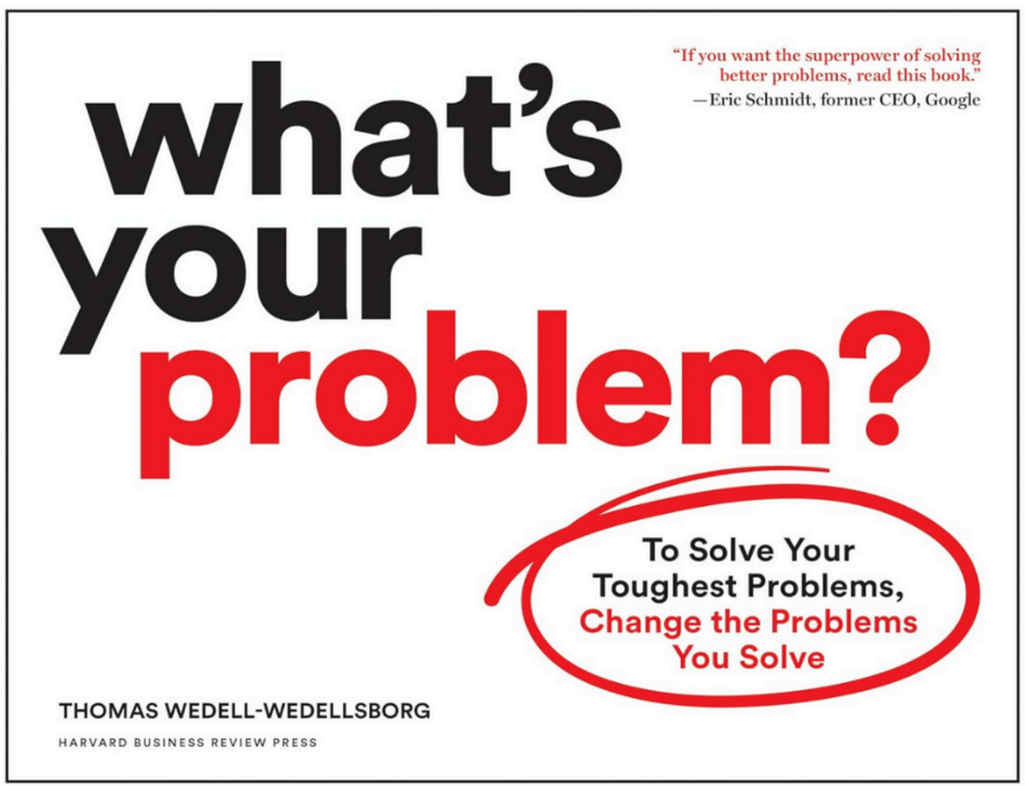
Why “Better Training” Can Never Work



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”

Learn One Skill That Helps You Do 1,000 Things

Digital Guides

Findable

Digital Guides

Findable

Followable

Digital Guides

Findable

Followable

Scannable

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”**

Throwing Away Limiting Beliefs

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Employees who **memorize** procedures perform better	

Throwing Away Limiting Beliefs

Limiting Beliefs	Find & Follow Insight
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Throwing Away Limiting Beliefs

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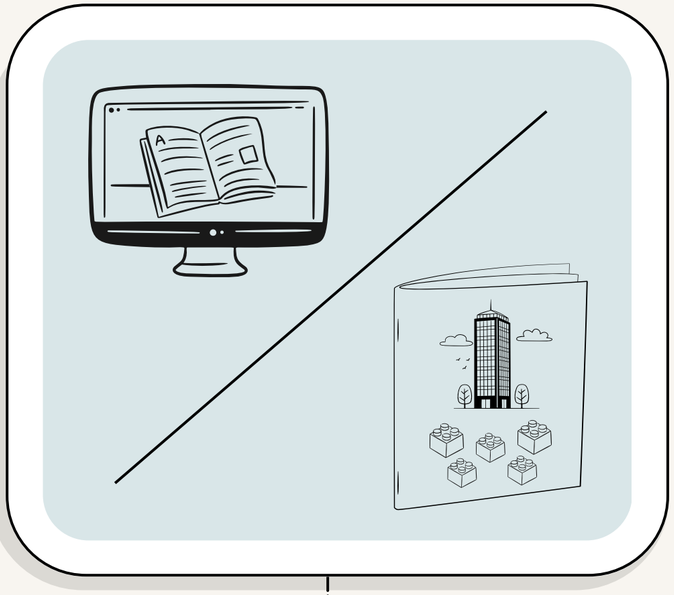
~~Employees who **memorize** procedures perform better~~	Employees perform better by **memorizing less** procedural information
~~Trainers who are subject matter experts and are **helpful** create better employees~~	Trainers who are **too helpful** create *dependent* employees

Learn One Skill That Helps You Do 1,000 Things

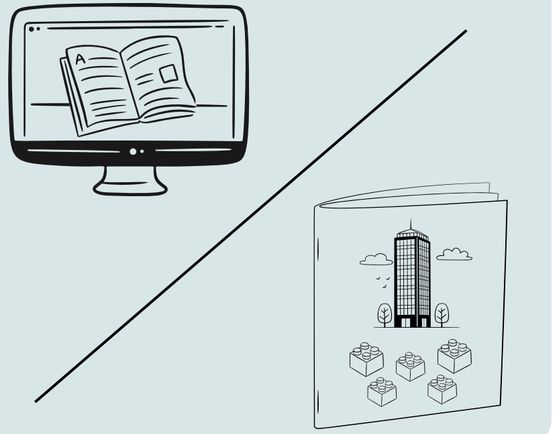
Find & Follow



1

Separate Foundational and Actionable Knowledge

Find & Follow



1

Separate Foundational and Actionable Knowledge

Findable

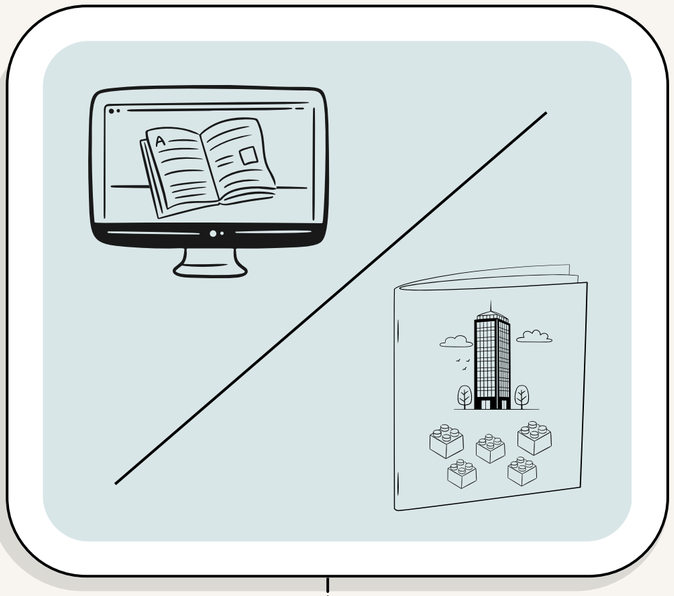
Followable

Scannable

2

Optimize the content—make it findable, followable, and scannable

Use AI to Create the Find & Follow Program



1

Separate Foundational and Actionable Knowledge

FINDABLE

FOLLOWABLE

SCANNABLE

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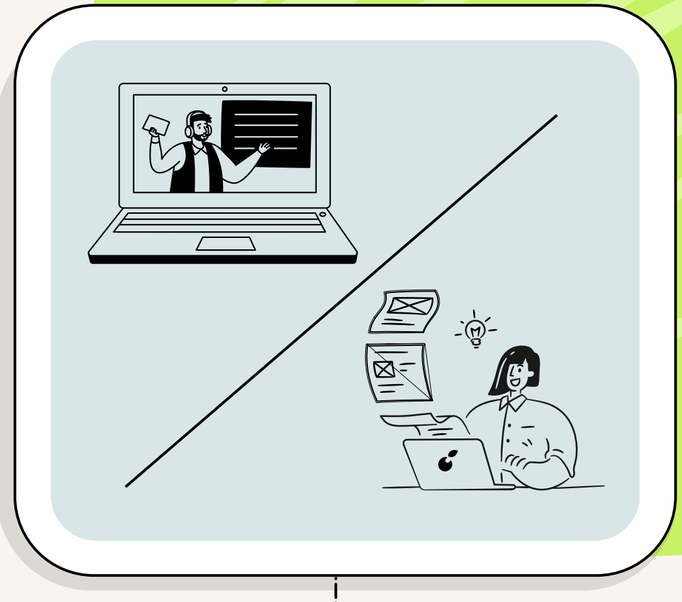
Optimize the content—make it findable, followable, and scannable



3

Teach Foundational, Practice Finding & Following

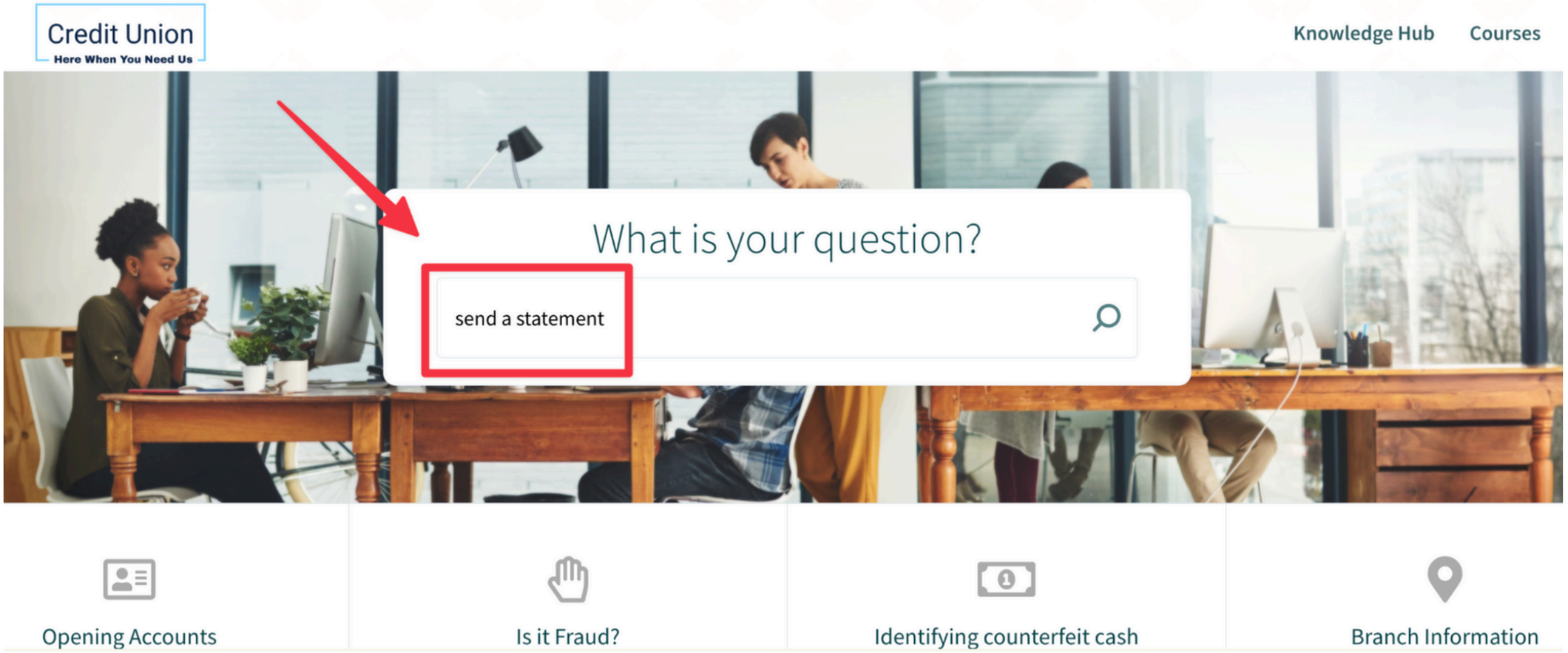
Digital Guides

Findable

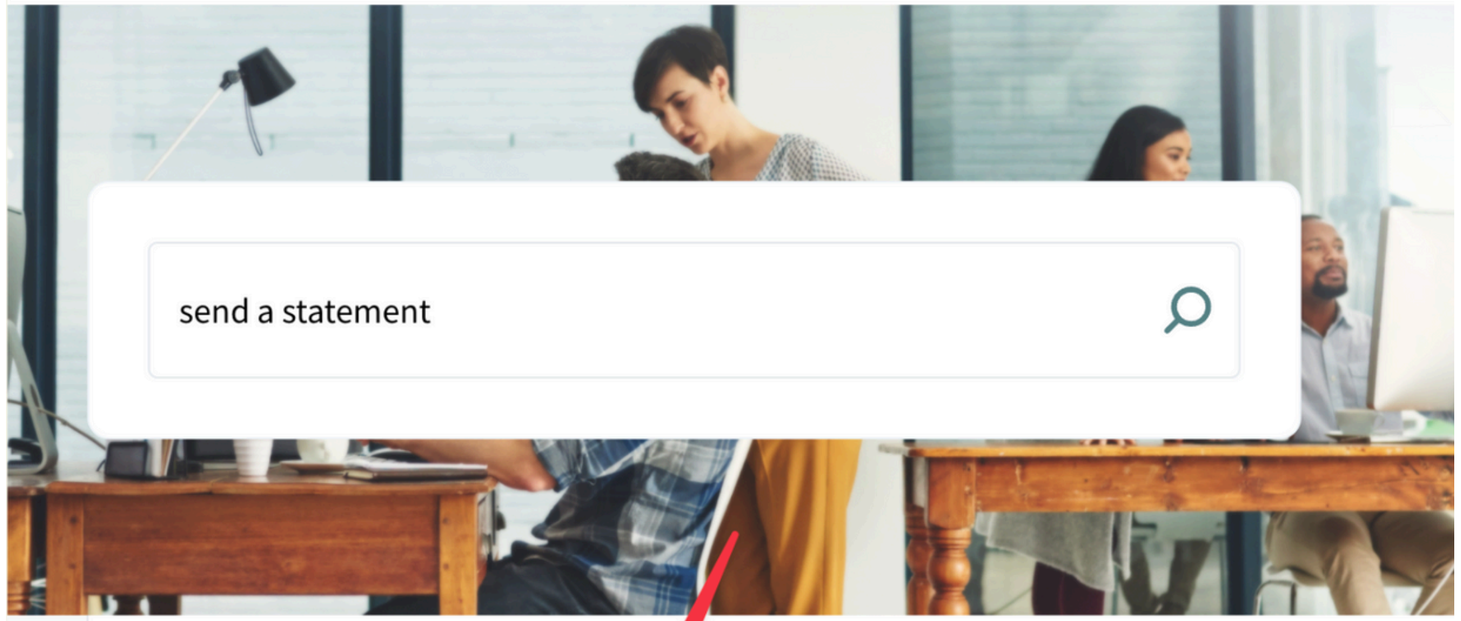
Followable

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



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Search Results (1)

How to send a Statement to a member

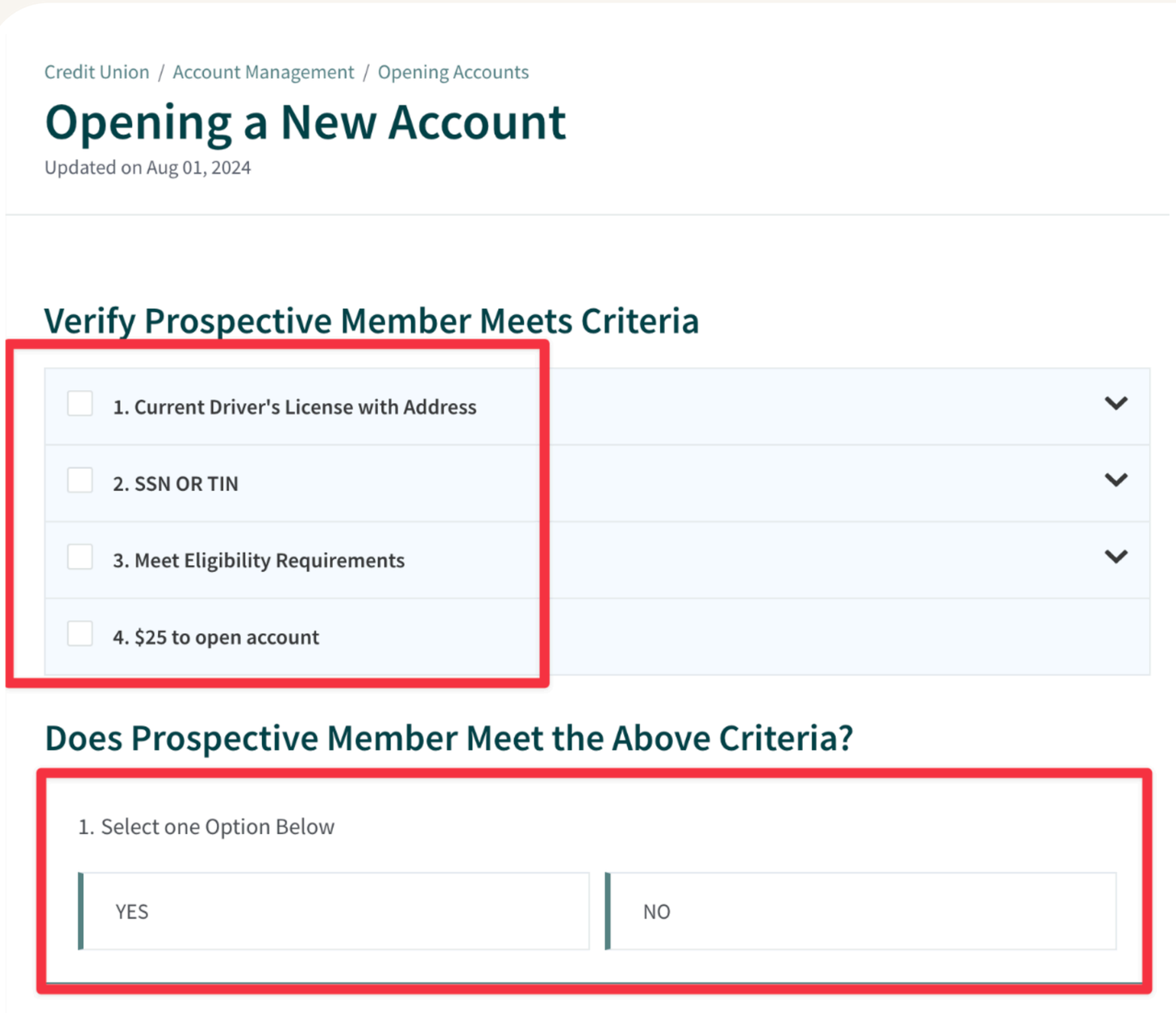
Updated on Jan 12, 2024

Does customer want you to send statements ?

Knowledge Hub / Account Management / Account Inquiries

Workflow

Decision Trees and Checklists for Complex Procedures



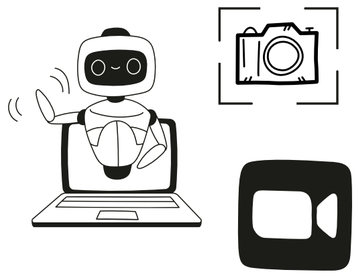
Your Homework

- Are mixing Foundational and Actionable knowledge?
- Are your guides findable, followable, and scannable?
- Are you encouraging memorization or Find & Follow?

Questions?

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

"This is the **best thing I've invested in for our credit union for the longest time**.

We can't keep relying on ‘Go-Ask-Susan’ for processes.

We needed a way to capture and share processes that employees can find, follow, and trust.

Shushilya Mohammed
Advent Health Credit Union
Chief Operating Officer

Next steps

Find & Follow Resource Center

screensteps.com/resource-center

Get in touch!
greg@screensteps.com

Thank you for joining me!

(PROMISE UPHELD)