

Presentation by :  
**Greg DeVore**

# Knowledge Ops Platform Walkthrough

✦ ScreenSteps



“What would have probably taken me **a month** to do, I was able to get done **in about a day's worth of work.**”

Mandy Burton

Processing Department Manager

Heritage South Credit Union

“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



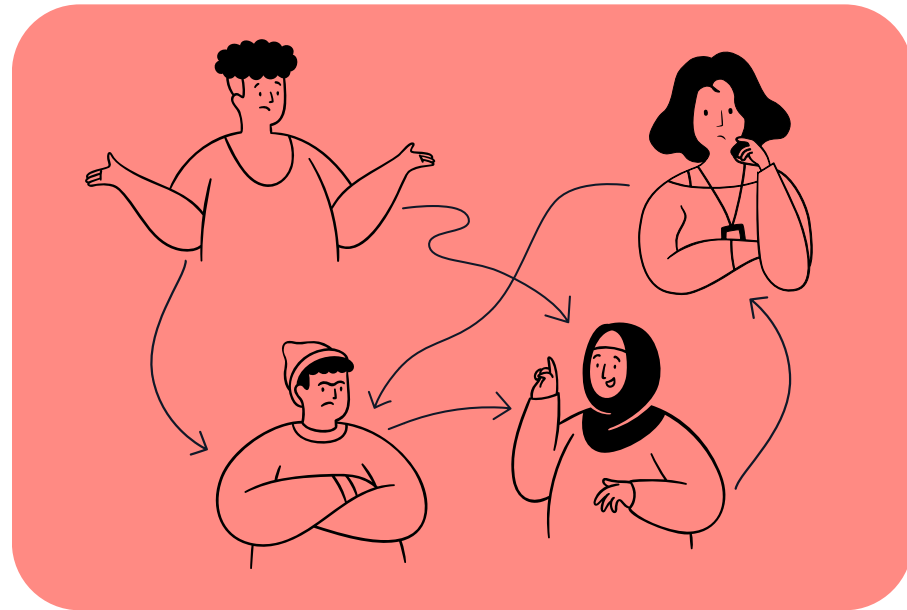
**Your Company is  
Running on  
Tribal Knowledge!**

# What Problems Does Tribal Knowledge Cause?

- Escalations
- Inconsistencies
- Change resistance



## Employee Independence



### Tribal

"Phone a friend"



### Document

"Search...Then phone a friend"



### Guided

"Find & Follow"

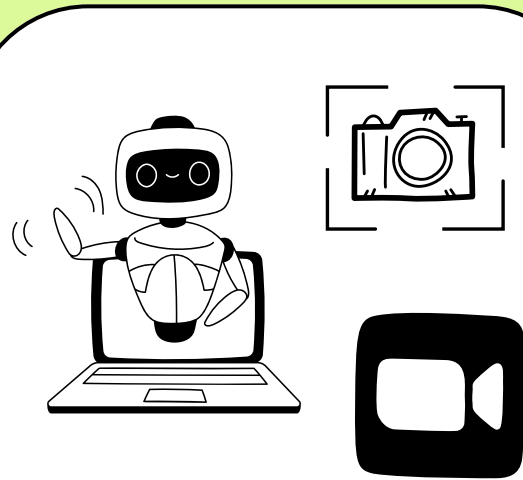
Cross-training

Onboarding

Change management

# Knowledge Ops Platform

Single Source of Truth for Operational Knowledge



**Integrated  
Knowledge  
Capture**

# AI Knowledge Capture

×

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

# 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

<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
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“I LOVE the AI tools for getting knowledge out of my head.

It's so easy to just talk through the process and have the ScreenSteps AI create the guide.

What would have probably taken me **a month** to do, I was able to get done **in about a day's worth of work.**”

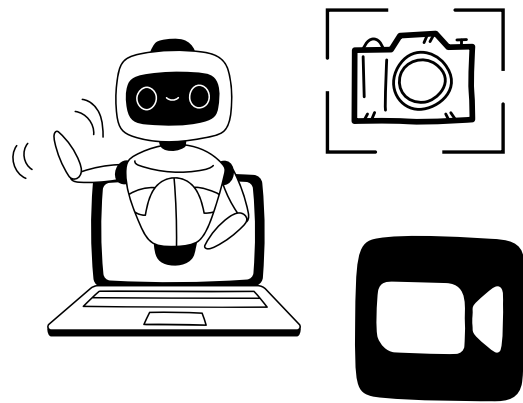
Mandy

Processing Department Manager

Heritage South Credit Union

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Single Source of Truth for Operational Knowledge



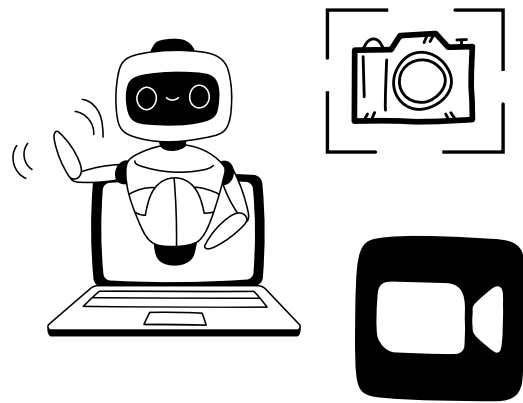
**Integrated  
Knowledge  
Capture**



**Micro-Courses**

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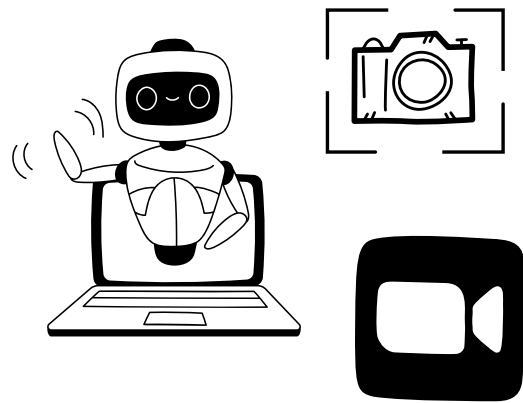
**Micro-Courses**



**Articles,  
Checklists, and  
Decision Trees**

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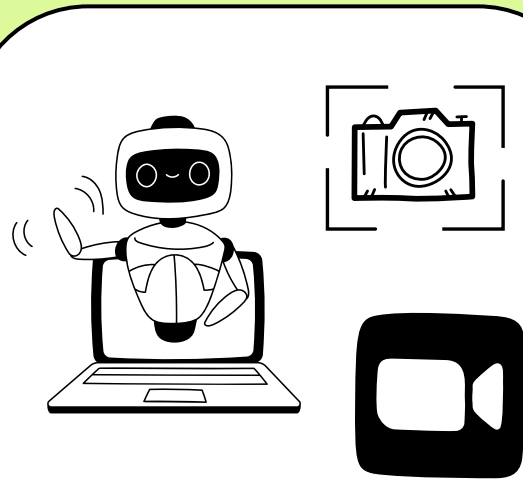
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**Change  
Notifications &  
User Feedback**

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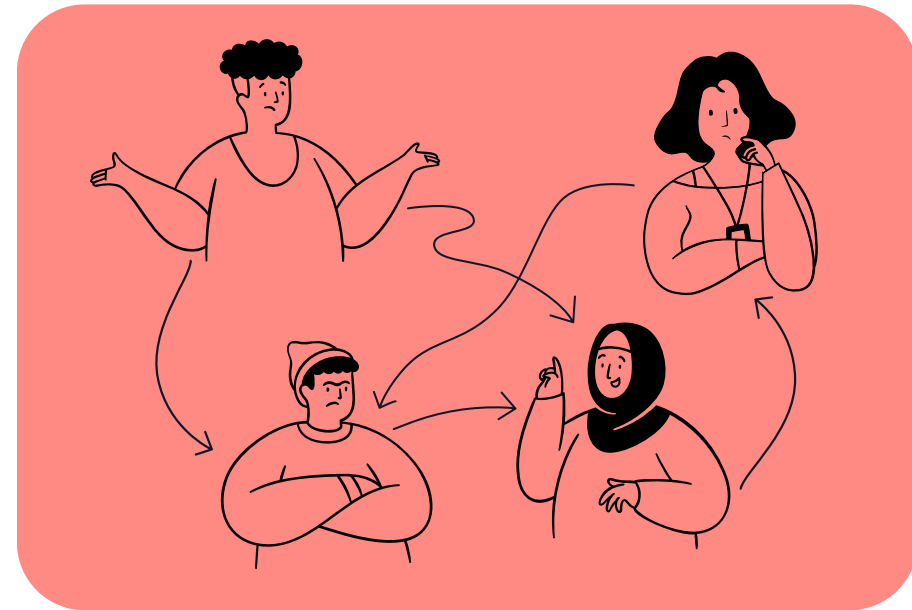


**Change  
Notifications &  
User Feedback**



**Pushed Into  
Workflow**

## Employee Independence



### Tribal

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# Questions?