Operational Knowledge

Discover the ins and outs of operational knowledge transfer — the key to a better customer and employee experience.

SCREENSTEPS

DEFINING OPERATIONAL KNOWLEDGE

As opposed to industry, regulatory, or policy knowledge, **operational knowledge** is the company-specific information employees need to perform tasks, answer questions, and troubleshoot problems. How does it compare to different types of knowledge? Compare three knowledge types below.

Regulatory Knowledge: The universal rules and regulations for an industry. For example, the regulations at every credit union or call center would be the same.
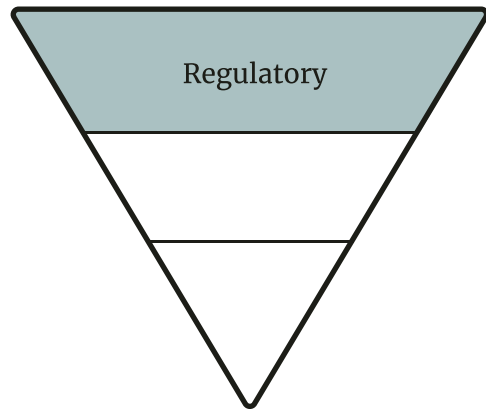
Regulatory

General Policy & Process: This is the accepted practices that dictates how your organization applies the regulatory rules to your organization.

Regulatory

General Policy & Process
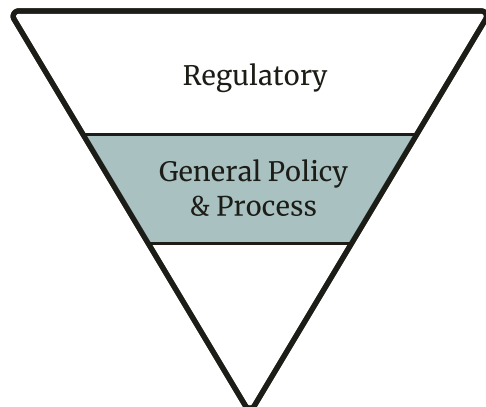
Operational Knowledge: The specific, step-by-step and click-by-click instructions for how to handle procedures in your organization.

Regulatory

General Policy & Process

Operational Knowledge
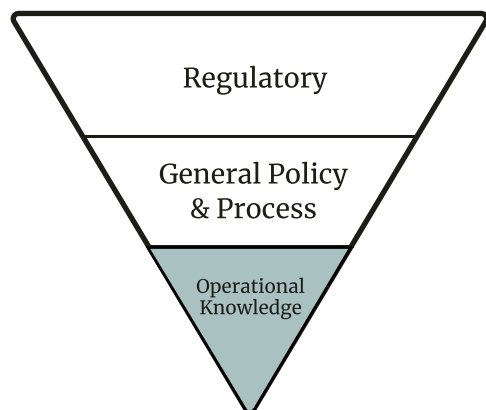
CHALLENGES & IMPACT OF OPERATIONAL KNOWLEDGE

Operational knowledge requires more from employees than memorizing facts. It requires your employees to take the information from the general policies and processes and translate them into click-by-click instructions. When employees don't have easy access to operational knowledge, training and operations can feel chaotic.

What is different about operational knowledge?

It is difficult to keep operational knowledge in your head. Why? Because of the nature of the information. Operational knowledge is:

COMPLEX	DETAILED	UNIQUE	CONSTANTLY CHANGING
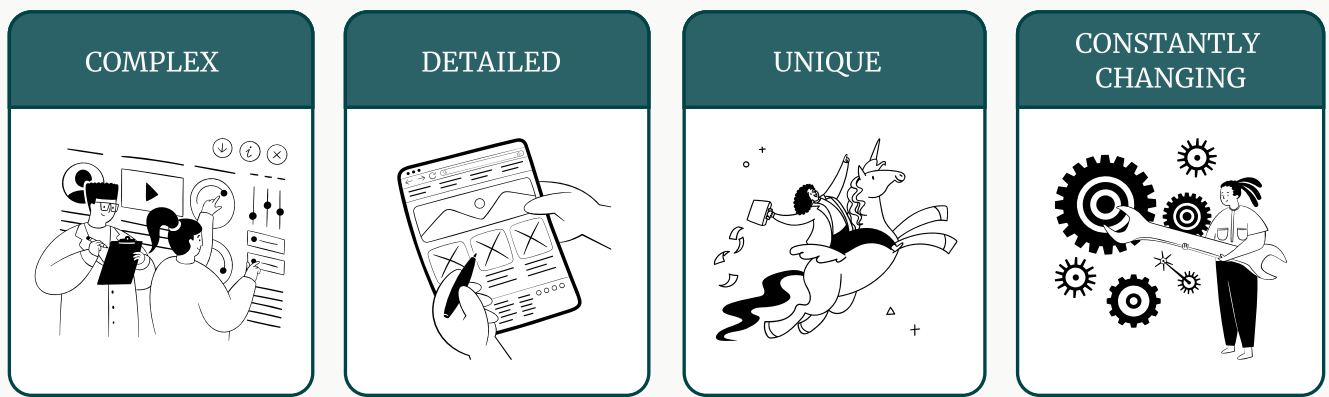
What does operational knowledge impact?

When you don't have operational knowledge captured, it makes many business projects more challenging. Some of those areas include:

ONBOARDING

AI

CONSISTENCY

SUPERVISOR BANDWIDTH

CHANGE MANAGEMENT
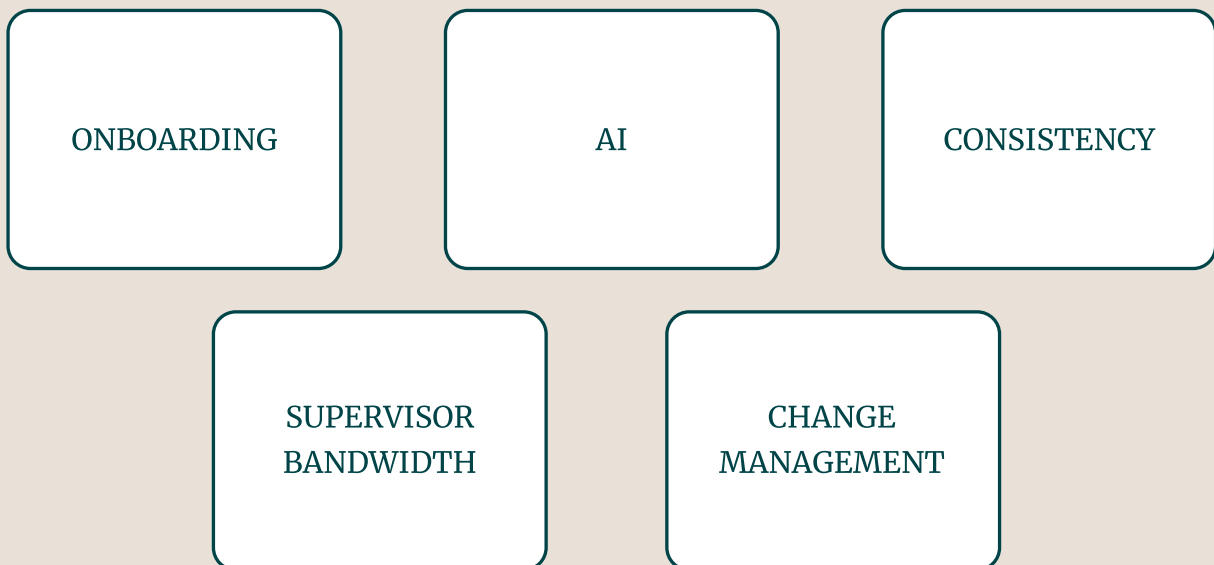
HOW TO THINK ABOUT OPERATIONAL KNOWLEDGE

Every task and project in your organization, has a procedure. That requires an input *(customer question or request)*, a process *(tools and steps you use to handle the input)*, and an output *(the result the customer wants)*.

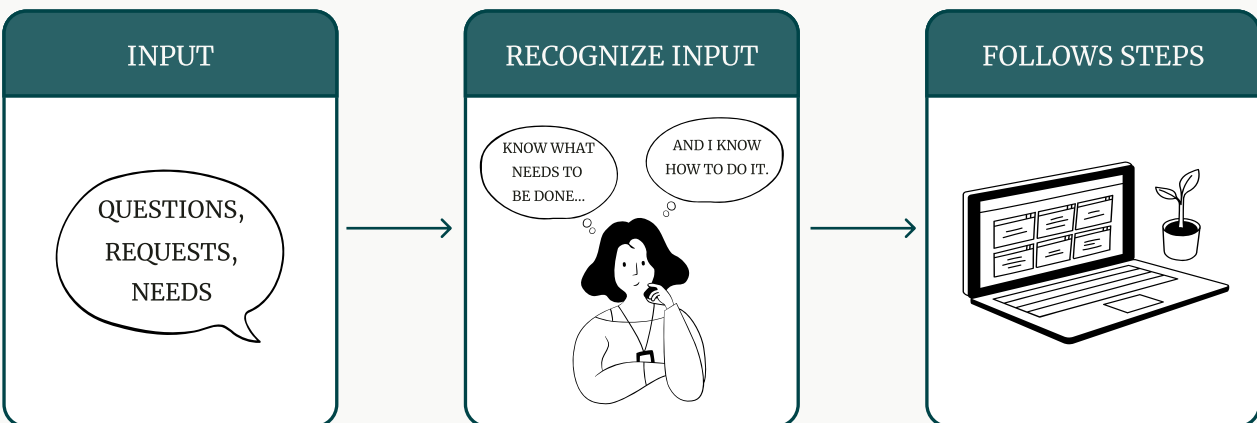| INPUT | → | PROCESS
TOOLS + STEPS | → | OUTPUT |

TYPICAL BUSINESS SCENARIO

The scenario below is how most businesses handle operational knowledge. Employees are dependent on supervisors and experienced co-workers.

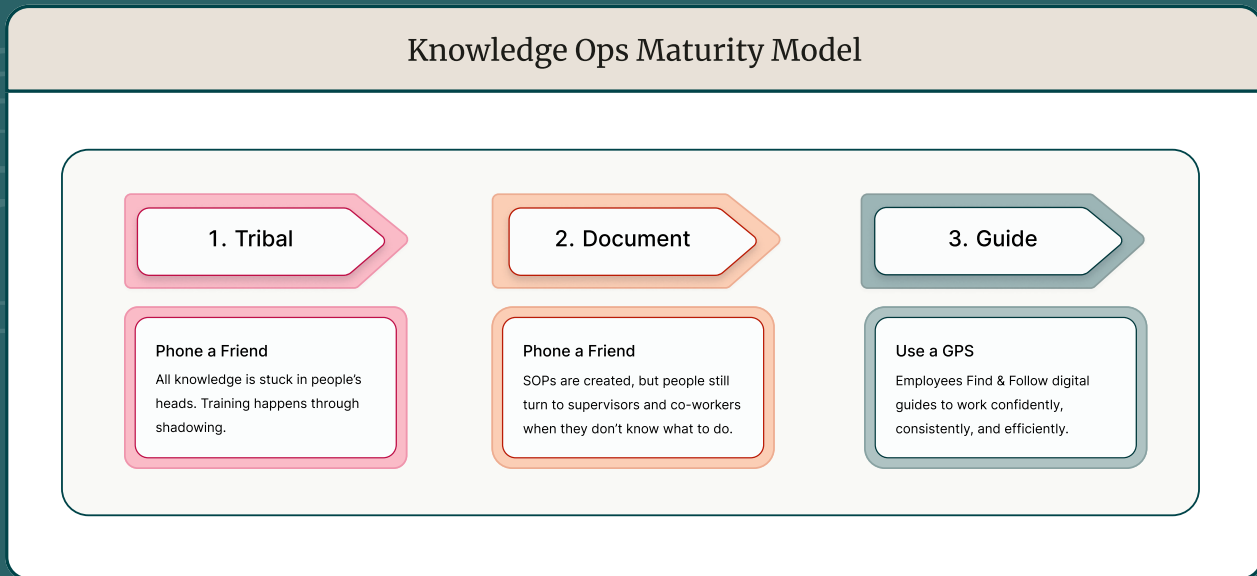| INPUT	DOESN'T RECOGNIZE INPUT OR STEPS	ASK FOR HELP

CAN YOU...?
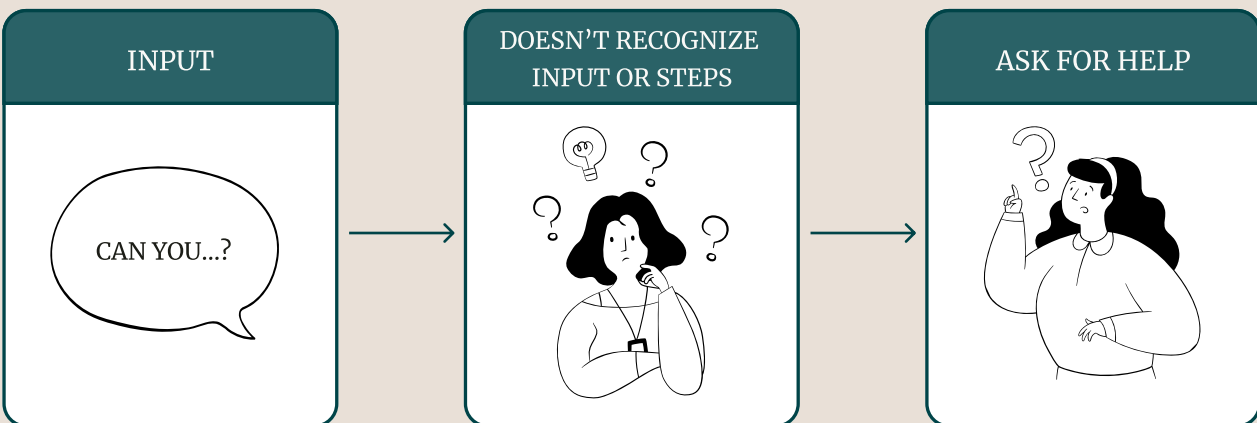
IDEAL BUSINESS SCENARIO

An organization with high-functioning knowledge operations looks more like the below scenario. Every employee knows how to access answers and handle requests independently.

INPUT	RECOGNIZE INPUT	FOLLOWS STEPS

QUESTIONS, REQUESTS, NEEDS

KNOW WHAT NEEDS TO BE DONE...

AND I KNOW HOW TO DO IT.

TRANSFERRING OPERATIONAL KNOWLEDGE

Knowledge Ops Maturity Model

1. Tribal	2. Document	3. Guide
Phone a Friend	**Phone a Friend**	**Use a GPS**
All knowledge is stuck in people's heads. Training happens through shadowing.	SOPs are created, but people still turn to supervisors and co-workers when they don't know what to do.	Employees Find & Follow digital guides to work confidently, consistently, and efficiently.

THE KNOWLEDGE OPS MATURITY MODEL

The Knowledge Ops Maturity Model is a resource to help organizations measure how efficiently they transfer operational knowledge.

It examines the strategy, tools, behaviors, and outcomes surrounding your company's training approach and employee support resources.

The three phases on the Model starts in the **Tribal Stage** where organizations are ineffectively transferring operational knowledge. Knowledge is stuck in experts' heads, which means employees seek out the experts for support.

Moving into the **Document Stage**, organizations begin capturing operational knowledge. However, it is difficult to access and guides are too confusing to follow, so behavior inevitably replicates the Tribal Stage.
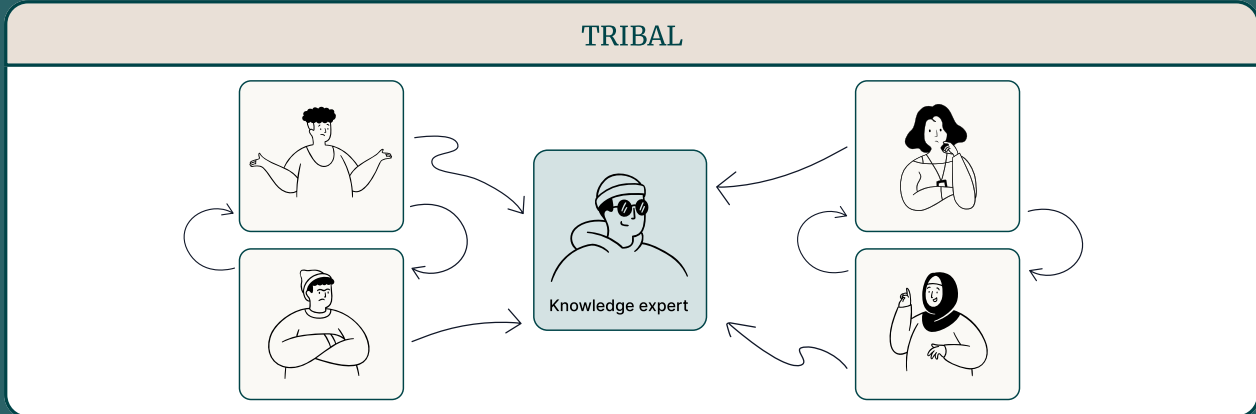
At the **Guide Stage**, employees can work confidently and independently. Onboarding new hires, cross-training employees, and change management projects are easier.

Where does your organization fit on the Knowledge Ops Maturity Model?
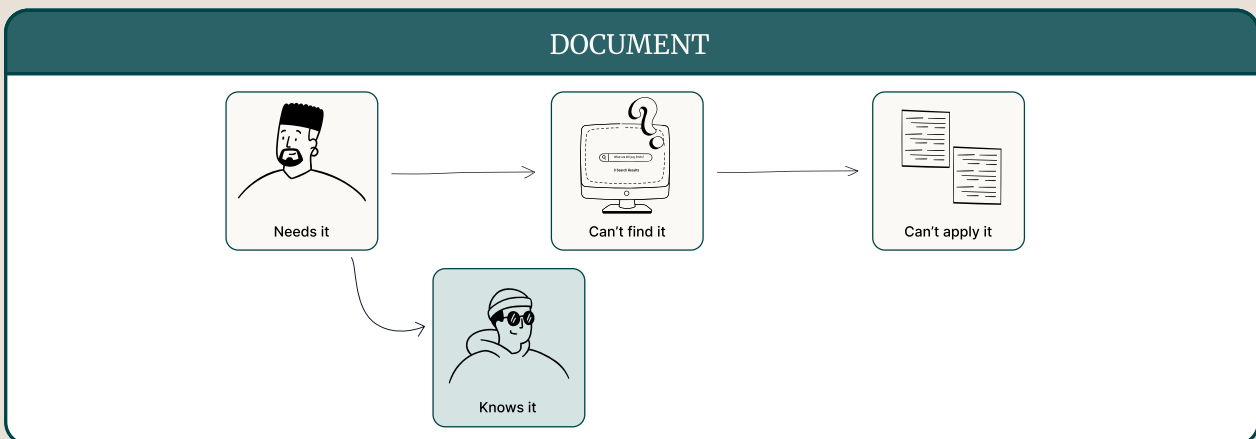
WHAT THE DIFFERENT STAGES LOOK AND FEEL LIKE

TRIBAL STAGE

All knowledge is stuck in people's heads. Training and support happens through shadowing.
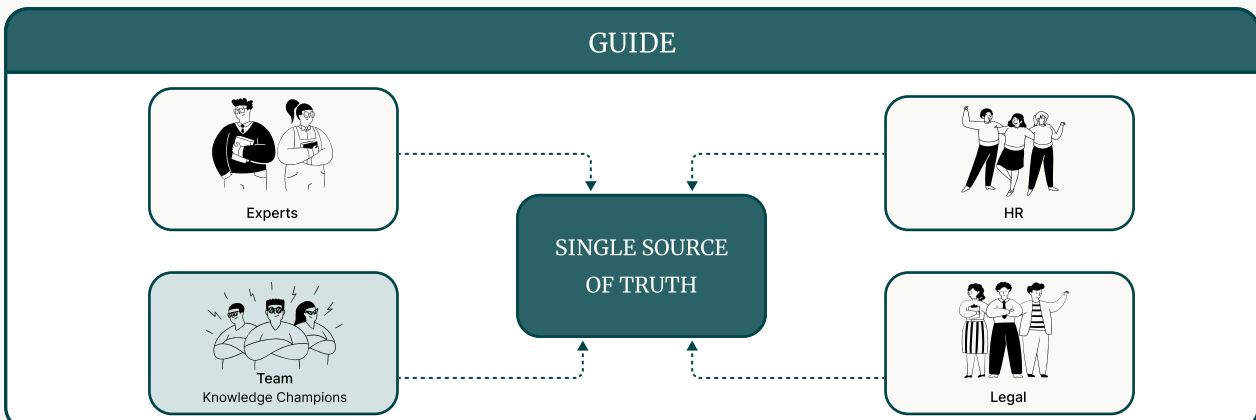
TRIBAL

Knowledge expert

DOCUMENT STAGE

You've documented SOPs, but people still turn to supervisors & co-workers when they're stuck.

DOCUMENT

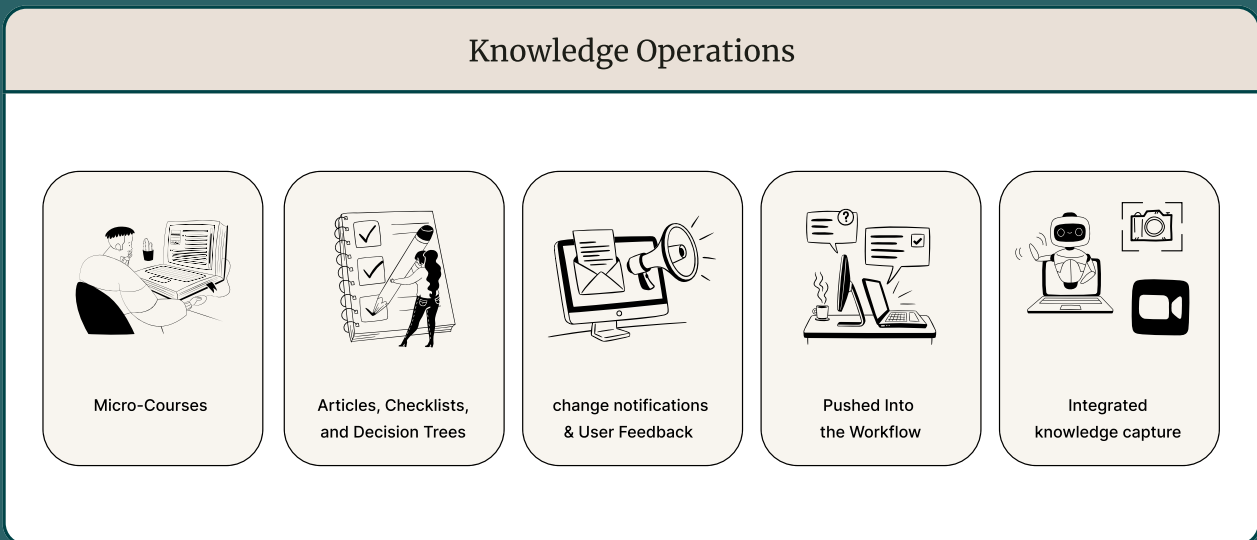Needs it → Can't find it → Can't apply it

Knows it

GUIDE STAGE

Employees find and follow digital guides to work confidently, consistently, and efficiently.

GUIDE

Experts

Team
Knowledge Champions

SINGLE SOURCE
OF TRUTH

HR

Legal

THE SOLUTION: A KNOWLEDGE OPS PLATFORM

Knowledge Operations

Micro-Courses

Articles, Checklists, and Decision Trees

change notifications & User Feedback

Pushed Into the Workflow

Integrated knowledge capture

SCREENSTEPS – THE WORLD'S FIRST KNOWLEDGE OPS PLATFORM

ScreenSteps is the world's first Knowledge Operations Platform, an AI-powered software designed to help teams capture, transfer, and maintain operational knowledge.

The Knowledge Ops Platform — paired with the Find & Follow Framework (methodology) and Knowledge Operations Team — helps businesses escape tribal knowledge and deliver findable, followable, and scannable knowledge resources. This combination empowers employees to handle any process, no matter the complexity or pace of change.

The result is independent and confident employees, fewer mistakes, increased supervisor bandwidth, smoother change management, and increased consistency across the organization.

BENEFITS OF A KNOWLEDGE OPS PLATFORM

👍

In-app access to guides that are followable and scannable

👍

Same cost no matter how many apps you support

👍

SMEs can update guides directly (no specialized team required)

👍

Updates take minutes

👍

Builds long-term understanding and critical thinking skills

> **"This platform has been a real game-changer in transforming the way we create and transfer knowledge. It's helped us grow employee expertise and create a remarkable member experience."**

ALASKA DELAIRE

INFORMATION TECHNOLOGY SUPPORT SPECIALIST, CONNECTFIRST CREDIT UNION

SCREENSTEPS

SCHEDULE A SCREENSTEPS DEMO

Reduce supervisor burnout, improve customer consistency, and empower confident employees with a Knowledge Ops Platform.

Make Every Employee an Expert

Schedule a Demo