

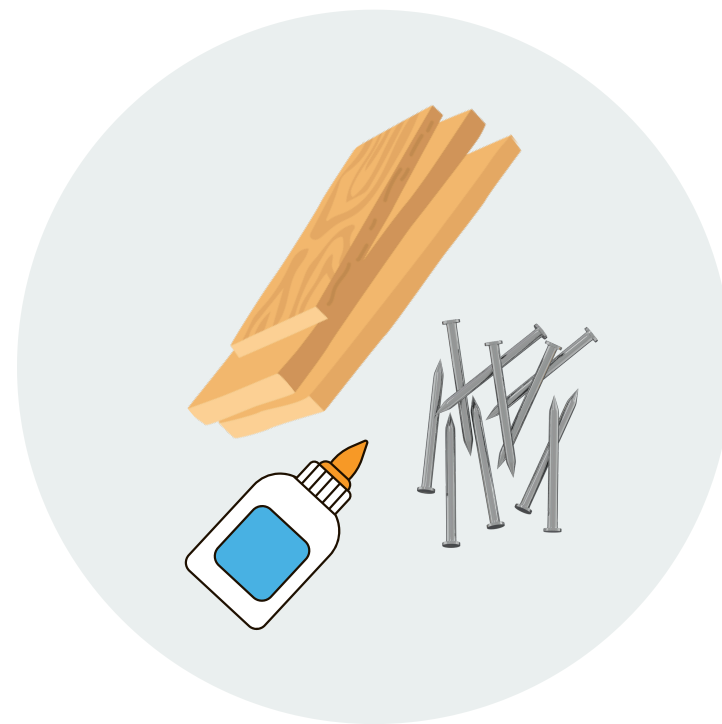
Helping Others Do Amazing Things

Jonathan DeVore

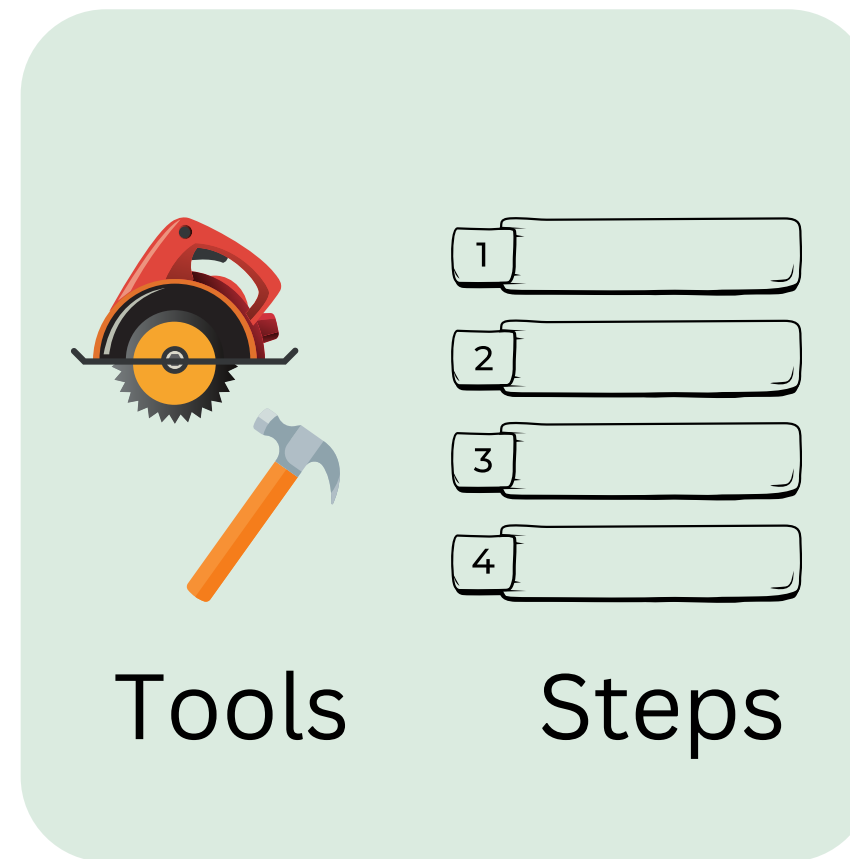
**Can I Have a
Volunteer?**

Business Operations

Chair Manufacturer



Input



Tools

Steps

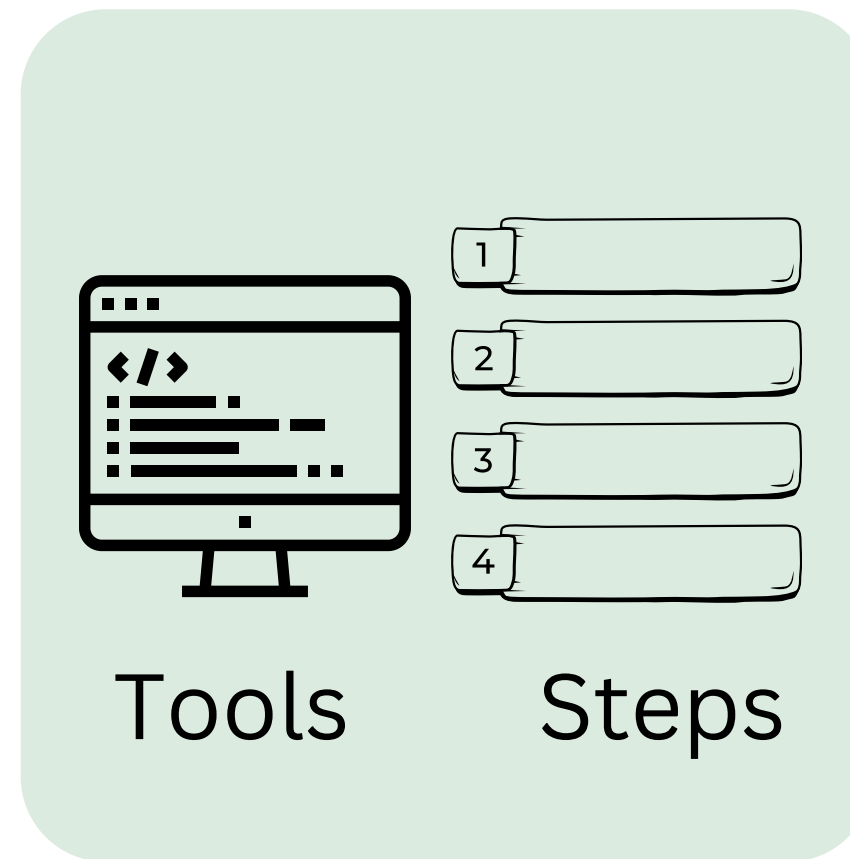
Process



Output

Business Operations

App Developer

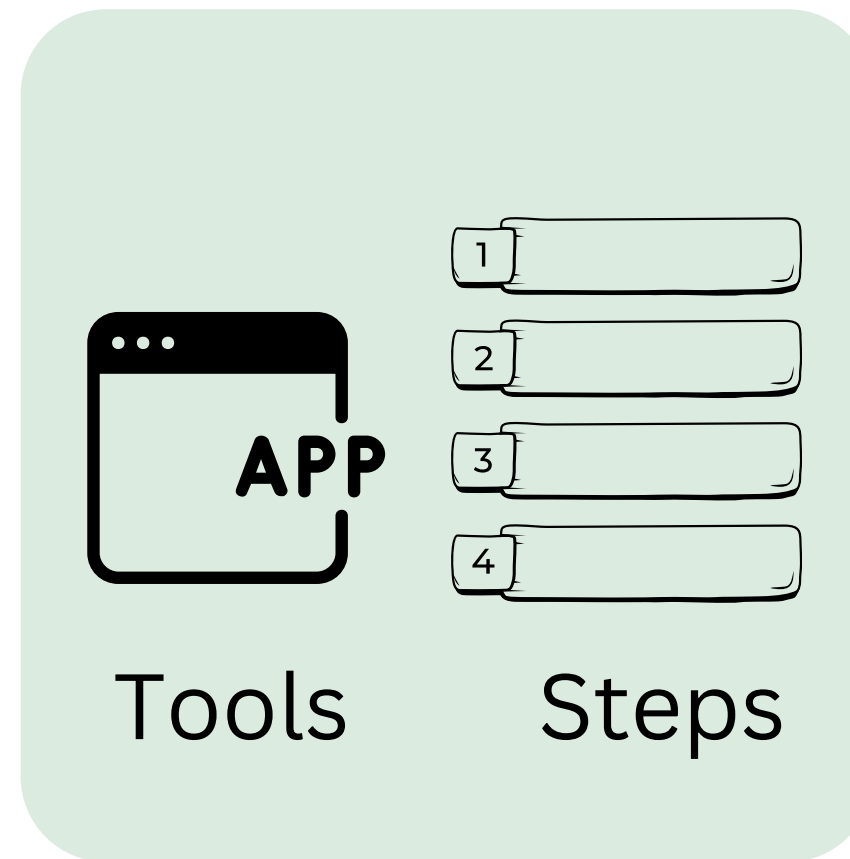


Business Operations

Frontline Employees



Input



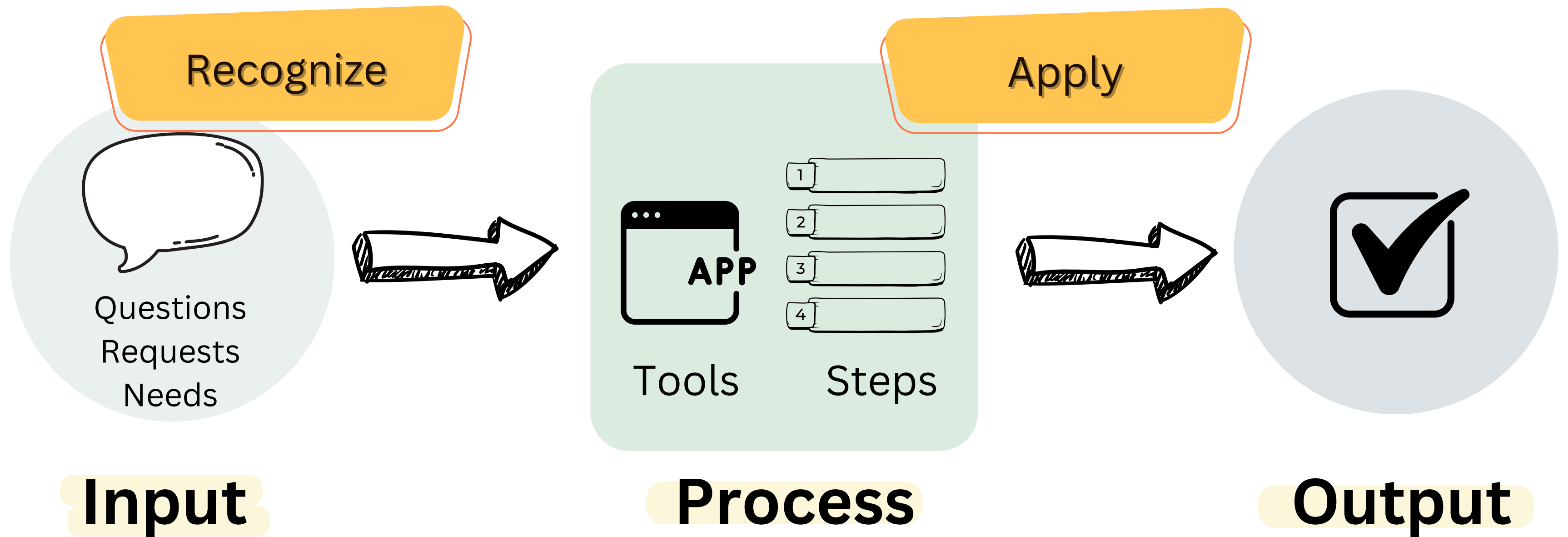
Process



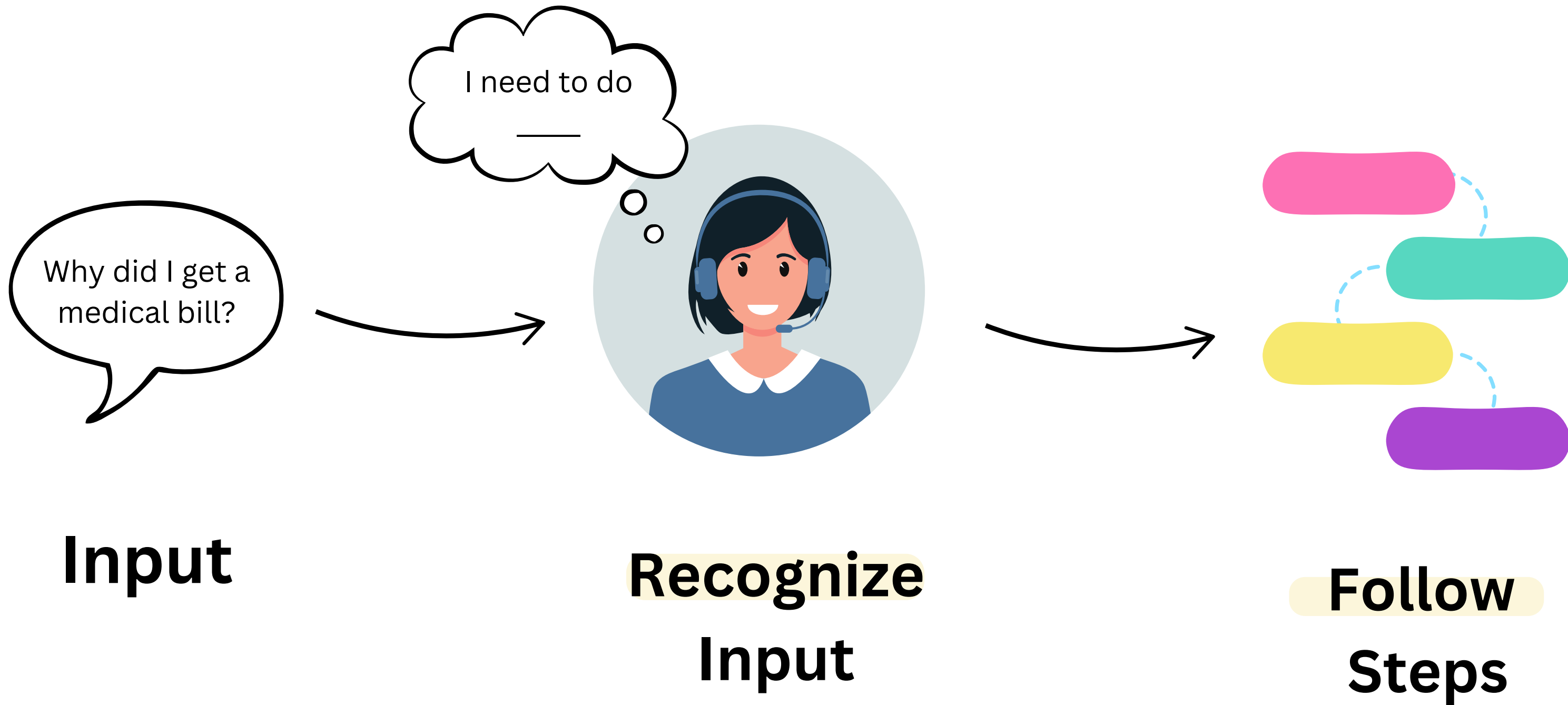
Output

Business Operations

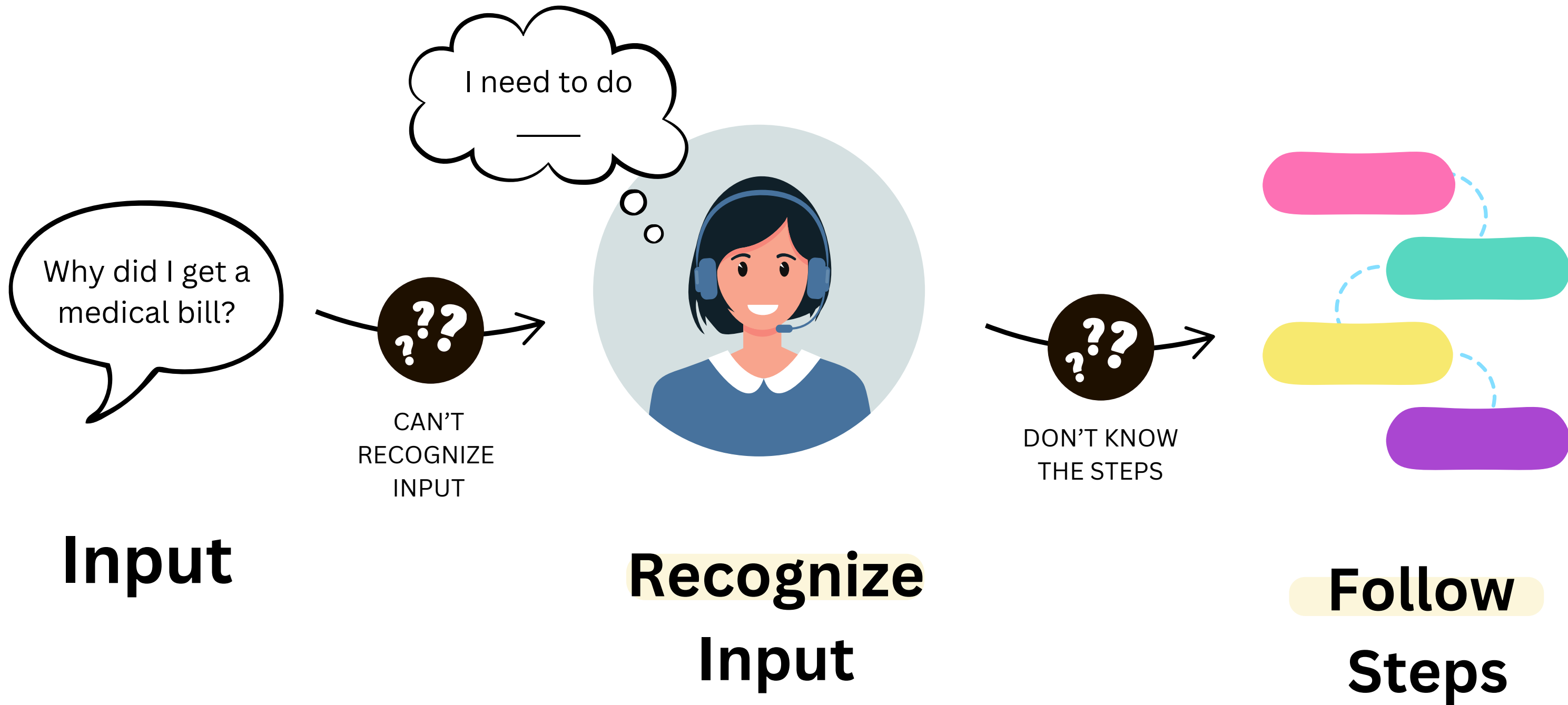
Frontline Employees



What Employees Need to Do

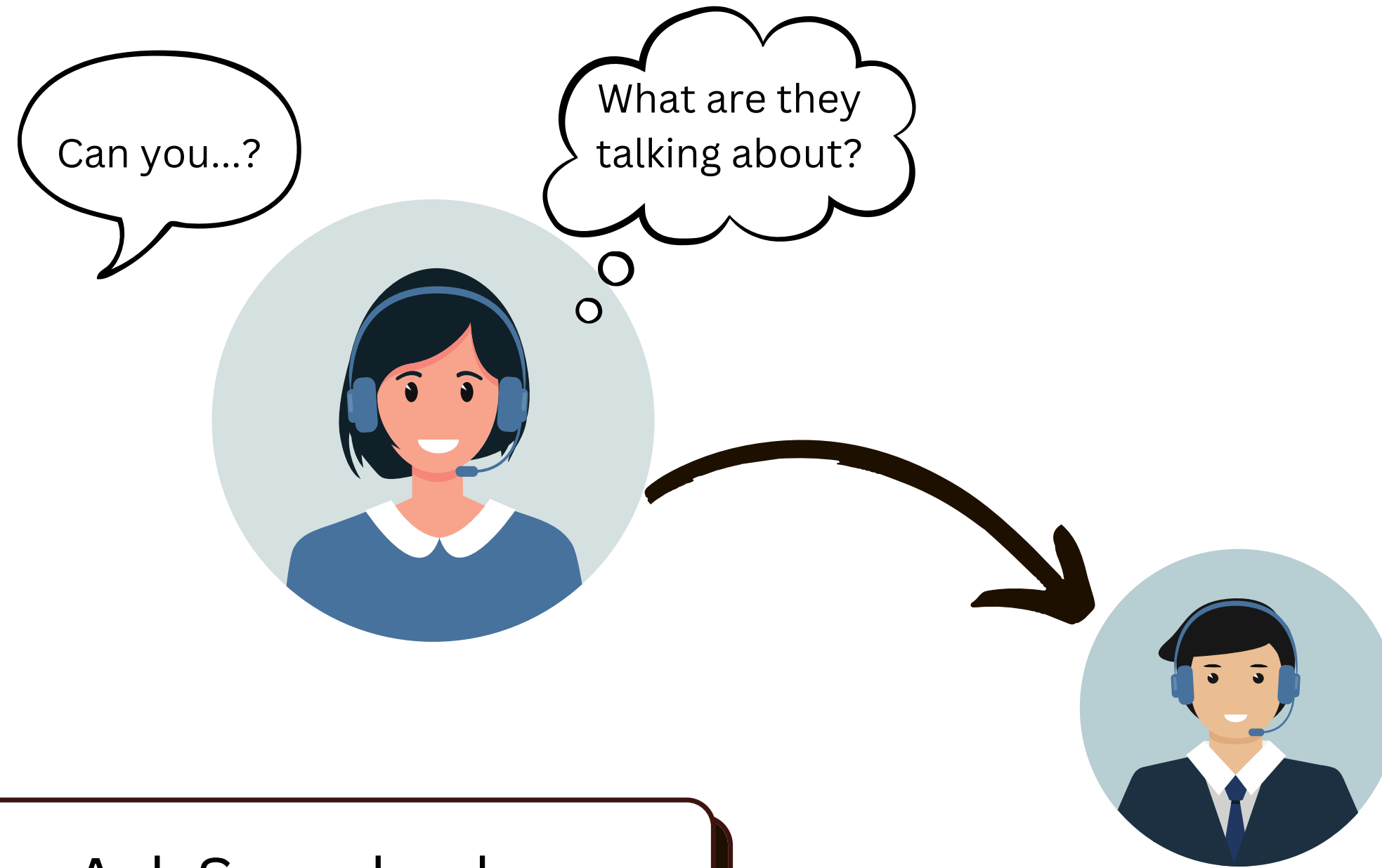


Where Employees Struggle



**What Do They
Do in Those
Situations?**

Don't Recognize Inputs



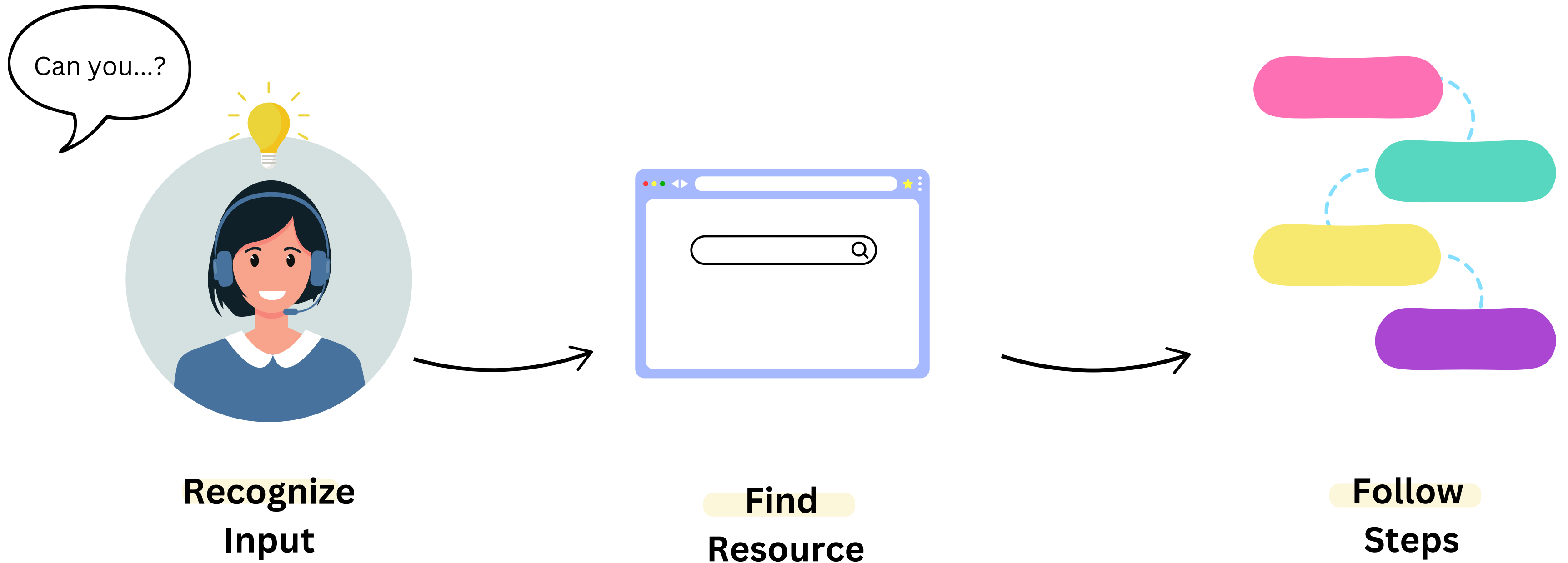
Ask Somebody

Don't Know Steps



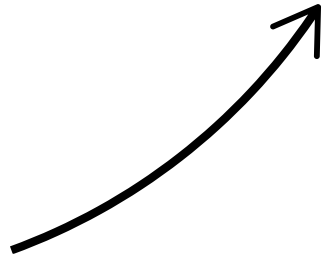
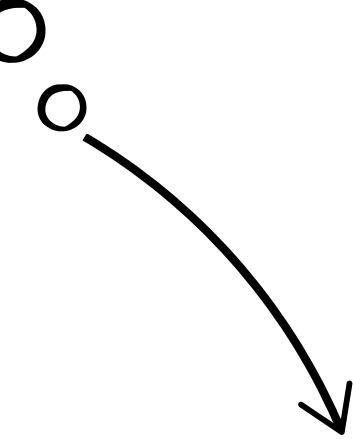
**How Does This
Behavior Impact
Your Operations?**

Ideal Flow



How do I change the name of the site?

They need to change the name of the site.



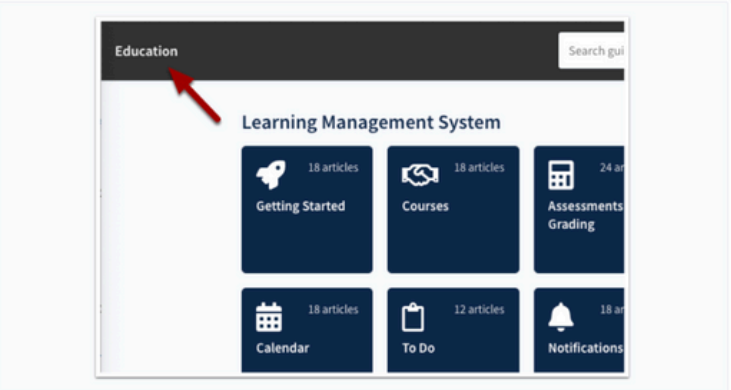
ScreenSteps / Customize Your Site / Basic Customizations

How to Change the Name of Your Site

Updated on Nov 01, 2024

What will this article show you how to do?

This article will show you how to change the name of your site.



1. Navigate to Title in Site Settings

1. Navigate to Site Settings
2. Change Title to what you want it to say

Education Search

Learning Management System

Getting Started 18 articles

Courses 18 articles

Assessments Grading 24 articles

Calendar 18 articles

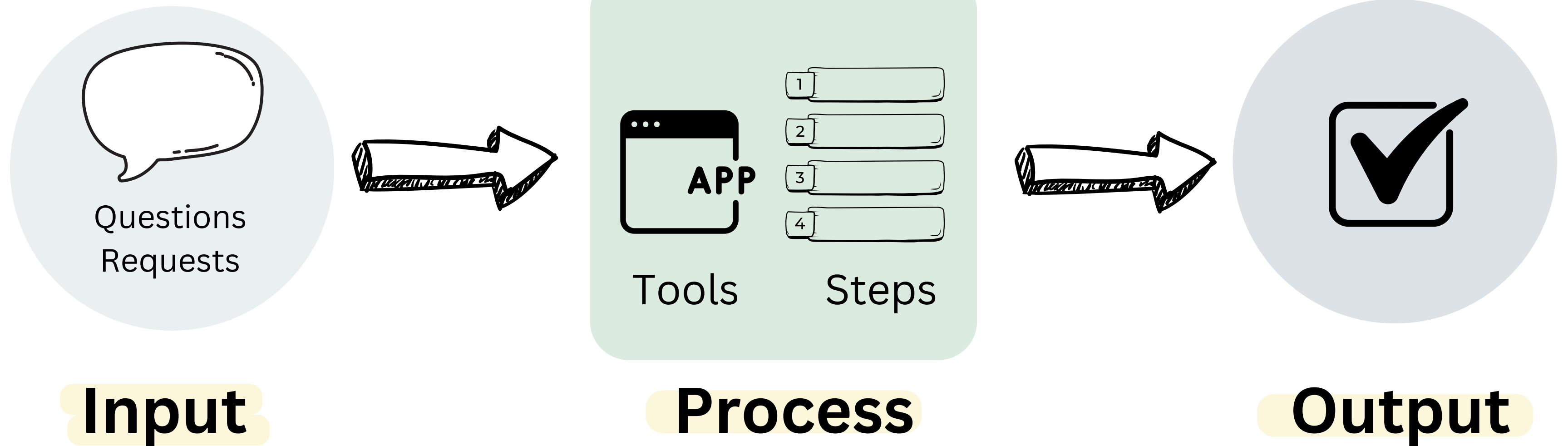
To Do 12 articles

Notifications 18 articles

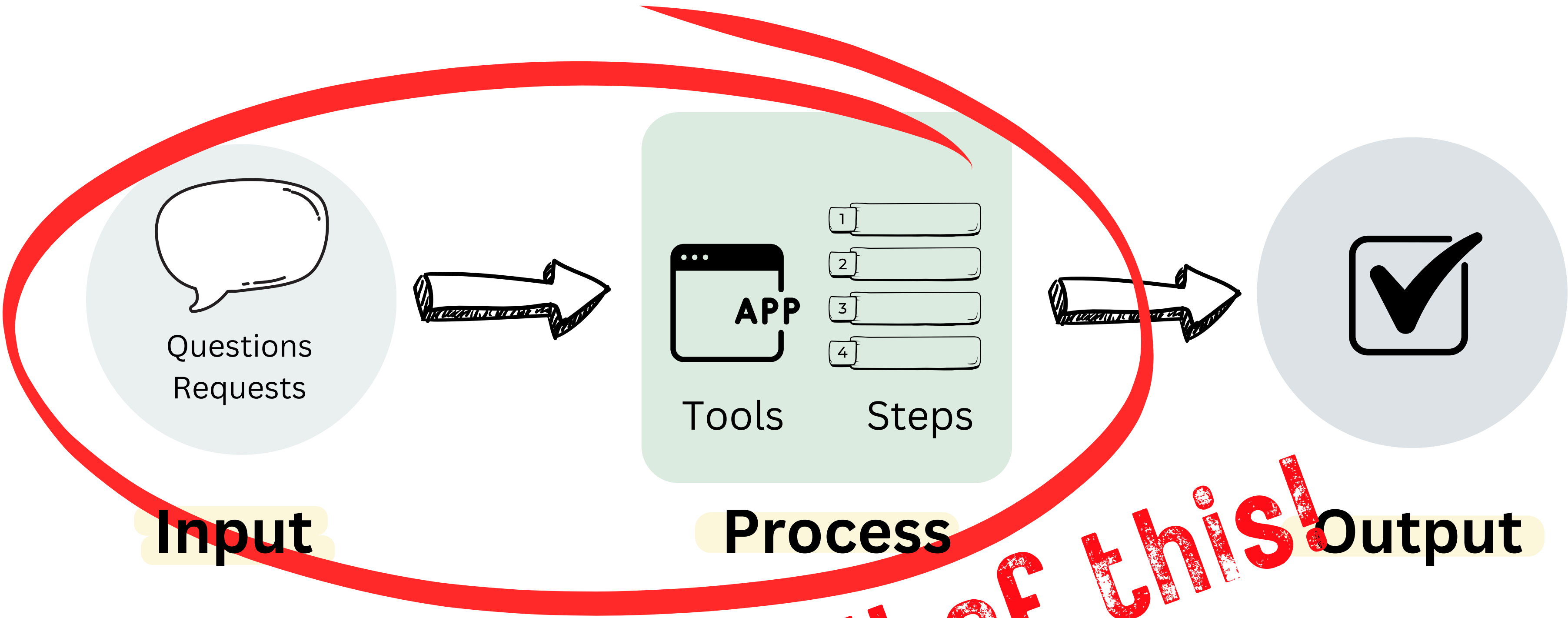
Education Quick search articles...

**How Can We Help
New People?**

What Do New People Need?

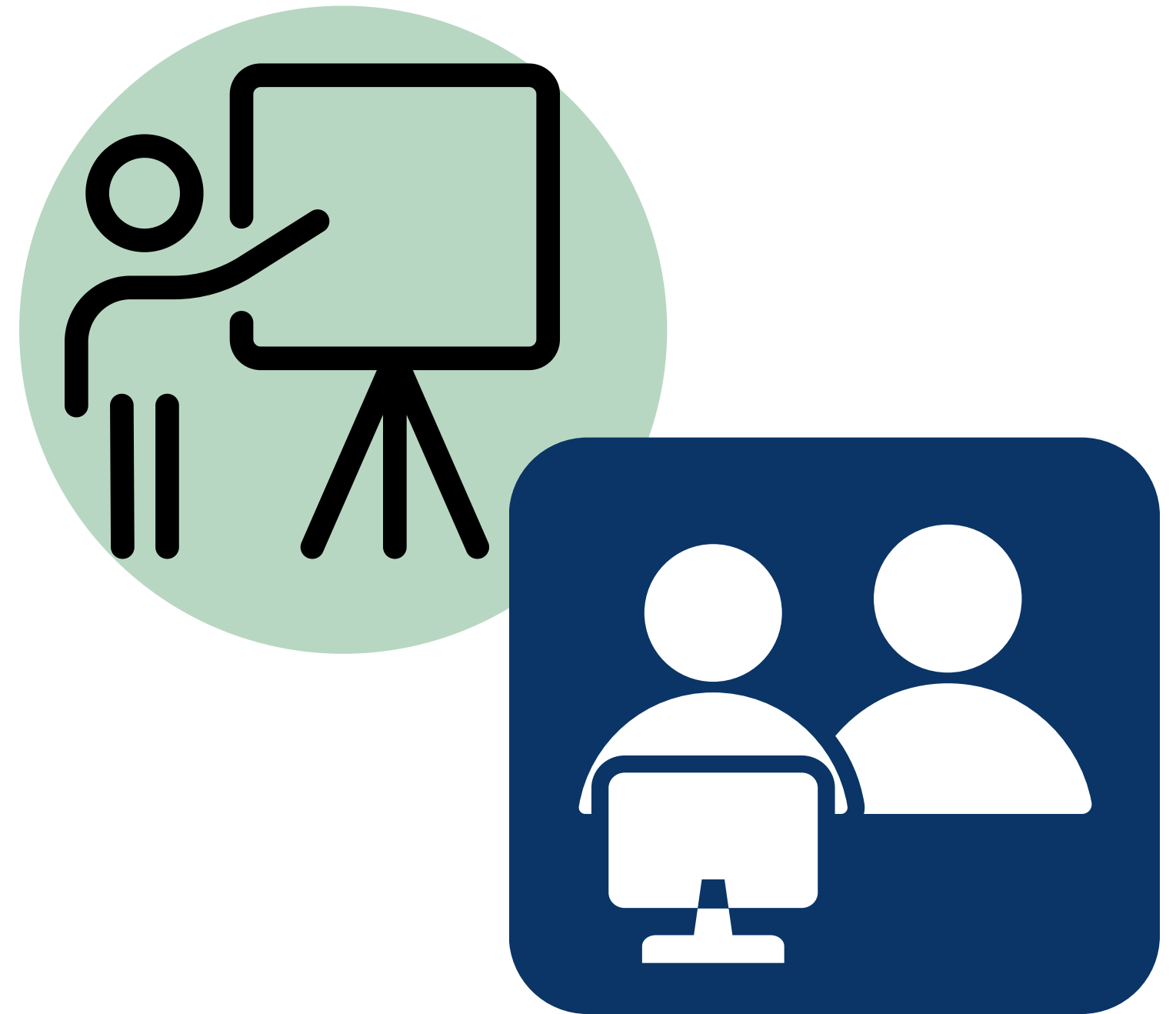


What Do New People Need?

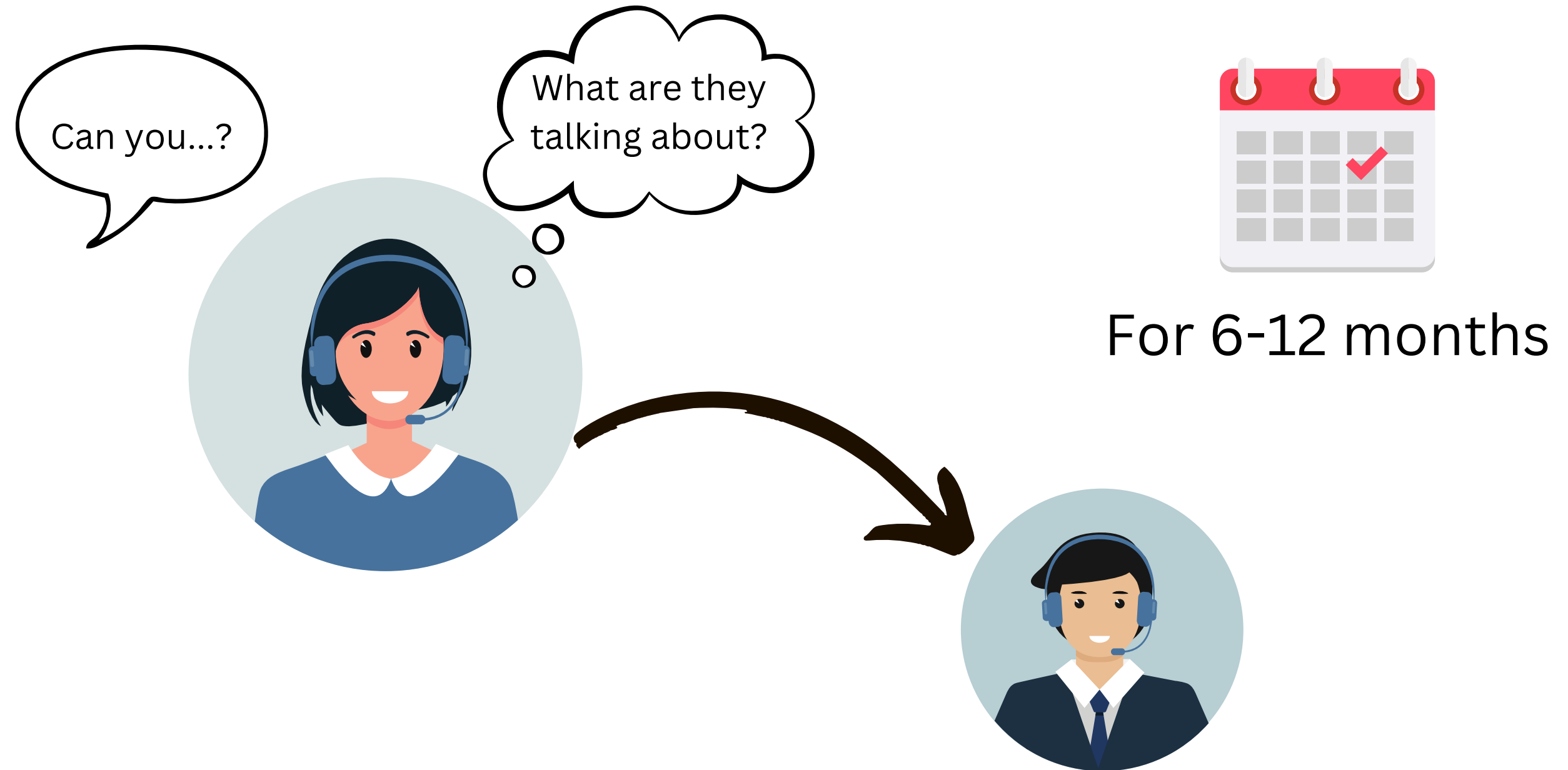


Traditional Way...

- Weeks of Lecturing
- Days Shadowing
- Months of asking for help
- Eventually Memorize
- 6-18 months until proficient



Results



Find & Follow Way

33% Zelle

3 / 9 COMPLETED

- Welcome to the Course! ✓
- What is P2P Payment Service? ✓
- Overview of Zelle ✓
- Steps of Using Zelle
- Main Features of Zelle
- Main Security Features of Zelle
- Zelle Process
- Common Member Questions
- That's it!

STEPS TO USING ZELLE

ZELLE FOUNDATIONAL COURSE

Related Resources

- [How to make a payment in Zelle](#)
- [How to request a payment in Zelle](#)
- [How to see payment history in Zelle](#)
- [Can you request a refund in Zelle?](#)

What is your question?

Search guides and checklists...

- Opening Accounts**
View a workflow that guides you through the steps of opening an account
- Is it Fraud?**
Follow these guidelines if a member reports suspected fraud
- Identifying counterfeit cash**
Follow this guide to identify counterfeit cash and handle it appropriately
- Branch Information**
View information about all the branches and the services they offer

Courses

Learn Inputs

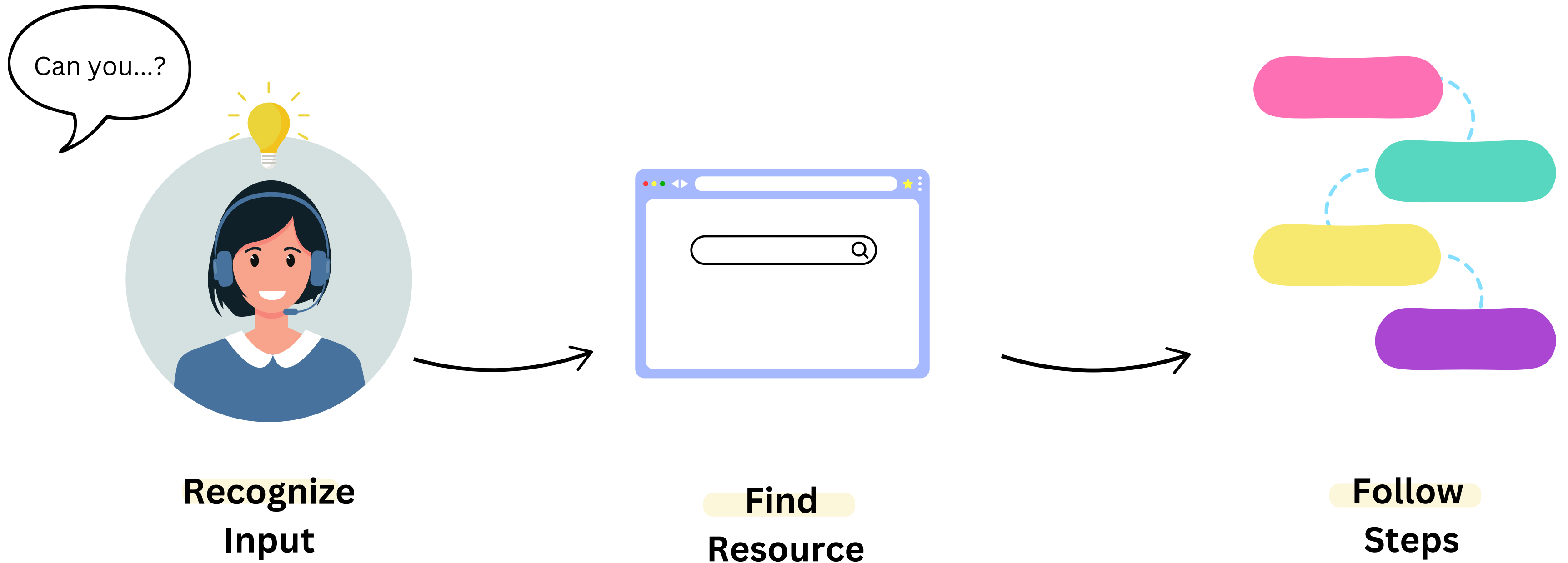
Learn Tools

Learn How Things Are Connected

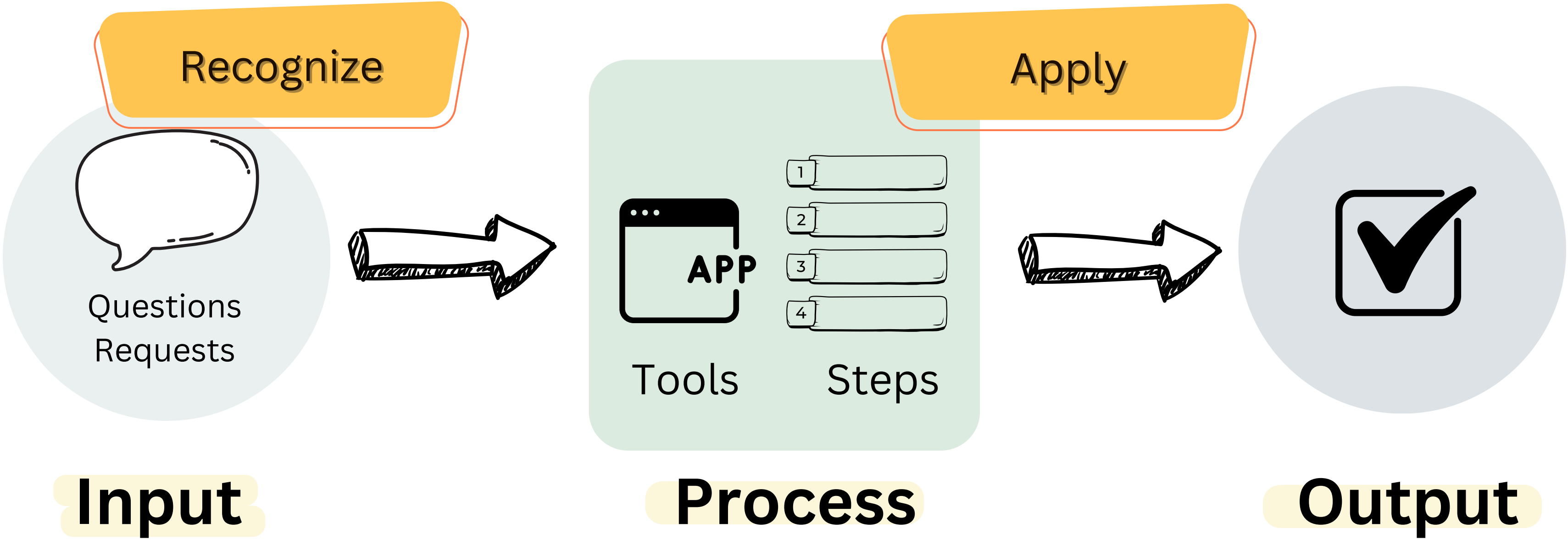
Knowledge Base

Learn How to Apply Process

Practice This Flow



Helps Them Recognize & Apply



Rinse and Repeat

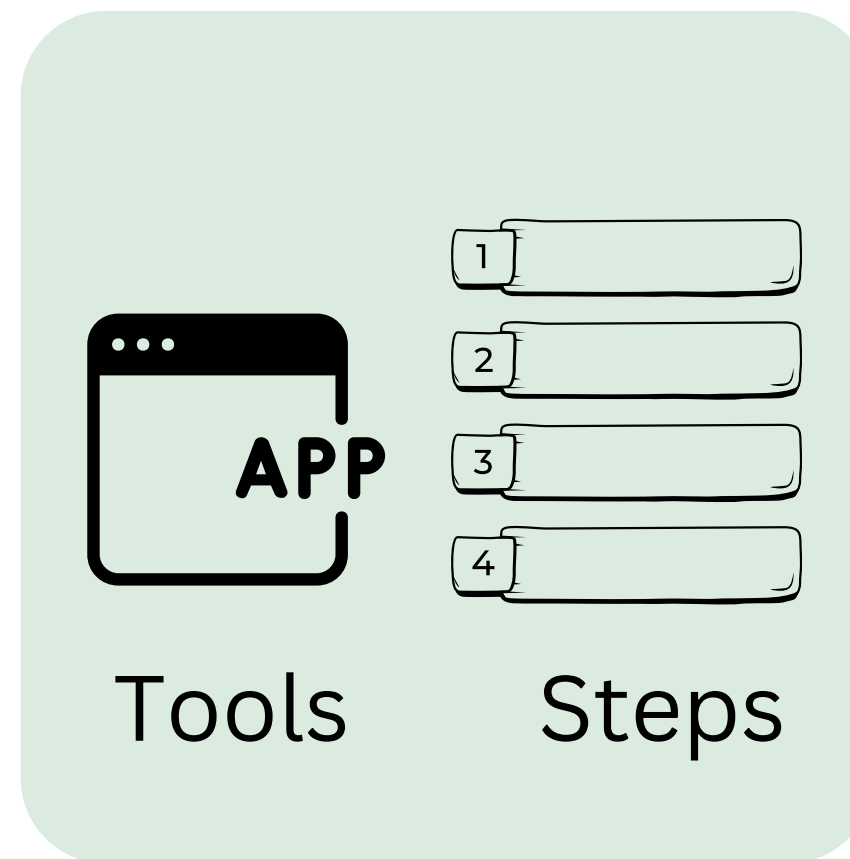
**How Would This
Approach Change
Your Operations?**

**How Do We Help
People When
Something Changes?**

Which Part of This is Changing?



Input



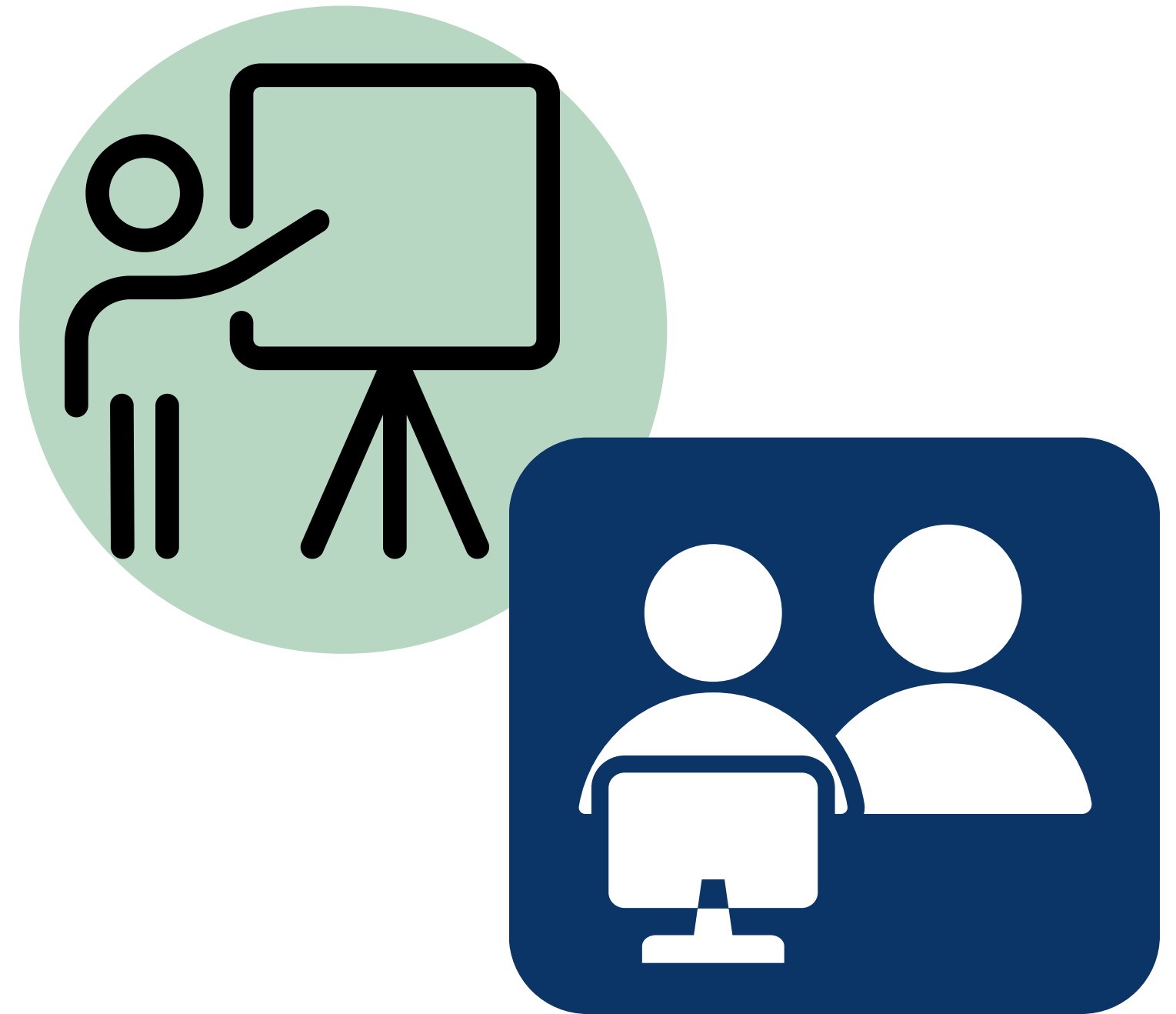
Process



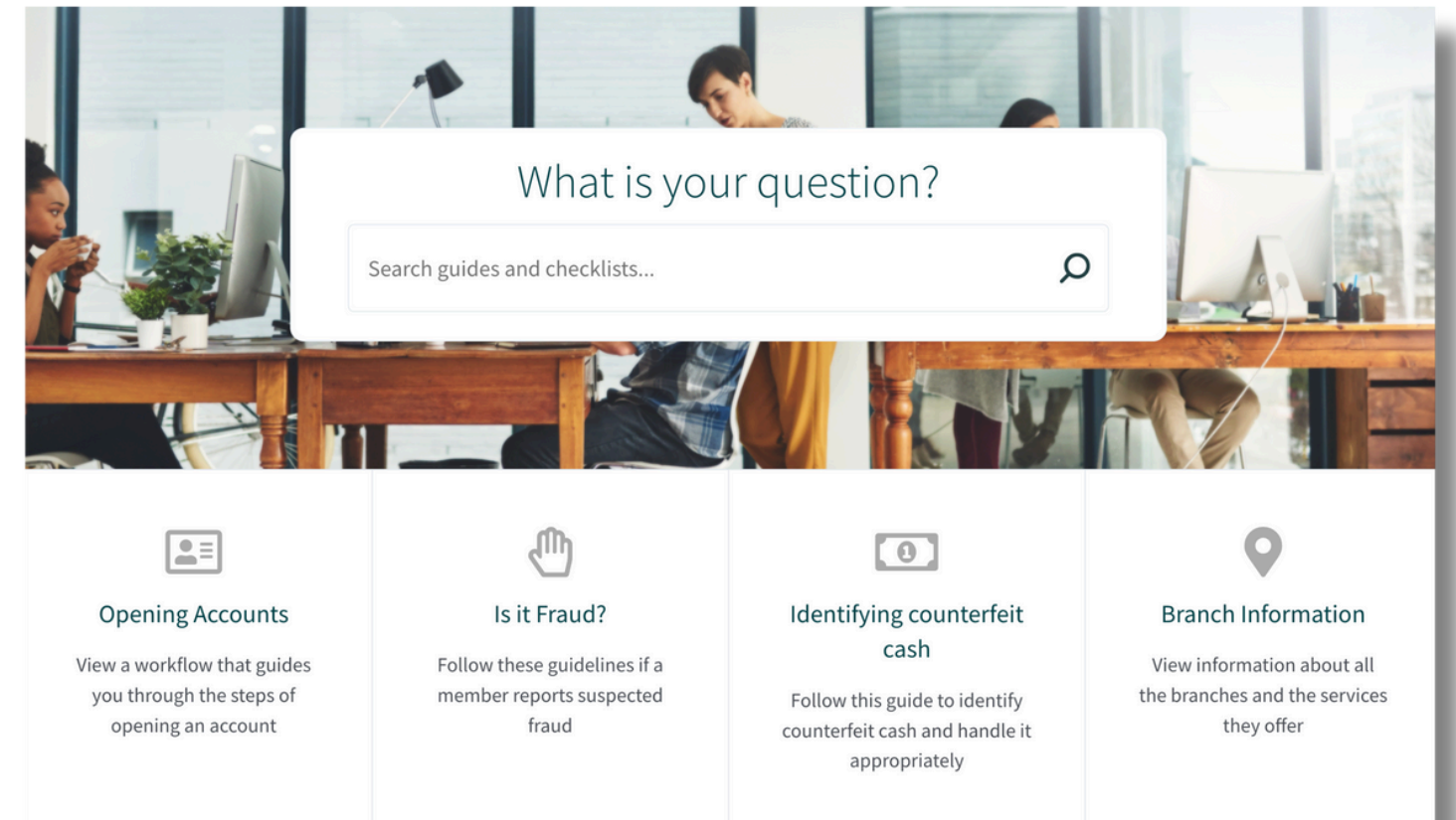
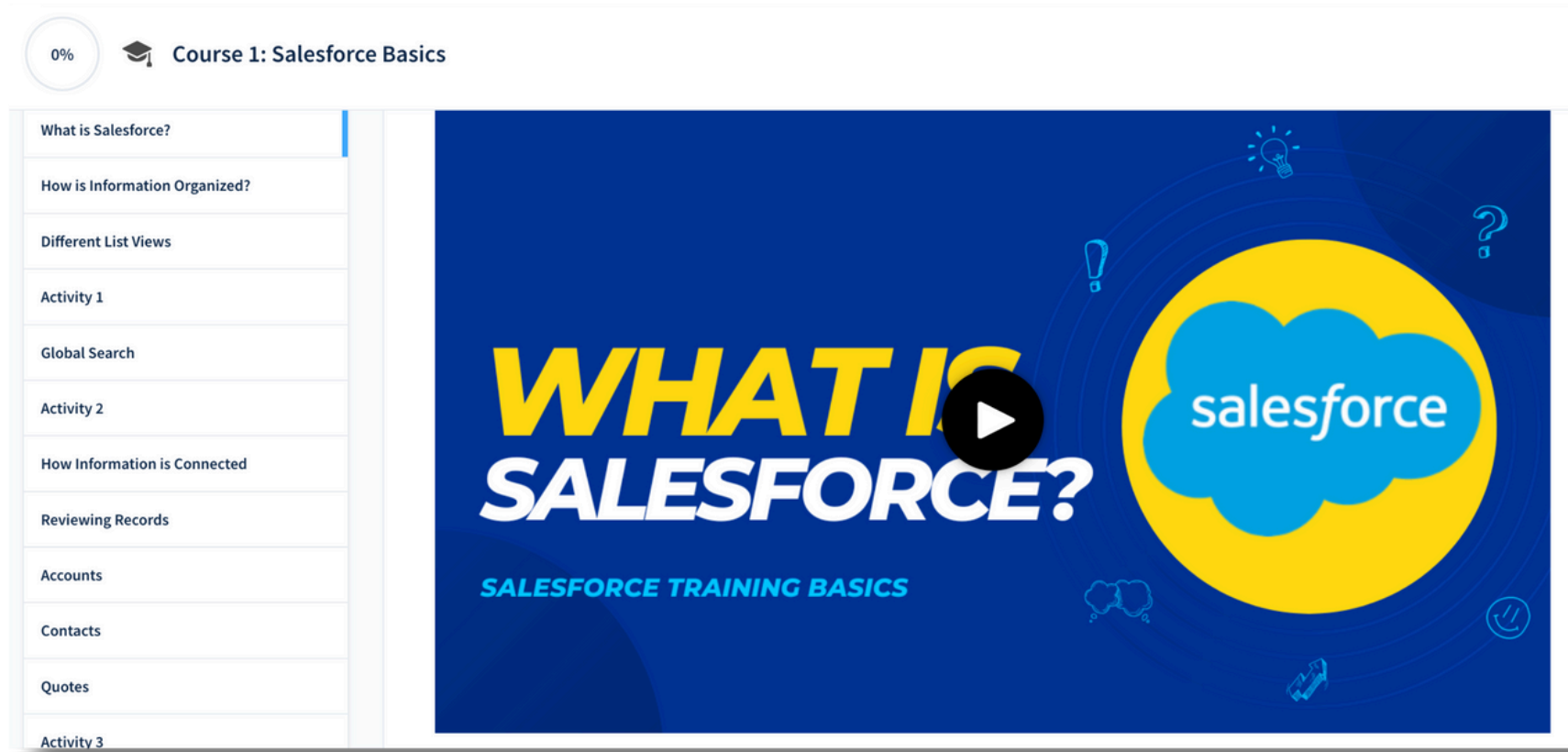
Output

Traditional Way...

- Lunch and Learn
- Show and Tell
- Special Slack or Teams Channel
- Months of asking for help
- Eventually Memorize
- Delayed Adoption



Find & Follow Way



Courses

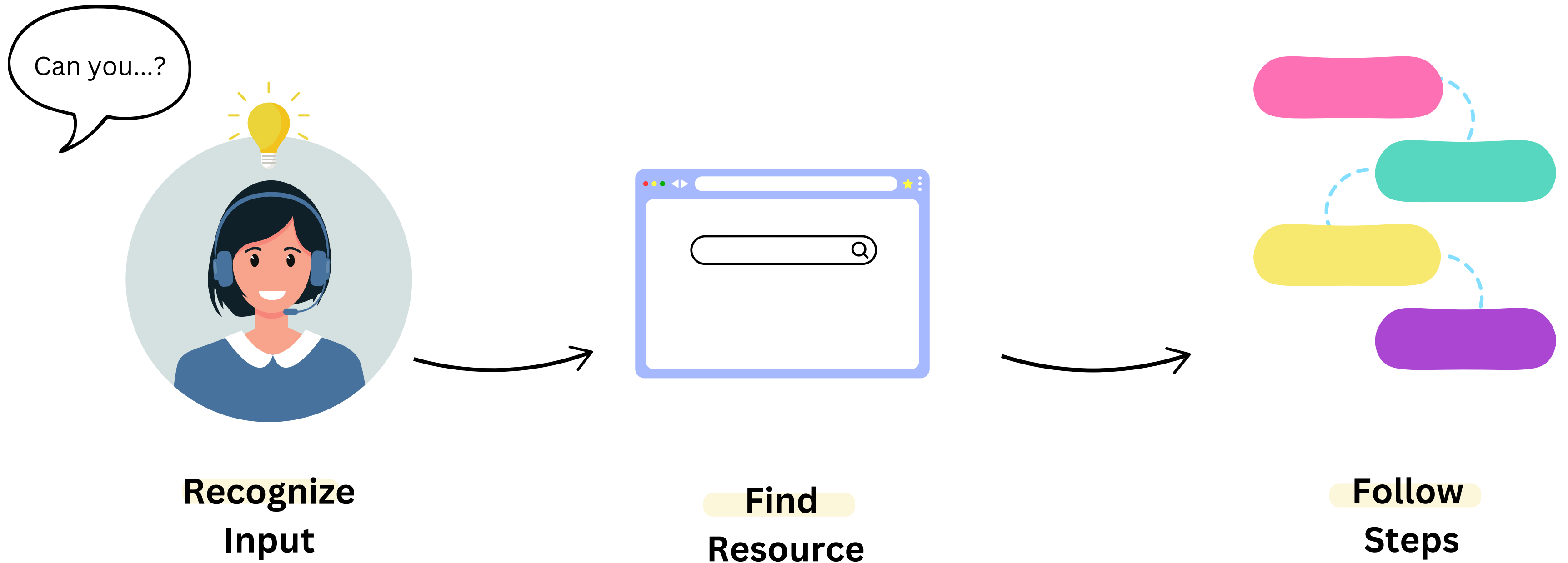
Introduce New Change

Overview of New Behavior/Tool

Knowledge Base

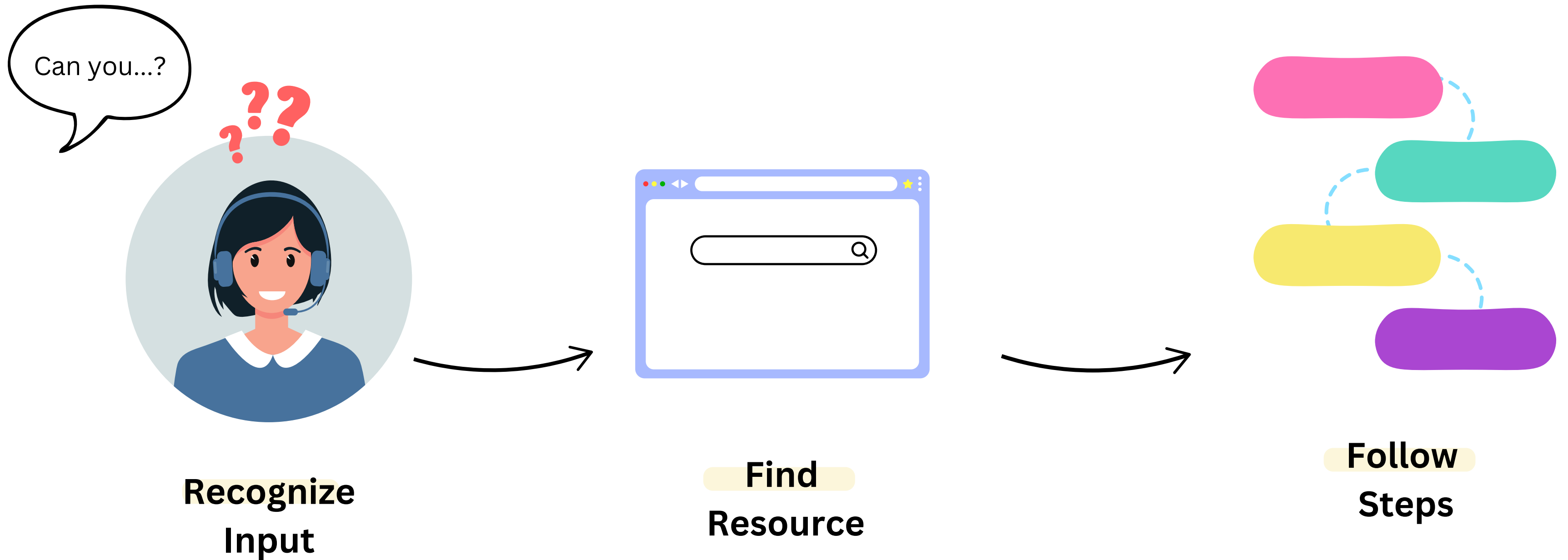
Learn Process

Practice This Flow

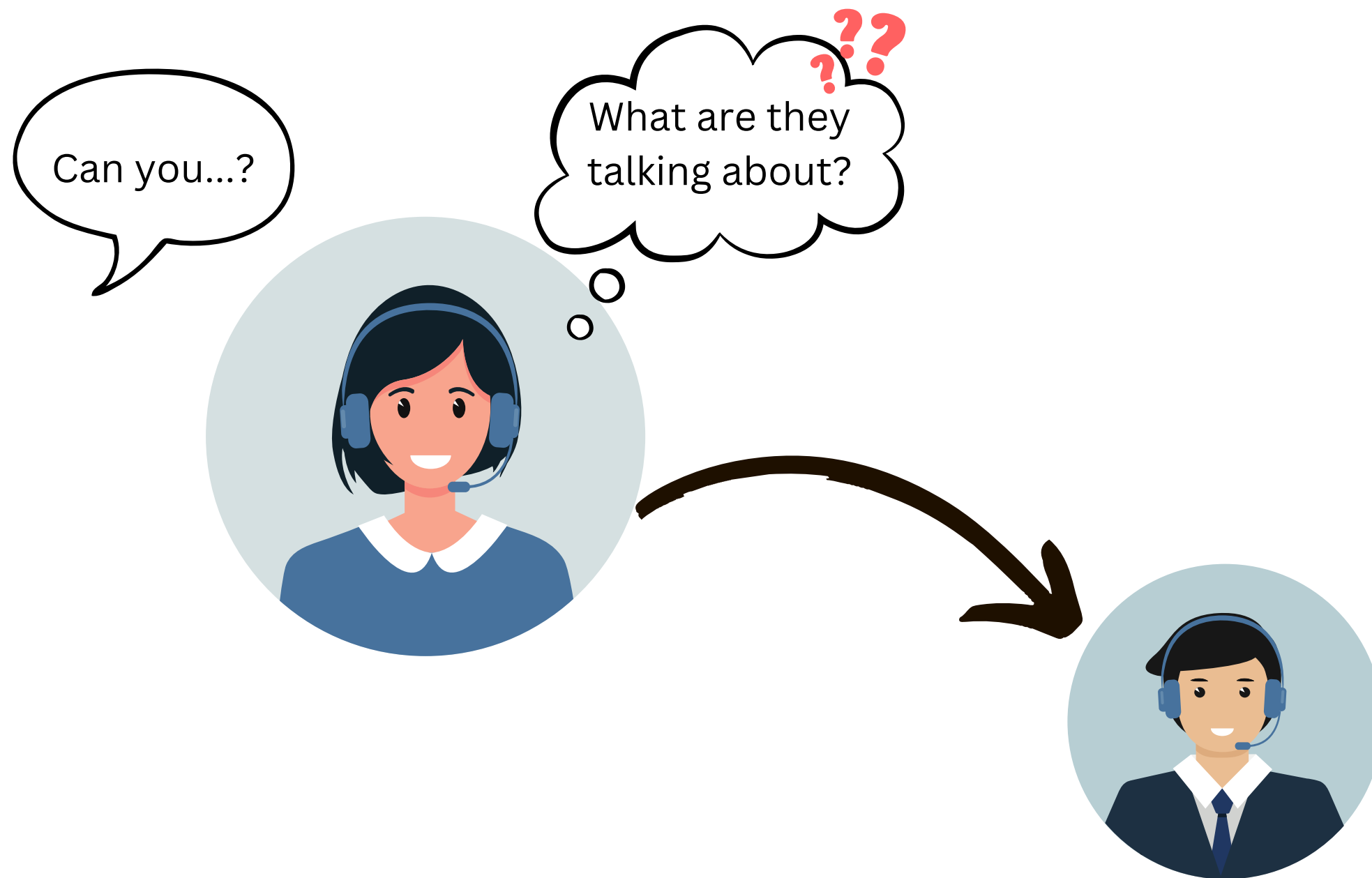


**What Will Sabatoge
Find & Follow?**

Don't Recognize Input



Behavior

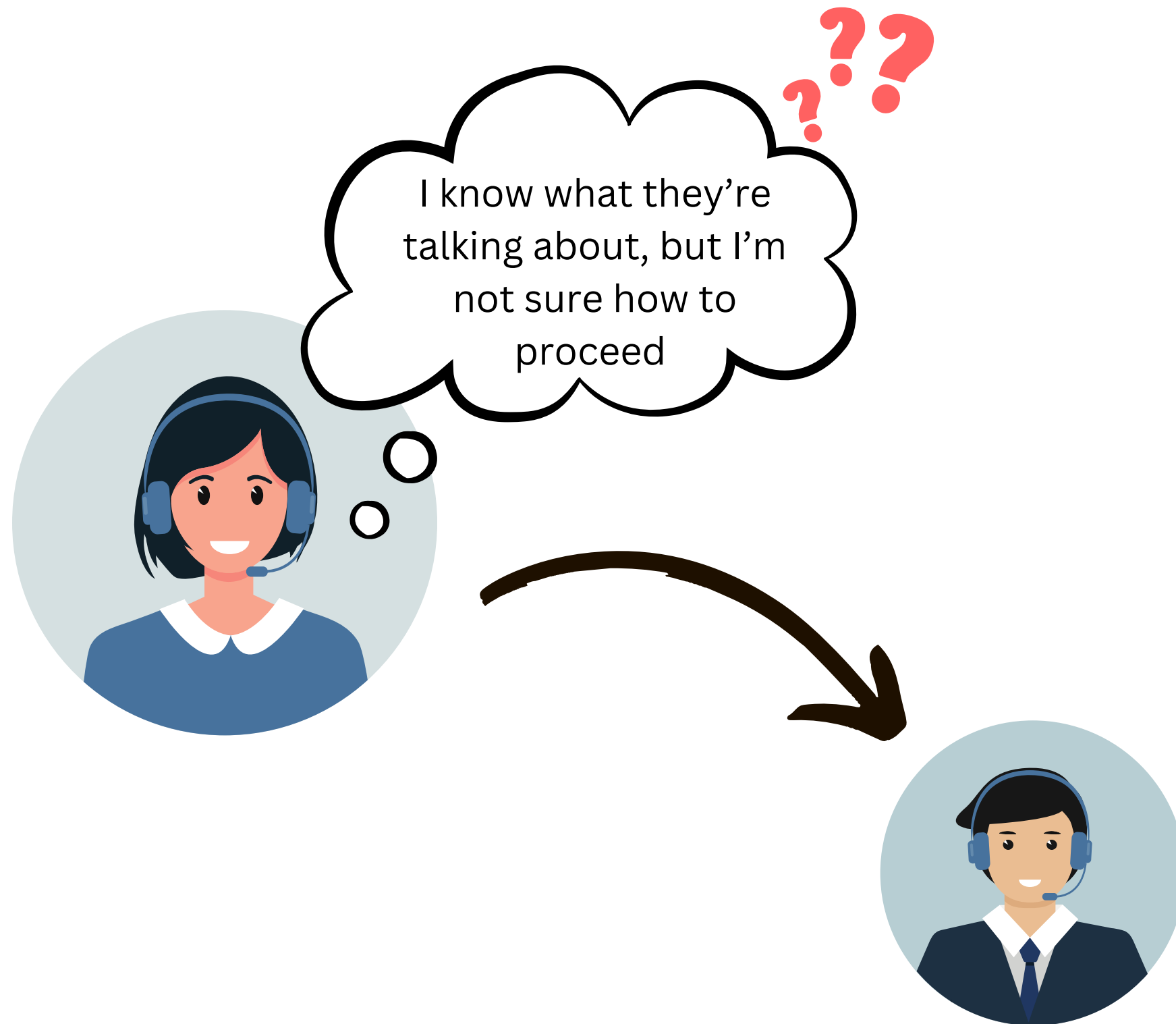


Remedy

Reason: Lack experience and exposure. Not Familiar with the context of the question or request.

Remedy: Foundational Resources + Practice Activities, Optimize Search

Behavior



Remedy

Reason: Misunderstand input, don't understand how things are connected.

Remedy: Develop skill of reflective listening, Foundational Knowledge + Coaching to help identify how things are connected, guides that better match input.

Foundational Resources

ScreenSteps / Organizing Content / Articles

What are Tags and How are They Used?

Updated on Nov 01, 2024

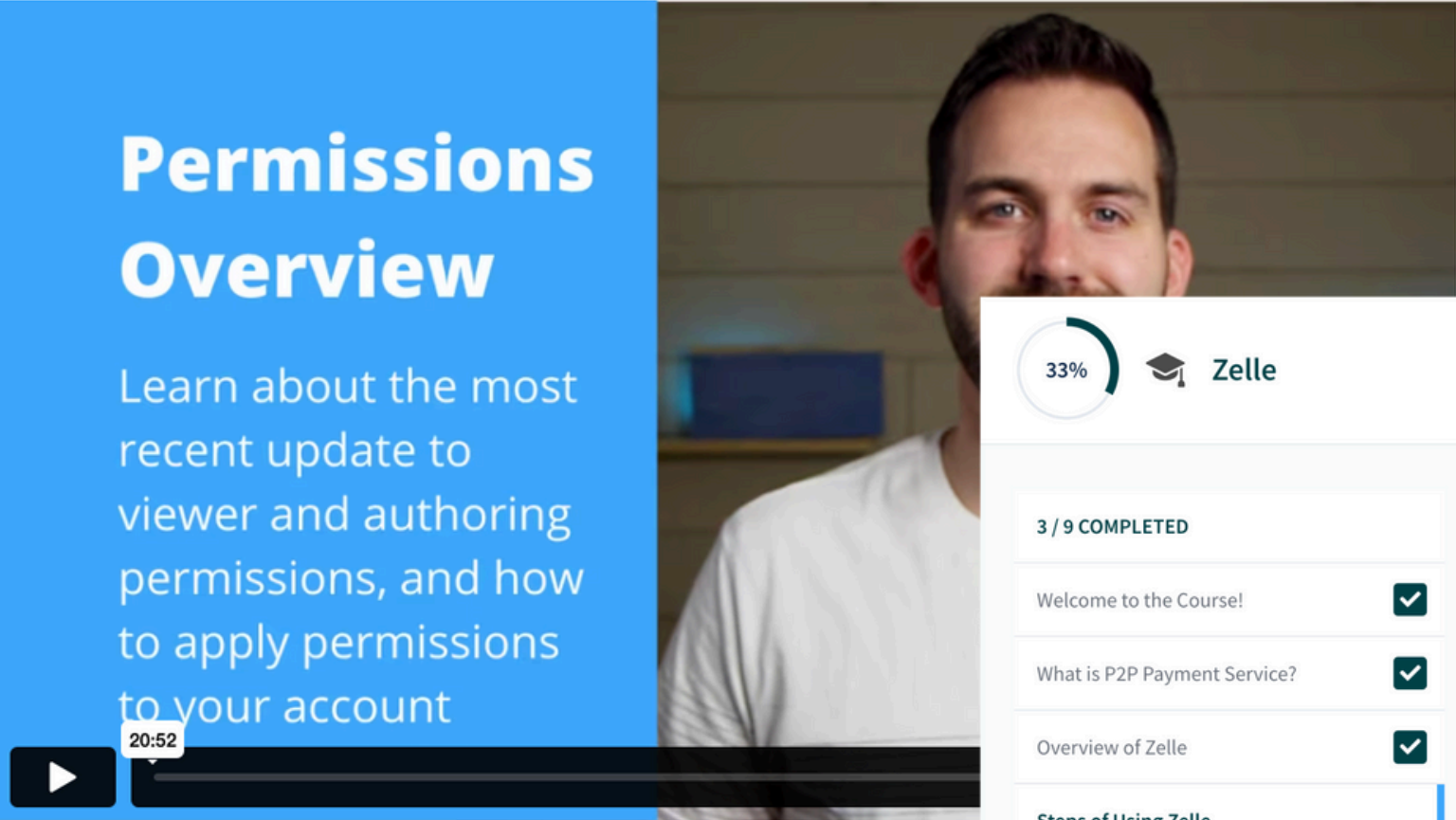
Summary: Tags are utilized as a method for categorizing articles, allowing for efficient searching and organization within the admin area. They enable the grouping of related content across different chapters or manuals, aiding in systematic updates and management. While tags can enhance search functionality, their misuse can arise when they're used to boost search results unnecessarily. Tags remain hidden from end users and serve organizational purposes for contributors and administrators.

Usage of Tags

- Tags categorize articles for easy identification in the admin area.
- Facilitate searches for articles related to specific systems or software.
- Enable updates to related articles when systems or software are updated.
- Integrate with APIs for use with external systems.
- Boost search results when articles are tagged, although this is not the primary purpose.
- Remain invisible to end users, used solely for backend organization.

Examples of Tag Utilization

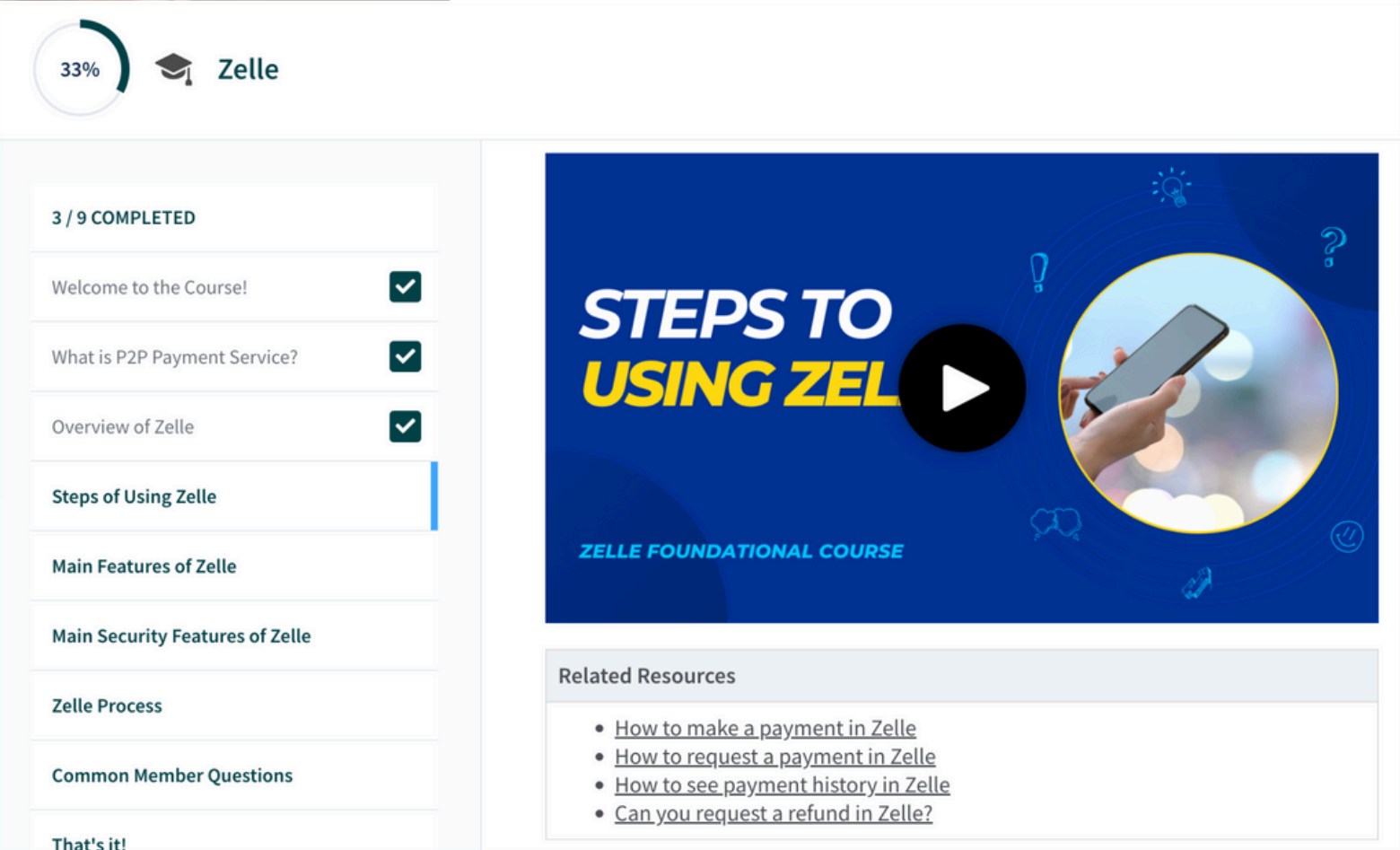
- Tagging articles related to a software version for easy updates.
- Using tags for specific areas in software, aiding in updates and troubleshooting.
- Department-based tagging, such as for accounting, to filter relevant content.



Permissions Overview

Learn about the most recent update to viewer and authoring permissions, and how to apply permissions to your account

20:52



33% Zelle

3 / 9 COMPLETED

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ZELLE FOUNDATIONAL COURSE

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- [How to see payment history in Zelle](#)
- [Can you request a refund in Zelle?](#)

Examples of What a Foundational Resource Includes

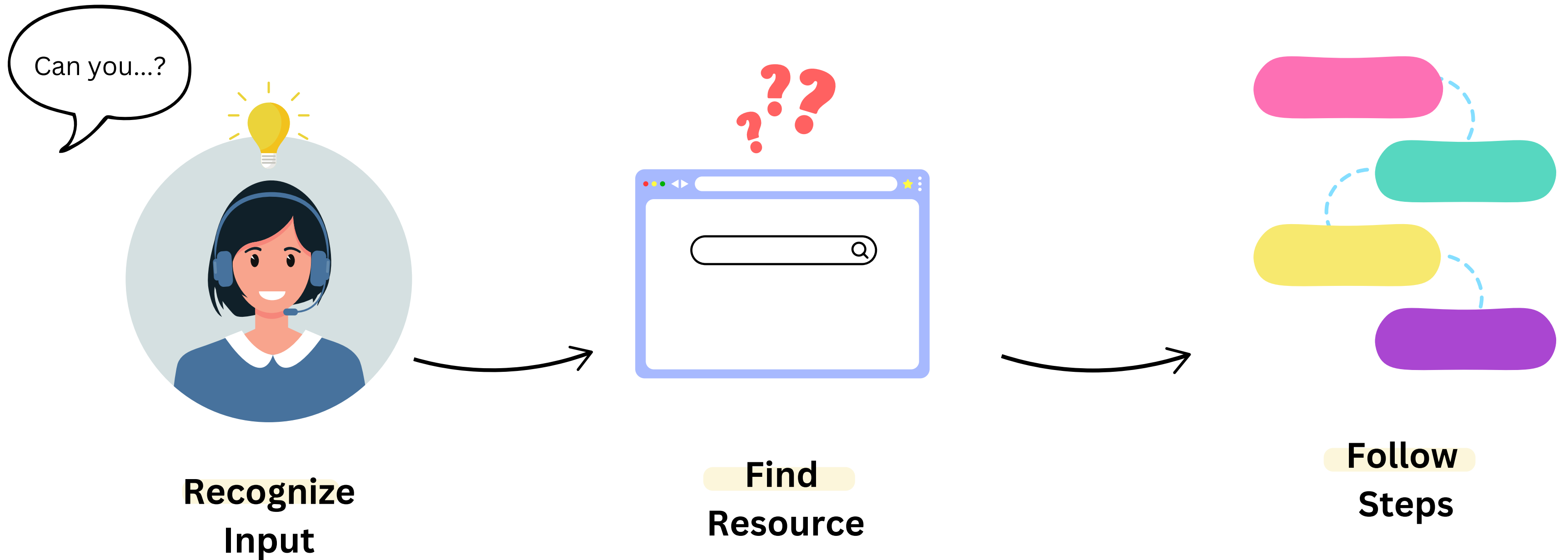
Zelle Overview

1. What is P2P Payment Service?
2. Overview of Zelle
3. Steps of Using Zelle
4. Main Features of Zelle
5. Main Security Features of Zelle
6. Zelle Process
7. Common Member Questions

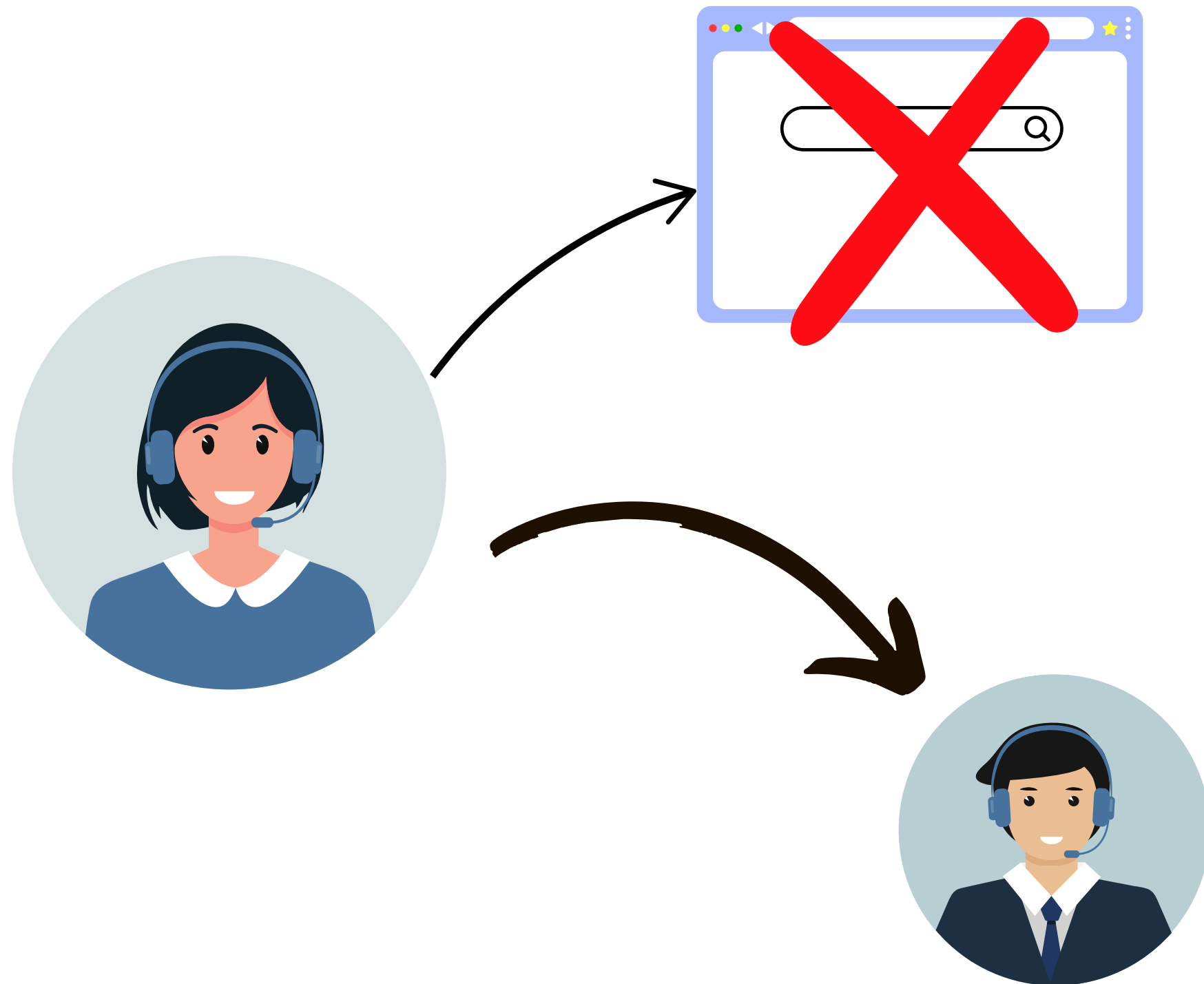
Overview of Tags

1. What are Tags?
2. How are Tags used?
3. How are they misused?
4. Examples of tags usage
5. Common questions around tags

Can't Find Resource



Behavior



Remedy

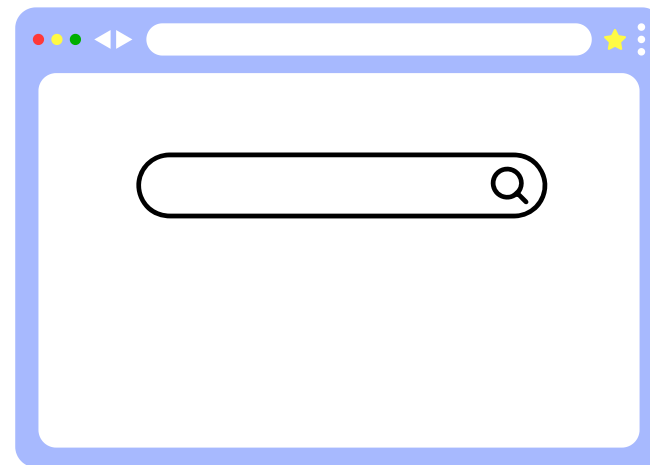
Reason: Bad search terms, no content, don't trust it/lack confidence in ability to find resource, built habit of asking for help, resources don't closely match inputs.

Remedy: Optimize guides to match inputs, coach SMEs to turn folks to the guides, create the resources on the spot.

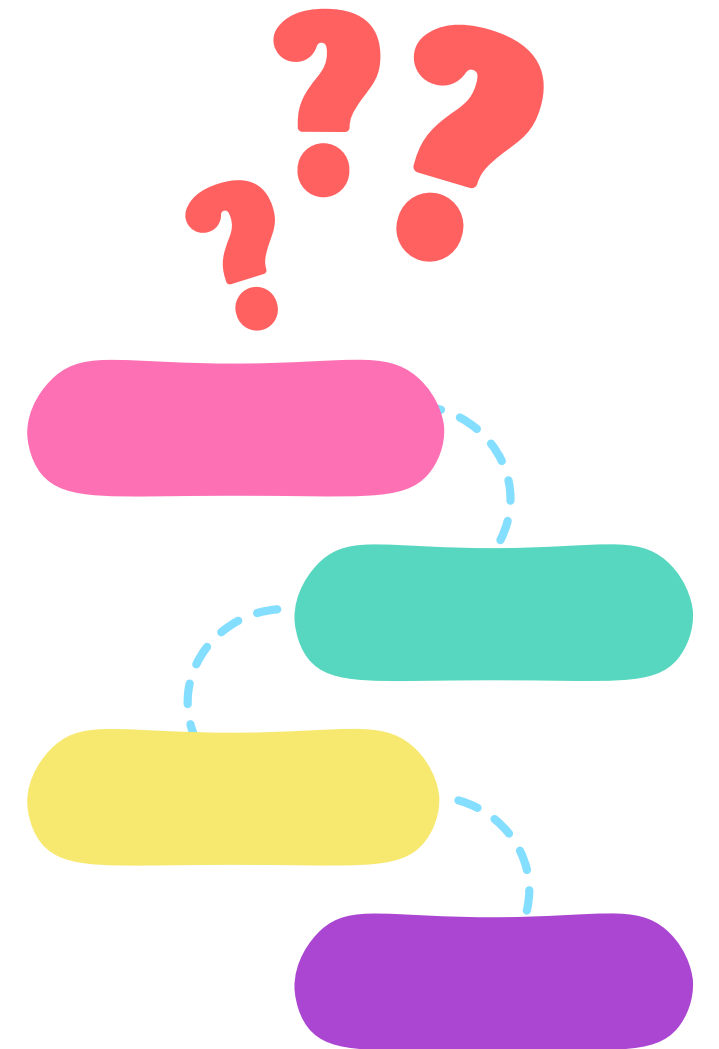
Don't Follow Steps



**Recognize
Input**

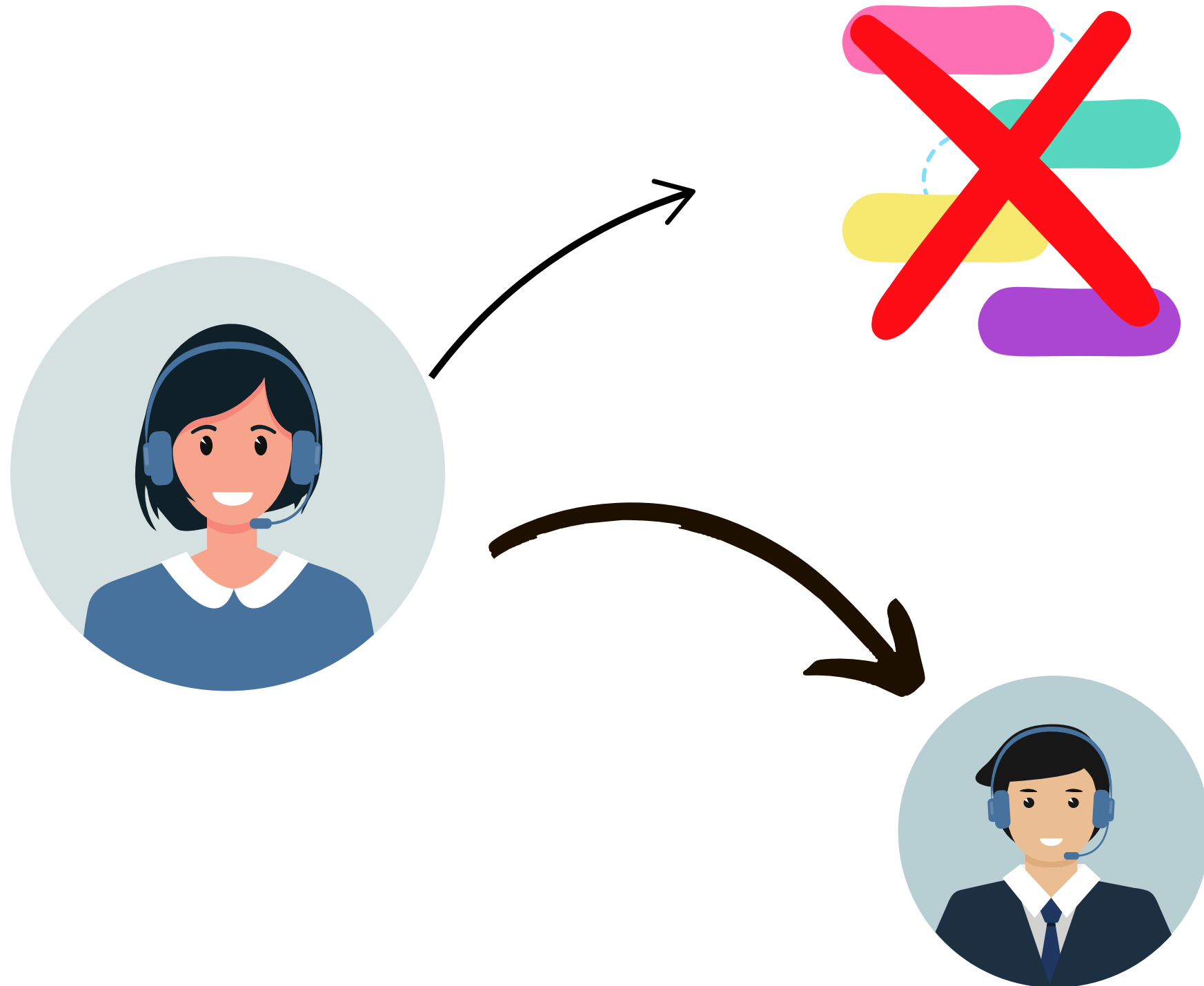


**Find
Resource**



**Follow
Steps**

Behavior



Remedy

Reason: Critical path is unclear, guides are difficult to read through

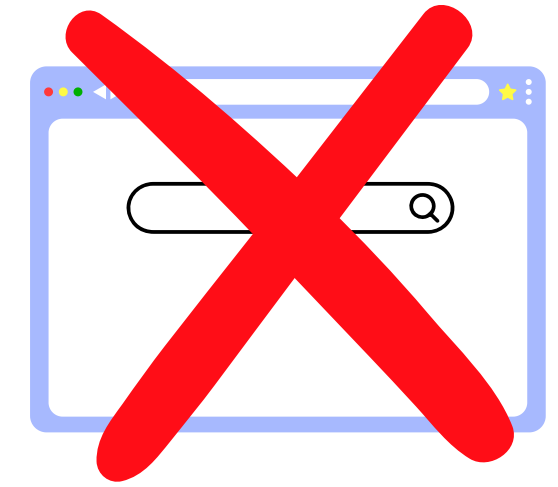
Remedy: Make critical path clearer, separate out foundational knowledge, use imperative mood,



**Recognize
Input**



**Identify
what to do**



**Find
Resource**



**Follow
Steps**



**Where is it falling apart
for your teams?
(input, search, steps)**

**How can you recruit
SMEs so they work with
you to address gaps?**

**You can help your team
do amazing things!**