

3 Benchmarks for Better Knowledge Findable, Followable, Scannable

Greg DeVore

Music Copyists

Music Copyists



We are preparing for a *performance.*

Not a book.

Operational Knowledge

A remittance transfer provider must refund the total amount of funds provided by the sender, including any fees and, to the extent not prohibited by law, taxes imposed in connection with the remittance transfer, within three business days of receiving the sender's request to cancel the remittance transfer. - 12 CFR § 1005.3

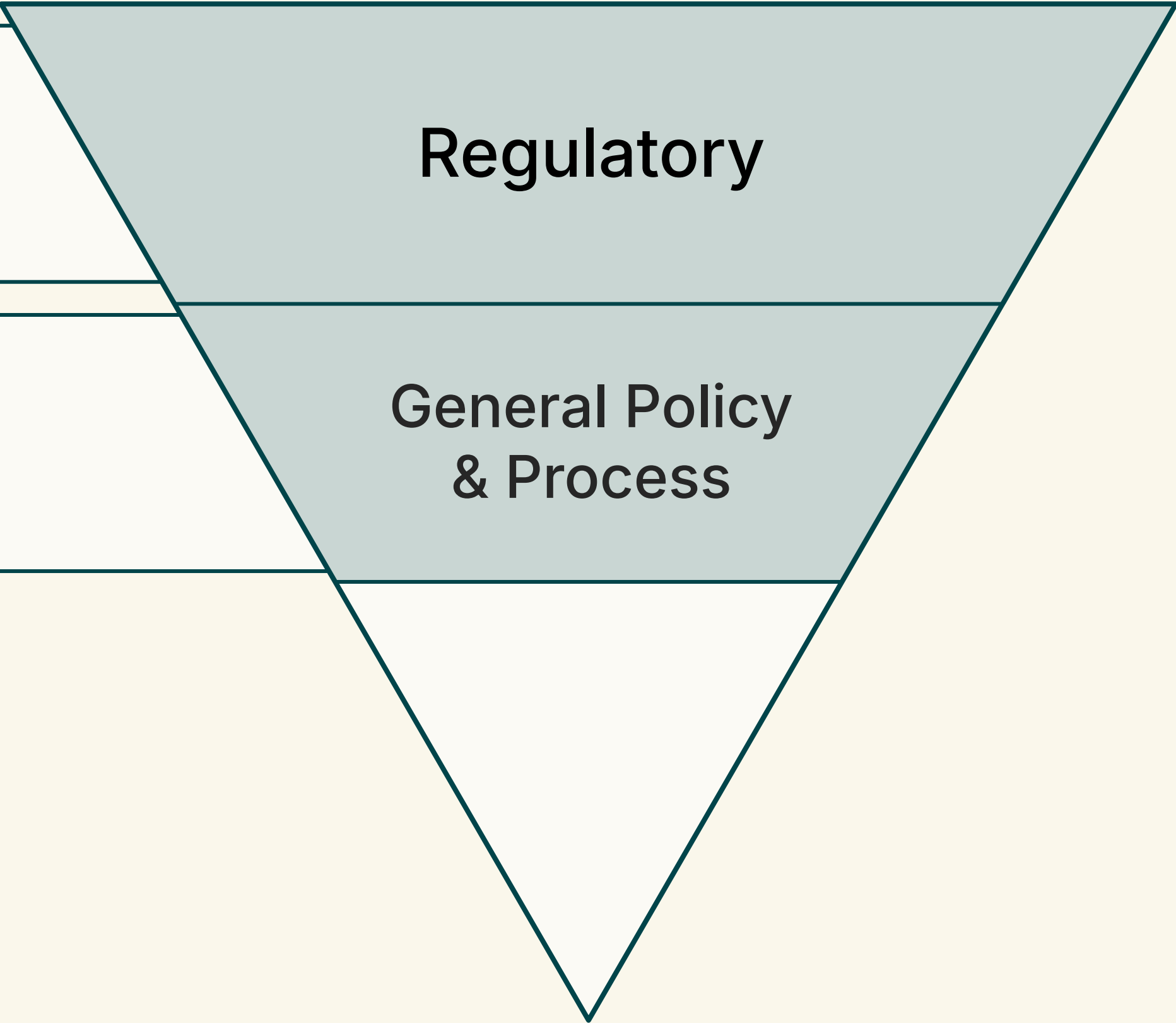


Regulatory

Operational Knowledge

A remittance transfer provider must refund the total amount of funds provided by the sender, including any fees and, to the extent not prohibited by law, taxes imposed in connection with the remittance transfer, within three business days of receiving the sender's request to cancel the remittance transfer. - 12 CFR § 1005.3

Customers can cancel a remittance transfer within 30 minutes of payment if they provide a confirmation code.

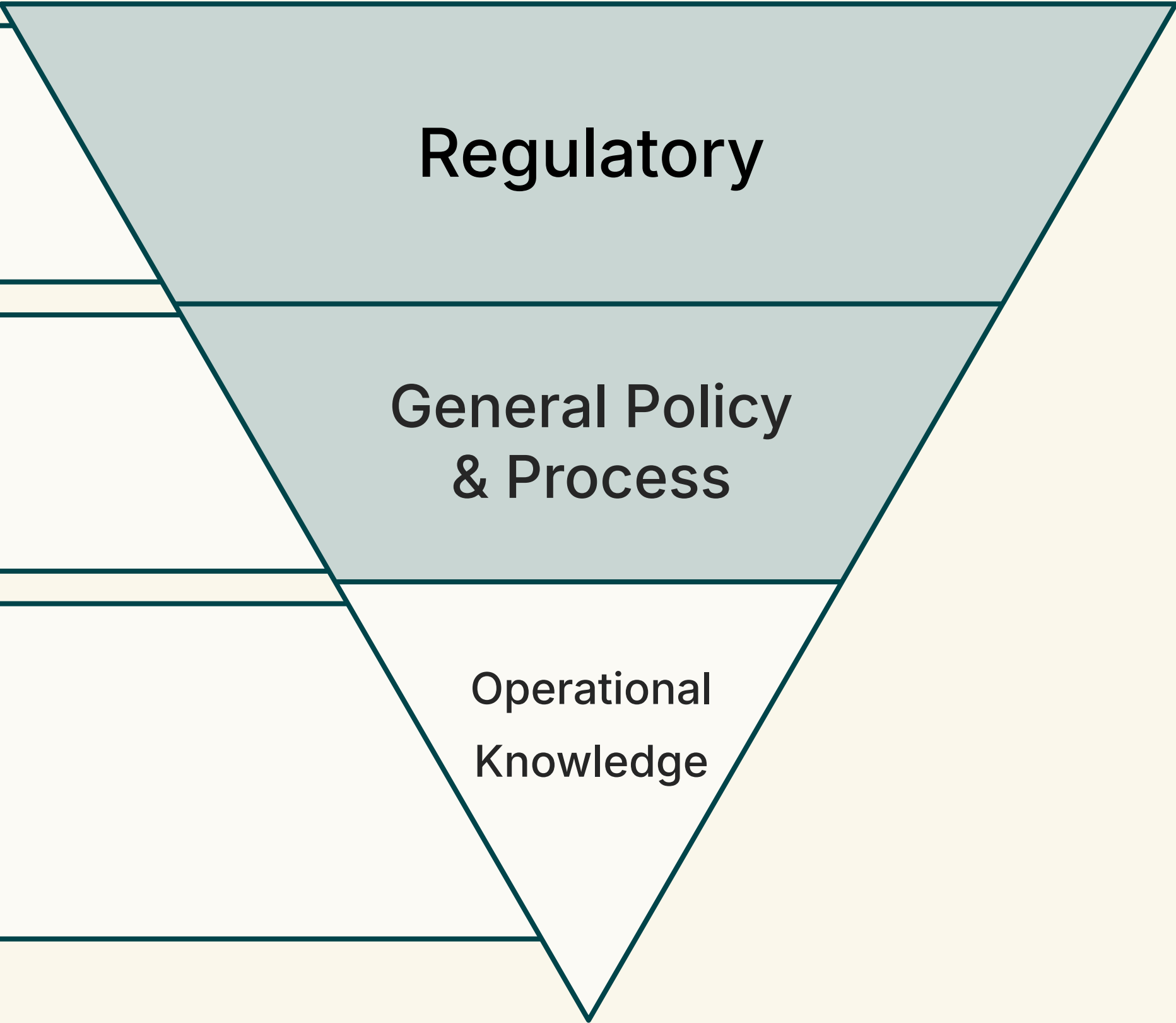


Operational Knowledge

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Customers can cancel a remittance transfer within 30 minutes of payment if they provide a confirmation code.

1. Open System X
2. Navigate to Account profile
3. Review transactions...



“It doesn’t feel like we have new employees!”

The Standard

1

Findable

2

Followable

3

Scannable

Findable

How to think about Operational Knowledge



Financial Institution "Input" examples



I LOST MY CARD.



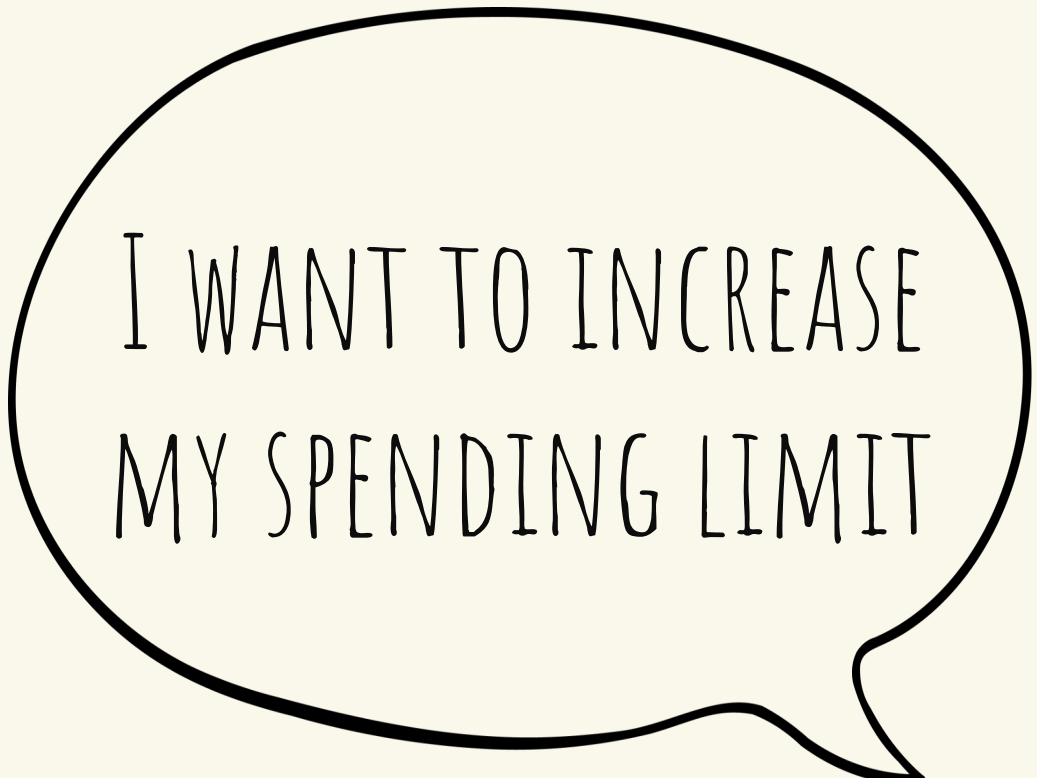
I'D LIKE TO
DISPUTE A CHARGE.



I'M TRAVELING
INTERNATIONALLY
NEXT MONTH.




I NEED TO UPDATE
MY ADDRESS




I WANT TO INCREASE
MY SPENDING LIMIT

Financial Institution "Input" examples



I LOST MY CARD.

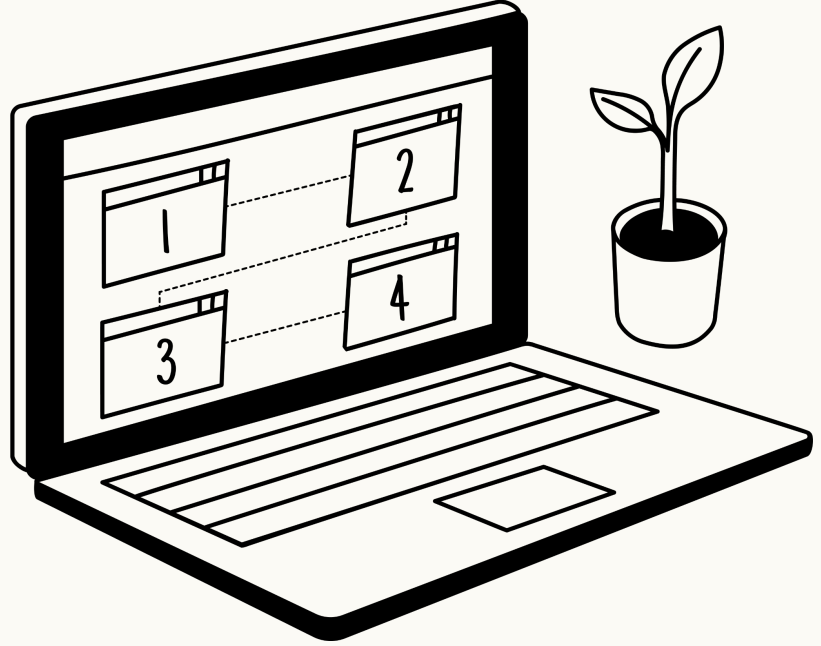
INPUT



KNOW WHAT NEEDS TO BE DONE..


AND I KNOW HOW TO DO IT.

RECOGNIZE INPUT




FOLLOW STEPS

Financial Institution "Input" examples



CAN YOU...?

INPUT



DOESN'T RECOGNIZE INPUT
OR DOESN'T KNOW STEPS



ASK FOR HELP

Findable

Break up content to match inputs

Digital Banking

Things you need in order to access The Bank Digital Banking:

You can access The Bank Digital Banking with an internet connection and a supported web browser or our mobile banking app.

For desktops running Windows or macOS, the minimum system requirements for browsers include:

- Current version of Google Chrome and previous two versions (recommended)
- Current version of Mozilla Firefox and previous two versions (supported)
- Current version of Microsoft Edge and previous two versions (supported for Windows)
- Current version of Apple Safari and previous two versions (supported for macOS)

The minimum system requirements for our mobile banking app include:

- Current version of iOS and previous two versions (supported for iPhone® and iPad® devices)
- Current version of Android and previous two versions (supported for Android™ devices)

Note: Earlier versions of browsers and operating systems may still be able to access Digital Banking. However, certain features may not display or function correctly. Additional bug fixes and security enhancements may not be available on older versions. Experiences may differ across various browser, device and operating system combinations.

Direct deposit

Direct deposit with your employer can be set up by downloading and filling out the [direct deposit form \(PDF\)](#), [Opens in a new tab](#).

You'll need to give the completed form, your The Bank account and [ABA routing number](#) to your employer's payroll department.

Direct deposit of federal payments can be set up in several ways:

- Enroll online at [GoDirect.org](#), [Opens in a new tab](#)
- Call [800-333-1795](#)
- Visit your local The Bank [branch](#), [Opens in a new tab](#)

[Secure access code or register browser or device](#)

[Secure access code or register browser or device](#)

may need to request a secure access code each time you log in.

[Secure access code or register browser or device](#). If you're using your personal computer or device, we recommend that you use a secure access code by text is the quickest way to receive your code.

[Secure access code or register browser or device](#) **clear cookies each time it closes**. If this is the case, it'll clear the registration and you'll need to re-register your device each time you log in. Check your browser settings, and make sure it'll allow

[Secure access code or register browser or device](#) **different browser on a registered computer**. If you use multiple browsers (e.g. Chrome and Firefox), you'll need to be registered in each browser.

[Secure access code or register browser or device](#) **installed the mobile banking app**. You'll need to re-register your device the first time you use the app.

[Secure access code or register browser or device](#) **before logging in**. Make sure you log in fully to complete registration, then return to the browser before reaching the Accounts Overview page.

[Secure access code or register browser or device](#) **is set to clear cookies**. The antivirus software installed on your device may delete cookies and log out of Digital Banking.

[Secure access code or register browser or device](#) **may be reset for all users**. At times, we may reset all users' active registrations for security reasons.

[Secure access code or register browser or device](#) **Digital Banking**: After you've logged in, select **Profile and Preferences** from the left navigation menu, then select **Log In Preferences**. From this page you can change your login ID, password and how you'll receive your one-time secure access code). If you're in the Digital Banking app, you can also change your login ID, fingerprint and 4-digit PIN access.

[Secure access code or register browser or device](#) **Digital Banking**: You can change your login ID and password by selecting **Change Login ID or Password** in our login box or by selecting the **Forgot Password?** or **Forgot Login ID?** links from the login page. You'll need your account number, Social Security number or Tax ID, and the email address associated with your account. When changing your login ID or password, please follow these guidelines:

[Secure access code or register browser or device](#) **must be at least 14 characters**.

[Secure access code or register browser or device](#) **must be the same as your password**.

[Secure access code or register browser or device](#) **must be unique and must have 8 to 72 characters including at least one uppercase letter, one lowercase letter, one number and one special character**.



Findable

Break up content to match inputs

The image shows a screenshot of a digital banking page with several callout boxes highlighting specific content for accessibility. The page title is "Digital Banking".

- Things you need in order to access The Bank Digital Banking:** A callout box highlights this heading.
- Direct deposit:** A callout box highlights a list of requirements for direct deposit.
- Secure access code or register browser or device:** A callout box highlights a section about secure access codes and device registration.
- Reset my login credentials:** A callout box highlights a link to reset login credentials.

The background text on the page includes:

Digital Banking

Things you need in order to access The Bank Digital Banking:

You can set up direct deposit with your employer's payroll.

Direct deposit

Direct deposit of federal payments can be set up in several ways:

- Email online at [Goldman.org](#). [Opens in a new tab.](#)
- Call [800-333-1700](#).
- Visit your local The Bank [branch](#). [Opens in a new tab.](#)

Secure access code or register browser or device

When changing your login ID or password, please follow these guidelines:

- 8 characters.
- Same as your password.
- Must include at least one uppercase letter, one lowercase letter, one number and must have 8 to 12 characters including at least one uppercase letter, one lowercase letter, one number and one special character.



Findable

Break up content to match inputs

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Direct deposit

Direct deposit with your employer can be set up by downloading and filling out the [direct deposit form \(PDF\)](#), [Opens in a new tab](#).

You'll need to give the completed form, your The Bank account and [ABA routing number](#) to your employer's payroll department.

Direct deposit of federal payments can be set up in several ways:

[Bank Demo](#) / [Personal Mobile & Online Banking](#) / [Guide Examples](#)

Edit Article ▾

Setting up Direct Deposit with Employer or Other Entity



Updated on Jan 17, 2023

Background

Customers may want to set up a direct deposit with their employer to receive payment for work (e.g. salary) OR they may want to set it up with a different entity (e.g. federal government for things like tax refunds).

Action

1. Select the purpose for setting up direct deposit

Are you trying to set up direct deposit with your **employer**? Or for **something else** like getting a tax refund

Set up Direct Deposit with Employer

Set up Direct Deposit with Other (e.g. receive federal payment for tax return)



Findable

- Guides cover one topic/procedure (input)
- Titles match the inputs customers and employees are receiving

Followable

Followable

Flow from beginning to end

Bank Demo / Personal Mobile & Online Banking / Digital Banking (Progress) Edit Article

Where can I find tax documents?

Updated on Jan 17, 2023

You can see your tax documents in Digital Banking. After logging in, navigate to **Statements and Documents** in the main menu, then select **Tax Documents**. From here, you can select and view all available tax documents for your accounts.

Bank Demo / Personal Mobile & Online Banking / Guide Examples Edit Article

Where can I find tax documents?

Updated on Jan 17, 2023

Background

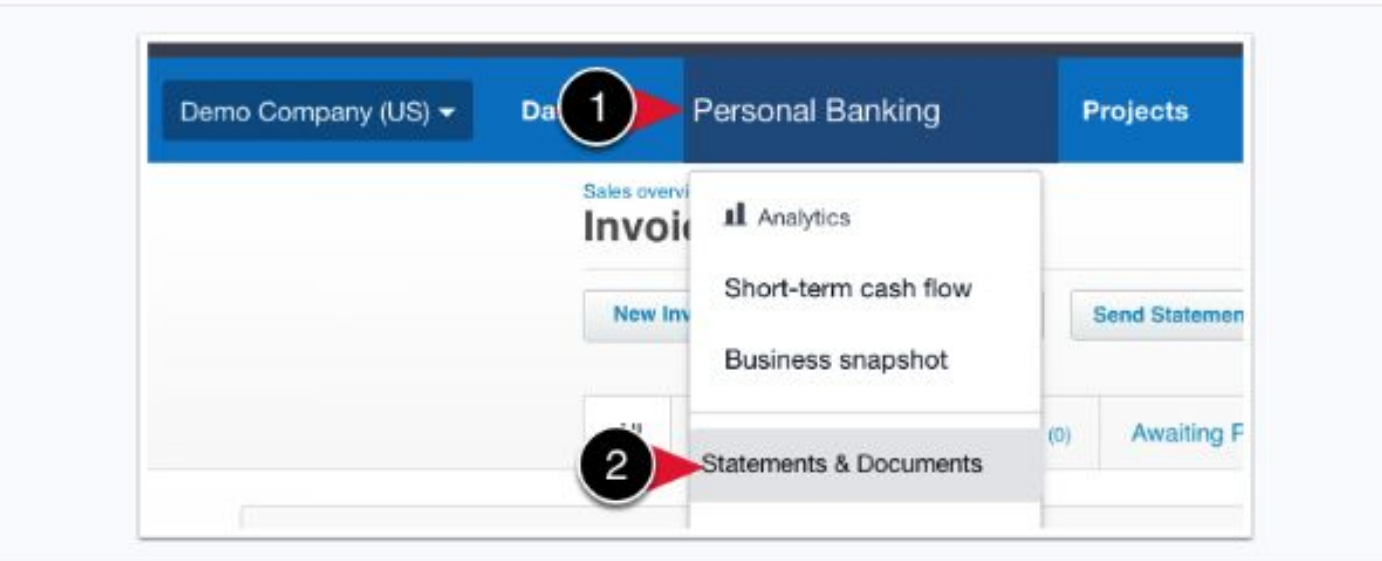
Customers may need to find/download tax documents from their online portal in order to file taxes. Follow the steps below to locate/download tax documents.

Action


1. Log in and Navigate to Statements & Documents

Enter `bank.com` in the URL and log in using your email and password.

Navigate to Statements & Documents.



2. Select Tax Documents



3. View tax Documents

From here, you can select and view all available tax documents for your accounts.



Followable Decision Trees

Bank Demo / Personal Mobile & Online Banking / Digital Banking (Progress) Edit Article ▾

How do I set up direct deposit?

Updated on Jan 19, 2023

Direct deposit with your employer can be set up by downloading and filling out the [direct deposit form \(PDF\)](#), [Opens in a new tab](#).

You'll need to give the completed form, your The Bank account and [ABA routing number](#) to your employer's payroll department.

Direct deposit of federal payments can be set up in several ways:

- Enroll online at [DirectDeposit.org](#), [Opens in a new tab](#)
- Call [800-333-3333](#)
- Visit your local The Bank [branch](#)

Bank Demo / Personal Mobile & Online Banking / Guide Examples Edit Article ▾

How do I set up direct deposit?

Updated on Jan 19, 2023

Background

Customers may want to set up a direct deposit with their employer to receive payment for work (e.g. salary) OR they may want to set it up with a different entity (e.g. federal government for things like tax refunds).

Action

1. Select the purpose for setting up direct deposit

*Are you trying to set up direct deposit with your **employer**? Or for **something else** like getting a tax refund*

Set up Direct Deposit with Employer	Set up Direct Deposit with Other (e.g. receive federal payment for tax return)
-------------------------------------	--

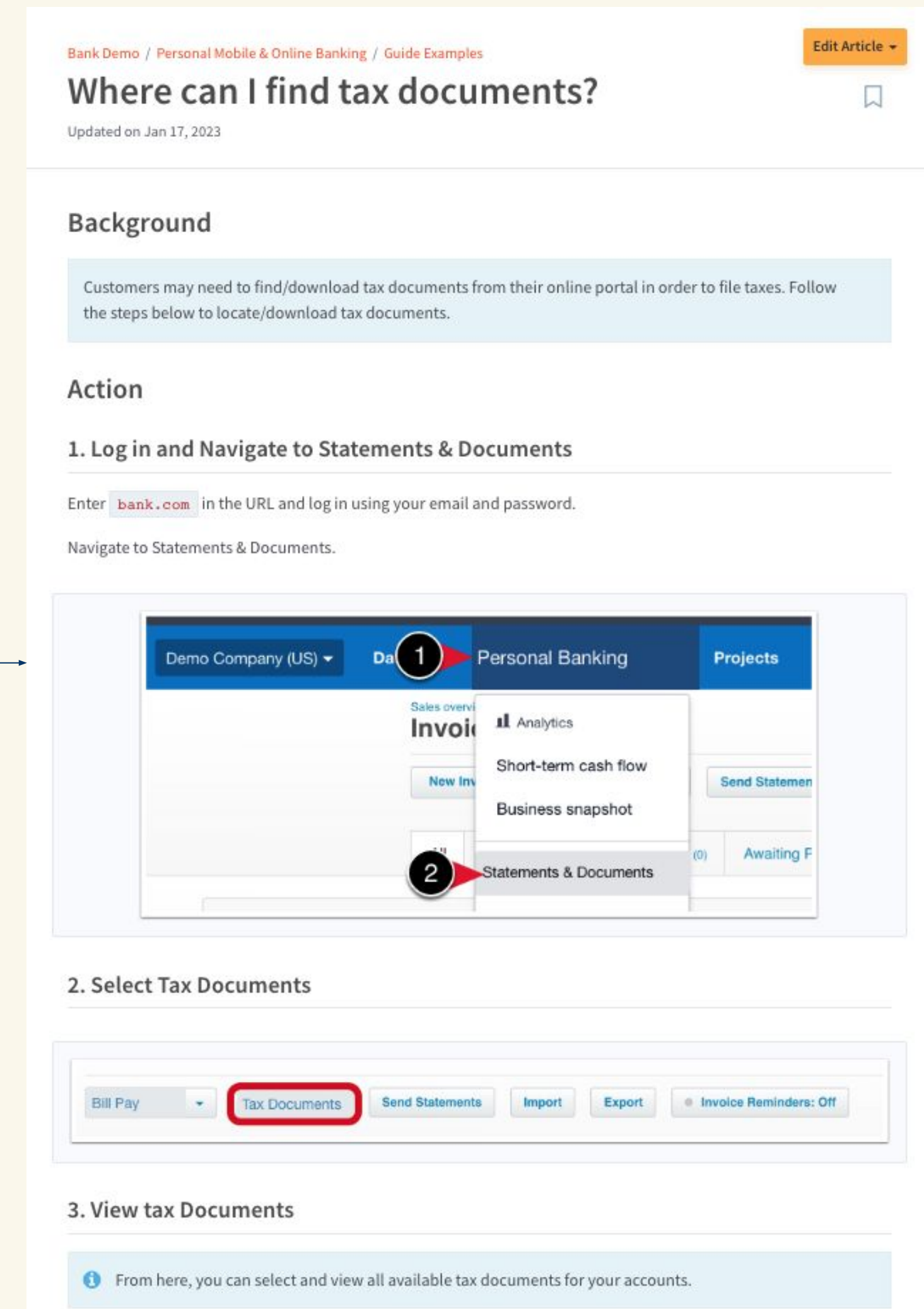
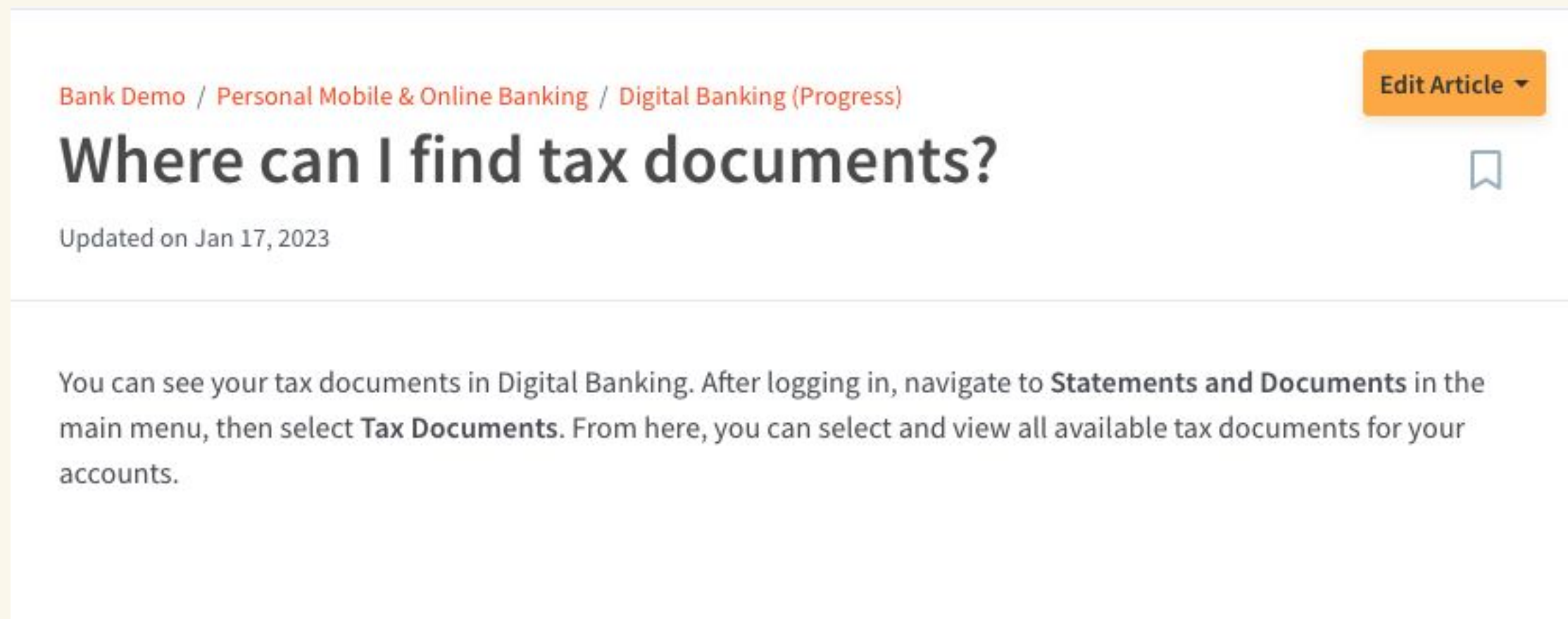


Followable

- Clear path from the first to the final step
- No jumping back and forth
- Use decision trees for complex workflows

Scannable

Scannable Images with annotations



Scannable Call outs

Bank Demo / Personal Mobile & Online Banking / Guide Examples Edit Article

How to Deposit a Check on the Mobile App

Updated on Jan 17, 2023

Background

Customers can deposit certain types of checks via the mobile app. See this article for specifics around what types of checks can and cannot be deposited via the mobile app: [What types of checks can I deposit with my mobile device?](#)

Action

1. Log in and select Deposit Checks



2. Upload image of front and back of check

1. Sign your check
2. Write "For deposit only at The Bank" on the back



Bank Demo / Personal Mobile & Online Banking / Guide Examples Edit Article

Why do I have to enter a secure access code or register my browser or device each time I log in?

Updated on Jan 17, 2023

Background

Customers may be asked to enter a secure access code or register their device/browser each time they log in. This article provides different reasons that may be occurring.

Reasons

- Registrations have been reset for all users
- Your antivirus software is set to clear cookies
- The browser was closed prior to completing your login
- You've deleted and reinstalled the mobile banking app
- You log in with a different browser on a registered computer
- Your browser is set to clear cookies each time it closes
- You may need to register your device

What types of checks can I deposit with my mobile device?

Updated on Jan 19, 2023

Background

Mobile Check Deposit does not accept all types of checks. If the type of check is not accepted via mobile, the customer will need to visit a branch. For instructions on how to deposit a check on a mobile device, click here: [How to Deposit a Check on the Mobile App](#)

Guidance

You CAN Deposit via Mobile	You CANNOT Deposit via Mobile (must visit a branch to deposit)
<ul style="list-style-type: none">Personal Checks payable in US dollarsBusiness Checks payable in US dollarsGovernment checks payable in US dollarsChecks drawn on a US bankChecks payable and endorsed by the account holder	<ul style="list-style-type: none">US postal money orders or savings bondsForeign or international checksTraveler's checksMoney ordersConvenience checksChecks drawn on a line of credit



Scannable

Use lists and decision trees

Bank Demo / Personal Mobile & Online Banking / Guide Examples Edit Article

Intake Guide

Updated on Jan 19, 2023

1. Greeting & Verification

Thank you for calling the Bank. My name is _____. May I have your Name and Account number?

If they do NOT have their account number, confirm the following:

1. Last 4 of their SSN
2. 1 security question.

2. Discover reason for call and locate procedure

How can I help you today?

- A. Repeat back to caller what they want
- B. Understand all the details
- C. Find guide
- D. Follow steps

3. Close Call

1. Summarize what you did
2. Inform member what next steps are (if any)
3. Ask if there's anything else you can do
4. Thank the caller.
5. Document details of the call in the ticket

Bank Demo / Personal Mobile & Online Banking / Guide Examples Edit Article

Reporting Lost / Stolen / Compromised Login ID, Password, or Other Security Credential

Updated on Jan 19, 2023

Background

Use this checklist when customers believe their login ID, password and/or other Security Credentials have been lost, stolen, or used without their authority or if they believe that an Electronic Fund Transfer has been made without their permission using information from their check.

Action

1. Select how it was reported

Phone	Email
Mail	



Scannable

- Text is concise
- No video longer than 5 seconds
- Language is actionable
- No foundational knowledge is included
- Use formatting tools:
 - Screenshots w/ annotations
 - Checklists
 - Bulleted or numbered lists
 - Styled text (e.g. tip, warning, etc.)
 - Collapsible sections
 - Headings
 - Highlights
 - Links

Test! Test! Test!

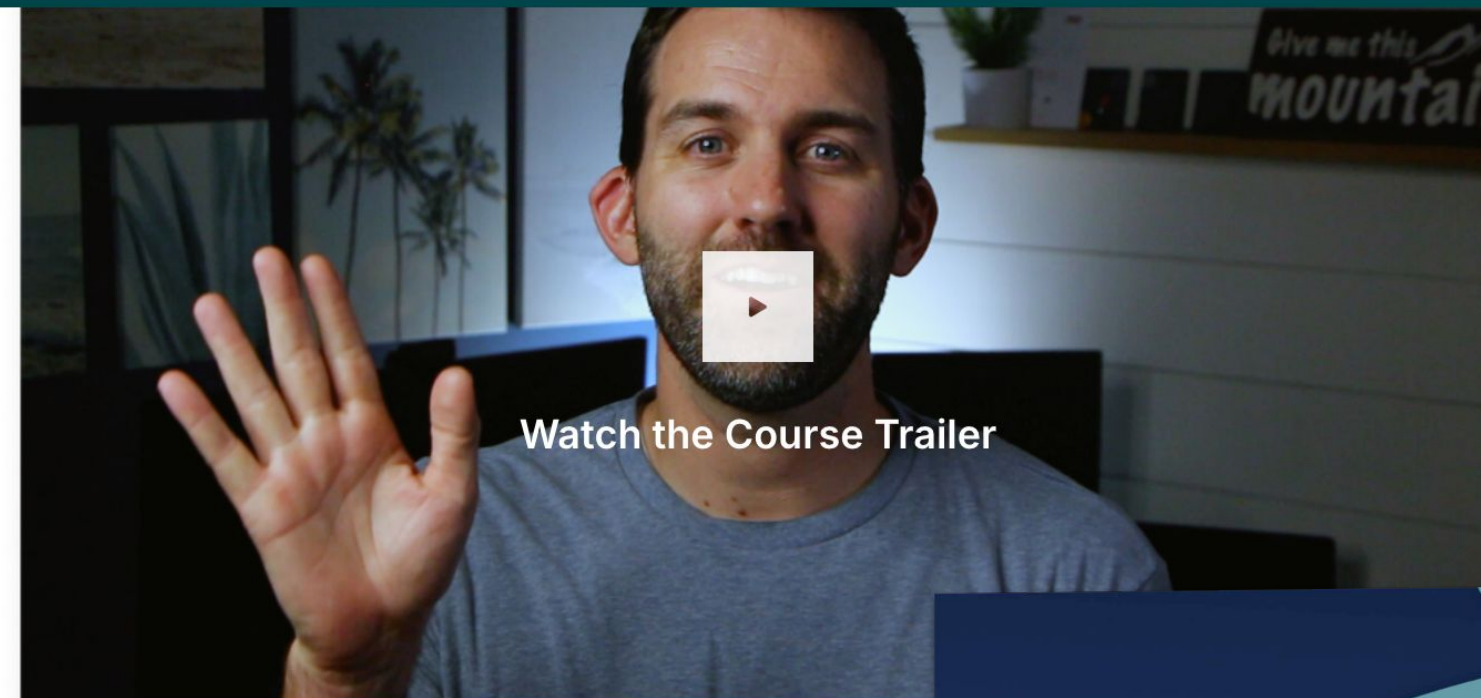
Testing

- Observe, don't talk or instruct
- Note where they get stuck
- Update the guide and try again

Find & Follow 101

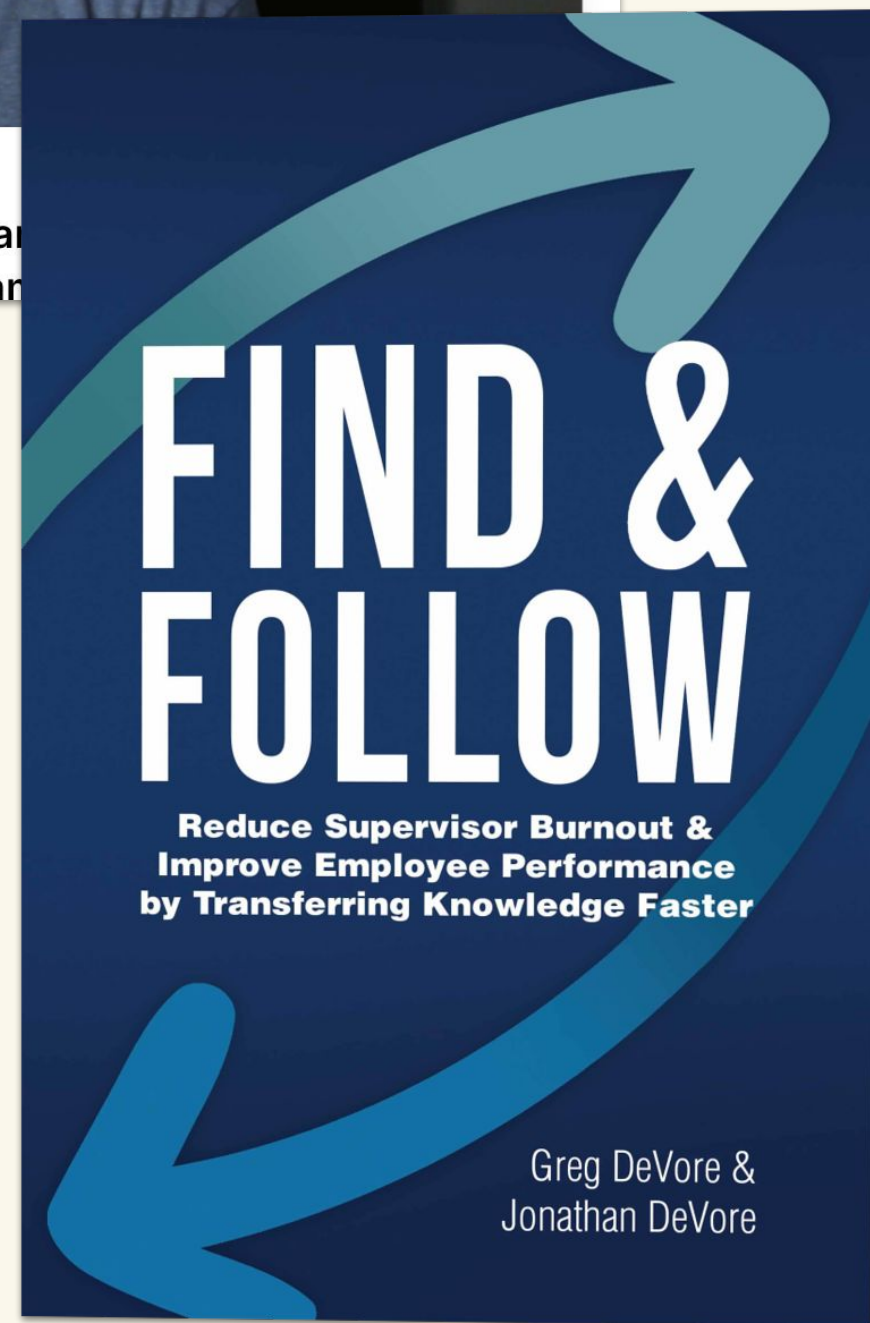
This free 30-minute course includes everything you need to know to get started with the Find & Follow Framework

Enroll for Free Now

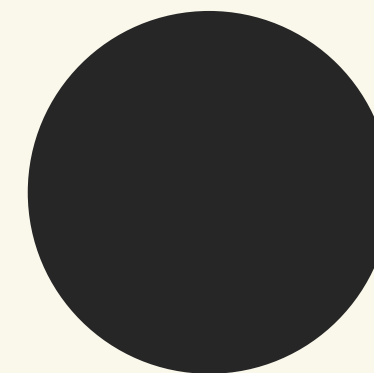


Watch the Course Trailer

Learn
Frame

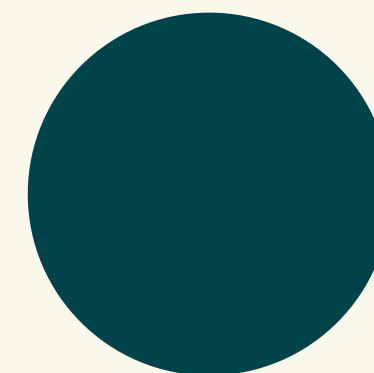


Next Steps



Find & Follow Course

<https://www.screensteps.com/find-follow-course>



Pick up the book

<https://www.screensteps.com/find-follow-book>