

# Solving the Knowledge Transfer Problem

How Find & Follow helps you transfer knowledge faster for more confident, independent, and productive employees.



# How would you describe your operations?

Look at the chart to the right.

If your business could be represented by the dot in the lower left corner, low complexity and low change, then stop reading. You don't need Find & Follow.

But if you are at the high end of complexity, change, or both, then you know **how impossible it feels to help employees be confident, efficient, and independent.**

The fact is, you are trying to cram more information into your employees' brains than they were ever designed to hold.



**Problem:**

How can employees **quickly learn** what to do and how to do it?



# We have seen companies attack this **learning** problem using 2 primary methods

**1** **Formal training** (*classroom or LMS*)

**2** **Informal training** (*coaching, chat, email, asking their neighbor*)



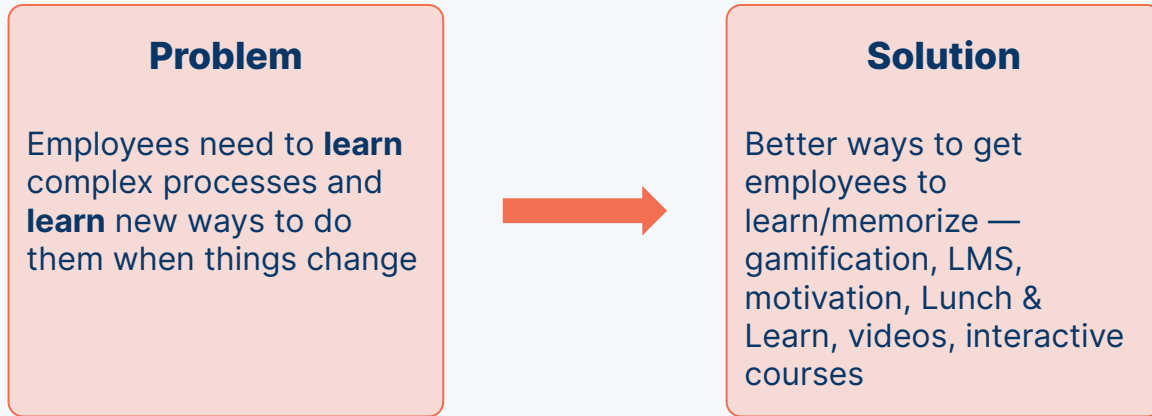
**Learning** (*i.e. memorizing*) how to do operational tasks when things are complex and/or changing **takes a very long time** and the results are mixed.



**So, let's reframe the problem ...**



# This is not the correct problem and solution



What do  
*you really*  
want?

You want  
employees **to do**  
their work correctly,  
efficiently, and  
independently.



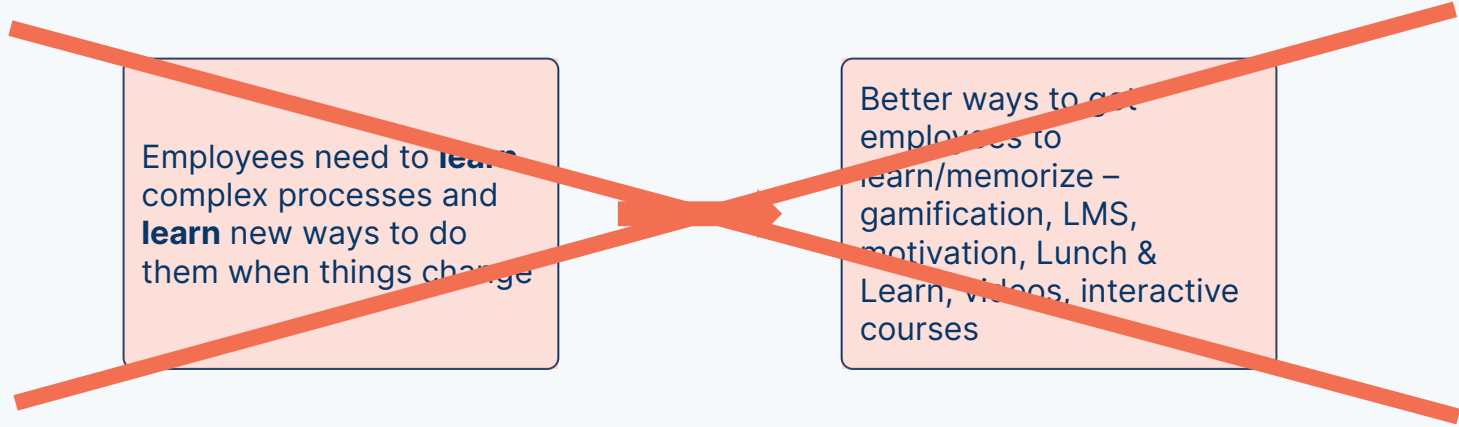


In reality, **employees can do things before they've become experts.** They can also learn as they do.

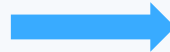
**What's another way we can get there?**



# What's the *real* problem and *real* solution?



Employees need to **perform** complex tasks and **apply** new ways to do them when things change



Better ways to **transfer knowledge** that can be **applied instantly**



You don't have a learning problem.

You have a **knowledge transfer problem.**



# What's the difference?

**Instead of** cramming information into people's heads ...



**... You're creating resources they can reference** to instantly transfer knowledge the moment they need it.

# How would training & operations change if you could effectively transfer knowledge?

1. **Less stress** for your employees and supervisors
2. More employee **independence**
3. Greater **consistency**
4. Tasks that take **less time**
5. Better ability to adapt to **change**
6. **Shorter onboarding times** for employees and customers



Truth:

The more effectively you can  
**transfer knowledge**, the better your  
operations will run



**How effectively are you  
transferring knowledge today?**



# Knowledge Ops Maturity Model



Learn more about this Knowledge Ops Maturity Model with [this blog post](#).



# Knowledge Ops Maturity Model

Knowledge transfer **stinks** and your operations feel **chaotic**

## 1. Tribal

All training happens through shadowing, nesting, and asking your supervisor or co-worker. No documentation exists.

## 2. Document

Some documentation is created but it isn't regularly used. Documentation is not designed with the end-user's needs in mind.

## 3. Guide

Digital guides are designed to guide employees when completing tasks, solving problems, and making decisions. Employees use the digital guides each time they perform a task.

## 4. Train

Digital guides are used during the new hire training process. Training consists of very little classroom time or lecture-based training. Most training is done by going through practice exercises that allow employees to practice using the digital guides.

## 5. Accelerate

The organization continues to build on the foundation they have built, further optimizing guides to help employees work more efficiently and with greater confidence.

Employee Independence

Most Organizations Operate Here



# Knowledge Ops Maturity Model

Knowledge transfer is **awesome** and operations run **smoothly!**

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Find & Follow Organizations Operate Here



**Find & Follow** is a **framework**  
for transferring knowledge more  
efficiently.

This is how organizations **climb the**  
**Knowledge Ops Maturity Model.**



# What is a Find & Follow Organization?

A Find & Follow Organization uses a different approach to business operations and knowledge transfer.

Employees rely less on memorization and tribal knowledge.

**Instead, a Find & Follow Organization is focused on centralized knowledge, standardized procedures, and just-in-time digital guides.**

They don't just think about what information is stored in a file somewhere. They consider how that knowledge will be accessed and used to drive better performance.

Click the video on the right to learn what makes a Find & Follow Organization more productive and efficient.



We **ARE NOT** creating a knowledge dumping ground.

It's not enough to just capture knowledge.

That doesn't drive any real improvements or results.

## 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 for 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 [800-333-1799](#)
- Visit your local The Bank [branch](#), [Opens in a new tab](#)

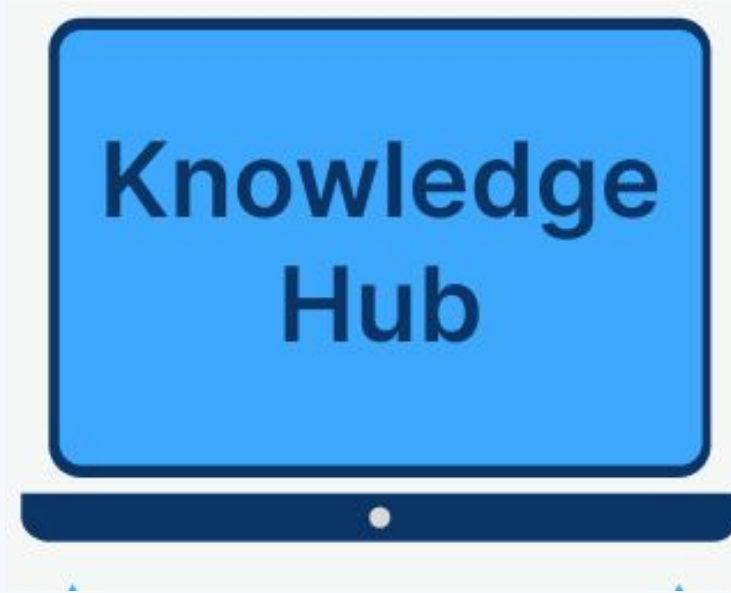
### Secure access code or register browser or device

There are several reasons you may need to request a secure access code each time you log in.

- **You may need to register your device.** If you're using your personal computer or device, we recommend that you select **Register Device** to avoid receiving the prompt for a secure access code each time you log in. Helpful tip: Requesting your secure access code by text is the quickest way to receive your code.



We **ARE** creating a knowledge hub.



# What are the differences in Find & Follow Organizations?

1. Onboarding times takes **weeks instead of months**
2. Employees are able to work **independently and confidently**
3. Employees are able to **accomplish more in less time**, with less support
4. Adapting to change **takes minutes**, not weeks or months



# What other areas are impacted?

- Employee stress
- Accountability
- Transparency
- Cross-training times
- Succession planning





# How to learn more:

1. Take the free 30-minute course, [\*Find & Follow: The Basics\*](#)
2. [\*Schedule time to meet\*](#) with a Find & Follow expert to learn what impacts the framework could have at your organization and how to get started implementing the framework

