

A DISCUSSION GUIDE FOR LEADERSHIP TEAMS

Is Your Team Ready for the Moment of Performance?

A short exercise to find out whether escalations on your highest-stakes, lowest-frequency tasks are an information problem or a confidence problem—and what to do about it.

THE MOMENT OF PERFORMANCE

Every customer-facing employee lives here, all day

The instant an employee has to answer a question, execute a task, or solve a problem—usually with someone waiting.

1

Knows it,
does it right

The outcome everyone is
optimizing for.

2

Thinks they know it,
gets it wrong

Tribal knowledge creates
inconsistency and compliance
risk.

3

Unsure,
escalates

The expensive outcome—and
the one most leaders misread.

THE REFRAME

Escalation is often a liability shield, not an information gap.

Your employees aren't just trying to get the right answer. They're managing risk to the customer relationship, risk to the compliance record, and risk to their own job—all in the same moment. Escalating lets them say someone else signed off. That's often cheaper than acting alone, whether or not the answer was already in front of them.

“

When I see that wall of text, I just turn to the escalation desk.”

— Contact center agent, describing why he escalates even when the chatbot gave him an answer

Training doesn't scale to your highest-stakes work

DAILY TASKS

Reinforced constantly.
Training works well here.

High repetition builds real, tested confidence long before the stakes get high.

RARE, HIGH-STAKES TASKS

Weekly, monthly, quarterly.
Training can't fix this.

A wire transfer. A beneficiary change after a customer's death. Often your highest-stakes moments—and employees never get enough repetitions to build real confidence, no matter how good the training was.

The reframe: *"The way you frame a problem determines which solutions you come up with. By shifting the way you see a problem, you can sometimes find radically better solutions."* —Thomas Wedell-Wedellsborg, *What's Your Problem?*

WHERE ARE YOU STARTING FROM?

Most regulated teams are stuck at the wrong stage to fix this

STAGE 1

Tribal

Word of mouth and memory.
Employees ask a coworker or supervisor for every non-routine answer.

STAGE 2

Document

Procedures exist, but they weren't built for the moment of performance. Nobody uses them live.

STAGE 3

Guide

Employees get structured, performance-ready guidance they can actually follow under pressure.

Most regulated organizations we talk to are stuck between Tribal and Document—which is precisely why escalation, inconsistency, and compliance risk show up at the volume they do.

Benchmark your team: blog.screensteps.com/knowledge-ops-maturity-model-how-effective-knowledge-operations

Is this actually costing you?

1

Identify the tasks

List the tasks that are high-stakes but low-frequency—weekly, monthly, quarterly. Wire transfers. Beneficiary changes. Anything with real consequences that doesn't come up often enough to build muscle memory.

2

Ask what employees actually do

When one of these comes up, what happens? Listen for who they go to for reassurance—and how often that's the real pattern, not the exception.

3

Add up the cost

Supervisor bandwidth pulled into answering questions. Slower response times for the customer. Errors when someone guesses instead of asking. Burnout from being the constant answer desk.

Does your current system stand a chance?

Pull up the documented procedure for one of the tasks from Part 1.

Ask an employee, directly: “What stops you from using this while you’re standing in front of a customer?”

That answer is usually the real diagnosis—not a missing-content problem, but a confidence problem.

You'll come away knowing whether the fix is more training, better documentation, or a genuine knowledge operations strategy.

NEXT STEPS

Run this conversation with your team this week.

You'll know a lot more about whether you're solving the right problem—and what your team actually needs to perform under pressure while staying compliant.

Talk to a ScreenSteps expert

screensteps.com/demo

