

CU*SOUTH Partners with ScreenSteps to bring AI-Powered Knowledge Management to Credit Unions

Partnership helps credit unions improve operational efficiency, accelerate staff onboarding and strengthen institutional knowledge retention



FAIRHOPE, AL, UNITED STATES, June 23, 2026 /EINPresswire.com/ -- [CU*SOUTH](#), a 100% credit union-owned credit union service organization (CUSO) that provides essential products and solutions for credit unions, today announced a partnership with [ScreenSteps](#), an AI-powered knowledge base and process documentation platform built to help organizations train employees, standardize procedures, and retain operational knowledge.

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*Danny Phillips, SVP of Client Experience, CU*SOUTH*

Through the partnership, CU*SOUTH credit unions will gain access to ScreenSteps’ intelligent documentation and workflow platform to support employee training, operational consistency, and long-term organizational knowledge retention.

The partnership addresses one of the most persistent operational challenges facing financial institutions today: ensuring employees can quickly access accurate procedures and institutional knowledge while reducing dependence on tribal knowledge and lengthy training

cycles.

"Credit union staff juggle hundreds of tasks across lending, new accounts, teller operations and compliance. Every policy update and system change adds one more thing to remember," said Danielle Steed, head of partnerships at ScreenSteps. "With ScreenSteps employees open a step-by-step guide or decision tree right where they're working and follow the correct process in real time. No searching through shared drives. No waiting for a supervisor. That's what this partnership puts in front of every CU*SOUTH credit union."

Through the ScreenSteps Sidekick browser extension, staff pull up the exact guide and decision tree they need in context, inside the platform. The partnership delivers three specific capabilities to credit unions: in-app guide delivery via Sidekick, which surfaces procedures without requiring employees to leave CBX; interactive decision trees that walk staff through conditional workflows such as account disputes, loan exceptions and compliance checks; and AI-assisted content creation that allows subject matter experts to produce polished, formatted documentation quickly.

ScreenSteps is in use at more than 50 financial institutions. The company reports that customers have reduced teller training time from as much as 12 months to as little as two days, while one customer trained 30 new hires for a 24/7 operation in under 120 days.

"We're always looking for ways to help our credit unions operate more efficiently and better support their employees," said Danny Phillips, SVP of Client Experience for CU*SOUTH. "This partnership gives credit unions access to modern AI-powered knowledge management tools that can improve staff readiness, reduce onboarding friction and preserve critical operational knowledge as organizations grow and evolve."

CU*SOUTH and ScreenSteps will host a live webinar on July 8, 2026, showcasing how credit unions can leverage AI-powered documentation and knowledge management to improve operational performance and employee training.

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About CU*SOUTH

CU*SOUTH is a 100% credit union-owned CUSO with a mission to grow strong credit unions. The company provides core software solutions, essential services and collaborative partnerships to help credit unions achieve their strategic goals and serve their communities. CU*SOUTH is part of the cuasterisk.com network of CUSOs. For more information, visit cusouth.com.

About ScreenSteps

ScreenSteps is an integrated knowledge base software and training solution that helps employees become knowledgeable, consistent and efficient in 30 days or less, without making customers wait. Since 2003, ScreenSteps' cloud-based knowledge base software has served as both a documentation and a training tool for companies, which empowers agents from the first day on the job. Follow ScreenSteps on LinkedIn, Twitter, and YouTube.

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