IRIS / Contact Center Research

Preliminary interviews

We conducted 7 interviews for our first round of research to better understand contact center authoring and content management processes. These 60-minute interviews took place between September 29, 2020 and October 16, 2020.

A notetaker was present for 5 of the 7 sessions; notes uploaded in our preliminary interview notes folder

Secondary interviews

Contact centers provided us with additional people to follow-up with to gain deeper insights into the content processes, and we had follow-up questions after synthesizing data from the preliminary interviews.

Interviews with new contacts, follow-up interviews, and emails soliciting clarification were sent between October 16 - Nov 9.

These Mural boards reflect notes from preliminary and follow-up sessions with participants, as well as information gathered via email.

- Debt Management Center, Veteran Experience Division
    - 3 interviews
    - Produces internal, agent-facing content
    - Mural board includes data collected during 30 min interview with Quality team lead
- Debt Management Center, Treasury, Education and External Relations
    - 1 interview
    - Produces external, public-facing content
- Education, Client Applications
    - 1 interview
    - Manages public-facing EDU content, including gibill.custhelp.gov.
- Health Resource Center, Help Desk
    - 1 interview
    - Produces internal, agent-facing content
- Health Resource Center, Member Services
    - 1 interview
    - Manages HRC help desk publishing process through eGain to KnowVA (KM)
- Office of Community Care
    - 2 interviews and follow-up emails

    - Produces internal, agent-facing content
- Oracle Service Cloud - Contact center IRIS support
    - 2 interviews
    - Administers Oracle Service Cloud platform, which is the system that runs IRIS.
- National Call Center
    - 1 interview
    - Produces internal, agent-facing content
- National Cemetary Association, Scheduling
    - 1 interview
    - Produces internal, agent-facing content
    - National Cemetary Association, Executive Correspondence
    - 1 interview
    - Produces external, individualized correspondence; recently migrated IRIS FAQs into KnowVA.
- Veterans Experience Office Tier 1 (White House line, 311
    - 1 interview
    - Produces internal, agent-facing content

Contact Center Content Teams

We interviewed 8 teams at 6 content centers with the assumption they were involved in some way with creation, maintenance, or usage of external facing IRIS content. Our research quickly disproved our hypothesis. We learned that the teams at these contact centers create little, if any, Veteran-facing customer service content, and play no role in maintaining content in IRIS. These teams primarily create content for contact center agents and team members who support them (leads, supervisors, etc.).

Supporting Details

What: Content types

Who: Audiences

How: Content flow, and systems and software

Debt Management Center (DMC)

Fields inbound requests from Veterans and debtors regarding debt owed to the VA. Non-scripted contact center.

Who we interviewed
- Internal agent-facing content team
- External, public-relations content team
- Quality team that facilitates the internal content review process

Team org chart

✖ Team members dedicated to content
✔ Quality team oversees content (internal only)

Health Resource Center (HRC)

Contact center provides technical support for beneficiary travel reimbursement (BTSSS), eBenefits, MHV, and Access VA. This team utilizes specific workflows and systems to manage their content processes.

Who we interviewed
- Help desk content team
- Knowledge management team

Team org chart

✔ Team members dedicated to content
✔ Quality team oversees content (internal only)

National Cemetery Administration (NCA)

Fields inbound requests related to scheduling burials from cemeteries, funeral directors and next-of-kin.

Who we interviewed
- Team members from the scheduling division
- Members of the executive correspondence team

Team org chart

✖ Team members dedicated to content
✖ Quality team oversees content

National Call Center (NCC)

Fields calls related to claims - NEED MORE INFO.

Who we interviewed
Internal agent-facing content team
Team org chart

✔ Team members dedicated to content
? Quality team oversees content (unable to confirm)

Office of Community Care (OCC)

OCC contact center handles inquiries related to all of the VHA OCC programs that allow Veterans and their family members to receive and pay for care and services through providers outside of VA.

Who we interviewed
Internal agent-facing content team
Team org chart

✔ Team members dedicated to content
✖ Quality team oversees content (internal only)

Veterans Experience Office (VEO)

Fields calls coming into the White House VA Hotline and VA 311. Non-scripted contact center.

Who we interviewed
Contact center training team
Team org chart

✖ Team members dedicated to content
? Quality team oversees content (unable to confirm)

Contact Center Authoring Flow

We set out to learn about the contact center authoring flow with the assumption in some way involved the creation, maintenance, or usage of external facing IRIS content. Our research quickly disproved our hypothesis. Six of the seven contact center teams represented in this flow produce internal, agent-facing content. Examples of this content include knowledge articles, scripts, SOPs, and step-by-step job aides. One division of the Debt Management Center produces external, customer-facing content such as VSO outreach presentations, email/social media, "pattern paragraphs" (customer response templates), and web pages on va.gov/debtman.

Three teams included here have a dedicated content team; content authoring and management is an ancillary responsibility for the other 3 teams. This flow is an informal process for most teams, with communication taking place via email.

Supporting Details

What: Content types

Who: Content teams, and their audiences

How: Systems and software

Pre-content creation

Content requested

Requests for new content and updates come from various sources for most centers; they're often driven by the business line, and received via email.

Step details by team

Evaluate

All centers perform some level of evaluation before drafting content.

Step details by team

Create/Update Content

Draft

Drafts are most often created in Microsoft Word by an author or analyst.

Step details by team

Review

All contact center teams conduct some level of review prior to publishing content, but the scope and format of the review varies by team. Many circulate Word documents via email and use the Track Changes feature.

Step details by team

Approval

Division chiefs, assistant chiefs, and business line contacts typically approve content via email.

Step details by team

Publish

Teams publish to KnowVA through eGain and/or Sharepoint. The final destination varies by team. On most teams, this is done by someone other than the author.

Step details by team

Post-publication

Maintain

Teams usually only update content when asked; 2 contact centers have a process to regularly audit and flag content.

Step details by team

Retire

Content is retired by request or when flagged in an audit. Most teams use a status setting in Sharepoint or eGain to retire content.

Step details by team

Contact Center Team	Step details: Content Requested
Debt Management Center Treasury, Education and External Relations Division	Requests for new, external content often arise from a change in a law or a process, or an event such as COVID-19. The team manually reviews content to identify needed updates on a regular basis.
Debt Management Center Veteran Experience Division	Requests for new, agent-facing content are often reactive. Originate from DMC senior leadership in response to an issue that has escalated. May start as a verbal conversation, but official requests will ultimately come through email. Content updates are triggered by audits from the Quality team or procedural changes.
Health Resource Center MHV Help Desk	For content coming from internal partners, the help desk receives request in LEAF that something needs to be changed or created. For content from external partners, the help desk receives these requests via email.
National Cemetery Administration Scheduling Division	Team does not create or update content on a regular basis. “Unless we create or add a new service, our stuff remains the same.”
National Call Center Help Desk	Requests come in through various avenues such as an agent request in eGain, email submissions, etc. New content is typically driven by a law or major procedural changes (e.g. appeals process). Updates are typically driven by business lines or SMEs asking for tweaks. Both go through the same process of review and publication.
Office of Community Care Customer Experience	Typically, the chief receives request from business unit content owners, and then passes the request to editors. Occasionally, requests come in directly to the editors. Either way, requests are submitted via email, and process applies for both new and updated content.
Veterans Experience Office Tier 1 Contact Center	Creates training materials when they receive new VA.gov product guides.

Contact Center Team	Step details: Retire
Debt Management Center Treasury, Education and External Relations Division	The team is in the process of migrating to a new Debt Portal, and retiring content will be addressed as part of the migration process. In the past, retiring content has been an informal process.
Debt Management Center Veteran Experience Division	Content is retired as a reaction to a change, e.g. a process update, or through a quality audit. Retired content is archived in SharePoint.
Health Resource Center MHV Help Desk	The help desk team has an archive option for articles highlighted during an audit. If they decide to archive an article (based on usage of article, content relevancy), the archived articles are moved into an "Archive" folder in eGain, are assigned an expiration date, and have the topic removed so they no longer appear on KnowVA. In SharePoint, the article will get a status of "archived."
National Cemetery Association Scheduling Division	Content retirement is based on ad hoc requests and goes through the same process as creating and updating content.
National Call Center Help Desk	Awaiting details from team on how they handle this step of the process.
Office of Community Care Customer Experience	If editors come across content that seems outdated or has low traffic, they'll check with the business unit about retiring it. Some articles get retired when they're merged with other articles and information, and the business line is not consulted. This team has created an authoring guide to sunset content in eGain.
Veterans Experience Office Tier 1 Contact Center	This step does not apply to the VEO team.

Contact Center Team	Step details: Maintain
Debt Management Center Treasury, Education and External Relations Division	The team conducts a quarterly review of content to ensure no PII has been mistakenly published, and to see if any content needs to be updated. Content updates follow the same workflow as new content.
Debt Management Center Veteran Experience Division	Content is revisited when brought to their attention, usually through an audit from their Quality team. Sometimes a known and planned change also triggers content updates. Content updates follow the same workflow as new content.
Health Resource Center MHV Help Desk	Content is revisited when brought to their attention, and goes through the same process using LEAF. Knowledge management team regularly audits content based on last revised date to verify relevance.
National Cemetery Association Scheduling Division	Requests for updates typically come via email. Content updates follow the same review and approval process for new content.
National Call Center Help Desk	Analysts revisit articles when brought to their attention by agents or other help desk team members. Sometimes a known and planned change also triggers content updates. Content updates follow the same workflow as new content.
Office of Community Care Customer Experience	Editors revisit articles when brought to their attention. Sometimes a known and planned change also triggers content updates. Content updates follow the same workflow as new content.
Veterans Experience Office Tier 1 Contact Center	Updates to training materials would come out of a result of a change to or addition of a VA.gov product guide from Chante. If a product guide didn't reflect what was on VA.gov, VEO would consult Chante.

Contact Center Team	Step details: Publish
Debt Management Center Treasury, Education and External Relations Division	Agent-facing approved content is typically published onto SharePoint, or in the shared drive. Web content is put on the website by an analyst and then reviewed and published by Jason H, Director of Ops at DMC.
Debt Management Center Veteran Experience Division	Quality team publishes content to SharePoint.
Health Resource Center MHV Help Desk	Knowledge management authors publish approved content in eGain, to be published on KnowVA. A copy of published content is also stored in SharePoint as a backup.
National Cemetery Association Scheduling Division	The publishing step is handled differently based on the kind of content being published. They sometimes leverage their web team for publishing.
National Call Center Help Desk	Analyst (Billy F) publishes content to KnowVA via eGain; leverages UI components to improve UX for agents. Analyst (Lindsay H) sends email to agents with new or updated content attached as a Word document.
Office of Community Care Customer Experience	Editors publish to the KM through eGain. They copy and paste HTML templates for intial formatting and then paste content from Word into the template. This team sends a weekly email to agents to notify them of new or updated content.
Veterans Experience Office Tier 1 Contact Center	SharePoint is used as a repository to house training materials and user guides provided by Chante.

Contact Center Team	Step details: Approve
Debt Management Center Treasury, Education and External Relations Division	Approval process depends on the scope of the content. Some content can be approved by the immediate team. Sometimes will solicit approval from higher up the management chain.
Debt Management Center Veteran Experience Division	Division and assistant chiefs circulate content for approval. Once approved, content is sent to Quality team for implementation.
Health Resource Center MHV Help Desk	Designated approvers notified content is ready for approval through LEAF; they submit approval directly on the LEAF request.
National Cemetery Administration Scheduling Division	Any Veteran-facing content is sent to the Web Services email box to implement the change.
National Call Center Help Desk	Assistant director approves content via email.
Office of Community Care Customer Experience	Business unit/requestors approve content for publication via email.
Veterans Experience Office Tier 1 Contact Center	This step does not apply to the VEO team.

Contact Center Team	Step details: Review
Debt Management Center Treasury, Education and External Relations Division	The scope of the content dictates the review process. Some content is only reviewed by the immediate team. Sometimes, the team will solicit feedback from VSOs or send things higher up the management chain.
Debt Management Center Veteran Experience Division	Content is sent to Quality to ensure consistency with existing content, review for discrepancies, and provide any feedback. Once review is complete, content is circulated to division chiefs and any other stakeholders (dependant on content) for final approval.
Health Resource Center MHV Help Desk	Content management rep submits request for review in LEAF and assigns to the help desk manager and/or the knowledge management (KM) team for review. Content always goes to KM team for a final review. KM team will draft any recommended changes, and route back to the designated approvers as a final step. LEAF workflows and approval groups are set up by an adminstrator so all team members are notified of requests.
National Cemetery Administration Scheduling Division	For updates to content, a Word document is passed around stakeholders via email. Stakeholders are determined by the type of content in question (form update, law change, etc.).
National Call Center Help Desk	Analyst review with assistant director via email or in-person meetings; possibly with another business line, quality and/or compliance teams depending on scope of content.
Office of Community Care Customer Experience	Editors review draft with requester via email and Word documents. They also use multiple guides (508, authoring checklist) as part of the review process to ensure consistency.
Veterans Experience Office Tier 1 Contact Center	This step does not apply to the VEO team.

Contact Center Team

Step details: Draft

Contact Center Team	Step details: Draft
Debt Management Center Treasury, Education and External Relations Division	Assistant chiefs work on a draft in Word.
Debt Management Center Veteran Experience Division	Assistant chief(s) or SME (supervisor/analyst) work on a draft in Word.
Health Resource Center MHV Help Desk	Content management rep (Louis or Shannon) drafts changes in Word, and attaches to a request in the LEAF system. LEAF is a VA tool that allows for workflow tracking and routing. In some cases, they'll request feedback or collaborate with other stakeholders before officially sending to the review stage.
National Cemetery Administration Scheduling Division	Does not regularly draft content.
National Call Center Help Desk	Analyst writes a draft in Word, and reviews with assistant director via email or in-person meetings. In the draft stage, the analyst may collaborate with another business line, quality and/or compliance teams depending on scope of content.
Office of Community Care Customer Experience	Editors work on a draft in Word, collaborating via email. A content style guide is used for language, and templates are used to ensure consistent formatting.
Veterans Experience Office Tier 1 Contact Center	This step does not apply to the VEO team.

Contact Center Team	Step details: Evaluate
Debt Management Center Treasury, Education and External Relations Division	Division and assistant chiefs evalute scope of the content. For larger content efforts, sometimes will create an internal working group to strategize or partner with another business line (e.g. VHA)
Debt Management Center Veteran Experience Division	Division and assistant chiefs determine author and identify content resources they need to consult (e.g. existing SOPs) to ensure alignment across divisions and content types. This is based on the DMC business lines involved in the request. Authors are notified of the needed work via email.
Health Resource Center MHV Help Desk	Help desk evaluates request to determine audience, which in turn determines which approval group the content will flow through. They've provided each service line they support with a content checklist that helps ensure all required information is submitted.
National Cemetery Administration Scheduling Division	The scope of evaluation depends on the nature of the request that comes in. Discussions about content requests take place via email or conversations at this stage.
National Call Center Help Desk	Analyst reviews the request, gathers background information, and determines the best format (job aide, SOP, etc.) to present the content. They'll also compare content with other contact centers.
Office of Community Care Customer Experience	Editors review the request and try to determine the best format (job aide, FAQ, etc) to present it. They evaluate any provided content to see if anything seems discrepant. They'll also cross-check with other resources (KM portal, team member knowledge, policy manuals, and VA.gov) to validate request.
Veterans Experience Office Tier 1 Contact Center	This step does not apply to the VEO team.

Internal Content Process: Systems and Software

See Oracle Service Cloud info for external content process and tools

Debt Management Center (DMC 1)
Treasury, Education and External Relations Division

Debt Management Center (DMC 2)
Veteran Experience Division

Health Resource Center (HRC)
MHV Help Desk

National Cemetery Administration (NCA)
Scheduling Division

National Call Center (NCA)
Executive Correspondance Team

National Call Center (NCC)
Help Desk

Office of Community Care (OCC)
Customer Experience

Veterans Experience Office (VEO)
Tier 1 Contact Center

Content authoring and management

Word documents (circulated via email, except HRC)

DMC DMC HRC NCC NCA OCC

eGain

HRC NCA OCC

LEAF (review and approvals)

HRC

Content published to:

Knowledge management portal (intranet)

HRC NCC OCC

Memorial Benefit Management System (MBMS)

NCA

SharePoint

DMC DMC VEO

Shared drive

NCC NCA

Routing and task management

VA Integrated Enterprise Workflow Solution (routing)

DMC DMC NCA NCA

LEAF (routing)

HRC

Customer Relationship Management Tools (CRM)

Veterans Account Management System (VAMS)

DMC DMC

Sales Force

VEO

Audiences

✖

Debt Management Center (DMC 1)
Treasury, Education and External Relations Division

Debt Management Center (DMC 2)
Veteran Experience Division

Health Resource Center (HRC) MHV Help Desk

National Cemetery Administration (NCA)
Scheduling Division

National Call Center (NCA)
Executive Correspondance Team

National Call Center (NCC)
Help Desk

Office of Community Care (OCC)
Customer Experience

Veterans Experience Office (VEO)
Tier 1 Contact Center

Primary audiences

Contact center agents and leads who support them

DMC HRC NCA NCC OCC VEO

Outreach event organizers and presenters

DMC

Veterans

DMC NCA

VSOs and SCOs

DMC

Funeral directors

NCA

Secondary audiences

Teams stated that they sometimes are asked to create or contribute to content for these audiences. In same cases, these are not the *intended* audience but the content makes its way to these groups when links are shared across the internet.

Veterans

DMC NCC

American Legion/Disabled American Vets/VFW

DMC

Outreach event organizers and presenters

NCC

Content types

Debt Management Center (DMC 1)
Treasury, Education and External Relations Division

Debt Management Center (DMC 2)
Veteran Experience Division

Health Resource Center (HRC)
MHV Help Desk

National Cemetery Administration (NCA)
Scheduling Division

National Call Center (NCA)
Executive Correspondance Team

National Call Center (NCC)
Help Desk

Office of Community Care (OCC)
Customer Experience

Veterans Experience Office (VEO)
Tier 1 Contact Center

Internal-facing content

Job Aides

DMC HRC OCC

SOPs

DMC NCA OCC

FAQs

NCC OCC

Procedural guidance and protocols

DMC HRC NCA NCC

Contact center agent training material

NCA NCC OCC VEO

Scripts*

HRC NCA NCC OCC

External-facing content

Training material for organizations that support Veterans (VSO, SCO)

DMC

Web content (TeamSite)

DMC

Standard text responses

DMC HRC

Social media and email campaigns

DMC NCC

*OCC has done away with the term scripts, and instead uses “knowledge articles”

Debt Management Center (DMC) Teams

Internal content

Chief of Operations for Veterans Experience Division (Tim W.)

- Assistant Chief (Dawn E.)
  - 4 supervisors
  - 1 analyst
- Assistant Chief (Jodi T.)
  - 4 supervisors
  - 1 analyst

External content

Chief of Treasury, Education and External Relations (Julie L.)

- Assistant Chief, Outreach and Education (Nicole E.)
- Assistant Chief, Treasury (Jamie)

Quality

Assistant Chief, Internal Controls and Process Improvement Division (Kevin C)

Health Resource Center (HRC) Teams

HRC Help Desk Content

Deputy Associate Director
(Brenda T)

Help Desk Operations Manager
(Sylvia P)

Supervisors

- Content Management Rep (Louis R.)
- Content Management Rep (Shannon F.)
- Content Management Rep (Tracy)

Member Services Knowledge Management

Deputy Associate Director of Knowledge Management (Jacque B.)

- Supervisory Program Analyst (Eric B.)
- Supervisory Program Analyst (Patricia H.)
- Knowledge Management System Liaison (Beki L.)

13 knowledge management authors

National Cemetery Administration (NCA) Teams

Internal content (Scheduling division)

Director of Scheduling Office (Jay D.)

Assistant Director (Steve E.)

External content (Executive correspondence team)

This team was of interest to our research study because they recently transferred NCA FAQs from IRIS to KnowVA. Historically, this team was not responsible for the FAQs, but will be moving forward. They transferred FAQs as a rapid response to the sudden announcement of the IRIS sunset. The team primarily writes individual correspondence in response to complex inquiries. Those processes aren't represented in the flow for our study since they're so individualized for each inquiry.

Chief of Executive Correspondence (Danielle B.)

Program Specialist (Tiffany E.)

Correspondence Analyst (Anissa A.)

National Call Center (NCC)

Internal content

Assistant Director (Regina Y.)

- Analyst (Lindsay H.)
- Analyst (Billy F.)
- Acting Chief of Training (Breon J.)

Office of Community Care (OCC)

Internal Content

Chief of Customer Experience
(Geoff D.)

Author / Editor
(Janiece M.)

Author / Editor
(Mary Jane P.)

Author / Editor
(Faz K.)

Veteran Experience Office (VEO)

Training Team

Management Analyst (Todd U.)	Training Specialist (Donita S.)	Training Specialist (Christopher F.)	Training Specialist (Stephen F.)	Associate Consultant (S.J. R.)	Trainer (Ren R.)

Oracle Service Cloud (OSvC)

OSvC is a customer support tool used by the VA to track requests for assistance. There are 4 interfaces in total; 3 provide public-facing support. The interfaces are primarily self-service, providing users with searchable FAQs* to answer their questions. Users can submit inquiries through the Ask a Question feature if FAQs don't answer their questions. This overview explains the OSvC sites and their interfaces.

Oracle Service Cloud Help Desk

Supports 3,200 VA employee (internal) users, who work in the GI Bill Help interface, IRIS interface, and My HealtheVet technical support interface.
More details

- https://va-osvchelpdesk.custhelp.va.gov
- Has internal facing FAQs*
- UI available only to authorized users.

GI Bill Help

Provides and tracks support specifically for the GI Bill education benefit.
More details

- https://gibill.custhelp.va.gov/
- Has external facing FAQs* Review FAQ management flow
- Has public-facing UI, and an internal UI accessible to authorized users.

IRIS interface

Provides and tracks support for Veterans and their families across all VA business lines.
More details

- https://iris.custhelp.va.gov/
- Has external facing FAQs* Review FAQ management flow
- Has public-facing UI, and an internal UI accessible to authorized users.

My Health*e*Vet (MHV) Technical Support

Provides and tracks support specifically for MHV customers.
More details

- https://www.myhealth.va.gov/mhv-portal-web/web/myhealthevet/contact-us
- Does not have FAQs*
- Has public-facing UI, and an internal UI accessible to authorized users.

** FAQs are called "Answers" within the UI and by OSvC team members*

Answer (FAQ) Managment Flow

Two Oracle Service Cloud (OSvC) sites have public-facing answers, or FAQs: GI Bill Help and IRIS. These FAQs are managed in the back-end of the public-facing website by administrators. Each site has their own administrator. The IRIS FAQs are intended to address questions related to all business lines with the exception of anything related to GI Bill education benefits. Part of the OSvC retirement plan is for teams to migrate existing FAQs to other websites.

	Pre-content creation	Create/Update Content		Post-publication	
	Content requested	**Review**	**Publish**	**Maintain**	**Retire**
GI Bill	Requests for new content and updates to existing FAQs on the GI Bill help site (as well as their TeamSite website) are made by members of 3 teams in the Education division. They email the Education program analyst directly.	Program analyst reviews; collaborates with requesters as needed to ensure the content uses plain language and is easy to understand.	Requester and program analyst (PA) agree on content. PA makes changes directly in the GI Bill interface and publishes.	Updates are made by request and go through the same process.	There isn't a formal process to retire content. When content is no longer needed, it is deleted from the system and no longer accessible to anyone.
IRIS	The OSvC team isn't involved in the creation or review of content for these systems. This team trusts that all content has been approved and vetted by business line POCs and SMEs by the time it reaches their queue. A request to create new IRIS answers has not been submitted in the last 7 years.		Business line submits a ticket via the help desk to "Add a new FAQ to IRIS." The request would contain the final content to be published and the associated topic. The OSvC administrator publishes the new FAQ via the IRIS interface.	A help desk ticket must be created for an update to be made. OSvC administrator makes update directly in the system.	Content gets retired when it becomes obsolete. A ticket is submitted, and the OSvC administrator changes the status of content to "retired." Content remains available in the system to admins for reference.

External (public facing) UI

The Ask a Question form is accessible to anyone visiting https://www.myhealth.va.gov/mhv-portal-web/web/myhealthevet/contact-us. This site does not have FAQs.

Internal UI

The Health Resource Center (HRC) help desk receives and responds to the Ask a Question submissions. Help desk agents respond directly to customer inquires through this interface. They can elect to use “standard text” templates to create a response.

The HRC help desk is actively engaged in maintaining their standard text responses.

External (public facing) UI

FAQs and the Ask a Question form are accessible to anyone visiting https://iris.custhelp.va.gov. These FAQs are stored in a separate database from the GI Bill Help FAQs.

Internal UI

Inquiries submitted through Ask a Question are routed to VA offices, primarily contact centers, across all VA business lines based on the topic selected by the user.

Respondents (primarily, but not always, contact center agents) can elect to use “standard text” templates to build a response without starting from scratch. Some teams maintain separate versions of standard text responses in Word documents specifically for their team.

Respondents can also include links to IRIS FAQs as part of their response to customers.

In FY2020, 216,612[1] inquires were submitted through Ask a Question. IRIS FAQs were accessed through the agent console 619[2] times during this same period, which suggests they aren’t used as a primary customer-support resource.

A request to add a new IRIS FAQ hasn’t been submitted in at least 7 years. With few exceptions, a request to update an IRIS FAQ has not been submitted. There are 1 or 2 FAQs, such as the VA Contact Information FAQs, that do get necessarily updated.

1. Oracle Service Cloud report: iris_inquiries-created-by-topic_fy2020
2. Oracle Service Cloud report: iris_answers-accessed-in-console_fy2020

GI Bill Help

External (public facing) UI

FAQs are accessible to anyone visiting https://gibill.custhelp.va.gov/. GI Bill help FAQs are in a separate database from the IRIS FAQs. Registered users of the portal (anyone can register) are able to submit inquiries via the Ask a Question form.

Internal UI

Education analysts and employees at regional processing centers receive inquiries through the Ask a Question feature. Inquiries are routed to the appropriate contact centers based on the topic selected by the user. Respondents can respond directly to customer inquiries through this help desk interface.

Respondents can also include links to GI Bill Help FAQs as part of their response to customers. Respondents can elect to use "standard text" templates to build a response without starting from scratch.

FAQs are managed from within the help desk interface by a program analyst on the Education, Client Applications team.

Oracle Service Cloud (OSvC) Help Desk

External (public facing) UI

The Oracle Service Cloud Help Desk is an internal facing tool for VA employees, and doesn't have an external facing UI that the general public can access.

Internal UI

The help desk is designed for internal users (VA employees) to understand and troubleshoot the interfaces they work in through self-service. When they're unable to find the information they're looking for, they can submit a help desk ticket to get further assistance.

Tickets (i.e. Inquiries) are routed to the appropriate Help Desk team members based on the topic selected by the user. Respondents can respond directly to tickets through this help desk interface.

Respondents can elect to use "standard text" templates to build a response without starting from scratch.

One full-time administrator and 3 to 5 part-time team members respond to tier 1, 2, and 3 OSvC help desk inquiries submitted by VA employees. Creating a new answer (FAQ) is considered a tier 3 issue.

IRIS / Contact Center Research Findings Supplement

Digital Services Veterans Affairs (DSVA), VSA, Public Websites

Liz Lantz (liz.lantz@adhocteam.us), November 2020

View the Research Plan.

Purpose

This document serves to supplement the content team, authoring flow, and Oracle Service Cloud maps created from the findings in our research study.

Background

The primary goals for this research study were to:

- Determine to the source of IRIS FAQs, and who has been managing/updating them.
- Understand how IRIS currently fits into each contact center's workflow
- Understand processes around Veteran-facing customer service content authoring and creation for contact centers.
- Understand processes around internal, agent-facing customer service content authoring and creation for contact centers.

Research Methodology

The preliminary round of research took place over Zoom. We conducted 1 hour remote interviews with teams at 6 contact centers.

- Debt Management Center (DMC)
- Health Resource Center (HRC)
- National Cemetery Administration (NCA)
- National Call Center (NCC)
- Office of Care Coordination (OCC)
- Veterans Experience Office Tier 1 Contact Center (VEO)

This overview of contact center teams provides insight into the purpose of each call center and details about the teams we spoke with.

We also interviewed the team lead for Oracle Service Cloud, the platform IRIS runs on.

Our second round of research included email and Zoom follow-ups with the teams we previously talked to, as well as interviews with other contacts we were referred to.

The [complete list of research questions]() can be found in our research plan.

Key Findings

1. None of the contact center teams we spoke with publish or update IRIS FAQ content.
2. When IRIS FAQs were initially created in 2002, SMEs from the business lines were responsible for creating and maintaining the content. All information available suggests that they created the original FAQ content, but did not do any further work on the FAQs after the initial creation.
3. The contact center teams we spoke with are primarily authoring and managing internal content for contact center agents; most do not handle any external, Veteran-facing content.
4. Three of the teams have a dedicated content staff. Content management is an ancillary responsibility for the other 3 teams.
5. Only IRIS administrators can publish or update IRIS content.
6. A new IRIS FAQ hasn't been added in at least 7 years, and a request to update an IRIS FAQ hasn't been submitted in at least 2 years.
7. One team (HRC) has a mature content management process with formalized routing and feedback/publication loops.
8. We identified 3 teams responsible for Oracle FAQs; this new responsibility was assigned to 2 teams as a result of the decision to retire the system.
    - NCC recently took ownership of the FAQs, and hasn't touched them.
    - The NCA external content team believes they *would* be responsible for these moving forward; no current owner of this content today. The NCA executive correspondence updated some NCA FAQs based on VA.gov content and then migrated them to KnowVA via eGain.
    - The Education, Client Applications team has always managed the GI Bill help FAQs, and has begun the process of migrating them to KnowVA.
9. Content governance is a pain point for teams across VA contact centers. We heard repeatedly that many teams struggle with tracking down SMEs to verify information, and that there is a sense of a lack of content ownership beyond the initial ask to have the content created.

Supplemental Findings

Our interviews were incredibly informative, and not all of the information we gathered fit appropriately into our maps and flows. The information below captures supplemental details teams shared that may be of interest as our content governance processes evolve.

Debt Management Center (DMC)

- Two divisions work with content:
    1. Veteran Experience Division (VED), focused on agent-facing customer support content.
        - This team does not have access to Oracle Service Cloud, or IRIS.
    2. Treasury, External Relations and Education Division, focused on external, public-facing content primarily targeted to Veteran Service Officers, School Certifying Officials, and Veterans.
        - This team does have access to Oracle Service Cloud and IRIS, and logs in daily to respond to IRIS inquiries. Pain point: Inability to include attachments when responding to IRIS inquiries.
        - They manage their own version of IRIS standard text in a Word document shared among the team. They call these "pattern paragraphs" and use them in email responses.
        - This division would be the main entry point into DMC. We'd be the point of contact for the FAQS to validate that the answers are correct and coordinate the team to draft/edit content. Since they don't really have a formal process, division chief would approve and put it out there.
- Neither of these divisions has a dedicated content team.

    > We truly don't have the resources to devote somebody to this type of work. It's collateral work for everybody that is doing it.

- VED team lead doesn't feel like there is a set process in place.

    > As we talk about it, I'm feeling like we're fragmented when it comes to our content.

- VED team works with members from the Internal Controls and Process Improvement Division, internally referred to as "Quality".
    - This team is involved in the review and publication process. They review proposed content to ensure consistency, and that there aren't any discrepancies, redundancies, misinformation, etc.

        > Our role has become trying to make sure that we give space for everyone to give some feedback, and make sure that all the interested parties know what is going on

    - This team also manages DMC's Sharepoint instance and publishes content once it's approved by division chiefs.
- DMC is rolling out a new debt portal in early 2021 that will replace va.gov/debtman.
    - The treasury team is helping with the content transition to the new debt portal.
    - They are currently not sure how any content publication processes will work, or how if the content will stay in the format it is in today (e.g. they have FAQs on the site, and are unsure whether or not it'll stay in an FAQ format)

- DMC is also in the process of implementing Veterans Account Management System (VAMS), which is a CRM based on Sales Force.
    - Some of the teams "pattern paragraphs" (used to standardized agent email responses, DMC equivalent of IRIS standard text) have been moved from a shared drive into a VAMS feature called "S Docs".
    - Eventually all of the pattern paragraphs will live in VAMS within the S Docs feature.
- DMC VED agents primaries provide phone support
- The Treasury, External Relations and Education Division handles Ask a Question IRIS inquiries.
    - IRIS inquires that indicate the customer prefers a call back, or has missing email information will be routed to the VED team.

National Call Center (NCC)

- One team member uses UI elements to make content easier for agents to use. His role is to publish internal content in eGain.
- Utilize internal templates as guides for content, but doesn't have a tone and voice style guide.
- We were not able to get answers to follow-up questions from this team before the conclusion of our research.

Office of Community Care (OCC)

- Team leverages a variety of authoring guides during their process, including voice and tone, 508 compliance, and a peer review checklist
- Content team receives requests from 3 different areas of OCC: Community Care Contact Center (C4), Family Members (FM), and ChampVA.
    - They have designated contacts within C4 and FM who submit requests for content. They rely on these content owners to tell them when things have changed in order to keep their content in sync with VA.gov.
    - Those contacts act as liaisons to SMEs.
- The team heavily relies on VA.gov content for their agent-facing articles.

  > If you're giving me a resource I want to know the last date. We love that about the field guidebook and VA.gov - we can look in and see that it hasn't changed since that day.

- Has moved away from the term "scripts" - Agents prefer FAQs
- Has an upcoming initiative to re-do their taxonomy in the KM.
- Differentiates between knowledge articles and FAQs. Over time, FAQs get merged into knowledge articles.

  > FAQs are approved questions we expect people to ask. We rely on those for new things because it's easier for the CSR to see the question rather than navigate through blocks of text.

- Painpoints:

- Don’t have a good way for routing. Requests come in via email, IM, hallway conversations, etc.
- Business owners want to put things in the knowledge management system (intranet) that don’t belong there (e.g. IT info).
- Heavy reliance on SMEs to verify content, and sometimes SMEs are unresponsive.
- Many times have to go back for additional info because it doesn’t make sense, the flow isn’t right, or there is contradictory information.
- Lots of back and forth, waiting for approval. Timeliness is a problem. Sometimes requester doesn’t have a response.

Veteran Experience Office Tier 1 Contact Center (VEO)

This contact center handles calls that come in through 2 phone numbers:

- White House VA Hotline.
- VA311

> "We [VA311] provide general information. Agents have knowledge a mile wide, but an inch deep on all VA services."

The team members we spoke with are members of the training team responsible for training the call center agents. From a content perspective, their responsibility is to create and maintain internal training documentation. This documentation is created in the form of videos, power point presentations, and/or Visio documents.

This team wasn't familiar with IRIS or eGain. They "use their own Sales Force version of eGain", which they hope to move over to Microsoft Dynamics.

National Cemetery Association (NCA)

We spoke with members of two teams:

1. The scheduling office, which has mostly static content that doesn't change much. The team doesn't have anyone dedicated to content management, and is prioritizing a total overhaul of their content and training processes in 2021.

   > No one is a writer/editor as a primary role. Everyone does these tasks as an ancillary responsibility.
   >
   > Chaos. That's really the state we're in right now, for many reasons.

2. The executive correspondence team, which primarily authors individual correspondence in response to inquiries that come through IRIS and VIEWS
   - They rely heavily on VA.gov and other VA-approved content for their correspondence, which helps avoid delays caused by approval processes.
   - The team scrambled when IRIS was suddenly shut off. They evaluated their FAQs, updated as needed based VA.gov content, and moved all their IRIS FAQ content to KnowVA.

Health Resource Center (HRC)

- This team has the most mature content management process of the contact centers we observed.
- They leverage the LEAF system to manage review, approval, and publication of contet.
- The LEAF system has groups set up with specific individuals authorized to perform different actions in the content process. All members of the group are notified when that action takes place.
- The Member Services, Knowledge Management team supports HRC content in the form of drafting, editing, publishing and auditing. They also administer the LEAF system
    - KM System Liaison, Beki Laird, is incredibly knowledgable and helpful with all things LEAF, eGain, and KnowVA.
- Fields/metadata observed in LEAF request:
    - request number
    - article ID
    - doc type
    - initiated by
    - date
    - service (e.g. HRC)
    - existing or suggested article title
    - suggested edit or change
    - last update
    - Audience
- Agents primary focus at HRC help desk is to answer phones. They rotate email duty w/ phone duty every 4-6 weeks.

Oracle Service Cloud and IRIS

- The IRIS FAQs we sought to understand are part of a platform called Oracle Service Cloud (OSvC), which was first implemented at the VA 20 years ago.
    - IRIS was launched in 2002 as an internal VA-hosted product, which they continued to do for a number of years.
    - Right Now Technologies took over the system from the VA - first data migration.
    - Oracle bought Right Now Technologies in 2011 - second data migration
- Originally, IRIS FAQs were created from a team with members from the 4 business lines at the VA.
- IRIS didn't have a single agency sponsor, so governance became a problem - nobody owned it.
    - We were hopeful that we could identify the original content authors through data logs, but that isn't possible since what we see in the system today reflects mass-data migrations that took place when the system changed hands.

- The VA decided to retire OSvC and gave teams 30 days notice. DMC and other contact centers raised red flags since the Ask-A-Question feature is critical to a Veteran's ability to submit inquiries to the VA. This is particularly critical for Veterans who aren't able to place a call to a contact center. The timeline to retire OSvC has been extended; update as of 10/26/2020 is that data migration will take place in Q4 2021.
- 6 IRIS workgroups were formed, containing contact center SMEs.
  - Workgroups were focused on inquiry response and creating/managing cases.
  - No workgroup was formed to address IRIS FAQs.
  - The OSvC administrator hasn't been part of the workgroups.
- The OSvC admins provided IRIS analytics that may be helpful in prioritizing migrating content to VA.gov.

Education, Client Applications

We interviewed Tammy Hurley, who manages the FAQs on gibill.custhelp.gov (GI Bill equivalent of IRIS), to gain insights into their content processes.

- The content management process is intentionally informal and flexible. Tammy strives to maintain consistency while being flexible with the way different folks like to work. Communication takes place primarily via email.
- Stakeholder engagement team are "the people telling us how to communicate all the policy and procedures. They come up with a communications plan". Terry Warren worked with the DMC team to create GI Bill specific content related to debt; could be a good contact for R&S content.
- This team doesn't leverage the workflow and analytics functionality in OSvC
- Tammy has been working on moving the GI Bill Help FAQs into eGain. Once they're migrated over, she'll figure out who will manage and own that information within Education services. They still don't know who that person would be.

Appendix

Content team, authoring flow, and Oracle Service Cloud maps

Conversation guide

Interview notes

Links to Mural boards used for synthesis available in README