### **Meeting Overview**

The purpose of.

### Team

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role | Name | | | Email |
| Program Manager (PM) | | Rafael Samuels | rafael.samuels@cfpb.gov | |
| Customer Service Analyst (CSA) | | Rachel Chen | hong.chen@cfpb.gov | |
| Customer Service Analyst (CSA) | | Ricardo Lindo | ricardo.lindo@cfpb.gov | |
| Technical Trainer (TT) | | Nelly Casseus | nelly.casseus@cfpb.gov | |
| Reporting Specialist (RS) | | Angelo Cuna | angelo.cuna@cfpb.gov | |
| Technical Writer (TW) | | Dany Garcia | dany.garcia@cfpb.gov | |

## Efforts In Progress

|  |  |  |  |
| --- | --- | --- | --- |
| **ServiceNow Knowledge Base (KB) Articles** | | | |
| **Customer Knowledge Base** | **POC(s)** | **Catherine Hurkamp** | **Level of Effort** |
| The articles in this KB provide customers with important information, updates, and reference points. The effort includes:   * Review document content for validity. * Prioritize articles by content / dates. * Update Valid To dates if no update. * Retire articles no longer needed. | **Roadblocks** |  | |
| **Notes** |  | |
|  |  |  |
| **Service Desk Knowledge Base** | **POC(s)** | **K. White, B. Ennis, C. Gray** | **Level of Effort** |
| The articles in this KB provide technicians with important information, updates, and reference points. The effort includes:   * Review document content for validity. * Prioritize articles by content / dates. * Update Valid To dates if no update. * Retire articles no longer needed. | **Tasks** |  |  |
| **Roadblocks** |  | |
| **Notes** |  | |

## 

## Detailed Tasks:

|  |  |
| --- | --- |
| **✔** | **Tasks** |
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## Timeline Schedule

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| --- | --- | --- | --- |
| **Deliverable** | **Tasks** | **Level of effort** | **Notes & Roadblocks** |
| **Customer KB** | Meet with Cathy to identify business owners, priority, status, and actions. | **4** |  |
|  | Create Requests in SN to track actions. | **4** |  |
|  | Review, proofread, and update articles | **32** |  |
| **ServiceDesk KB** | Meet with SD Leads to identify priority, status, and actions | **4** |  |
|  | Create Requests in SN to track actions. | **4** |  |
|  | Review, proofread, and update articles | **32** |  |
| **ServiceNow Tasks** | SD Documentation SN Queue | **20** |  |
| **SharePoint Repository** | Organize items based on grouping, status, or knowledgebase/subject. | **20** |  |