Learning Center Research -- NCC

**Date**

9/30/20

**Attendees**

Regina Yount, VBAVACO

Victor Breon Johnson, VBAVACO

Lindsay Hof, VBAVACO

Liz Lantz

Jennifer Lee

Beth Potts

Laura Walsh

**Agenda**

1. Understand the team structure and roles of people contributing to content creation at your contact center
2. Understand the current content creation process, at a high-level
3. Identify people we can speak to and processes we may be able to observe to gain a deeper understanding of content creation at NCC

**Meeting Notes**

Regina Yount

Asst Director of Training Policy procedures

Create internal content for agents to take calls and walk-ins at offices

Knowva has some content, responsible for content there.

M27 manual is their responsibility as well. Available externally and internally. Tells people interacting with public how to interact with press and people. Gets published in knowva portal.

Lindsay Hof

Analyst on Regina’s team.

Write procedural guidance for call center like scripts, system steps to complete task, info about law changes, how to merge procedures with other biz lines to communicate effectively, procedural updates for initial draft creation, then goes to Regina and then quality assurance staff.

Billy Furman

Program analyst.

Content form Lindsey and pushes to KM portal. Publish to pages in Intranet. Compile data and metrics.

Victor Breon Johnson

Acting chief of training. Give assignments to new hires for onboarding. for new hire materials for call center.

Public contact teams refresher training.

Creates training materials for new hires and public contact teams.

Other team members

SMEs

Collaborate with other business lines.

Key people are the ones on the call.

IRIS responsibilities

That’s the Veteran facting content. Working through now who/how will provide content going forward for what replaces IRIS—the va.gov learning center. They hope new system will be more intuitive.

Content creating and management process

Kinds of content:

M27

Prepare comprehensive procedural guidance for steps and processes

Emergent issues

Pension and fiduciary and other business lines make procedural changes, ask Regina’s team to generate content so call center is ready to address

Background, procedural guidance, background, faqs

Faqs are preferred format for agents. They want flexibility to have a real conversation—not a script they have to follow

New hire and ongoing training requirements, documents, content for new call center and regional office contact teams

Knowledge management portal—makes updates and enhancements that help agents better serve vets (Billy)

Short email blasts that doesn’t require article, but will send short info on issue and how to handle it (Lindsay)

VBA focused on every access channel is consistent and accurate, so they do content around topics like Blue Water

Training on how to use KM portal

Audiences

Call center 1450 employees, plus 800 in regional offices who are contact teams

Veterans

People doing briefings and other outreach events to prep to answer questions

Content housed

* KM portal where all info is housed (via eGain)
* IRIS faqs—they just became responsible for updating them. So not doing much there now. As we migrate to learning center they want to avoid duplicating content. IRIS so outdated. They want to merge their content into learning center. Don’t want to maintain two systems.
* Lindsay has a library of documents. Keeps prior versions. (Word docs)

Triggers for new content

* Business lines -- Procedural changes or law changes in other business lines requires new content.
* Agents – they submit requests through egain
* Leadership teams – regular meetings are a forum for them to make requests as well as through email
* Press release goes out – They have to scramble to respond
* Informal internal reviews to identify simple content refinements, broken links, etc. Changes that don’t have to go through concurrence process.

6 million calls this year. It’s the number Veterans first try. So get a lot of calls that are about Caregivers and other topics agents have to refer to another contact center.

* Process example:  
  Decision reviews/AMA causes overhaul of process.
* Agents have to understand all options with new claims versus legacy claims and key dates and how they impact process. KM guidance and training materials put thorugh concurrence, distribute materials to field and get their feedback, final updates.
* They look at content from other business lines to see what gaps there are, what they need to fill in.
* Background info
* Scripting mandatory or suggested
* Procedural updates are laid out or link to existing procedure
* Faqs
* Link to other resources like press releases, sample forms, sample letters, etc.

Approval process

* Draft 1 content
* Regina reviews
* Business line review if needed, but not often
* Training managers and call center managers (only if major change like AMA)
* Quality or compliance team as needed
* Content goes into portal (billy)
* Email announcement with Word doc to agents and contact team, also updated in KM. Word docs are just for first-look and training. Day-to-day they use KM so it’s current and they have links to other content to support live conversations
* Each doc has a date of issue and a change log so it’s easy to see what’s current/changed
* Billy adds searchable tables, accordions and other functionality to make content more user friendly for agents

Integrated Project Group (IP)

For major initiatives, they form a group with all stakeholders.

Victor’s process for training materials is the same. Virtual training through Microsoft teams. Instructor gives final product to Billy. Training content housed in VBA intranet pages and Sharepoint sites.

Tracking workflow

Manual. They don’t use any workflow tools. They want to transition to a Sharepoint site.

Styleguide

VBA style guide they refer to. Breon has template guides for training materials. Lindsay has templates for SOPs and procedural guidance documents.

Next steps

Setting up a session to walk through content creation process. Do a live review when Lindsay has a project. See her process and Billy’s. They’ll let us know timing.

Process pros

Team can effectively predict what agents will need and what users will ask.

Content that’s effective and helpful and structured in KM in ways that are manageable and searchable.

Review and approval process works well. Feedback loop goes smoothly.

Quality team actively monitors phone calls and will, for example, say agents are mis-stating a particular point. They’ll do a quick training and adjust content.

Tone and manner of content is consistent. Helpful for agents.

Strong system in place that helps them meet the many demands from many sources.

Relationships internally and with other departments—good communication.

Process challenges

Capacity. They can’t get to things they want to do.

Communication can always be better. Lots of questions about caregiver program. Info about it could be more accessible.

Getting information at the last minute – even as Veterans are getting it. Has improved but still happens.

eGain challenges

- Security limitations. eGain portal is external and internal so security issues. Javascript. Make things dynamic to help agent move through data—but can only do inline due to security requirements.

- Hard to make dense copy manageable

- No externally loaded script files including styling elements

- Upgrading browsers changes functionality

- No outward facing articles now, but because the capability is there, so security is higher level

- Billy does not break long articles into different pages, keeps in a single “container”