**Learning Center Research**

**Meeting Notes**

**Date**

9/29/20

**Attendees**

Geoff Davies

Janiece Moore

Liz Lantz

Jennifer Lee

Beth Potts

Laura Walsh

**Agenda**

Discussion on:

1. Team structure and roles of people contributing to content creation at 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 OCC

**Meeting Notes**

Geoff Davies

* Chief Customer Experience over customer management solution includes knowledge management, QA workforce management and analytics.
* In Denver 4 years.
* Background in call center.
* How his role fits in content management through—not involved in content creation.

C4 and nFm – constant battle with nFM who wants them to do something, but don’t provide the needed information to do it. We can edit and format and make it look presentable, structure it well, but we often have to go back to them for addtl info because the flow is wrong, or incomplete info or even contradictory info. We have stuff just sitting with them while we wait for approval and review.

Janiece Moore

Lead writer and editor for cust ex CX knowledgemanage team. Works with contect centers to pub knowledge articles (they have moved away from the term/format “scripts”). Faqs. Job aids. SOPs. All for internal consumption. Lots of formatting, Editing for brevity. QA – like checking against VA.gov. No original content dev on her team.

Hard thing is you’re not the SME. When reviewing content you rely heavily on SMEs and authoritative sources.

**Other team members**

Mary Jane and Fasiya (Fah SEE uh) are content authors, like Janiece. They all report to Geoff.

**The process**

Request comes from business unit. Someone on Veteran or family member side—have content they believe is important for call center agents to have.

Janiece looks at what they sent. Might be an email or a write up in a Word doc. Content authors determine best format, like job aid, faq, SOP (Standard Operating Procedures), etc.

Then they review internally.

Content authors collaborate. They ID resources like a policy manual or va.gov or an SME –compile resources to check. There’s a fair amount of due diligence that needs to be done.

Start to draft based on all info received from business unit and resources the content authors found.

Collaborate with initial requester. Authors share concerns about missing or contradictory info. Ask the business unit for help. It can take a while to get a response. Sometimes they don’t have the answers, either.

Business unit approves content before publishing.

**Updates**

Something prompts an update. They don’t review articles on a schedule. Maybe a caller calls and notes a discrepancy. Or there’s a new program or act or law that triggers a review of an article.

OCC = Office of community care

C4 is Comm care contact center

FM is family member, so is CHAMPVA

There are multiple sub programs. Under C4 --Adverse Credit Reporting (ACR)

Mill bill. Temporary line that activates for things that have a start/end point. Like settlement letters going out. Had to do scripts associated with letters. What do we want our agents to say. Court case that impacted over a million Veterans. Specific start/end date for content.

CHAMPVA has sub called specialty care. Multiple biz lines with small population. Children of women viet nam veterans.

Va.gov/communitycare gives a breakdown of all the programs.

Avoid pdfs or paper docs. Too hard to do version control. All posted in KM so single version.

Discourage KM print option. Only use live so it’s always current version.

Weekly, they send out a list of updated and new articles.

Biz owners want to put a lot of stuff in KM that agents don’t need in order to answer calls. And unclear who is supposed to update it –especially IT stuff.

Everyone in VA can see KM and it might not ideal to have certain info in there—like leave policies for agents.

They can add expiration dates and take stuff down.

They come across stuff that hasn’t seen traffic or seems outdate, they will reach out to business unit owner to ask about removing it.

eGain lets you add expiration date, but you have to monitor. It won’t alert you.

They have a taxonomy set up. All the programs have folders. Subfolders by type of content, like faqs, SOPs, etc.

KM lets you browse by a folder or content type or word search.

Job aid is related to system Like how to access a claim in the electronic system. Step by step directions. So for things that need step action tables.

Content style guides. Borrowed one from member services, and repurposed. Knowledge management style guide.

Use eGain, email, manuals, VA.gov.

They can access content from other service lines. So if another business line might have content that’s related, they can access it.

Sometimes they may point to content from another branch, or duplicate it in their portal. Depends on the need, updates etc.

VA mission act. WE owned and pointed it to everyone. Lots of changes from lots of stakeholders. Governance can be complex. What’s the right info. Who has to approve it? Can be a big cluster.

Not clear on how agents find the articles. Whether they go to index, search by keywords, bookmarks?

Next steps: Make a time with one of the team’s content authors to see the content authoring process in action.

Process working well from agents POV. Easy for them to find and access the info they need. There’s not a lot of negative feedback on the KM system from agents.

Lacks a good way to route content for approval, alerts for when there are changes or content that expires. To do list is to create governance strategy for agents who notice inaccuracies in KM – putting on paper to track it.

Their team can’t just change something. Has to go back to business owner for review.

On one business line, we’re not sure who the SME is. They don’t have a list of people to reach out to. They have to go to deputy chief who has to farm it out, rather than going right to a go-to person who has the knowledge and, ideally the authority to approve for publishing.

Love that they can see other contact center’s KM systems. They can see what someone else is doing on member services. Great shared resource.

Problem with Mission act is they created articles applicable to everyone. Then they owned it and became single source of publishing and maintaining it. Every time there was a change, they got stuck doing it. The initial people who reviewed and approved the articles moved on and there was no clear chain of command to approve them.

Janiece is available for another call. Mondays are bad.