MMS Support & Training Team Meeting // Dec. 4, 2020

Team Attendees: Jen Armson-Dyer (Badger), Nancy Funk (Pioneer), Erin Glass (Rocky Mountain), Penny Rodgers (North Texas), Daniel Becker (USAV)

Meeting Agenda:
1. Welcome and Introductions
2. Discuss Agenda and add any others
3. Discuss Goals and add any others
4. Discuss Items from Executive Summary, add others and prioritize
5. Confirm Action Items
6. Decide on next meeting date/time

Meeting Goals:
1. Prioritize discussion topics from Executive Summary
2. Identify any "quick hit" items that can be accomplished quickly in Action Items

Discussion Items from Executive Summary:
1. Definitions List - develop a list to define
2. Document for categorizing help articles - Jen will find this and send it to the group
   a. Daniel did start this but the links have changed
   b. Have the links to the article so that the most updated information is there
   c. Have the SE team help with this
   d. Also have a subset of our group edit and pre-read to make sure we understand all of the terminology and directions (Nancy)
      i. Make sure it's right and detailed enough with step by step instructions and isn't vague
3. Create documentation of Region Policies that affect how SE Help should respond to clubs/members in a certain region
   a. When regions build rosters, how regions do rostering, etc.
   b. This will also aid in SE Help taking some of the technical load
   c. How to do this?
      i. Daniel would prefer if it's a document where the regions can all see it and update it.
         1. This would keep it current and also allow all regions to see what other regions are doing
         2. Region would be responsible for filling out and also how SE should respond in certain situations
         3. Will be helpful for regions to see how other regions are doing things and the why, and maybe that helps regions make some changes that make sense for them
            a. This may be a helpful education piece for regions
      ii. Would have to ask regions to review it every six months, etc.
         1. Could be a link on the region website or ask at Region meetings to check and make sure it's ok.

           iii.   **Do this via a survey**
1. Can collect information on if they liked the way they did a certain process and then we put it in a document for regions to review.
2. Ask regions to rank their top 10 pain points and we can provide documentation from there
3. Get the name and email of all registrars and communicate with them (can also send to commissioners)
   a. This is important and has been a struggle at the USAV level.
   b. The biggest concerns coming from commissioners aren't the things that are affecting a large amount of customers or that USAV is hearing from registrars
4. Get from SE as what they're seeing as the common issues and what their standard responses are.
   a. Not just one-offs, is there a larger fix to common issues and how to communicate this to the region. Is just refreshing the membership / system the solution, or is that a larger fix and can that be addressed in the longer term?
   b. Would like info from SE on how they're tracking these items and where that info is going
5. Make sure SE fully understands the issues
6. Identify the biggest things that the regions see that we can help USAV / SE with in terms of training and support. Work with SE Customer Service to identify common issues
   a. Frustration from the regions to the SE support team
   b. Frustration from SE Support about the different region policies and procedures
   c. Keep the education going and make sure all of the regions and clubs know where this is
      i. MMS Future Items Comms team is tasked with this
   d. Don't necessarily focus on the fix (this goes into the Future Items or bug items lists) but the training of how to do it right now with current functionality
7. Create a method to capture data and details
   a. Steve and Bernie are working on this, wait to see what they come up with. A solution is pending.
   b. Can this be a central complaint center where USAV and our groups can see what the information is, and then we can bring these to SE. We then own that info.
   c. This also allows regions to be heard
   d. This allows regions to see what the issues are and have been submitted and are being worked on. The registrars need to know this, not just the commissioners.
8. Space for the regions to help troubleshoot with each other.
   a. Our team, registrars can discuss items they're seeing
   b. Nancy's computer does not agree with Slack
9. Making sure regions are aware of when new things come out and more functionality is added or changed.
   a. Can also be aided by Future Item Comms Team
   b. Could be region website, could be via email

i. Some regions don't want to have to go look somewhere daily, would like to be notified of changes
10. Meetings can be topic based or general sessions where any issue can be discussed?
　　a. Webinars this summer were good but just ahead of where we were with the knowledge we now have. May be more well-received now. Sandbox wasn't exactly the system. When it went live, then started to comprehend.
　　b. Training videos are better than webinars. Or if webinars, people submit questions, and not have it be a free-for-all.
11. Establish a training plan to include a calendar of offerings
12. How do we best address board disparities across regions? How do we best support regions in need of assistance?
　　a. Current idea is to get the pain points and address the most common with help documentation and knowledge teams and go from there

Additional Discussion
- There is so much information, don't know where to start
- In triage mode right now, the future group is going to be the ones that can tackle more of the common issues and how to fix those. Spend energy on how to make that better.
- Some regions just fix things and don't contact SE. There may be issues that SE may not know about because the region is handling them or has an internal fix. Is there a registration or form that the region could submit an issue. Essentially a complaint department to make sure that it's all getting tracked and documented. Even within the RVA website, regions can file a complaint and we can push to SE.
　　- This will be done via the Help Desk ticketing system that Steve and Bernie are working on
- People want communication and want to know that the issues are being worked on and are trying to help, even in the short term for fixes.
- Have documentation in an editable format so that regions can tweak as needed to their specific processes or language
- The Future Items Comm Team is tasked with finding a central place and a way to get all of this information out.

Training Topics - Submit to Future Items Comms Committee for development
- Merging records
- Train regions on how to properly communicate help details and where to go
- Roster approvals - what is the process for re-syncing - two ways
　　- Submit to SE to reindex (longer fix, takes SE intervention)
　　- Quick manual approval for time-sensitive rosters

Action Items:
1. Jen will set up a Google Drive folder that all documents for this team will live in
2. Develop a definitions list via Google doc (Jen will start)
3. Jen will find the internal comms list that Tammy shared and put it in the Google folder
4. Develop survey questions for the regions via Google doc (Jen will start)

5. Develop top five training topics (one-pagers) for Future Comms Team via Google Doc (Jen will start)

Next Meeting:
Tuesday, Dec. 12 at 1:30 pm ET / 12:30 pm CT / 11:30am MT
- Jen will send this meeting link and post notes and next link on the RVA website