

## MEMORANDUM OF UNDERSTANDING FOR CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM

The following constitutes agreement between the Veterans Benefits Administration (VBA) and the American Federation of Government Employees, AFL-CIO National VA Council #53 (NVAC) concerning the Unified Desk Top initiative, for Customer Relationship Management (CRM) System throughout the Veterans Benefits Administration (VBA).

1. Management will notify the AFGE Mid-Term team of all pertinent information, which includes but is not limited to, appropriate data to be gathered and any procedural changes that may be necessary for this implementation.
2. The VBA Mid-Term Committee and local AFGE Presidents will be provided the draft training plan, to include, but not limited to, a copy of the final plan and any and all updates for all bargaining unit employees (BUE) who will utilize the program.
3. Prior to implementation employees expected to use CRM/Unified Desktop will be provided orientation and training about the initiative. The Local Union will be informed of the meeting so a representative may attend. Training will be recorded in the Talent Management System (TMS).
4. Management will consider individual employee requests for additional training or re-training on CRM/Unified Desktop and will adhere to Article 37 and Article 66. If additional training/retraining requests are not granted, the BUE and local president will be notified of the denial reasons in writing.
5. Management will comply with Articles 27 and 66 of the Master Agreement between DVA and AFGE.
6. The agency will ensure that all employees expected to use CRM/Unified Desktop have the necessary equipment to use the system. If the CRM/Unified Desktop is not operational or it is causing operational delays, management will consider the affects in determining appropriate mitigation measures, such as excluded time to offset availability time impact.
7. Management will monitor and assess implementation. The VBA Mid-Term Committee will be provided quarterly reports of aggregate data, to include, but not limited to, the critical elements by position and by station for a period of one-year following national implementation. These updates will include aggregate performance data for each station utilizing the CRM/Unified Desk-top.
8. Should the agency decide to roll-out the CRM/Desk-Top initiative to positions other than those identified in this MOU, (Legal Administrative Specialists / Public Contact Representatives in the National Call Centers, Pension Management Call Centers, and

Regional Office Public Contact units), management will notify the VBA AFGE Mid-Term Bargaining Committee and fulfill its bargaining obligation.

- 9. Management will comply with Article 47 with respect to local bargaining.
- 10. Management will provide copies of this Memorandum of Understanding to all local presidents.

William Carson  
For Management

Alberta Franklin  
For AFGE-NVAC

2/9/2012  
Date