



## Agency Priority Goal Action Plan

# Improve the Customer Experience at USDA

### Goal Leader:

Robert Stephenson, Chief Operating Officer, Farm Production and Conservation (FPAC)

# Overview

---

## Goal Statement

USDA will effectively deliver farm and conservation programs to America's farmers, ranchers, and foresters, ultimately increasing their ability to prosper and grow. By September 2019, the Department will enhance the customer experience for farmers, ranchers, and foresters at USDA service centers and improve and expand service delivery channels by establishing an effective framework to serve customers in-person and online.

# Overview

---

## Challenges

- Cultural and Organizational Change – 1<sup>st</sup> Customer Experience (CX) Office. There is no “as-is” or existing template for standing up and sustaining a CX Office
- Developing customer feedback processes and reporting capabilities.
- Delivering a consistent customer experience across all channels.
- Creating a customer first organizational culture.
- Finding the most appropriate technology solutions to improve customer experience.
- Aligning resources with desired customer experience initiatives.

## Opportunities

- Develop an iterative, data driven customer experience model using innovative methods to understand producers and find what works for them.
- Use insights gained to drive strategic and tactical planning.
- Increase Farm Production and Conservation (FPAC) local visibility and improve interactions while acknowledging resource constraints.
- Establish Key Performance Indicators (KPIs) to monitor and assess quality of customer experiences.
- Refine KPIs over time to ensure alignment with FPAC strategic objectives and management goals and resource constraints.

# Leadership

## Core Team:

- Kimberly Graham, Acting Director, FPAC Customer Experience Office
- Sarah Campbell, Customer Experience/Service Specialist, FPAC CX Office (1<sup>st</sup> permanent FTE) start date: June 24<sup>th</sup>
- Ken Hill, Helen Linden, Glenn Schafer, and Michael Kresin (*Agency Adhoc Team Members*)

## Governance Structure

Entity	Members	Responsibilities
FPAC Executive Committee	FPAC Under Secretary, FSA Administrator, NRCS Chief, RMA Administrator, FPAC Chief Operating Officer, FPAC Deputy COOs, & FPAC CIO	<ul style="list-style-type: none"><li>– Comprehensive customer experience strategy</li><li>– Plan, guide, and prioritize customer experience initiatives</li><li>– Resource allocation</li><li>– Sets “tone at the top”</li></ul>
FPAC Customer Experience Office	FPAC Customer Experience Officer Customer Experience Office Staff	<ul style="list-style-type: none"><li>– Strategy</li><li>– Innovation</li><li>– Business Improvement/Performance Management</li><li>– Research, data, insights</li><li>– Marketing/Outreach</li><li>– Culture</li></ul>
FPAC Customer Experience Core Team	Customer Experience Officer, representatives from FPAC Program and Mission Support areas.	<ul style="list-style-type: none"><li>– Leading customer experience initiatives</li><li>– Recommending new initiatives</li><li>– Field research</li></ul>

# Strategies, Objectives, and Milestones

## Strategies

	Gather Insights & Ideas	Improve Experiences	Measure Impact	Strengthen Customer Experience Office
	<p>Build empathy for producers and field staff and identify useful tools. Test the refined insights by surveying a representative group of producers and service center staff.</p> <p><i>e.g., Select regional representative farming operations and locations for co-design research.</i></p>	<p>Make programs, policies &amp; processes producer-centric. Change systems to enhance in-person and digital engagement.</p> <p><i>e.g., Standardize terms to improve info sharing across agencies and work with program managers to update eligibility requirements.</i></p>	<p>Set metrics, assess what works and find out how to get better. Build prototypes, run quick tests with producers and staff, iterate KPIs then scale.</p> <p><i>e.g., Test interaction logs using paper and existing service center information systems.</i></p>	<p>Stand up office with appropriate resources, staff and authority to be the lead for FPAC customer experience work.</p> <p><i>e.g., Fund national and local Customer Experience Office (CX) budgets. Hire subject matter and methodology experts. Share best practices widely.</i></p>
<i>Current State</i>	<p>Research focused on targeted group of producers in different regions. All counties visited want to be involved further.</p>	<p>Pressing producer and service center staff needs and experience problems have been identified. Initial experience improvements have been ideated.</p>	<p>A set of KPIs that can be phased in over time have been scoped. Initial KPIs and data collection have been determined and goals set for future system.</p>	<p>Customer experience office for FPAC is currently in the planning stage. Initial priorities and strategy have been scoped.</p>
<i>Objectives</i>	<p>System to scout, share and scale useful tools from the field that improve producers' experiences prototyped.</p>	<p>1-2 priority experience projects in place at scale.</p>	<p>Initial KPIs, metrics and analytics tested and in place in 25-30 service centers nationwide.</p>	<p>National &amp; local CX budget set. Staff and Subject Matter Expert (SME) hired.</p>
<i>Milestones</i>	<ul style="list-style-type: none"> <li>• Insights Sharing</li> <li>• Targeted Insights Developed</li> <li>• Nationwide CX dialogue and office enrollment</li> </ul>	<ul style="list-style-type: none"> <li>• Project Prioritization</li> <li>• Improvements Designed</li> <li>• Improvements Piloted &amp; Refined</li> <li>• Improvements Scaled</li> </ul>	<ul style="list-style-type: none"> <li>• Pilot Design</li> <li>• KPI Baseline Analysis</li> <li>• Rollout to Service Centers</li> </ul>	<ul style="list-style-type: none"> <li>• Strategy planning</li> <li>• Staffing</li> <li>• Communication planning</li> <li>• Service Center meetings</li> </ul>

# Key Milestones

## Strategy 1 – Gather Insights & Ideas

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Insights Sharing</b>					
<ul style="list-style-type: none"> <li>Sessions with key FPAC &amp; USDA Leadership</li> </ul>	Q2 FY18	Complete – ongoing			
<b>Targeted Insights</b>					
<ul style="list-style-type: none"> <li>Conduct further research interviews</li> </ul>	Q1 FY19	Started – in progress			The team has completed 3 additional service center visits (NE, CA, and MS) and is expected to complete one additional service center visit early September.
<ul style="list-style-type: none"> <li>Conduct 6-8 co-design sessions</li> </ul>	Q1 FY19	Started – in progress			
<b>Nationwide CX Dialogue and Office Enrollment</b>					
<ul style="list-style-type: none"> <li>Field office sharing sessions</li> </ul>	Q1 FY19	Started – in progress			

# Key Milestones

## Strategy 2 – Improve Experiences

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Projects Prioritized</b>					
<ul style="list-style-type: none"> <li>Identify experience improvements</li> </ul>	Q3 FY18	Completed-ongoing			
<ul style="list-style-type: none"> <li>Rate and prioritize improvements</li> </ul>	Q3 FY18	Completed - ongoing			<p>Priority improvements identified could require statutory changes. Resource constraints due to competing priorities (newly mandated programs to address market or weather conditions impacting farmers and ranchers).</p> <p>The milestone has since been completed. An initial set of improvements were identified, rated and provided to FPAC Agency CX Champions to be included in the Agency Customer Experience Improvement Plans (CXIP) that were submitted to the Department's Office of Customer Experience Office.</p>
<b>Improvements Designed</b>					
<ul style="list-style-type: none"> <li>Identify potential system, policy, program and process improvements</li> </ul>	Q1 FY19	In progress			System capabilities limitations. Internal resources to implement process improvements may be limited due to competing priorities such as implementation of the next Farm Bill.
<ul style="list-style-type: none"> <li>Prototype tools and other changes</li> </ul>	Q1 FY19	Not Started			
<b>Improvements Piloted and Refined</b>					
<ul style="list-style-type: none"> <li>Test improvements</li> </ul>	Q1 FY19	Not Started			
<ul style="list-style-type: none"> <li>Refine improvements based on feedback</li> </ul>	Q1 FY19	Not Started			
<b>Improvements Scaled</b>					
<ul style="list-style-type: none"> <li>Convene teams to scale improvements</li> </ul>	Q2 FY19	Not Started			
<ul style="list-style-type: none"> <li>Finalize scale improvements</li> </ul>	Q2 FY19	Not started			
<ul style="list-style-type: none"> <li>Conduct training sessions for staff</li> </ul>	Q3 FY19	Not Started			

# Key Milestones

## Strategy 3 – Measure Impact

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Pilot KPI design</b>		Started - ongoing			
• Create prototype data collection tools	Q4 FY18	Completed			
• Collect initial KPI data	Q4 FY18	Started–ongoing			
<b>KPI baseline analysis</b>					
• Measure performance	Q1 FY19	Started-ongoing			
• Identify trends and patterns	Q1 FY19	Started–ongoing			
<b>Rollout to Service Centers</b>					
• Refine data collection methods	Q2 FY19	Not Started			Internal staffing requirements to ensure performance is measured and analyzed.
• Training for employees responsible for collecting and reporting data	Q2 FY19	Not Started			

# Key Milestones

## Strategy 4 – Strengthen Customer Experience Office

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Strategy Planning for Customer Experience Office	Q2 FY18	Completed – ongoing			The milestone has since been completed. The CX Office will provide a limited set of core services and functions in support of the FPAC CX mission and goals. The CX Office action plan is being developed.
Establish Customer Experience Office	Q1 FY 19	In progress			The CX Office’s implementation and program delivery framework is being built and designed around three workstreams: Strategy & Operations (Gathering Insights, Ideas & Customer Advocacy); Data and Research (Measure & Analyze Impact); Business Optimization (Improve Experience)
Communication Planning	Q2 FY18	In progress			
Service Center Meetings	Q4 FY19	In progress			

# Key Performance Indicators

To measure producers' experiences, FPAC is developing a balanced set of KPIs based on 3 categories: relationships, processes, and outcomes. These KPIs are aligned with producers' core values.

The table below includes the initial set of KPIs. Additional KPIs will be developed over time.

KPI Category	Metrics of Success and Trend Goals	Data Source	Frequency
<b>Relationships:</b> Producers and staff have strong trusted connections with each other.	▲ Number of local education events attended by Service Center staff	Service Center Interaction Log <sup>1</sup>	Monthly
	▲ Number of first time program participants	Service Center Staff Survey <sup>1</sup>	Monthly
<b>Process:</b> Program tasks can be understood and completed without hassles.	▼ Average processing time for direct farm loans	FSA Direct Loan System	Monthly
<b>Outcomes:</b> Results from engagements meet producers' goals within program objectives.	▲ Post-engagement customer satisfaction	Producer Electronic Survey <sup>1</sup>	End of Engagement

<sup>1</sup> Data sources, collection methodologies, and baseline data being developed in FY18. The KPI's are being tested and are still under development. A pilot producer survey was launched in August and the 1st round of data should be available by FY19 Q2.

# Summary of Progress – FY 2018 Q1

- Beginning in October 2017, The FPAC Core Customer Experience (CX) team, with contractor support, defined a data-driven model for evaluating and analyzing customer experiences. Although customer service, customer satisfaction, and customer experience are similar concepts, customer experience was the priority. Therefore, the team's efforts were focused on understanding the producers' experiences and how to improve them.
- The CX team conducted in-depth research at USDA Service Center locations in Stearns County, MN, Cuming County, NE, and Hinds County, MS, during October through December 2017. The evaluation and analysis process consisted of ethnographic interviews, producer feedback and insights gathering, key performance indicators (KPIs) design sessions, and Service Center employee interviews.
- The CX team created an initial set of KPIs and strategies to measure and improve producer experiences. *(Met Key Milestone – Strategy 2 Improve Experiences: Identify Experience Improvements and Identify potential system, policy, program and process improvement)*
- In January 2018, FPAC and USDA leadership were briefed on the results of this initial phase of the FPAC Customer Experience work, specifically the process, observations and insights, recommended actions, and the proposed KPIs. *(Met Key Milestone – Strategy 1 – Gather Insights & Ideas: Insights Sharing)*
- FPAC Business Center assigned Kimberly Graham as Acting Director of the FPAC CX Office
- FPAC CX Office permanent staffing hires are underway. First vacancy announcement for a CX Specialist closed on March 13<sup>th</sup>.

# Summary of Progress – FY 2018 Q2

- The FPAC CX Office facilitated an “NRCS of the future” session. The 3-day session took place in Norman, Oklahoma, March 6 – 8. The session focused on the development of an Agency vision, strategic and business operating plan that would be customer-centric and customer focused.
- The FPAC CX Office has worked closely with Joe Doyle, Director, USDA OCX in planning USDA’s 1<sup>st</sup> CX Summit planned for June 7<sup>th</sup>. Several FPAC members of the core CX team and agency employees are providing support.
- Identified 7 FPAC Mission Area CX Champions (2 CX Champions per agency and 1 Lead CX Champion for the mission area)
- Worked collaboratively with the GSA/OAI CX CoE to prepare for discovery workshops and journey mapping sessions which were conducted in 6 States (VA, GA, NY, OKC, OR, ND) to gain a deeper understanding of the customer journey and experience specific to the farm loan programs. *NOTE:* The Farm Service Agency Direct Farm Loan program is slated to become one of the first programs to be deployed to the farmers.gov website.
- Developed and presented the CX Division Business Case (for the FPAC reorg) to the FPAC leadership. The CX Business Case includes the organization design structure, mission, core functions and budget.
- Announced 3 positions: Customer Experience/Service Specialist (2 FTEs – 1 applicant was selected and will start on June 24.); Chief Customer Experience Officer (1 FTE – selection pending)
- Working on contract award for additional CX support.
- Establishment of weekly CX Blog on the myFPAC.

# Summary of Progress – FY 2018 Q3

---

- Received OMB approval to pilot FPAC's 1<sup>st</sup> post customer engagement producer survey (external customer survey). The pilot project began late July 2018. The survey will enable FPAC to establish a customer experience baseline and help determine the appropriate metrics and measurement tools. The pilot will provide insights on scaling the survey and collection methods to meet the OMB Circular A-11, Section 280.7 requirements.
- The FPAC CX Office continues to work closely with Joe Doyle, Director, USDA OCX to ensure the FPAC CX Office is aligned with the Office of the Secretary's CX initiatives and goals. In addition to the CX Office, the agency CX Champions and their respective leadership continue to champion the Secretary's CX vision, mission, and goals. One of the initial tasks was to develop agency-specific Customer Experience Improvement Plans (CXIPs). The CX Champions provided draft CXIP's to the Secretary's OCX for review on July 25<sup>th</sup>.
- The GSA/OAI CX Center of Excellence team completed several field office visits to gain a deeper understanding of customer journeys and experiences for the farm loan programs. These programs will be one of the first areas to be revamped using human (user)-centered design modeling. The team provided customer journey maps that reflect the current state and the to-be state.
- The FPAC CX Office is also working with the GSA/OAI and Jump Associates to create a "Voice of the Customer" (VoC) program. The initial phases of the work have included an extensive review and analysis of the existing customer feedback channels.

# Data Accuracy and Reliability

---

Data sources and collection methodologies for KPIs, with the exception of the average processing time for direct farm loans, are being developed in FY 2018

Average processing time for direct farm loans.

- Data source: FSA Direct Loan System. A direct loan processing report in the FLP Enterprise Performance Management System is used for this performance measure. Data is available nationally and at the state and local level.
- Data quality: Data is high quality and there are no known data limitations.

# Contributing Programs

---

## Organizations:

- Farm Production and Conservation Mission Area: Farm Service Agency, Natural Resources Conservation Service, Risk Management Agency, FPAC Business Center

## Program Activities:

- Conservation, disaster assistance, farm loans, income support, and risk management

# Stakeholders

---

FPAC stakeholders include, but are not limited to:

- Primary customers - farmers, ranchers, producers, and landowners
- Commodity Organizations (American Farm Bureau, National Cotton Council, et al.)
- Soil and Water Conservation Districts
- Crop Insurance Providers
- Lending organizations/banks
- State Departments of Agriculture
- Land Grant Colleges and Universities
- USDA officials
- Office of Management and Budget
- Government Accountability Office
- Congress/congressional staff

# External Communications Plan

---

Initial internal communications plan is scheduled for completion by the first Quarter of FY 2019.

External Communications plan will be included in the FPAC Business Center communications plan. A final date for this plan is to be determined.