Improve the Customer Experience at USDA

Goal Leader(s): Robert Stephenson
USDA-FPAC Chief Operating Officer

Theme: Agriculture

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 – 1st 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
- Ken Hill, Helen Linden, TJ Wilson, Sarah Campbell, Lilia McFarland, Glenn Schafer

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	– Comprehensive customer experience strategy – Plan, guide, and prioritize customer experience initiatives – Resource allocation – Sets "tone at the top"
FPAC Customer Experience Office	FPAC Customer Experience Officer Customer Experience Office Staff	– Strategy – Innovation – Business Improvement/Performance Management – Research, data, insights – Marketing/Outreach – Culture
FPAC Customer Experience Core Team	Customer Experience Officer, representatives from FPAC Program and Mission Support areas.	– Leading customer experience initiatives – Recommending new initiatives – Field research

Strategies, Objectives, and Milestones

	Strategies			
	Gather Insights & Ideas	**Improve Experiences**	**Measure Impact**	**Strengthen Customer Experience Office**
	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.	Make programs, policies & processes producer-centric. Change systems to enhance in-person and digital engagement.	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.	Stand up office with appropriate resources, staff and authority to be the lead for FPAC customer experience work.
	e.g., Select regional representative farming operations and locations for co-design research.	*e.g., Standardize terms to improve info sharing across agencies and work with program managers to update eligibility requirements.*	*e.g., Test interaction logs using paper and existing service center information systems.*	*e.g., Fund national and local Customer Experience Office (CX) budgets. Hire subject matter and methodology experts. Share best practices widely.*
Current State	Research focused on targeted group of producers in different regions. All counties visited want to be involved further.	Pressing producer and service center staff needs and experience problems have been identified. Initial experience improvements have been ideated.	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.	Customer experience office for FPAC is currently in the planning stage. Initial priorities and strategy have been scoped.
Objectives	System to scout, share and scale useful tools from the field that improve producers' experiences prototyped.	1-2 priority experience projects in place at scale.	Initial KPIs, metrics and analytics tested and in place in 25-30 service centers nationwide.	National & local CX budget set. Staff and Subject Matter Expert (SME) hired.
Milestones	• Insights Sharing • Targeted Insights Developed • Nationwide CX dialogue and office enrollment	• Project Prioritization • Improvements Designed • Improvements Piloted & Refined • Improvements Scaled	• Pilot Design • KPI Baseline Analysis • Rollout to Service Centers	• Strategy planning • Staffing • Communication planning • Service Center meetings

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**
Insights Sharing					
• Sessions with key FPAC & USDA Leadership	Q2 FY18	Complete – ongoing			Scheduling conflicts
Targeted Insights					
• Conduct further research interviews	Q1 FY19	Not Started			
• Conduct 6-8 co-design sessions	Q1 FY19	Not Started			
Nationwide CX Dialogue and Office Enrollment					
• Field office sharing sessions	Q1 FY19	Not Started			

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**
Projects Prioritized					
• Identify experience improvements	Q3 FY18	Complete - ongoing			
• Rate and prioritize improvements	Q3 FY18	In progress			Priority improvements identified could require statutory changes.
Improvements Designed					
• Identify potential system, policy, program and process improvements	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.
• Prototype tools and other changes	Q1 FY19	Not Started			
Improvements Piloted and Refined					
• Test improvements	Q1 FY19	Not Started			
• Refine improvements based on feedback	Q1 FY19	Not Started			
Improvements Scaled					
• Convene teams to scale improvements	Q2 FY19	Not Started			
• Finalize scale improvements	Q2 FY19	Not started			
• Conduct training sessions for staff	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**
Pilot KPI design					Data accessibility – We are still determining "how" the data will be collected and what metrics will be supported. We may be limited to what data will be available in this first year and build out the data collection tools for the data we want to collect based on the finalized KPIs.
• Create prototype data collection tools	Q4 FY18	Not Started			Limited data collection tools.
• Collect initial KPI data	Q4 FY18	Not Started			
KPI baseline analysis					
• Measure performance	Q1 FY19	Not Started			Internal staffing requirements to ensure performance is measured and analyzed.
• Identify trends and patterns	Q1 FY19	Not Started			
Rollout to Service Centers					
• 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	In progress			
Establish Customer Experience Office	Q2 FY 18	In progress			
Communication Planning	Q2 FY18	In progress			
Service Center Meetings	Q4 FY19	Not Started			

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

[1] Data sources, collection methodologies, and baseline data being developed in FY18

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 13th.

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:

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

Program Activities:

- o 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 in the 2nd Quarter of FY 2018.

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