



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

- Continue to work cultural and organizational change as a new office; includes defining roles and responsibilities, key priorities, and resourcing across FPAC.
- 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 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:

- Sarah Campbell, Acting Director, FPAC Customer Experience Division
- Laurie Snow, Abena Apau, Janie Hudson: FPAC CX Division Customer Experience/Service Specialists; CX Champions who are mid- to senior-level employees from Natural Resources Conservation Service (NRCS), Farm Service Agency (FSA), Risk Management Agency (RMA), and Business Center (BC) who lead and support agency-specific CX initiatives; CX Enhancement Committee members who are Field-level staff from NRCS, FSA, RMA, and BC; and key executive leaders in NRCS, FRS, and RMA

Governance Structure

Entity	Members	Responsibilities
FPAC Executives	FPAC Under Secretary, FSA Administrator, NRCS Chief, RMA Administrator, FPAC Chief Operating Officer, FPAC Deputy COO (Enterprise Services), & FPAC CIO	<ul style="list-style-type: none">– Comprehensive customer experience strategy– Plan, guide, and prioritize customer experience initiatives– Resource allocation– Sets “tone at the top”
FPAC Customer Experience Division	FPAC Customer Experience Officer Customer Experience Division Staff	<ul style="list-style-type: none">– 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.	<ul style="list-style-type: none">– 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
	<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 & 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 (CX) Division budget. 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 & local CX budget set. Staff and Subject Matter Expert (SME) hired.</p>
<i>Milestones</i>	<ul style="list-style-type: none"> • Insights Sharing • Targeted Insights Developed • Nationwide CX dialogue and office enrollment 	<ul style="list-style-type: none"> • Project Prioritization • Improvements Designed • Improvements Piloted & Refined • Improvements Scaled 	<ul style="list-style-type: none"> • Pilot Design • KPI Baseline Analysis • Rollout to Service Centers 	<ul style="list-style-type: none"> • 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					
<ul style="list-style-type: none"> Sessions with key FPAC & USDA Leadership 	Q2 FY18	Complete – ongoing			CX Division has briefed Farm Production and Conservation Mission Area senior leadership and continues to present and report plans and results.
Targeted Insights					
<ul style="list-style-type: none"> Conduct further research interviews 	Q1 FY19	Postponed until Q3/Q4 FY19	Postponed until FY 20		FPAC engaged in a new umbrella CX PRA clearance process to enable further research with Producers. This process is ongoing and additional research interviews are contingent upon the completion of that clearance process.
<ul style="list-style-type: none"> Conduct 6-8 co-design sessions 	Q1 FY19	Postponed until Q3/Q4 FY19	Postponed until FY 20		
Nationwide CX Dialogue and Office Enrollment					
<ul style="list-style-type: none"> Field office Visit and Research Sessions 	Q1 FY19	Planning	Postponed until FY 20		The CX staff visited several field offices in FY19 while supporting human and customer centered design efforts for FPAC software developments and is planning more visits in conjunction with CX-focused IT and User Centered Design research for FY 20.

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					
<ul style="list-style-type: none"> Identify experience improvements 	Q3 FY18	Completed-ongoing			
<ul style="list-style-type: none"> Rate and prioritize improvements 	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.</p>
Improvements Designed					
<ul style="list-style-type: none"> Identify potential system, policy, program and process improvements 	Q1 FY19	In progress	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"> Prototype tools and other changes 	Q1 FY19	In progress ongoing	In progress ongoing		A producer survey was prototyped at the field level in FY 18, refined in FY 19 and will be deployed in FY 20. The CX Division plans to execute the first Annual Producer survey nationally in Q2 FY20 pending PRA approval.
Improvements Piloted and Refined					
<ul style="list-style-type: none"> Test improvements 	Q1 FY19	In progress	Postponed to FY20 (in progress)		The FPAC CXD will work with FPAC service centers to co-design session and field office engagement events to validate and test identified process improvement projects.
<ul style="list-style-type: none"> Refine improvements based on feedback 	Q1 FY19	In progress	In progress		The FPAC CXD was able to better refine some identified process improvements, either championed by the CX Division or the mission area agencies, with agency leadership (State Conservationists and State Executive Directors) during the FPAC 2018 Leadership Summit in Oklahoma. With the additional feedback the division was able to make some changes to the identified process improvements and producer survey. Producer Survey has been further refined and is planned for nationwide scaling by Q2 FY 20.
Improvements Scaled					
<ul style="list-style-type: none"> Convene teams to scale improvements 	Q2 FY19	Not Started	Not started		
<ul style="list-style-type: none"> Finalize scale improvements 	Q2 FY19	Not started	Not started		
<ul style="list-style-type: none"> Conduct training sessions for staff 	Q3 FY19	Not Started	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		Started - ongoing			
<ul style="list-style-type: none"> • Create prototype data collection tools 	Q4 FY18	Completed			None. The CX Division collected initial producer pilot survey data and tracked initial KPI metrics (see Attachment). In addition, FPAC will continue its APG in FY20-21 and is designing a cross-FPAC indexed measure.
<ul style="list-style-type: none"> • Collect initial KPI data 	Q4 FY18	Completed			
KPI baseline analysis					
<ul style="list-style-type: none"> • Measure performance 	Q1 FY19	Started-ongoing	Scaling; planned for deployment Q4 FY19		USDA and OMB clearance: timing and changed process for external survey. The initial CX producer survey provided limited and preliminary data; the CX Division designed an external producer survey and has been significantly delayed by external factors in obtaining the infrastructure (application) for deployment. And, the Paperwork Reduction Act clearance to conduct additional interviews and deploy this survey was submitted to USDA in Q2 and is still pending approval. The OMB notice posted in September of 2019. Deployment of survey is estimated in Q2 FY 20. The survey software selection and purchase has now been completed, sample set drawn and the comment period for the Producer survey started.
<ul style="list-style-type: none"> • Identify trends and patterns 	Q1 FY19	Started-ongoing	Identified new data needs for the revised survey.	CXD	
Rollout to Service Centers					
<ul style="list-style-type: none"> • Refine data collection methods 	Q2 FY19	Not started	Complete	CXD	Working to complete the means for roll out through deployment of surveys and subsequent research and pilot efforts
<ul style="list-style-type: none"> • Train field staff on data collection methods 		Not Started	Postponed	CXD	

Key Milestones

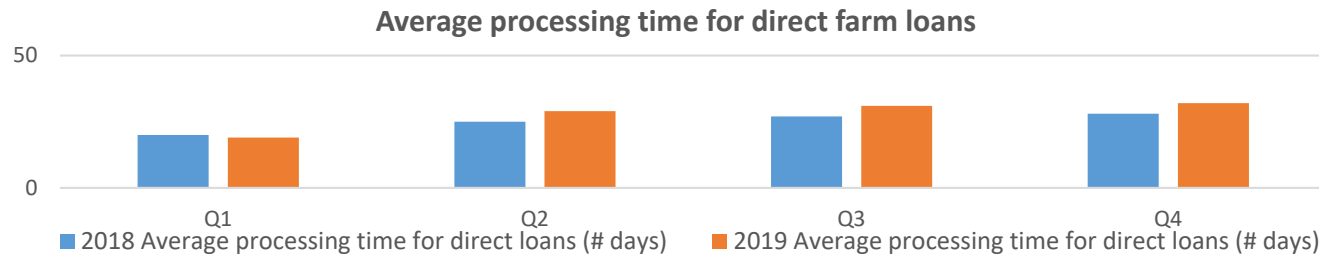
Strategy 4 – Strengthen Customer Experience Division

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 Division	Q2 FY18	Completed – ongoing	CXD Workplan and Action Plans for FSA and NRCS are approved.	CXD	The milestone has since been completed. The CX Division will provide a limited set of core services and functions in support of the FPAC CX mission and goals. CX Action Plans for High Impact Service Provides are complete. The CX Division Workplan has been approved.
Establish Customer Experience Division	Q1 FY 19	Completed			The FPAC Business Center agency/organization was effective October 15 th , 2018. The FPAC CX Division is one of the Divisions/functional areas included in the FPAC Business Center. It will continue to mature as an organization over time to support the diverse set of customers and the multi-faceted program agencies within the FPAC mission area.
Communication Planning	Q2 FY18	In progress	In Progress	CXD	Communication planning and implementation is ongoing through regular internal communications.
Service Center Meetings	Q4 FY19	In progress	Postponed		CXD is currently limited in terms of staffing and funding for increased qualitative- and service center-focused research. In FY20, plans are in place to increase staffing levels and further integrate CX functions across FPAC. Further research may be pursued in FY20 following survey data analysis as priority areas emerge for further exploration and process improvement testing.

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, which will be updated in FY20.

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	Service Center Interaction Log ¹	Monthly
	▲ Number of first time program participants	Service Center Staff Survey ¹	Monthly
Process: Program tasks can be understood and completed without hassles.	▼ Average processing time for direct farm loans	FSA Direct Loan System ²	Quarterly
Outcomes: Results from engagements meet producers' goals within program objectives.	▲ Post-engagement customer satisfaction	Producer Electronic Survey ¹	End of Engagement



FY	Indicator	Q1	Q2	Q3	Q4	Annual Target
2018	Average processing time for direct loans (# days)	20	25	27	28	31
2019	Average processing time for direct loans (# days)	19	29	31	32	30

¹ Data sources, collection methodologies, and baseline data being developed in FY19. The KPIs are being tested and are still under development.

² Note – The following factors contributed to the increase in FY19 direct loans processing time: loan application backlog that occurred during lapse in funding, increasing volume and size of farm ownership loans, increasing complexity of loans caused by higher loan limits provided in the Farm Bill, rising delinquencies in some States that require more attention to loan servicing, attrition of experienced staff, and 2-year training for new loan officers to be productive.

Summary of Progress Q4 FY 19

- CX Expo Planning – Supported the Office of the secretary and Secretary’s Office of Customer Experience by coordinating the inclusion of 3 FPAC projects from 3 FPAC agencies (NRCS, FSA, and Business Center) in the USDA Impact Expo, which was originally scheduled for August 22, 2019.
- OMB Comment Period for Producer Satisfaction Survey (<https://federalregister.gov/d/2019-20445>) - Published a request for comment via the Federal Register to seek comments on the proposed Producer Survey. The comment period is open from September 23, 2019 to November 22, 2019. A second comment period may be executed after the first comment period closes. The expected date for publication of the Producer Satisfaction Survey is April 2020.
- FPAC Annual Customer Experience Surveys – Completed framework for these surveys and submitted to FPAC Business Center leadership for review. In addition, the survey tool has been procured and FPAC is currently working through the Secretary’s Office of Customer Experience to use the tool. The proposed timing for these surveys is April (Producer Satisfaction survey)/May 2020 (Internal Customer survey).
- CX Enhancement Committee – Stood up a field-focused Customer Experience Enhancement Committee to provide a mechanism for FPAC employees to discuss and understand their customers’ experiences, to identify informational or other needs to better support customers, and to pilot ideas that may enhance our customers’ journeys through various internal and external FSA, NRCS, RMA, Business Center, and FPAC-wide processes and programs. The Committee will help ensure that these ideas and needs (from producers and the field staff directly serving them) are shared.
- The average processing time for direct farm loans in FY19 was 32 days.
- Business Process Reengineering and Continuous Process Improvement Activities – Considerable work in this area across multiple internal processes continues, intended to also save field and other staff’s time, indirectly and directly benefiting customers, and avoiding significant costs by streamlining and optimizing processes to make more field staff time available to serve customers.

Summary of Progress Q4 FY 19

- USDA's Farm Production and Conservation (FPAC) mission area launched [Farmers.gov](https://www.farmers.gov), an interactive one-stop website with mobile device capability for producers to fill out forms, apply for disaster assistance, and find the most convenient USDA office locations. Farmers.gov is built around the needs of customers, with farmer-focused content, interactive tools, and a business data dashboard that allows producers more time to focus on their farm and less time filling out antiquated and time intensive paper forms. In FY19, there was continued focus on developing applications in farmers.gov by leveraging the agile development process to ensure software features meet the needs of employees and customers. This includes development of many farmers.gov features that have been launched including the Farm Loan Discovery Tool, WHIP (Wildfires and Hurricanes Indemnity Program), WHIP+, MFP (Market Facilitation Program). The design of these applications are intended to save considerable producer and field staff time.
 - *H-2A Education Tool*: This online Farmers.gov tool helps farmers, ranchers, and producers fill out the required forms faster and more efficiently. The tool contains an interactive checklist with application requirements, fees, forms and a timeline built around a farmer's hiring needs.
 - *Farm Loan Discovery Tool*: This new interactive tool on farmers.gov can help farmers find information on USDA farm loans within minutes. Farmers who are looking for financing options to operate a farm or buy land can answer a few simple questions about what they are looking to fund and how much money they need to borrow. After submitting their answers, farmers will be provided information on farm loans that best fit their specific needs. The results page also provides easy access to the loan application and additional resources and directs farmers to their nearest USDA Service Center.
 - *Disaster Discovery Tool*: This new tool available on Farmers.gov assists agricultural producers to prepare for and recover from impacts of natural disasters. The tool walks producers through five questions to help them identify what USDA disaster assistance programs are available that fit their individual circumstance. A process that historically took nearly a year and a half from when a farmer files a disaster claim to when they receive their payment, now takes less than four months with continuous process improvements expected to continue to minimize the time lag.

Agency Priority Goal Summary

- FPAC's Customer Experience activities are well underway, and cut across a wide range of activities.
- In addition to several cost-cutting activities across FPAC this year, each of our agencies have implemented at least 15 agency-level CX initiatives that have helped in institutionalizing a customer-centric culture across FPAC.
- Several major deliverables were accomplished, and some were partially completed and will be finalized in FY 2020.
- The existing goal is now closed out, but an updated CX APG has been proposed and accepted for another 2-year cycle, with significant work underway.
- Overall, the objectives for the FPAC APG have been achieved.

Data Accuracy and Reliability

Data sources and collection methodologies for continued and updated KPIs have been assessed and put in place in FY 2019 and will continue into early FY 2020, in particular through survey data collection and analysis, farmers.gov analytics, business process reengineering activities, and alignment of FPAC's top operational goals and metrics to the continuation of this Agency Priority Goal in FY2020-FY2021.

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 (FSA), Natural Resources Conservation Service (NRCS), Risk Management Agency (RMA), FPAC Business Center

Program Activities:

- Conservation, disaster assistance, farm loans, income support, and crop insurance

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

An initial internal communications plan was completed in early Q2 FY 2019 and continues to be implemented. FPAC continues to visibly focus on enhancing its customer-centric culture through planning, implementing, and communicating about customer-centric processes and approaches to doing business.

Messaging on customer experience continues to be increasingly included in a wide range of FPAC leadership messaging, including in presentations, speeches, testimonial statements, and other engagements.