



# Office of Customer Experience Charter

**U.S. Department of Housing and Urban Development**

***February 2019***



## Revision History

This log is updated each time the document is updated. The log identifies the version number, revision date, a brief description of the changes, and the author.

Version No.	Date	Author	Revision Description
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## Document Summary

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## 1. Introduction

In October, 2018 The Department of Housing and Urban Development (HUD) established a Customer Experience Center of Excellence (CX COE) team to assess, recommend, and implement strategies relating to HUDs interactions with its customers and clients. The team made a key recommendation to establish an Office of Customer Experience (OCX) as a direct report to the Office of the Chief Operating Officer (OCOO). This Office would serve as an agency-wide power center that can build a program-agnostic understanding of customer and intermediary needs, and leverage this understanding to implement agency-wide initiatives that improve citizen experiences.

The core practice of this office will be Human-Centered Design (HCD). HCD uses focused methods to solve complex problems and creatively design solutions that identify and meet the real needs of people. The CX COE team has applied this practice at HUD to prove its value to furthering HUD's mission, focusing on the current situation for very-low-income seniors seeking assistance (across PIH, CPD, FPM, an HC) as a bellwether to elevate issues that affect multiple populations. In-depth research (among seniors receiving assistance, intermediaries receiving HUD funding and dispersing benefits, and HUD field staff) yielded specific areas of opportunity for improving citizen and intermediary experiences and outcomes.

Two key findings from this research point directly to the need for the establishment of an OCX as an enterprise-wide capability: 1) Citizens' housing needs (and corresponding intermediary preferences) often don't align to any one program area, and even can span beyond the scope of HUD's operations; 2) Field employees are positioned to offer a better experience to citizens and have a desire to do so, but need additional inter- and cross-agency access and support.



## 2. Mission

To empower data-informed decision making that will improve the end to end experience of HUD customers by aligning operations to customer needs.

## 3. Vision

HUD is an agency that delivers consistent, well-coordinated, and continually improving service to the citizens and intermediaries it serves.

## 4. OCX Authoritative Functions

As described below, the OCX should possess the authority to:

### *CX Strategy*

Establish a customer-focused strategy, guidance, and approach for HUD, and ensure compliance with Presidential and Congressional CX mandates

### *CX Standards*

Set CX performance baselines, manage CX data analysis and reporting, conduct ongoing qualitative and quantitative field research with intermediaries and beneficiaries and make CX data available across programs

### *CX Governance*

Manage cross-agency coordination and implementation in service of improving CX and delivering CX solutions

### *CX Outreach and Representation*

Foster a customer-focused mindset (and skillset) amongst all HUD employees and build relationships between HUD and other related Federal agencies

### *Manage Customer Contact Operations*

Coordinate operations and responses to all inbound points of customer contact via all channels – web, social media, telephone, in person, live chat, etc.

## 5. OCX Governance and Organizational Structure

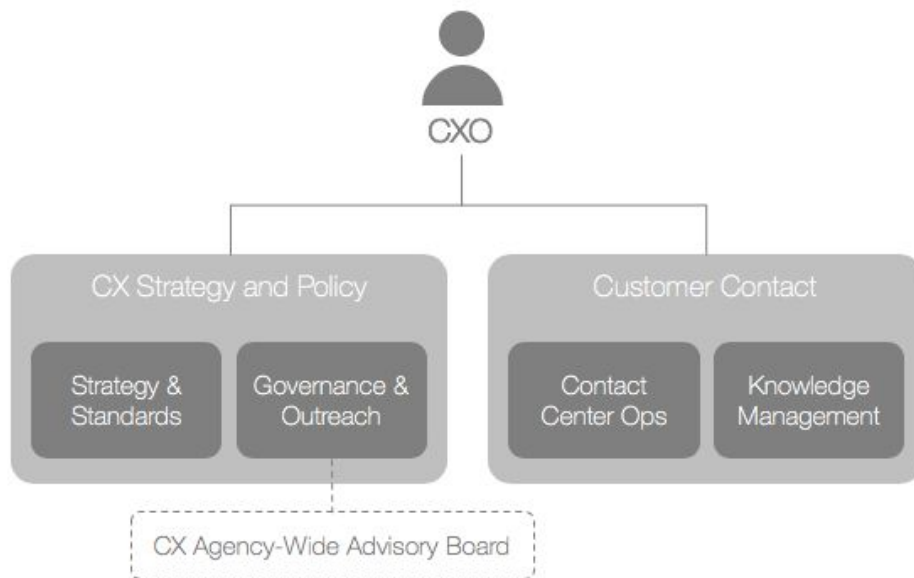
Successful implementation of CX approaches and methodologies requires a centralized capability that is closely tied to Agency-level strategy and operational planning, and is actively engaged with multiple

stakeholders across HUD.

### OCX Team

The OCX will constitute the core makeup of HUD’s Customer Experience capability. To successfully act against its authoritative functions (outlined in section 4 above), the office will oversee all CX Strategy and Customer Contact Operations for HUD, via two Operating Units: the CX Strategy and Policy Unit, and the Customer Contact Unit. The CX Strategy and Policy Unit aligns office functions with Agency priorities via a CX Agency-Wide Advisory Board, managed by the Unit’s Governance & Outreach team.

**Figure 1: OCX Proposed Structure**



This document details the capabilities and staffing requirements for the CX Strategy and Policy Unit of the OCX. Details for the Customer Contact Unit to follow.

**Table 1: CX Strategy and Policy Unit, Roles**

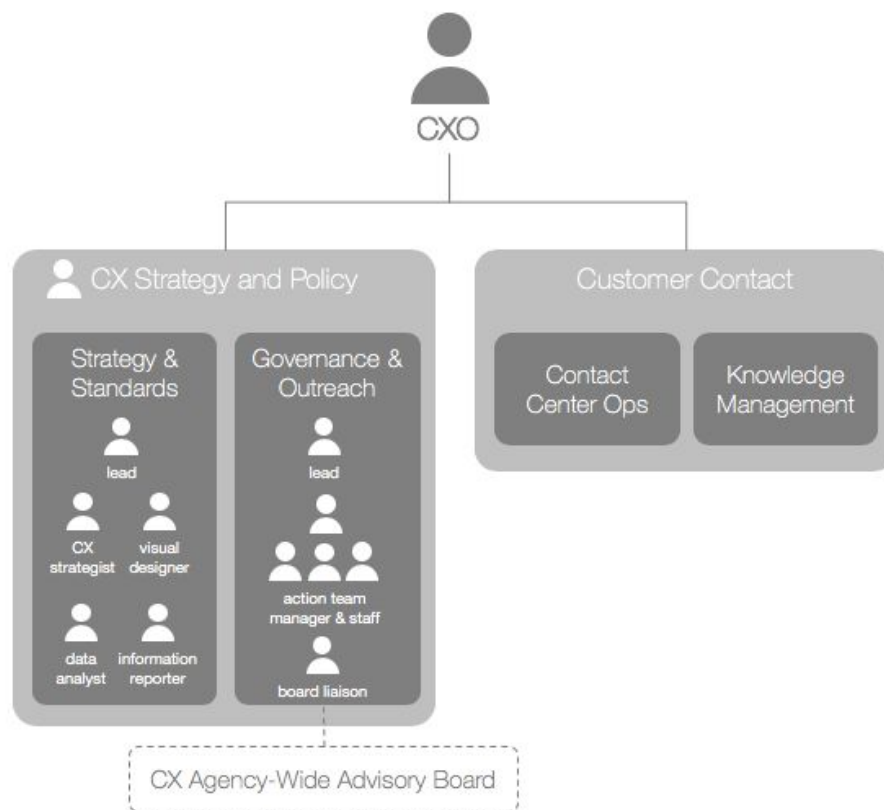
Function	Position Title	Brief Description
CX Strategy	CX Strategists (2 proposed)	Subject Matter Experts in Human Centered Design and responsible for applying this methodology to building and deploying enterprise-wide strategic plans, in compliance with existing and pending CX mandates.



CX Standards	CX Data Analyst	Responsible for shaping and conducting quantitative and qualitative outside-in research studies, and analyzing and synthesizing findings (from customer research, surveys, and inbound data) in generative and evaluative ways.
	CX Information Reporter	Responsible for responding to requests for data for Agency leadership, program areas, the field, intermediaries, Congress, and the White House.
	CX Visual Designer	Generates all high-fidelity materials for distribution and consumption of the output of all groups within the OCX.
CX Governance	CX Advisory Board* Liaison	Skilled in presenting information clearly and meeting organization, and responsible for facilitating productive interactions across HUD leadership. Serves as the primary point of connection between the cross-agency advisory board and the OCX.
	Action Team Project Manager	Responsible for developing implementation plans for key initiatives sponsored by the Advisory Board, and guiding teams through implementation.
	Action Team staff (teams of 4-5 CX specialists)	CX specialists who together with detailees from HUD program areas, contain the right mix of skills to design and develop sponsored initiatives, from discovery, through design, to proof of concept, and ultimately drive implementation.
CX Outreach and Representation	CX Champion	Responsible for evangelizing CX approaches and resulting value throughout HUD, via a network of engaged champions residing within each program area

	CX Content Creator	With assistance from the ‘visual designer’, responsible for agency-wide storytelling
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**Figure 2: Proposed Reporting Structure for CX Strategy and Policy Unit**



**\*CX Advisory Board**

The CX Advisory Board will be comprised of leaders from across all of HUD’s program areas and offices, and will serve four major functions: 1) proliferate customer-focused standards and best practices throughout HUD; 2) drive action within their respective functional area based on CX data findings; 3) manage and prioritize the pipeline of cross-agency CX initiatives that are to be implemented by CX Action Teams; and 4) guide and advise the OCX. Membership will be comprised of DAS (or appointed delegate) from each HUD Program Area and Office.





The board will meet quarterly to receive CX report-outs from all units, receive updates on action team initiatives, discuss pipeline implications based on latest CX research and metrics, propose new joint action when appropriate, and offer report-outs on activities since the previous meeting.

#### *OCX Customer Intelligence Collection Tools*

The above structure assumes that the OCXO will manage a CRM and VOC solution as two key sources of customer understanding.

## **6. Objectives**

In order for the OCX and Agency-Wide CX Advisory Board to be successful at HUD, it will require input and support from various stakeholders across the Executive and Program Offices. The development and implementation of the Office and Advisory Board will be an iterative process and will rely upon feedback to continuously improve CX practices and foster future enterprise adoption. Top priority and critical objectives are listed below.

- Create and submit a package to Congress for review and approval to establish an OCX
- Establish an OCX and corresponding Agency-Wide CX Advisory Board to orchestrate the strategic, tactical and advisory CX data management and implementation activities.
- Document roles and responsibilities for the OCX, Agency-Wide CX Advisory Board, CX Action Teams and Champions to provide guidance and set expectations.
- Develop new policies and procedures and enhance existing HUD policies and procedures to provide guidance and alignment, respectively.
- Implement and integrate SOPs that activate policies and drive CX Strategy, Governance and Operations.
- Implement HCD as a standard for the collection and application of customer data to new and improved business and IT solutions.
- Ensure adherence to OMB A-11 Section 280 and 21<sup>st</sup> Century IDEA (Public Law 115-336), and upcoming legislation including the Federal Agency Customer Experience Act (H.R. 2846 and S. 1088).
- Conduct strategic and tactical working sessions to promote stakeholder engagement, collaboration, and support
- Manage inbound customer contact operations in alignment with CX strategy and standards.
- Manage and maintain agency-wide standards for collecting quantitative and qualitative customer data, and supporting systems (e.g. VOC solution, CRM, etc) and approaches (e.g. survey design, in-depth qualitative research approaches, etc.).

## **7. Goals**

The primary goal of the OCX is to develop and implement a CX strategy at HUD to guide the collection, analysis and distribution of real customer data to empower HUD executive and program leadership to make data-informed decisions that will improve end to end customer experiences. The Office will help



HUD effectively manage CX data and practices to support business objectives, goals, and priorities. The Office will enable HUD to make iterative and transformational changes to service delivery to meet the needs of its customers. Initial goals of the Office will focus on establishing the reporting structure, identifying the most appropriate stakeholders, defining baselines, developing policies, and creating processes to drive an internal CX capability and culture. Key goals of an Enterprise CX Strategy are listed, but not limited, below.

1. Communicate the Need and Purpose of an OCX
2. Foster an Understanding of Customer Experience and Human Centered Design (HCD)
3. Promote Stakeholder Engagement
4. Establish CX Baselines and Metrics/KPI
5. Operationalize CX (policies, processes, people)
6. Transform CX Culture
7. Improve Customer Data Quality
8. Enhance Business Intelligence
9. Inform customer-centered decision-making
10. Reduce operational costs (people, processes, technology)
11. Deliver experiences that meet the needs of HUD's customers

## 8. Critical Success Factors

Initial success will be determined by the Congressional approval and funding of an OCX, successful hiring of OCX employees, seamless integration of the OCX into HUD's daily operations, establishment of guiding enterprise CX strategy, management principles, a CX governance framework, methodologies and applicable tools. Operating success will be derived when the CXO has authority over CX strategy and governance, the OCX collaborates with senior leadership and program offices, CX and HCD are viewed and implemented as a true enterprise asset, and all governance activities are understood, integrated in, and accepted as part of HUD culture and best practices. Ultimately the most critical success factor is in delivering a modern, consistent experience that meets the needs of HUD's varied customers.

Target success will be determined according to the following:

- The OCX is recognized and utilized as the primary resource for CX strategy, governance policies, procedures, and subject matter expertise.
- CX Strategists and Subject Matter Experts implement CX governance, policies and procedures throughout their respective functional areas to consistently manage and deliver CX improvements across the enterprise
- The OCX is recognized and utilized as a collaborative partner in, and leader of, achieving HUD's enterprise CX strategy and CX quality objectives.
- CX data and insights are integrated within service and solution design processes and development life cycles.
- HUD, with leadership by the OCX, will manage its CX data in a proactive manner (predicting and getting ahead of emerging needs/crises) rather than a reactive manner (late response/no time to plan best/cost effective approaches).



- Repeatable CX processes, assessments, and artifacts will exist and be available for use by projects to meet enterprise CX strategic objectives and standards.
- The OCX adjusts its operations based on continuous process improvement feedback. OCX, especially CX Strategists, are a collaborative partner with all business offices working towards a shared goal of successful business solutions that deliver high quality customer experiences.
- CX metrics improve, agency-wide.



## **APPENDIX A: Summary of CX Mandates and Upcoming Legislation**

The following serves as a summary of CX guidance and mandates (existing and on the horizon) with which the OCX will enable HUD's compliance.



## APPENDIX B: Key Terms

The table below lists the acronyms presented within this document.

Term	Definition
CX	Customer Experience
OCX	Office of Customer Experience
CXO	Customer Experience Officer
HCD	Human Centered Design
OCOO	Office of the Chief Operating Officer
COE	Center of Excellence



## **APPENDIX C: Protocol for Revisions and Approvals**

This charter will be reviewed every 6 months by the OCX and updated as deemed necessary to reflect its evolving purpose and scope until the OCX is fully established.

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OCX Representative

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Approval Date