

Business Case: Capital Asset Summary

Part I: Summary Information and Justification (All Capital Assets)

Section A: Overview & General Information

Date Investment First Submitted: 2019-09-16
Date of Last Change to Activities: 2021-08-26
Investment Auto Submission Date:
Date of Last Investment Detail Update: 2021-04-27
Date of Last Business Case Update: 2021-04-27
Date of Last Revision: 2021-08-26

Agency: 005 - Department of Agriculture **Bureau:** 03 - Office of the Secretary

- 1. Name of this Investment:** DA-OCX-Customer Experience
- 2. Unique Investment Identifier (UII):** 005-000003353

Section B: Investment Detail

- 1. Provide at least one Agency Strategic objective code ([A-11 Section 230](#)) and/or Agency Priority Goal code ([A-11 Section 250](#)) that this investment aligns to on performance.gov. If this investment aligns to more than one Agency strategic objective code and/or Agency Priority goal code list all that apply. If your agency does not report to performance.gov please use "0". This is required for Agency IT Portfolio Summary Part 1 and Part 2 Investments, not for Part 3 Investments.**

Agency Strategic Objective(s):

005SO18001: Modernize information technology infrastructure, facilities and support services to improve the customer experience.

Agency Priority Goal(s):

- 2. Briefly describe the investment's return on investment, including benefits internal and external to the government and outcomes achieved or planned.**
The Customer Experience CoE was stood up to enable USDA Mission Areas to analyze, understand, design, and produce outstanding customer experiences and an ecosystem to sustain them.

- 3. If this investment will result in the elimination or the reduction of another major or non-major investment(s), please complete the following:**

Table I.B.1 Affected Investment Information

| Investment UII | To Be Status |
|----------------|--------------|
|----------------|--------------|

NONE

4. Does the Investment currently include an intra- or inter-Agency shared service (common, shared, or centralized solution)?:

NO

5. Does the Investment plan to include an Intra- or Inter-Agency shared service that it does not currently include (common, shared, or centralized solution)?:

NO

6. If systems contained in this Investment collect data from the public, please identify the OMB Control Numbers which authorize that data collection as per the Paperwork Reduction Act. Use [Reginfo](#) at the following link to identify information collection requests and OMB control numbers. Agencies can work with their Records Officers to determine the applicability.

7. Provide the name of the Investment-level project manager:

Simchah Suveykebogin

8. Select the qualification/experience level of the Investment-level project manager (select one):

8 - No certification, but with between 2 and 4 years PM experience (within the last five years)

Section C: Life Cycle Costs

1. Provide the total estimated life cycle costs for the investment in millions. Note: Do not enter information in the grey cells as these will be calculated.

| Table I.C.1 Life Cycle Costs | | | | |
|---|--------------------|------------|------------|------------|
| | PY-1 & Prior | PY 2021 | CY 2022 | BY 2023 |
| Planning Costs: | 0 | 0 | 0 | 0 |
| DME (Excluding Planning) Costs: | \$4.591000 | \$0.255000 | \$0.300000 | \$0.300000 |
| DME (Including Planning) Govt. FTEs: | 0 | 0 | 0 | 0 |
| Sub-Total DME (including Internal Labor (Govt. FTE)): | \$4.591000 | \$0.255000 | \$0.300000 | \$0.300000 |
| O & M Costs: | \$0.027000 | 0 | 0 | 0 |
| O & M Internal Labor (Govt. FTE): | 0 | 0 | 0 | 0 |
| Sub-Total O & M Costs (Including Internal Labor (Govt. FTE)): | \$0.027000 | 0 | 0 | 0 |
| Total Cost (Including Internal Labor (Govt. FTE)): | \$4.618000 | \$0.255000 | \$0.300000 | \$0.300000 |
| Total Cost Internal Labor (Govt. FTE) costs: | 0 | 0 | 0 | 0 |
| # of FTE rep by costs: | 0 | 0 | 0 | 0 |
| Total change from prior year final President's Budget (\$) | | 0 | 0 | |
| Total change from prior year final President's Budget | | | | |

Table I.C.1 Life Cycle Costs

| | PY-1 & Prior | PY 2021 | CY 2022 | BY 2023 |
|-----|--------------------|------------|------------|------------|
| (%) | | | | |

2.
 - a. In which year did or will this investment begin? (specify year - e.g., PY-1= 2019)
2018
 - b. In which year will this investment reach the end of its estimated useful life? (specify year - e.g., FY+5 = 2027)
2025
3. Compare the funding levels for PY and CY to the final FY 2022 President's Budget for those same years. Briefly explain any significant changes. When making comparisons, ensure that you compare same-year-to-same-year (e.g., the FY20 level for 2020 versus the FY21 level for 2020):

Business Case Detail: Performance Measurement Report

Section A1: General Information

1. **Name of this Investment:** DA-OCX-CUSTOMER EXPERIENCE
2. **Unique Investment Identifier (UII):** 005-000003353

Section C1: Projects Table

Projects Table C.1

| Unique Project ID | Project Name | Project Goal | Project Start Date | Project Completion Date | Project Lifecycle Cost (\$M) | Software Project? |
|-------------------|-------------------------|---|--------------------|-------------------------|------------------------------|-------------------|
| 178968 | Voice of Customer COE | Establish a cohesive feedback management capability that enables customers to provide feedback across all programs and empowers employees with vetted CX metrics they can use to improve customer outcomes. | 10/15/2018 | 09/30/2019 | \$1.6 | No |
| 178986 | Customer Experience CoE | Enable USDA Mission Areas to analyze, understand, design, and produce outstanding customer experiences and an ecosystem to sustain them. | 04/02/2018 | 09/30/2019 | \$4.0 | No |
| 195089 | Multi Channel ATO/ATT | Survey Tools Medallia License subscription and Authority to Operate (ATO)or Authority to Test (ATT)Support,and Implementation/Configuration | 03/11/2021 | 09/30/2021 | \$0.4 | No |

Section C2: Project Activities

1. Provide all non-agile project activities for projects in Table C.1 that started in a previous FY (PY and earlier) and that have not been completed by the beginning of the CY, as well as activities that are scheduled to start in the current FY and BY.

Project Activity Table C.2.1

| Unique Project ID | Activity Name | Activity Description | Structure ID | Planned Start Date | Projected Start Date | Actual Start Date | Planned Completion Date | Projected Completion Date | Actual Completion Date | Planned Total Costs | Projected Total Costs | Actual Total Costs |
|-------------------|-----------------|--|--------------|--------------------|----------------------|-------------------|-------------------------|---------------------------|------------------------|---------------------|-----------------------|--------------------|
| 178986 | Discovery Phase | The Discovery Phase work included development of a Customer Experience | 178986.1 | 2018-04-02 | 2018-04-02 | 2018-04-02 | 2018-09-30 | 2018-09-30 | 2018-09-30 | 1.470000 | 1.470000 | 1.470000 |

Project Activity Table C.2.1

| Unique Project ID | Activity Name | Activity Description | Structure ID | Planned Start Date | Projected Start Date | Actual Start Date | Planned Completion Date | Projected Completion Date | Actual Completion Date | Planned Total Costs | Projected Total Costs | Actual Total Costs |
|-------------------|--------------------|---|--------------|--------------------|----------------------|-------------------|-------------------------|---------------------------|------------------------|---------------------|-----------------------|--------------------|
| | | Strategy, Service Delivery Models, Application of Human-Centered Design, Customer Journey Mapping, and Best Practice Research. | | | | | | | | | | |
| 178968 | Pre-Implementation | This pre-implementation phase consists of developing the project plan, quality control plan, omni channel listening strategy, strategy roadmap, requirements gathering, survey design, dashboard design, system test plan, and ATO package. | 178968.1 | 2018-10-22 | 2018-10-22 | 2018-10-22 | 2019-05-30 | 2019-05-30 | 2019-05-30 | 0.524000 | 0.524000 | 0.524000 |
| 178986 | Web Modernization | The Web Modernization workstream included a letter of engagement, sprint and research planning, a digital playbook and toolkit, | 178986.2 | 2018-10-16 | 2018-10-16 | 2018-11-08 | 2019-05-30 | 2019-09-15 | 2019-08-13 | 0.502000 | 0.502000 | 0.502000 |

Project Activity Table C.2.1

| Unique Project ID | Activity Name | Activity Description | Structure ID | Planned Start Date | Projected Start Date | Actual Start Date | Planned Completion Date | Projected Completion Date | Actual Completion Date | Planned Total Costs | Projected Total Costs | Actual Total Costs |
|-------------------|----------------------------------|---|--------------|--------------------|----------------------|-------------------|-------------------------|---------------------------|------------------------|---------------------|-----------------------|--------------------|
| | | marketing, training plan and workshops, and an engagement completion report. | | | | | | | | | | |
| 178968 | Implementation | This implementation phase consist of delivering the VoC Pilot Prep Kick-Off, Roll-Out Plan, Communications Plan, Training Material, Requirements Gathering for Configuration Planning, creating roles, Single-Sign-On Integration | 178968.2 | 2019-04-22 | 2019-04-22 | 2019-04-22 | 2019-07-31 | 2019-07-31 | 2019-07-31 | 0.524000 | 0.524000 | 0.524000 |
| 178986 | Forest Service Public Engagement | The FS Public Engagement workstream included a letter of engagement, sprint and reseach plan, PRA approval, research report, public engagement placemat, marketing, and engagement completion report. | 178986.4 | 2018-11-26 | 2018-11-26 | 2018-11-26 | 2019-08-15 | 2019-08-15 | 2019-05-13 | 0.502000 | 0.502000 | 0.502000 |

Project Activity Table C.2.1

| Unique Project ID | Activity Name | Activity Description | Structure ID | Planned Start Date | Projected Start Date | Actual Start Date | Planned Completion Date | Projected Completion Date | Actual Completion Date | Planned Total Costs | Projected Total Costs | Actual Total Costs |
|-------------------|---------------------|--|--------------|--------------------|----------------------|-------------------|-------------------------|---------------------------|------------------------|---------------------|-----------------------|--------------------|
| 178968 | Post-Implementation | The post-implementation phase consists of delivering an Operate and Monitor EFM System, CX Assessment and ROI Findings Document, Transition Plan, Technical Configuration Document, Tell Sonny Pilot Assessment Report | 178968.3 | 2019-04-29 | 2019-04-29 | 2019-04-29 | 2019-09-30 | 2019-09-30 | 2019-09-30 | 0.524000 | 0.524000 | 0.524000 |
| 178986 | Farm Loans | The Farm Loans workstream included a letter of engagement, sprint and research plan, prototype research, and a loans application guide, online wizard and vendor roadmap, marketing, and completion report. | 178986.3 | 2018-11-26 | 2018-11-26 | 2018-11-01 | 2019-09-30 | 2019-09-30 | 2019-09-30 | 0.502000 | 0.502000 | 0.502000 |
| 178986 | Search/Chatbot | The Chatbot workstream included a letter of engagement, data collection/ | 178986.5 | 2019-04-02 | 2019-04-02 | 2019-04-02 | 2019-09-30 | 2019-09-30 | 2019-09-30 | 0.502000 | 0.502000 | 0.502000 |

Project Activity Table C.2.1

| Unique Project ID | Activity Name | Activity Description | Structure ID | Planned Start Date | Projected Start Date | Actual Start Date | Planned Completion Date | Projected Completion Date | Actual Completion Date | Planned Total Costs | Projected Total Costs | Actual Total Costs |
|-------------------|-------------------------|---|--------------|--------------------|----------------------|-------------------|-------------------------|---------------------------|------------------------|---------------------|-----------------------|--------------------|
| 178986 | OneUSDA Ecosystem Pilot | processing, Bot; personality/user persona/UI customization, sprint and research plan, chatbot pilot, deployment roadmap, and engagement completion report. The OneUSDA Ecosystem Pilot included a letter of engagement, sprint and research plans, primary/secondary research, a USDA communications website audit, OneUSDA ecosystem visualization and persona journey map, marketing, and completion report. | 178986.6 | 2019-05-01 | 2019-05-01 | 2019-05-01 | 2019-09-30 | 2019-09-30 | 2019-09-30 | 0.502000 | 0.502000 | 0.502000 |
| 195089 | Multi Channel Tool ATU | ATU for Medallia | 195089.1 | 2021-03-27 | 2021-03-27 | 2021-03-27 | 2021-07-09 | 2021-07-09 | | 0.180000 | 0.180000 | |
| 195089 | Multi Channel ATT | ATT for Medallia | 195089.2 | 2021-07-10 | 2021-07-10 | | 2021-09-30 | 2021-09-30 | | 0.180000 | 0.180000 | |

Section D: Operational Data

1. Provide the date and results of the last Operational Analysis (for operational and mixed life cycle systems/Investments):

1. **Date of Analysis:**
2. **Analysis Results:**
3. **Analysis Conclusion:**

2. **Report a minimum of 5 metrics using the following table to provide metrics and actual results for each individual metric:**

| Metrics Definitions and Actual Results Table D.2 / D.3 | | | | | | | | | | |
|--|---------------------------|-----------------|---|----------------------------|-------------|-------------|-----------------------|---------------------|---|--------------------|
| Metric ID | Metric Description | Unit of Measure | Performance Measurement Category Mapping | Agency Baseline Capability | 2020 Target | 2021 Target | Measurement Condition | Reporting Frequency | Agency Strategic Objective / Agency Priority Goal | Is Metric Retired? |
| 30281 | Project Spending Variance | Percentage | 3 - Financial Performance | | 5.000000 | 3.000000 | Under target | Annual | 005SO18001 : Modernize information technology infrastructure, facilities and support services to improve the customer experience. | No |
| Metric ID | Actual Result ID | Actual Result | Date of Actual Result | Comment | | | | | | |
| | | | | NONE | | | | | | |
| 30280 | Customer Survey Results | Percentage | 1 - Customer Satisfaction (Process Results) | | 70.000000 | 78.000000 | Over target | Annual | 005SO18001 : Modernize information technology infrastructure, facilities and support services to improve the customer | No |

Metrics Definitions and Actual Results Table D.2 / D.3

| Metric ID | Metric Description | Unit of Measure | Performance Measurement Category Mapping | Agency Baseline Capability | 2020 Target | 2021 Target | Measurement Condition | Reporting Frequency | Agency Strategic Objective / Agency Priority Goal | Is Metric Retired? |
|-----------|--------------------|-----------------|--|----------------------------|-------------|-------------|-----------------------|---------------------|---|--------------------|
| | | | | | | | | | experience. | |

| Metric ID | Actual Result ID | Actual Result | Date of Actual Result | Comment |
|-----------|------------------|---------------|-----------------------|---------|
|-----------|------------------|---------------|-----------------------|---------|

30280 278440 0.910000 12/31/2020

30279 Average Number of Days to Respond to Emails Number 2 - Strategic and Business Results 1.500000 1.000000 Under target Monthly 005SO18001 : Modernize information technology infrastructure, facilities and support services to improve the customer experience. No

| Metric ID | Actual Result ID | Actual Result | Date of Actual Result | Comment |
|-----------|------------------|---------------|-----------------------|---------|
|-----------|------------------|---------------|-----------------------|---------|

NONE

| | | | | | | | | | | |
|-------|---|--------|------------------------------------|--|----------|----------|--------------|---------|---|----|
| 30278 | Average Length of Customer Service Calls (In Minutes) | Number | 2 - Strategic and Business Results | | 6.000000 | 5.000000 | Under target | Monthly | 005SO18001 : Modernize information technology infrastructure, facilities and support services to improve the customer experience. | No |
|-------|---|--------|------------------------------------|--|----------|----------|--------------|---------|---|----|

| Metric ID | Actual Result ID | Actual Result | Date of Actual Result | Comment |
|-----------|------------------|---------------|-----------------------|---------|
|-----------|------------------|---------------|-----------------------|---------|

30278 278439 4.330000 12/31/2020

30277 Average Response Time in Chat (in Number 2 - Strategic and Business Results 45.000000 43.000000 Under target Quarterly 005SO18001 : Modernize information

Metrics Definitions and Actual Results Table D.2 / D.3

| Metric ID | Metric Description | Unit of Measure | Performance Measurement Category Mapping | Agency Baseline Capability | 2020 Target | 2021 Target | Measurement Condition | Reporting Frequency | Agency Strategic Objective / Agency Priority Goal | Is Metric Retired? |
|-----------|--------------------|-----------------|--|----------------------------|-------------|-------------|-----------------------|---------------------|---|--------------------|
|-----------|--------------------|-----------------|--|----------------------------|-------------|-------------|-----------------------|---------------------|---|--------------------|

Minutes)

technology infrastructure, facilities and support services to improve the customer experience.

| Metric ID | Actual Result ID | Actual Result | Date of Actual Result | Comment |
|-----------|------------------|---------------|-----------------------|---------|
|-----------|------------------|---------------|-----------------------|---------|

30277 278438 39.000000 12/31/2020

| | | | | | | | | | | |
|-------|---|------------|------------------------------------|--|-----------|-----------|-------------|---------|---|----|
| 30276 | Percent of Calls Serviced on Spanish Line | Percentage | 2 - Strategic and Business Results | | 90.000000 | 93.000000 | Over target | Monthly | 005SO18001 : Modernize information technology infrastructure, facilities and support services to improve the customer experience. | No |
|-------|---|------------|------------------------------------|--|-----------|-----------|-------------|---------|---|----|

| Metric ID | Actual Result ID | Actual Result | Date of Actual Result | Comment |
|-----------|------------------|---------------|-----------------------|---------|
|-----------|------------------|---------------|-----------------------|---------|

30276 278437 98.560000 12/31/2020

| | | | | | | | | | | |
|-------|---|------------|------------------------------------|--|-----------|-----------|-------------|---------|---|----|
| 30275 | Percent of Calls Serviced on English Line | Percentage | 2 - Strategic and Business Results | | 90.000000 | 92.000000 | Over target | Monthly | 005SO18001 : Modernize information technology infrastructure, facilities and support services to improve the customer experience. | No |
|-------|---|------------|------------------------------------|--|-----------|-----------|-------------|---------|---|----|

| Metric ID | Actual Result ID | Actual Result | Date of Actual Result | Comment |
|-----------|------------------|---------------|-----------------------|---------|
|-----------|------------------|---------------|-----------------------|---------|

Metrics Definitions and Actual Results Table D.2 / D.3

| Metric ID | Metric Description | Unit of Measure | Performance Measurement Category Mapping | Agency Baseline Capability | 2020 Target | 2021 Target | Measurement Condition | Reporting Frequency | Agency Strategic Objective / Agency Priority Goal | Is Metric Retired? |
|-----------|--------------------|-----------------|--|----------------------------|-------------|-------------|-----------------------|---------------------|---|--------------------|
| | | | | | 30275 | 278436 | 96.120000 | 12/31/2020 | | |