

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
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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
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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
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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
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Metric ID	Actual Result ID	Actual Result	Date of Actual Result	Comment
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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?
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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
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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
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Metric ID	Actual Result ID	Actual Result	Date of Actual Result	Comment
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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		