



## Agency Priority Goal Action Plan

# Improve Customer Experience and Operational Efficiency

### Goal Leader(s):

Robert Stephenson, Chief Operating Officer, Farm Production and Conservation (FPAC)  
Business Center

# Overview

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## Goal Statement

- Enhance the customer experience for farmers, ranchers, and foresters through operational efficiencies and expansion of service delivery channels. By September 30, 2021, USDA modernization and technology efforts will improve customer experiences by avoiding at least \$50 million in costs annually, associated with enhancements to acreage reporting, applications and eligibility forms, self-service capabilities, and other process improvements. This time saved will enable employees to spend more time on delivering services and programs to customers directly.

## Challenge

- Institutionalizing a whole-lifecycle, customer-centric culture across FPAC.
- Establishing a cross-agency approach to customer relationship management, both from an operational and systems perspective.

## Opportunity

- Leverage a cross-agency approach, using customer experience best-practices, to develop cross-organizational and cross-functional ways to gain operational efficiencies and offer new service delivery channels.
- Refine KPIs over time to ensure alignment with FPAC goals and objectives and resource constraints.

# Leadership & Implementation Team

## Core Team:

- Ken Hill, Acting Director, FPAC Customer Experience Division
- FPAC CX Division Customer Experience (CX) staff; CX Champions and CX Working Group members 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; FPAC Performance, Accountability, and Risk Division (PAR); and key executive leaders in NRCS, FSA, and RMA

## Governance Structure

Entity	Members	Responsibilities
FPAC Executives	FPAC Under Secretary, FSA Administrator, NRCS Chief, RMA Administrator, FPAC Chief Operating Officer, & FPAC Assistant Chief Information Officer	<ul style="list-style-type: none"><li>– Develop comprehensive customer experience (CX) strategy and prioritize CX</li><li>– Allocate resources</li><li>– Set “tone at the top”</li><li>– Lead customer experience initiatives</li></ul>
FPAC Customer Experience Division	FPAC Customer Experience Officer CX Division Staff	<ul style="list-style-type: none"><li>– Implement CX strategy</li><li>– Lead CX innovation initiatives</li><li>– Lead efforts to incorporate CX into the following in FPAC polices and procedures: Business Process Improvement/Performance Management; Research, data, insights; Marketing/Outreach; Culture</li></ul>
FPAC Customer Experience Core Team	CX Officer, CX Specialist, CX Working Group, CX Enhancement Committee, and representatives from FPAC Program and Mission Support areas.	<ul style="list-style-type: none"><li>– Lead customer experience initiatives</li><li>– Recommend new initiatives</li><li>– Conduct field research</li></ul>

# Goal Structure & Strategies

Strategies				
	Gain understanding of customer needs	Implement actions to improve customer experiences	Establish performance measurement processes that reflect customer-driven data	Build capacity in Customer Experience Office to meet and adapt customer needs
	Identify producer and field needs. Survey and ideate using a representative group of producers and service center staff. Leverage field employees to develop and test initiatives, pilots etc.	Make programs, policies and processes producer-centric. Change systems to enhance in-person and digital engagement.	Develop routine and targeted data gathering instruments, baseline customer experience, assess what works and find out how to get better. Pilot solutions, evaluate, iterate KPIs and refine solutions then scale.	Continue to staff up the office with appropriate resources, staff and authority to be the lead for FPAC customer experience work.
	<i>e.g., Listen to field employees directly and empower them to make recommendations</i>	<i>e.g., Standardize terms to improve info sharing across agencies and work with program managers to update eligibility requirements.</i>	<i>e.g., Develop and deploy annual surveys and transactional surveys that are program and process specific. Pilot and test enhancements</i>	<i>e.g., Fund national and local Customer Experience (CX) Division budget. Hire subject matter and methodology experts. Share best practices</i>
Current State	A committee of field employees and a working group is established. The committee has 5 sub committees targeting key CX areas in FPAC and is developing CX enhancement proposals.	Customer experience pain points and inefficiencies have been identified and will be validated through measurement efforts. Initial experience improvements have been proposed for funding.	A set of KPIs that can be phased in over time have been scoped. Initial KPIs and a data collection plan have been developed.	Customer experience office for FPAC has been established and permanent hiring is underway. Initial priorities and strategy have been scoped, along with annual operational activities.
Objectives	Establish a mechanism to listen to customers in real time and give stakeholders the opportunity to assist in prioritization of work.	Identify 1-2 priority experience projects to be conducted at different levels within the organization (e.g. Field and HQ)	Develop initial KPIs, metrics and analytics to be tested and measured annually	Fully staff the customer experience division. Establish recurring communications mechanisms.
Milestones	<ul style="list-style-type: none"> <li>• Increase collaboration between FPAC and other USDA business units</li> <li>• Strengthen relationships between FPAC and its stakeholders</li> <li>• Obtain a greater understanding of customer needs</li> </ul>	<ul style="list-style-type: none"> <li>• Improve online experience with Farmers.gov that reflects customer input</li> <li>• Improve functionality of Farm Loan e-Commerce initiative</li> <li>• Optimize work load</li> <li>• Improve efficiency in access and documentation</li> </ul>	<ul style="list-style-type: none"> <li>• Increase understanding of experience that employees and producers have online collecting and analyzing valid, reliable and routinized data</li> <li>• Increase risk-based planning</li> <li>• Increase understanding of COVID-related implications on customers</li> <li>• Increase understanding of training effectiveness</li> </ul>	<ul style="list-style-type: none"> <li>• Improve processes that increase efficiency for front-line staff and producers</li> <li>• Enhance COVID-19-related communications</li> <li>• Establish a fully functional customer experience office</li> <li>• Enhance communication channels</li> </ul>

# Summary of Progress – FY20 Q1-Q2

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- Farmers.gov –
  - The Program Increment (PI) planning session cycles have been changed from a 10-week cycle to a 12-week cycle to allow for better penetration of the results from each cycle and to allow more time for subject matter experts (SMEs) to complete the necessary requirements. The Customer Experience (CX) Division and new CX POCs have been formally added to User Centered Design (UCD) role category within the Farmers.gov team to ensure a UCD role is embedded in all the core work streams. The Farmers.gov teams are beginning discussions to join an FPAC initiative to consolidate all Service Desk support functionality and this will roll out as a pilot project to allow for adequate testing prior to full roll out. The overall purpose of the various streams of work is to continue to support the customer experience for our producers by reducing their need for paper and enhancing their ability to request services from FPAC.
- CX Working Group (CX WG) and Enhancement Committee (Cxec) collaboration –
  - The CX WG and Cxec continue to make significant progress on CX activities across FPAC. These groups meet regularly and are working to identify ways to support the FPAC program agencies and producers as we adjust to a new operating structure required by the COVID-19 pandemic. These activities include collaboration on proposed project ideas and involvement in Farmers.gov User Centered Design (UCD) streams of work. Success is measured by the number of connections we are able to make across silos within FPAC.
- Internal CX and Producer Satisfaction Surveys, including KPI development –
  - The surveys are continuing to receive full support across FPAC and they are embedded with questions that allow for development of baseline metrics related to customer experience inside and outside of FPAC. Both surveys are anticipated to be executed by July-August 2020. The Producer Satisfaction survey seeks to meet OMB Circular A-11 section 280 requirements, develop a statistical look at USDA customers' experience, and align survey results with agency processes and priorities. The Internal CX survey seeks to measure the effectiveness of internal resources, evaluate the effect of internal processes on customer service delivery, and assess the impact of the creation of the FPAC Business Center (Farm Bill requirement).
- CX Division (CXD) Strategy Planning –
  - CXD continues to leverage partners across FPAC to continue to make progress on CX core work. These partners bring a field perspective to the CX work and this experience is a critical element of our work. CXD is participating in the OPM/OMB government-wide hiring action for CX Strategists.

# Key Milestones

- Gain understanding of customer needs
- Implement actions to improve customer experiences
- Establish performance measurement processes that reflect customer-driven data
- Build capacity in Customer Experience Office to meet and adapt customer needs

Milestone Summary					
Key Milestone	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Comments
<b><i>Gain understanding of customer needs</i></b>					
<ul style="list-style-type: none"> <li>• Increase collaboration between FPAC and other USDA business units by:               <ul style="list-style-type: none"> <li>• Establishing mechanisms for CX collaboration (e.g. working groups and committees)</li> <li>• Engaging the FPAC CX Champions</li> </ul> </li> </ul>	ongoing	On-Track	N/A	CXD/PAR	<ul style="list-style-type: none"> <li>• Coordination with USDA Office of Customer Experience (OCX) and FPAC agency leadership to assess partnership opportunities.</li> <li>• Facilitation of monthly meetings with FSA, RMA and NRCS CX Champions to implement OMB requirements, conduct workshops, and synergize efforts across FPAC and USDA.</li> </ul>
<ul style="list-style-type: none"> <li>• Strengthen relationships between FPAC and its stakeholders by:               <ul style="list-style-type: none"> <li>• Collaborating with the CX Enhancement Committee to support CX awareness campaigns across FPAC</li> <li>• Executing surveys to assess stakeholder engagement and trust</li> </ul> </li> </ul>	ongoing	On-Track	N/A	CXD	<ul style="list-style-type: none"> <li>• Facilitation of monthly meetings, in addition to weekly CXEC subcommittee meetings, to provide updates, training and, share pilot project proposals.</li> <li>• Execution of pilot COVID-19 survey to assess impact of FPAC leadership communications on field employee engagement. Results leveraged to enhance COVID-19 communications.</li> </ul>
<ul style="list-style-type: none"> <li>• Obtain a greater understanding of customer needs by:               <ul style="list-style-type: none"> <li>• Providing Human Centered Design support for Farmers.gov</li> <li>• Proposing CX pilot projects and executing them upon approval</li> </ul> </li> </ul>	ongoing	On-Track	N/A	CXD/ISD	<ul style="list-style-type: none"> <li>• Engagement of the Information Solutions Division (ISD) to support software awareness campaigns and public portal development (Farmers.gov).</li> </ul>

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<b><i>Implement actions to improve customer experiences</i></b>					
<ul style="list-style-type: none"> <li>• Improve online experience with Farmers.gov that reflects customer input by:               <ul style="list-style-type: none"> <li>• Collaborating on Farmers.gov enhancements and User-Centered Design (UCD) streams of work</li> </ul> </li> </ul>	Quarterly	On-Track	N/A	ISD	<ul style="list-style-type: none"> <li>• The goal for the Geospatial reporting tool (GEAR) is to develop an employee interface to test in select counties, with a plan for a rollout across the nation (to allow for self-reporting functionality). The NRCS Conservation Client Gateway (CCG) will be merged into the Farmers.gov platform in a phased Go-live approach.</li> </ul>
<ul style="list-style-type: none"> <li>• Improve functionality of Farm Loan e-Commerce initiative by:               <ul style="list-style-type: none"> <li>• Providing ongoing UCD support</li> </ul> </li> </ul>	Q4 2021	N/A	N/A	ISD/FSA	<ul style="list-style-type: none"> <li>• Work continues on Farm Loan e-Commerce initiative to allow for functionality such as applying for loans, viewing loan information, and making loan payments.</li> </ul>
<ul style="list-style-type: none"> <li>• Optimize workload by:               <ul style="list-style-type: none"> <li>• Coordinating with the NRCS and FSA on optimization efforts</li> </ul> </li> </ul>	Q4 2021	On-Track	N/A	FSA/NRCS	<ul style="list-style-type: none"> <li>• Work continues on multiple workload optimization efforts across FPAC.</li> <li>• See OMB Action plans for FSA and NRCS</li> </ul>
<ul style="list-style-type: none"> <li>• Improve efficiency in access and documentation by:               <ul style="list-style-type: none"> <li>• Implementing eAuthentication and eSignature features in Farmers.gov</li> </ul> </li> </ul>	Q4 2021	On-Track	N/A	ISD	<ul style="list-style-type: none"> <li>• Planned for Q4 2021</li> </ul>

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<b><i>Establish performance measurement processes that reflect customer-driven data</i></b>					
<ul style="list-style-type: none"> <li>• Increase understanding of experience that employees and producers have online by collecting and analyzing valid, reliable and routinized data by:               <ul style="list-style-type: none"> <li>• Implement CX Employee Survey (Internal)</li> <li>• Implement CX Producer Survey (External)</li> </ul> </li> </ul>	Q3 2020	On-Track	N/A	CXD	<ul style="list-style-type: none"> <li>• The Internal Customer Survey will assess the performance of the employee's journey over multiple interactions during the first year of FPAC. The survey is undergoing testing and review by FPAC leadership. Survey issued June 2020.</li> <li>• The Producer Satisfaction survey was approved, OMB Control Number: 0503-0024. Execution of this survey is anticipated for July-August 2020.</li> </ul>
<ul style="list-style-type: none"> <li>• Increase risk-based planning by:               <ul style="list-style-type: none"> <li>• Developing risk mitigation strategies that incorporate CX</li> </ul> </li> </ul>	Q4 2020	On-Track	N/A	CXD	<ul style="list-style-type: none"> <li>• Implemented the Enterprise Risk survey in May 2020 to identify top risks across the mission area and ensure that risk information is used to inform planning and budgeting activities.</li> </ul>
<ul style="list-style-type: none"> <li>• Increase understanding of COVID-related implications on customers by:               <ul style="list-style-type: none"> <li>• Implementing targeted CX Micro Surveys</li> </ul> </li> </ul>	Q1 2021	On-Track	N/A	CXD	<ul style="list-style-type: none"> <li>• Implemented the COVID-19 FPAC Business Center employee pulse survey in May 2020.</li> </ul>
<ul style="list-style-type: none"> <li>• Increase understanding of training effectiveness by:               <ul style="list-style-type: none"> <li>• Implementing various training evaluation surveys</li> </ul> </li> </ul>	Q3 2021	On-Track	N/A	CXD	<ul style="list-style-type: none"> <li>• Pending additional CX resources</li> </ul>



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<b><i>Build capacity in customer experience office to meet and adapt to customer needs</i></b>					
<ul style="list-style-type: none"> <li>• Improve processes that increase efficiency for front-line staff and producers by:               <ul style="list-style-type: none"> <li>• Conducting CX Strategy Planning – Support the implementation of major process improvements and tools that save significant time for front-line staff and producers</li> </ul> </li> </ul>	ongoing	On-Track	N/A	CXD	<ul style="list-style-type: none"> <li>• Continuing to work with the CX WG and CXC to identify potential improvement projects and provide recommendations for FPAC leadership by September 2020.</li> </ul>
<ul style="list-style-type: none"> <li>• Enhance COVID-19-related communications by:               <ul style="list-style-type: none"> <li>• Supporting FPAC leadership by developing communications tools to support additional COVID-19 activities</li> </ul> </li> </ul>	Ongoing	On-Track			<ul style="list-style-type: none"> <li>• Supporting FPAC leadership with employee insights to enhance COVID-19 employee communications.</li> </ul>
<ul style="list-style-type: none"> <li>• Establish a fully functional customer experience office by:               <ul style="list-style-type: none"> <li>• Fully staffing the CX Division</li> </ul> </li> </ul>	Q3 FY 20	On-Track	N/A	CXD/HR	<ul style="list-style-type: none"> <li>• Participating in the OPM government-wide hiring action for 2 CX Strategists.</li> </ul>
<ul style="list-style-type: none"> <li>• Enhanced communication channels by:               <ul style="list-style-type: none"> <li>• Conducting CX communication planning/awareness campaigns</li> </ul> </li> </ul>	Monthly	On-Track	N/A	CXD	<ul style="list-style-type: none"> <li>• Developed a communications strategy for the roll-out of the Internal Customer and Producer Satisfaction surveys.</li> </ul>

# Key Indicators

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Developing and validating data sources for a cost avoidance indicator.

CX Survey indicators will be available following analysis of the first annual survey.

# Data Accuracy and Reliability

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## Data Sources:

- Survey and KPI Data source: Qualtrics survey tool for employee, Producer, and KPI data will be used.
- Cost-avoidance Data sources - TBD

## Data quality:

- Producer Satisfaction survey – High Quality
- Cost- avoidance Data sources – TBD

# Additional Information

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## Contributing Programs

### Organizations:

- FPAC –
  - Business Center – CXD, Performance, Accountability and Risk Division, Information Solutions Division
  - Business Center, FSA, NRCS, RMA
- USDA Office of Customer Experience (OCX)
- GSA
- OMB

### Program Activities:

- FPAC Customer Experience Program

### President's Management Agenda:

- CAP Goal – Improving Customer Experience with Federal Services
  - This goal will provide a modern, streamlined, and responsive customer experience across government, comparable to leading private-sector organizations.

### Regulations:

- OMB Circular No. A-11 – Section 280