PRESIDENT'S MANAGEMENT AGENDA

Improving Customer Experience with Federal Services

High Impact Service Provider Annual CX Action Plan

Traveler Communications Center (TCC)

Submission June 30, 2019

HISP Annual Maturity Self-Assessment Summary

The content below summarizes the activities, outcomes, next steps and challenges of implementation CX efforts and opportunities for improvement in each of the core CX functions at CBP's Traveler Communication Center as of June 30, 2019.

Measurement: 1 / 6

Activities:
The TCC defined 49 customer relationship, voice of customer, and web analytics metrics and established a strategy to collect, analyze, report, and act upon the data.

Outcomes:
The TCC has reached a common program language to discuss CX data and has established Key Performance Indicators (KPIs) to evaluate the success of the TCC using quantifiable measures.

Next Steps:
The TCC plans to determine metric baselines that measure success over time, and improve CX feedback and customer relationship data by implementing Touchpoints and Salesforce.

Challenges (where applicable)**:**
However, the TCC is facing interim system outages amid its upgrade to a new Customer Relationship Management (CRM) and lacks customer insights pending the deployment of Touchpoints.

The TCC addresses the following OMB evaluation criteria from the self-assessment form:

- *We have defined Customer Experience metrics in line with the government-wide reporting requirements.* (CX Level 1 - Completed)
- *We have identified quantitative, objective customer-experience related metrics that we report on with our feedback metrics.* (CX Level 1- In Progress)
- *We have a "Voice of the Customer" strategy for collecting CX feedback and measures across our entity's entire purview.* (CX Level 2- In Progress)

Governance: 0 / 6

Activities:
The TCC designed a stakeholder strategy and impact report that align the TCC's goals, focus areas, measures of success, capabilities, governance approach, and the impact of the TCC mission outcomes.

Outcomes:
The TCC has proactively created materials to convey the value and benefits CX has on law enforcement outcomes, which can be demonstrated broadly across CBP.

Next Steps:
The TCC plans to partner with leadership and stakeholders to establish a quarterly CX steering committee and shared CX vision.

Challenges (where applicable)**:**
N/A

The TCC addresses the following OMB evaluation criteria from the self-assessment form:

- *We have sub-entity or program leadership dedicated to a specific customer segment CX strategy.* (CX Level 1- In Progress)
- *We have an Executive that is responsible and dedicated to the entity's CX strategy.* (CX Level 1- In Progress)

HISP Annual Maturity Self-Assessment Summary, Continued

The content below summarizes the activities, outcomes, next steps and challenges of implementation CX efforts and opportunities for improvement in each of the core CX functions at CBP's Traveler Communication Center as of June 30, 2019.

Organization & Culture: 0 / 6

Activities:
The TCC identified officer responsibilities to integrate CX into their mission-related work and adopted personas to familiarize officers with travelers that frequently contact the TCC.

Outcomes:
The TCC has developed additional activities and responsibilities to support the synthesizing of customer insights across different TCC stakeholders.

Next Steps:
The TCC plans to increase CX training materials, communications, and resources to improve CX knowledge across officers and customer service representatives (CSRs).

Challenges (where applicable)**:**
N/A

The TCC addresses the following OMB evaluation criteria from the self-assessment form:

- *All employees receive a training in which they are oriented to who the entity's customers are and our CX strategy.* (CX Level 1- In Progress)

Customer Research: 1 / 6

Activities:
The TCC conducted 50+ customer interviews, developed 9 personas for travelers that frequently contact the TCC and made CX materials readily available on a central platform to help officers better understand travelers' needs and behaviors.

Outcomes:
The TCC has generated 34+ persona-targeted solutions to help customers solve issues on their own, decrease their need to contact the TCC, and to improve the customer experience

Next Steps:
The TCC plans to conduct more research with customers, share relevant customer insights and materials with program offices, and provide recommendations for program improvements. customer research and analysis.

Challenges (where applicable)**:**
The TCC faces challenges in executing a formal process for customer research and analysis.

The TCC addresses the following OMB evaluation criteria from the self-assessment form:

- *We use ethnographic research techniques such as interviews and observational studies to better understand customer behavior.* (CX Level 1- Completed)
- *We have a central, entity-wide catalog of our customers and detailed personas that is annually reviewed.* (CX Level 1- In Progress)

HISP Annual Maturity Self-Assessment Summary, Continued

The content below summarizes the activities, outcomes, next steps and challenges of implementation CX efforts and opportunities for improvement in each of the core CX functions at CBP's Traveler Communication Center as of June 30, 2019.

Service Design: 0 / 6

Activities:
The TCC held recurring weekly and monthly meetings with stakeholders (e.g. travel program offices, OIT, etc.) to address customer website functionality.

Outcomes:
The TCC developed 37 CX recommendations for the ESTA website (a travel program the TCC supports) using a human-centered approach to address traveler pain points.

Next Steps:
The TCC plans to increase its day-to-day relationships with stakeholders to more effectively communicate CX recommendations.

Challenges (where applicable)**:**
The TCC lacks ownership of the travel programs it supports and their respective systems, which limits the TCC's ability to implement solutions across relevant websites, applications, and processes.

The TCC addresses the following OMB evaluation criteria from the self-assessment form:
- *We have mechanisms for involving stakeholders in co-creation of programs and improvements*. (CX Level 1- In Progress)

Areas of Focus

Reflecting upon our 2019 CX Maturity Self-Assessment, our HISP has decided to focus on raising our maturity in the following areas:

- X **Measurement**
- X **Governance**
- **Organization & Culture**
- **Customer Research**
- **Service Design**

PRESIDENT'S MANAGEMENT AGENDA

2019/2020 HISP CX Focus Areas

2019/2020 Actions

To support the maturation of our HISP organization in the areas of focus for the remainder of FY19 and through FY20 the following text highlights one of CBP's Traveler Communication Center customers and their challenge that has inspired us to focus on Measurement.

Name: "Rachel"

Stats: *Based on traveler personas*

Short Biography (what makes them a customer of your HISP?):
Rachel works in tourism in Mexico City and typically travels one week out of the month to visit new resorts, attend conferences, and make sure everything is running smoothly.

What they're trying to do (specific thing(s) they need from your HISP):
When she travels, she confirms plans ahead of time, and then reconfirms. After a recent trip to Tucson, AZ, Rachel drove back to Mexico. A few days later she received an email that she is at risk of overstaying her visa.

Frustrations:
- Inconsistent information and instructions making it difficult to understand travel requirements
- Feeling prosecuted for inadvertently being non-compliant
- Complex issue resolution impacting her ability to resolve her issues

Focus Area 1: Measurement

Goal to be accomplished by September 30th, 2021:
Execute metrics and reporting capabilities that can analyze trends and predictively impact how the TCC enables traveler compliance and deters bad actors entering the U.S.

Critical Actions and Milestones:
- Establish and refine on-going baselines across to increase efficiencies
- Determine trends on customer needs/values through GSA's Touchpoints survey tool, including additional CBP-wide focused questions
- Integrate maturing capabilities to automate and evaluate TCC analysis
- Promote TCC best practices through its steering committee

Other Notes:
In this focus area, the TCC addresses the following OMB evaluation criteria from the self-assessment form:
- *We are aligned with agency-wide customer service level standards including call centers and touch points in different mission areas. (CX Level 2)*
- *We have a central view of how our entity is doing on CX at Secretary, Regional, Program, Front-Line, or other appropriate levels. (CX Level 3)*

PRESIDENT'S MANAGEMENT AGENDA

2019/2020 HISP CX Focus Areas

2019/2020 Actions - Continued

To support the maturation of our HISP organization in the areas of focus for the remainder of FY19 and through FY20 the following text highlights one of CBP's Traveler Communication Center customers and their challenge that has inspired us to focus on Governance.

Name: General TCC Customer
Stats: *Based on traveler personas*
Short Biography (what makes them a customer of your HISP?):
The General TCC Customer is a traveler who has questions about ESTA, EVUS, TTP, or is subject to the I-94/ADIS program(s).

What they're trying to do (specific thing(s) they need from your HISP):
If the General TCC Customer has a question or issue related to one of the TCC travel programs, they may use a variety of approaches to resolve it; some call the TCC immediately, while others look on the travel program website first.

Frustrations:
- No systematic approach to answers that are clear or easy to find
- Lengthy processes required to solve issue
- Complicated processes causing unnecessary delays

Focus Area 2: Governance

Goal to be accomplished by September 30th, 2021:
Develop a strategy and associated governance that promotes improvements in CX including self-service to improve the public's experience as well as law enforcement outcomes

Critical Actions and Milestones:
- Create a CX vision as the foundation for a CX strategy
- Develop a CX strategy by defining goals, focus areas, measures of success, capabilities, and a governance structure
- Align processes and operations to execute the CX strategy
- Assess execution of the CX strategy against the CX vision

Other Notes:
In this focus area, the TCC addresses the following OMB evaluation criteria from the self-assessment form:
- *We have an executive that is responsible and dedicated to the entity's CX strategy. (CX Level 1)*
- *We have a CX strategy that is either aligned with or specifically a component of our overall agency strategy. (CX Level 2)*
- *Significant policy decisions and large investments require CX activities and documentation as part of the review process. (CX Level 2)*