



## Improving Customer Experience with Federal Services

**High Impact Service Provider Annual CX Action Plan**

**U.S. Small Business Administration  
Office of Field Operations**

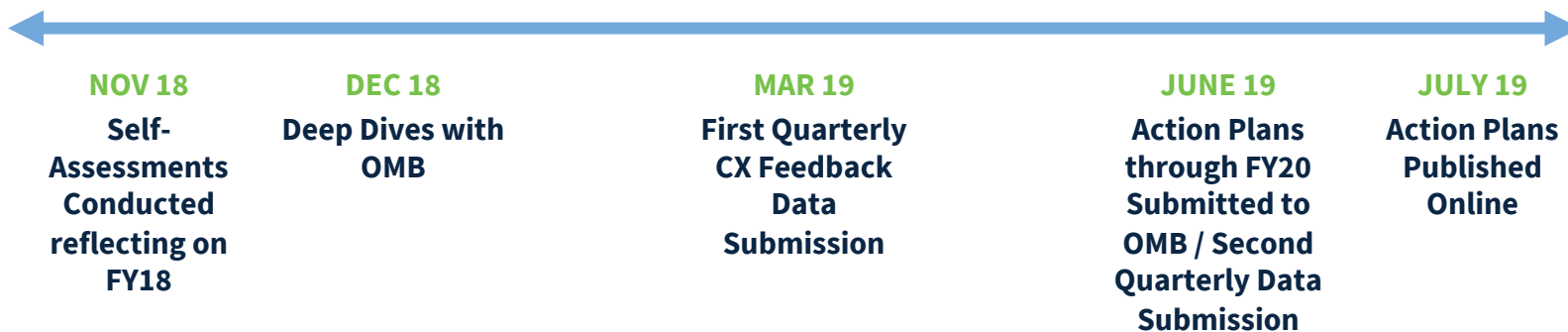
*June 2019*



# Timeline Overview

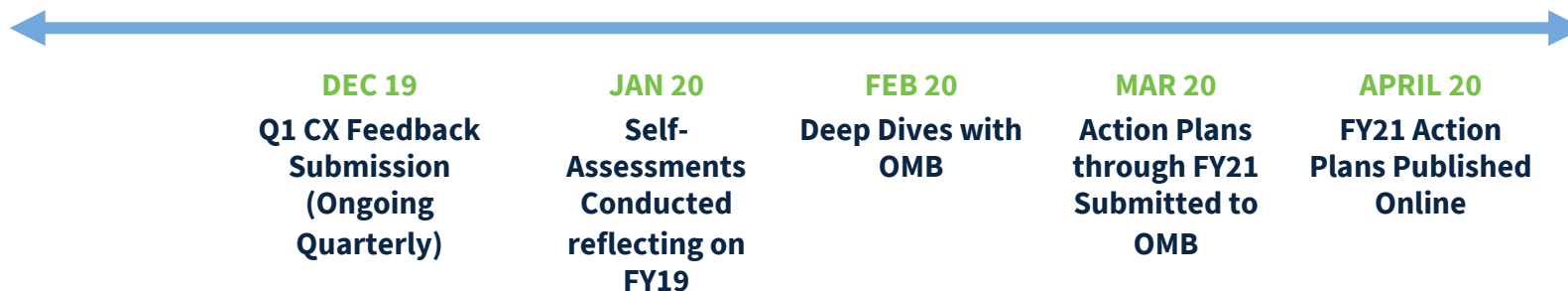
## FIRST YEAR Timeline for A-11 Section 280

**FY19**



## ONGOING Timeline for A-11 Section 280

**FY20**





## HISP Annual Maturity Self-Assessment Summary

In 200 words or less total, tell us about your efforts around each core CX function by responding to the following prompts that apply.

### Measurement: 1 / 6

Please give a 2-3 sentence summary of your efforts:

OFO has been collaborating with internal and external partners to hone measurements efforts and integrate best practices. OFO rolled out its CX survey and developed a plan to analyze the data and make recommendations for improvements.

What are you most proud of?

The field office reaction to hearing about CX at SBA was very positive. There is buy in for the process; the smooth rollout of the CX survey has positioned the CX team to accrue additional gains.

What nascent / ongoing activities do you hope to grow?

After collecting initial data, OFO needs to analyze and dive deeper so that the voice of the customer is heard throughout OFO and that CX excellence becomes part of the culture.

What's blocking you from initiating / making / fully implementing changes?

Implementing change takes time coupled with lack of data.

What else would you like to share?

SBA is for the first time ever giving customers the opportunity to share CX feedback on all Field outreach events.

### Governance: 1 / 6

Please give a 2-3 sentence summary of your efforts:

The vision for CX in OFO has been shared with field leaders. OFO is in the nascent stages of capturing processes and requirements in writing in order to rally additional senior leadership support and backing.

What are you most proud of?

OFO is most proud of the deliberate and smooth rollout of the CX efforts to the field and the positive reception of CX by field leaders.

What nascent / ongoing activities do you hope to grow?

OFO plans to develop a multi-year CX strategic plan that results in a shift in the culture of CX excellence in OFO.

What's blocking you from initiating / making / fully implementing changes?

Change takes time. Updating SOPs and Notices with multiple stakeholders takes time.

What else would you like to share?

N/A



# 2019 HISP Self-Assessment Summary

## Organization & Culture: 0 / 6

Please give a 2-3 sentence summary of your efforts:

OFO is building organizational awareness of CX through a variety of trainings at all levels and developing more robust tools and supports for the field. OFO plans to continue CX awareness trainings and plans to incorporate constructive and valuable feedback to field offices.

What are you most proud of?

The field has given many recommendations regarding the improvement of the CX program, indicating engagement.

What nascent / ongoing activities do you hope to grow?

OFO hopes to grow the inclusion of employees in the design of OFO's CX program.

What's blocking you from initiating / making / fully implementing changes?

Multiple stakeholder groups internal and external to the agency should be consulted, which takes time.

What else would you like to share?

N/A



## Customer Research: 0 / 6

Please give a 2-3 sentence summary of your efforts:

SBA has only anecdotal personas for their customer types because surveying has been minimal. As the data, subsequent analysis, and secondary data collections are realized, a clearer picture of OFO's customers' personas should emerge.

What are you most proud of?

OFO is on a track to improve knowledge about its customers.

What nascent / ongoing activities do you hope to grow?

Capturing of customer specific data will lead to identifying personas that can be leveraged to make strategic improvements in CX.

What's blocking you from initiating / making / fully implementing changes?

The personas of the SBA customers are often unique and varied. Bucketing them poses a challenge.

What else would you like to share?

N/A



# 2019 HISP Self-Assessment Summary

## Service Design: 1/ 6

Please give a 2-3 sentence summary of your efforts:

OFO is working with the Office of the Chief Information Officer (OCIO) and other program offices to identify opportunities to more effectively collect customer data and as a result design or refine services that improve customer experience as a result. OFO knows that coupled with the right people and processes in place, the data quality and fidelity can make a difference in CX.

What are you most proud of?

OFO is taking deliberate steps forward in the service design of CX. The collateral push, as an element of the communications plan, targets to improve quality and future interactions between customers and OFO.

What nascent / ongoing activities do you hope to grow?

OFO will work collaboratively with SBA's OCIO and other program offices to better manage customer information. Those gains will improve quality of customer data and poise OFO for related analysis and subsequent gains in OFO CX.

What's blocking you from initiating / making / fully implementing changes?

Multiple program offices use unique platforms for customer tracking.

What else would you like to share?

## 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 in FY19/FY20:



**Measurement**



**Governance**



**Organization & Culture**



**Customer Research**



**Service Design**



## FY 2019 / 2020 CX Improvement Actions

Describe a use case where a typical customer of your program faced challenge(s) during a service experience. This case should relate to one of your organization's Focus Areas for the remainder of FY19 and through FY20.

### Typical HISP Customer Profile – start a business

This customer persona is a female veteran who finished her active duty service and is evaluating if entrepreneurship is a good fit for her and her family. She wants to learn what tools are available to her throughout the process.

### Customer Needs + Frustrations

What will make the difference to this customer is the conveyance of:

1. Available resources 2. How to connect to useful SBA resources such as resource partners who could further assist her with developing a business plan 3. Options for access to capital and mentors who can help prepare for accessing that capital 4. Empathetic service

What else is helpful to this customer:

1. Knowledgeable staff 2. Ability to catalyze further independent research 3. Friendly, accurate service 4. Each District Office's Veterans Business Development Officer who can provide comprehensive and empathetic analysis of needs and resources for the client.

Common blockers may be:

1. A resource partner may not be available in her immediate area

### HISP Implementation Challenge(s)

There is no standardized guidance on providing great customer experience, though it is intuitive to most in the field. Customers needs are widely varied.

### Stats

SBA will not have survey data until Q4 FY19 and will report on that data until Q1 FY20.

## Action 1

### Focus Area: Measurement

#### **Goal to be accomplished by September 30<sup>th</sup>, 2021:**

Provide field offices the datapoints necessary to identify CX best practices and opportunities for improvement based on the CX Survey as well as identify areas for deeper dive and analysis through subsequent data collection activities.

#### **Critical Activities and Milestones:**

Compile Data  
Format for field and contractor use  
Data Analysis  
Develop teams to find solutions to the identified opportunities  
Field feedback  
Survey evaluation/modification  
Train to the procedural and technical corrections.

#### **Other Notes:**

None





## FY 2019 / 2020 CX Improvement Actions

Describe a use case where a typical customer of your program faced challenge(s) during a service experience. This case should relate to one of your organization's Focus Areas for the remainder of FY19 and through FY20.

### Typical HISP Customer Profile – expand a business

This customer persona is a minority entrepreneur who wants to enter government contracting and explore available options. His goal is to be awarded a government contract.

### Customer Needs + Frustrations

The following will make a difference to this customer:

1. A clear picture of the government contracting process
2. Resources available to help understand contracting process
3. Small business contracting opportunities
4. Clear 8(a) program information and guidance on how to apply
4. Empathy regarding the frustrations often associated with government contracting.
5. Resources in Spanish
6. Resources to help in the pursuant journey

Common blockers may be:

1. Customer frustration with work involved in GC process

### HISP Implementation Challenge(s)

The following include HISP Implementation challenges for this persona:

1. There is not a developed culture of CX

### Stats

SBA will not have survey data until Q4 FY19 and will report on that data until Q1 FY20.

## Action 2

### Focus Area: **Organization and Culture**

#### **Goal to be accomplished by September 30<sup>th</sup>, 2021:**

Develop training module for Customer Experience excellence.

#### **Critical Activities and Milestones:**

Determine Goal  
Stand up Training Teams  
Identify Target Audience  
Determine Content  
Socialize training  
Deliver training  
Gather feedback  
Modify as needed

#### **Other Notes:**

N/A