



*Character, Commitment, Customer Focus*

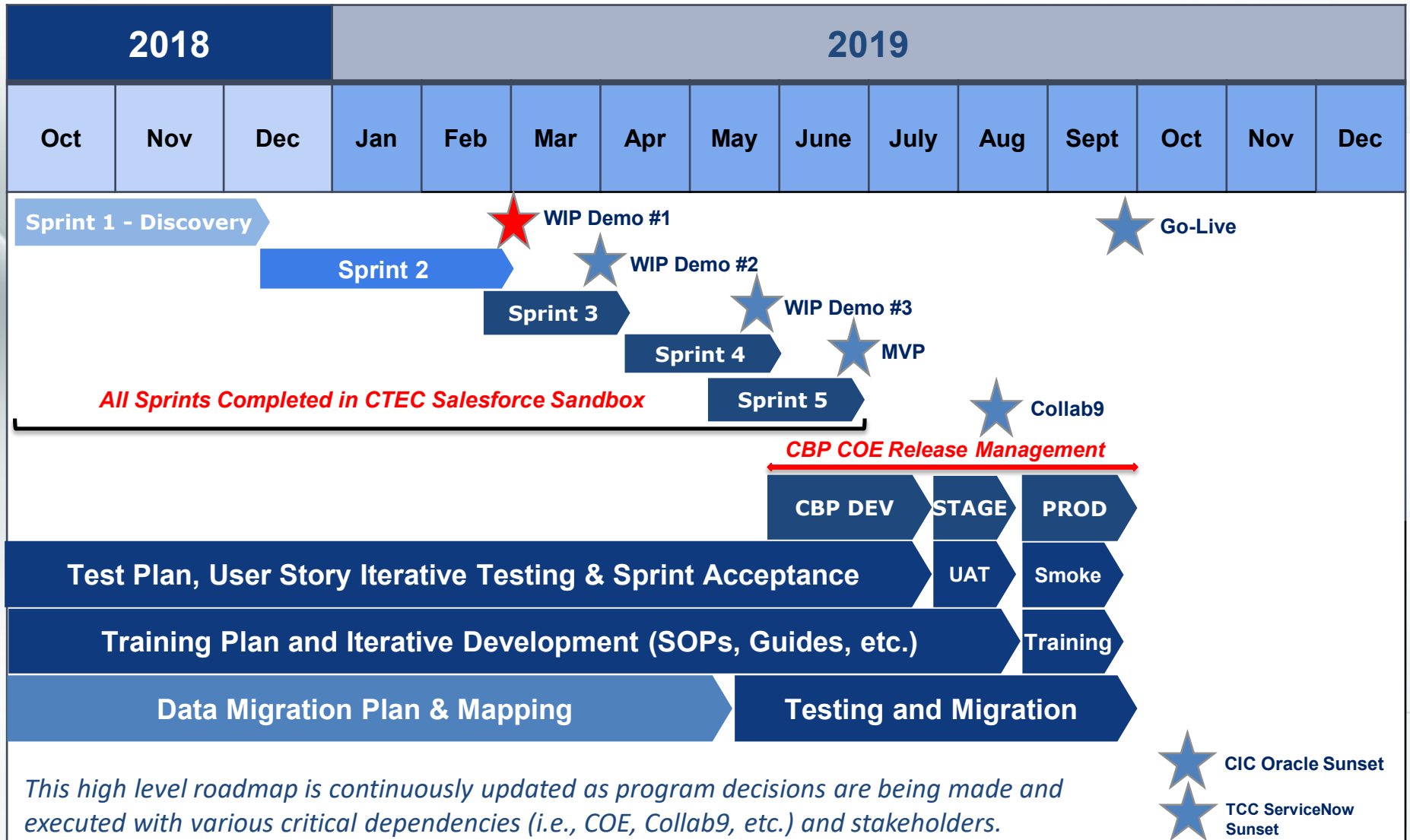
***US Customs and Border Protection (CBP)***

***CBP CRM Work In Progress (WIP) Demo #2***

***April 5, 2019***

- ❖ The purpose of the Customer Relationship Management (CRM) application is to be able to maintain a centralized view of all interactions and improve outreach experience to clients and foreign visitors contacting the agency. We will be building this application for the CBP's Information Center (CIC) and its 1600 internal users and worldwide external customers.
- ❖ We are currently showcasing the current work in progress as of February 28, 2019.
  - ❖ Review of discovery detailed user stories and requirements related to case management
  - ❖ Proof of concept of external facing website, which is pending final design and will be updated for WIP Demo #2
  - ❖ Knowledge Management, case management, and reports and dashboards configured to date

# CBP CMS High Level Plan



# Release Plan by Sprint

Sprints and Sprint Length	Sprint Goals/Scope	User Stories/Activities	Status
Sprint 1 (CIC & TCC) 10/1-12/3	Complete analysis of current state and target state for CIC and TCC systems Salesforce enterprise architect review the architecture and current state to define the future state architecture aligned towards the CBP's CIC and TCC business goals and objectives	Discovery & Architecture for CIC & TCC	Completed
Sprint 2 (CIC & TCC) 12/4-3/4	Participate in the demonstrations of the Oracle RightNow application functionality in order to understand the business functions Document the current As-Is business process and workflows for CIC and TCC Document the To-be business process and technical requirements for CIC and TCC Conduct WIP Demo # 1 on ¾ for CIC and TCC	Business Process Flows for As-Is and To- Be Systems for CIC and TCC	Completed
Sprint 3 (CIC & TCC) 3/5- 4/5	Gather requirements of Case Management flow for CIC and TCC.  Design, development and testing of Case Management user stories for case submission  lightning components to support the user stories Field mapping and Record level sharing hierarchy to support the user stories  Development of user stories for case processing, Community and Knowledge  Conduct Demo # 2 on 4/4	High level workflow of Case submission and processing  External user - submission - web-to-case - question External user - submission - email-to-case - question External user - submission - web-to-case – compliment External user - submission - web-to-case – compliment (Spanish) External user - submission - web-to-case - survey External user - submission - web-to-case - tip Internal user - Processing - web-to-case - question  Internal user - processing - web-to-case – comment Internal user - processing - web-to-case - compliment Internal user - processing - web-to-case - complaint Internal user - processing - web-to-case - tip Internal user - processing - Survey Community setup - create community, add template, publish Sign up into community-Acct Management Sign in into community-Acct Management Search for knowledge articles Add html content to community - work with Chuck from design Add Spanish - html content Knowledge setup - data categories, article type, hierarchy, security of articles Add knowledge articles Add Spanish - Knowledge article	Completed  Case submissions completed  Lightning and hierarchical component creation completed  User stories documentation completed

# Release Plan by Sprint Continued

Sprints and Sprint Length	Sprint Goals/Scope	User Stories/Activities	Status
Sprint 4 (CIC & TCC) 4/8-5/15	<p>Communities design doc Data migration - Data Data migration - Knowledge Base Articles Training documentation Data migration - Communities content Clarify requirements on Knowledge, Communities, Profiles, Reports &amp; Dashboards and document user stories Complaint Flow implementation Comment flow implementation Complaints, Question, Tip, Survey, Comment case in Spanish</p> <p>Case Management processing</p> <p>Communities implementation - phase 1</p> <p>Knowledge base Implementation - phase 1</p> <p>Security - profiles &amp; record level sharing</p> <p>CTI - Phase 1 Conduct the Demo # 3 on 5/14 and 5/15</p>	<p>Knowledge - Migrate knowledge articles from current state to future state Salesforce Coordination with training team Community - Migrate Community Content from current state to future state Salesforce</p> <p>External user - submission - web-to-case - complaint External user - submission - web-to-case - comment External user - submission - web-to-case - question, Spanish External user - submission - web-to-case - survey, Spanish External user - submission - web-to-case - tip, Spanish External user - submission - web-to-case - complaint, Spanish External user - submission - web-to-case - comment, Spanish Internal user - Processing - web-to-case - question Internal user - processing - web-to-case - question Internal user - processing - web-to-case - compliment Internal user - processing - web-to-case - complaint Internal user - processing - web-to-case - tip Internal user - processing - web-to-case - Survey Community setup - create community, add template, publish Signup into community-Acct Management Sign in into community-Acct Management Search for knowledge articles Add html content to community Spanish - html content</p> <p>Knowledge setup - data categories, article type, hierarchy, security of articles Add knowledge articles Spanish - Knowledge articles</p> <p>Security setup - profiles, permission sets, field level security, OWD, groups Add internal users, Add external/community users Internal user SSO External user SSO - login.gov</p> <p>CTI - Setup, API installation, call center configuration.</p>	Not started
Sprint 5 (CIC & TCC) 5/16-6/18	<p>Data migration, Reports &amp; Dashboards, Regression testing and defect resolution for case Management, security, community, knowledge, reports &amp; Dashboard for CIC &amp; TCC Conduct the MVP Demo on 6/17 and 6/18</p>		Not Started



# Record Sharing Hierarchy

## CMS Admin

CIC Admin

TCC Admin

GE

OIT

IPL

OSB

GI

CCB

TCC  
Feds

TCC  
Contractors

OFO

USBP

OPR

OAM

JIC

ORR

OCA

PDO

Limited  
BI

Full BI

POE1

POE2

POEn

S1

S2

Sn

## ❖ CIC – TCC Demo (CTEC Salesforce Sandbox)

### External User - Customer

- ❖ **Case Types – web-to-case**
  - ❖ Questions submission
  - ❖ Compliment submission
  - ❖ Complaints(option 1) submission
  - ❖ Survey submission
  - ❖ Tip submission
  - ❖ Multi-language support-Spanish
  - ❖ Lightning components(location, etc)

### Internal User - Agent

- ❖ **Case Management**
  - ❖ Log into Service Console
  - ❖ Open flow within console
  - ❖ Auto-response rules
  - ❖ Assignment rules
  - ❖ Escalation rules
  - ❖ Queues
  - ❖ Omni-channel
- ❖ **Security**
  - ❖ Record level sharing using group hierarchy

### Internal User - Admin

- ❖ **Security**
  - ❖ Users -> groups -> queues
  - ❖ Public groups for record sharing hierarchy
  - ❖ Mapping of Groups to queues
  - ❖ Sharing rules – exception to record sharing hierarchy
- ❖ **Hierarchal picklists administration**
  - ❖ English
  - ❖ Spanish

- ❖ ***“Section F. Include Agile artifacts related to each example. At least 3 samples of the same artifact over different points of the project lifecycle, in order to show interactive evolution, should be included. The artifacts may include website or application UI screenshots, wireframes, or other artifacts that demonstrate iterative development based on userfeedback and human centered design principles.”***





*Character, Commitment, Customer Focus*

## ***CBP Customer Portal – Before and After***



**U.S. Customs and  
Border Protection**

# Current State Home Page



U.S. Department of Homeland Security  
**U.S. Customs and Border Protection**  
Securing America's Borders

Log In Register Ver en Español

CBP Information Center

Announcement: [\\*\\* News from the Information Center\\*\\*](#)

Find an Answer GO

### Top Travel Topics

1. Temp CE Enrollment Center Staff Reductions
2. CE Enrollment Center Staff Reduction FAQ's 2019
3. Cuban cigars and goods - Importing & Personal Use
4. Documents needed for Cruise

➤ Show More

### Top Import/Export Topics

1. Do I need a license to import something?
2. Moving Household Goods to the U.S.
3. User Fee Decals
4. Missing Mailed Packages
5. Brokers or Carriers

➤ Show More

**Welcome to the CBP INFO Center**

**ASK A QUESTION**

Give Us a COMPLIMENT Problem? COMPLAINT?

Take a survey about your EXPERIENCE CLEARING CBP

[Report Illegal Activity](#)

Current state of homepage is unexciting.

## Related Government Sites

<a href="#">USCIS</a>	<a href="#">FinCEN</a>	<a href="#">DHS</a>
<a href="#">ICE</a>	<a href="#">TSA</a>	<a href="#">State Dept.</a>
<a href="#">FOIA</a>	<a href="#">TRIP</a>	<a href="#">OFAC</a>
<a href="#">EPA</a>	<a href="#">DOT</a>	<a href="#">USA Jobs</a>
<a href="#">USA.gov</a>	<a href="#">ATF</a>	<a href="#">TTB</a>

## Most Viewed Pages on CBP.gov

- [Forms](#)
- [Ports of Entry](#)
- [Electronic System for Travel Authorization \(ESTA\)](#)
- [User Fee Decals and Transponders](#)
- [Duty Rates](#)
- [Publications](#)
- [Know Before You Go](#)
- [Importing into the U.S.](#)
- [Importing a Motor Vehicle](#)
- [Exporting a Vehicle](#)



# Future State Home Page



U.S. Customs and  
Border Protection

[Log In](#)[Register](#)[Ver en Español](#)

## INFORMATION CENTER

Information Center

Top Travel Topics

Top Import/Export Topics

Take an Experience Survey



Welcome to the  
INFORMATION CENTER



How can we help you?



GO

Don't know what to ask?  
EXPLORE HERE!



Customer requested uniformed officers pictures and a new look and feel for CBP homepage.

# Future State Home Page

Submit a  
COMPLAINT



Give us a  
COMPLIMENT



Report  
ILLEGAL ACTIVITY

if you  
SEE SAY  
something something

REPORT

Customer requested that Complaints, Compliments, Illegal Activity, and Questions are accessible via new user friendly tiles.

## Related Government Sites

USCIS	OFAC
FinCEN	EPA
DHS	DOT
ICE	USA Jobs
TSA	USA.gov
State Dept.	ATF
FOIA	TTB
TRIP	



## Most Viewed Pages on CBP.gov

### Forms

Ports of Entry  
Electronic System for Travel Authorization (ESTA)  
User Fee Decals and Transponders  
Duty Rates

### Publications

- Know Before You Go
- Importing into the U.S.
- Importing a Motor Vehicle
- Exporting a Vehicle

# Current State Submission of Questions



**U.S. Customs and Border Protection**  
Securing America's Borders

[Log In](#) [Register](#) [Ver en Español](#)

**CBP Information Center**

[CBP INFO Center Home](#) > [E-mail us your Question](#)

[GO](#)

## *E-mail us your Question*

If you've had trouble finding the answer to a question, send us a message and a Public Information Officer will help you.

Topic \*

\*Required Fields

Select a topic

Email Address \*

Message \*

Attach Documents

[Choose File](#) No file chosen

[Continue](#)

[Find an Answer](#)

[Ports of Entry](#)

[Border Patrol Sectors](#)

[Deferred Inspection Sites](#)

[Border/Airport Wait Times](#)

[Give Us a  
COMPLIMENT](#)

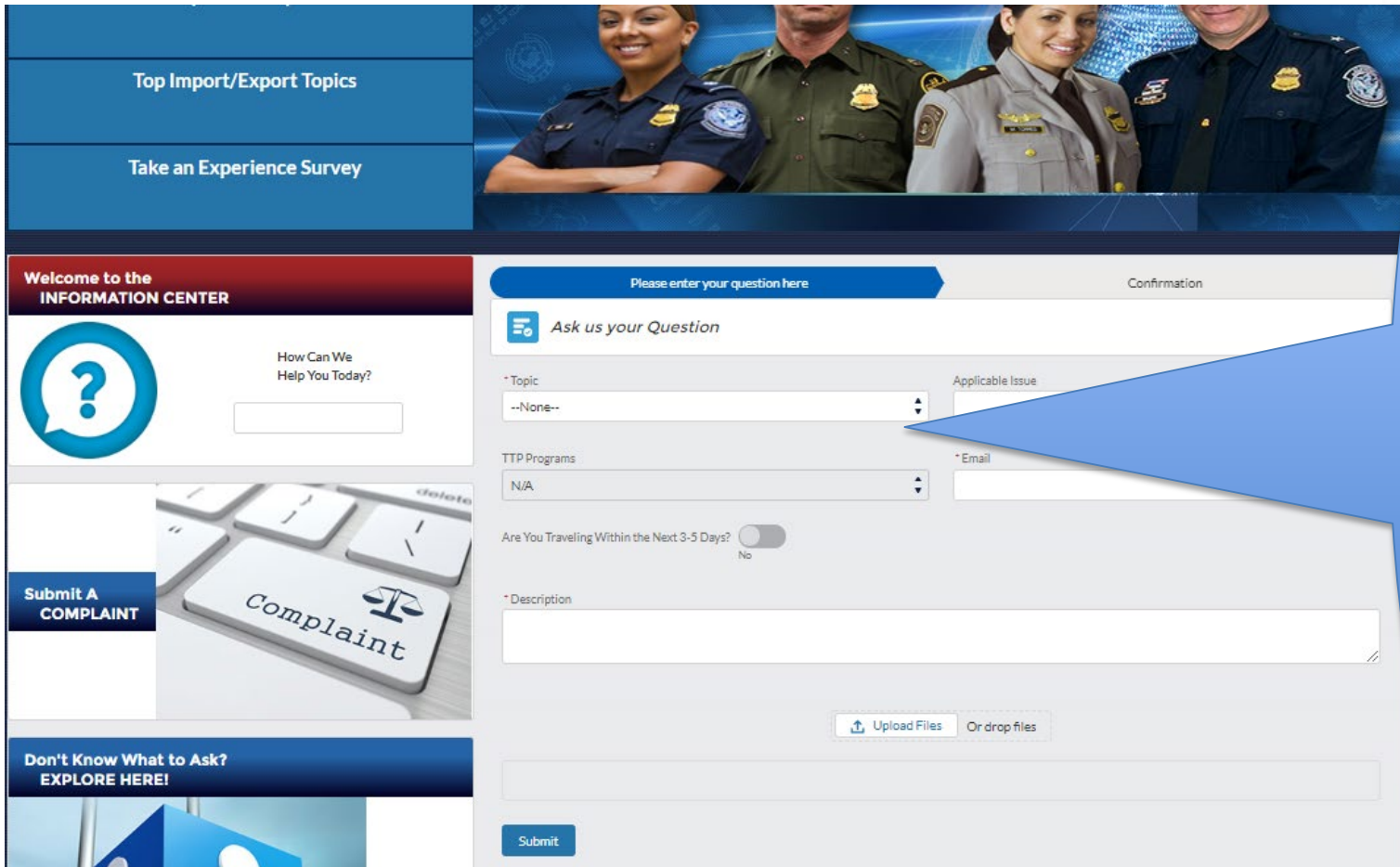
[Problem?  
COMPLAINT?](#)

[Report Illegal Activity](#)

Current state  
provided  
highly nested  
topic  
selection.



# Future State Submission of Questions



Top Import/Export Topics

Take an Experience Survey

Welcome to the INFORMATION CENTER

How Can We Help You Today?

Submit A COMPLAINT

Don't Know What to Ask? EXPLORE HERE!

Please enter your question here

Confirmation

Ask us your Question

\* Topic  
--None--

Applicable Issue

TTP Programs  
N/A

\* Email

Are You Traveling Within the Next 3-5 Days? ☐ No

\* Description

Upload Files Or drop files

Submit

Highly nested topic selection was replaced with only one level of topics, and applicable areas to make topic selection easier.

# Future State Submission of Compliments



The screenshot displays the U.S. Customs and Border Protection Information Center website. The header includes the agency logo, the text 'U.S. Customs and Border Protection', and the title 'INFORMATION CENTER'. A navigation menu on the left lists 'Information Center', 'Top Travel Topics', 'Top Import/Export Topics', and 'Take an Experience Survey'. The main content area features a large image of four CBP officers. Below this, a 'Submit a Compliment' form is visible. The form includes a progress bar, a welcome message, a search bar, and a 'Submit A COMPLAINT' button. The form fields are: Email, Incident Date, Name of CBP Employee(s) (set to 'Unknown'), Where Did This Happen? (set to 'Please select an option'), and Message (set to 'Please enter your compliment here'). A 'Submit' button is at the bottom right of the form.

U.S. Customs and Border Protection

INFORMATION CENTER

Register | Log In

Information Center

Top Travel Topics

Top Import/Export Topics

Take an Experience Survey

Welcome to the INFORMATION CENTER

How Can We Help You Today?

Submit A COMPLAINT

Don't Know What to Ask? EXPLORE HERE!

Submit a Compliment

We like compliments. Please tell us about your experience (in particular who was involved and where it happened) and we will make sure that the right people hear about it.

\* Required Fields

Email  
Please enter your email here

Incident Date

\* Name of CBP Employee(s)  
Unknown

\* Where Did This Happen?  
Please select an option

\* Message  
Please enter your compliment here

Submit

Provided consistent look and feel for Compliments Submission.

# Current State Submission of Complaints



**U.S. Customs and Border Protection**  
Securing America's Borders

[Log In](#) [Register](#) [Ver en Español](#)

**CBP Information Center**

[CBP INFO Center Home](#) > [Submit a Complaint/Concern](#)

[GO](#)

## *Submit a Complaint/Concern*

We're sorry to hear that we didn't meet your expectations

- ☒ My complaint is related to my experience with CBP arriving in or departing from the U.S.
- ☐ My complaint/problem involves CBP's Trusted Traveler Program (Global Entry, SENTRI, GOES, etc.)
- ☐ My complaint is related to my experience with CBP at a checkpoint or other location patrolled by the Border Patrol.
- ☐ My complaint is related to inspections at a general aviation facility (private aviation) or marina.
- ☐ I am having a problem importing/exporting goods or have another issue related to international trade.
- ☐ My complaint/concern is about CBP's website, ESTA application, I-94 retrieval, service delays/responsiveness (including lost or missing parcels), general practices and procedures, etc.

[Continue](#)

[Cancel](#)

[Find an Answer](#)  
[Ports of Entry](#)  
[Border Patrol Sectors](#)

[Border/Airport Wait Times](#)

[Give Us a COMPLIMENT](#)

[Problem? COMPLAINT?](#)

[Report Illegal Activity](#)

CBP officer's picture is not automatically associated with the complaint area.



# Future State Submission of Complaints

Information Center


Top Travel Topics

Top Import/Export Topics

Take an Experience Survey



Welcome to the  
INFORMATION CENTER



How Can We  
Help You Today?

Submit A  
COMPLAINT



Select Type

Expect Response or Rema... For you or someone else? Personal Information Confirmation

 **Submit a Complaint/Concern**  
We're sorry to hear that we didn't meet your expectations

\* Please select one of these options


- ☒ My complaint is related to my experience arriving in or departing from the United States
- ☐ My complaint is related to my experience with a U.S. Customs and Border Protection Officer
- ☐ My complaint is related to my experience with an agent while traveling through
- ☐ My complaint is related to my experience at a general aviation facility
- ☐ My complaint is related to importing or exporting goods
- ☐ My complaint is related to a lost, delayed, or stolen item

CBP Officer

Border Patr

Air and Mar

Other (Local Police)



When the user selects an area for complaints, the correct CBP officer is automatically displayed

# Current State Submission of Complaints

CBP INFO Center Home > Submit a Arrival/Departure Complaint/Concern

Find an Answer GO

## Submit a Arrival/Departure Complaint/Concern



CBP Officers wear this type of uniform. If your experience did not involve someone dressed like this, then you may not be complaining to the right agency. Many people confuse CBP Officers with TSA employees. TSA handles security screening, which happens immediately after you clear customs and immigration and are proceeding to your connecting flight. If you think this might be the case, please submit your complaint [here](#).

Okay, first we'll need your contact info so we can get back to you.

Email Address \* \*Required Fields

First Name \* Middle Name Last Name \*

Address Line 1 (House Number, Street Name)

Address Line 2 (Apt., Suite #)

City

Country \* State/Province Postal Code

Phone Country Code (if not in U.S.) Phone Number. Please give us a number to contact you with follow-up questions.

## Additional Information- as applicable

The below fields request information that will help us to research the circumstances surrounding your complaint. Many of the fields are for various document numbers, You don't need to provide information about every identity document you have, provide just the one you used when entering the U.S.

Date of Birth (MM/DD/YYYY)

Country of Citizenship \*

EDL - Enhanced Drivers License Number

Alien Registration Number (LPR Number)

FAST PASS ID

NEXUS PASS ID

Location \*

Select a category

Passport Number

Passport Card Number

EDL State Issuer

Border Crossing Card

SENTRI PASS ID

Global Entry PASS ID

Incident Date \*

Find an Answer

Ports of Entry

Border Patrol Sectors

Pre-Clearance Locations

Deferred Inspection Sites

Border/Airport Wait Times

Give Us a COMPLIMENT

Problem? COMPLAINT?

[Report Illegal Activity](#)

Current state had many irrelevant fields.



# Future State Submission of Complaints

Welcome to the  
INFORMATION CENTER

How Can We  
Help You Today?

Submit A  
COMPLAINT

Don't Know What to Ask?  
EXPLORE HERE!

**Submit an Arrival/Departure Complaint/Concern**

CBP Officers wear this type of uniform. If your experience did not involve someone dressed like this, then you may not be complaining to the right agent.

Okay, first we'll need your contact info so we can get back to you.

\* Email \* Required Fields

\* First Name Middle Name \* Last Name

Address Line (House Number, Street Name, Apt, Suite #)

City

Country State/Province Postal Code

Phone Number

Additional Information- as applicable  
The below fields request information that will help us to research the circumstances surrounding your complaint. Many of the fields are for various document numbers.

Birthdate Passport Number

\* Country of Citizenship Passport Card Number

Irrelevant  
fields  
were  
removed  
to make  
the form  
easier.

❖ ***“10. Representative examples of how user feedback was captured with help/service desk metrics and customer satisfaction summary reports, and how that feedback was incorporated into a minor enhancement within 90 days or less”***

***The following slides provide representative examples of feedback captured through the help desk and how those changes were incorporated into a minor enhancement within 30 days.***

# Current State Submission of Tips



**U.S. Customs and Border Protection**  
Securing America's Borders

[Log In](#) [Register](#) [Ver en Español](#)

**CBP Information Center**

[CBP INFO Center Home](#) > [Report Illegal Activity](#)

[GO](#)

## Report Illegal Activity

Please contact [Immigration and Customs Enforcement](#) to report illegal aliens already living and working in the U.S., or workplace violations.

CBP appreciates any information about illegal activity related to goods and people crossing the U.S. Border.

If you have specific information about import-related violations that involve misclassification of merchandise, country of origin markings, health and safety violations, intellectual property rights violations, textile or other trade violations, please submit those through [e-Allegations](#).

### \*Required Fields

Email Address

First Name

Last Name

Office Phone

Message (include all details such as Who, What, Where and When) \*

[Submit](#)

[Cancel](#)

[Find an Answer](#)

[Ports of Entry](#)

[Border Patrol Sectors](#)

[Pre-Clearance Locations](#)

[Deferred Inspection Sites](#)

[Border/Airport Wait Times](#)

[Give Us a COMPLIMENT](#)

[Have a COMPLAINT?](#)

[Report Illegal Activity](#)

Current  
state for Tip  
Submission.

# Future State Submission of Tips

Top Travel Topics

Top Import/Export Topics

Take an Experience Survey



Future  
State of Tip  
Submission  
with New  
Look and  
Feel.

Welcome to the  
INFORMATION CENTER



How Can We  
Help You Today?

Submit A  
COMPLAINT



Don't Know What to Ask?  
EXPLORE HERE!

Tips/Illegal Activity - Case

Report Illegal Activity

Thank You For Your Tip

Report Illegal Activity

\* Required Fields

Email

Please enter your email here

First Name

Last Name

Phone Number

\* Message

Please enter your tip here

Previous

Next



# Current State Submission of Surveys



**U.S. Customs and Border Protection**  
Securing America's Borders

[Log In](#) [Register](#) [Ver en Español](#)

**CBP Information Center**

[CBP INFO Center Home](#) > [Tell Us About Your Experience](#)

[GO](#)

Port of Entry

Select Port of Entry

Please select the choice that best fits your experience.

	Excellent	Good	Average	Fair	Poor
Please rate the overall condition of the CBP facility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Please rate your overall CBP experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please select the choice that best fits your experience.

	Completely Agree	Agree	Neutral	Disagree	Completely Disagree
I felt welcomed arriving in the U.S.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The admission process seemed as efficient as possible	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
During the admission process I was treated with courtesy, dignity and respect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The directions displayed in the CBP processing area were easy to understand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Find an Answer](#)

[Ports of Entry](#)

[Border Patrol Sectors](#)

[Pre-Clearance Locations](#)

[Deferred Inspection Sites](#)

[Border/Airport Wait Times](#)

[Give Us a COMPLIMENT](#)

[Report an Activity](#)

Complicated matrix for survey questions and submission.




# Future State Submission of Surveys

Top Import/Export Topics


Take an Experience Survey

Welcome to the  
INFORMATION CENTER





How Can We  
Help You Today?

Submit A  
COMPLAINT



Don't Know What to Ask?  
EXPLORE HERE!





Tell Us About Your Experience

Overall CBP Experie...

Admission Process

CBP Officer

CBP Officer Contin...

CBP Process

Thank You

Take a Survey about your experience Clearing CBP.

\* Where Did This Happen?

Please select an option

Please select the choice that best fits your experience.

\* Please rate the overall condition of the CBP facility

☐ Excellent

☐ Good

☐ Average

☐ Fair

☐ Poor

\* Please rate your overall CBP experience

☐ Excellent

☐ Good

☐ Average

☐ Fair

☐ Poor

Next

Simplified  
version of  
survey  
questions  
with  
options.