



Agency Priority Goal Action Plan

Improve the Customer Experience at USDA

Goal Leader:

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

Overview

Goal Statement

USDA will effectively deliver farm and conservation programs to America's farmers, ranchers, and foresters, ultimately increasing their ability to prosper and grow. By September 2019, the Department will enhance the customer experience for farmers, ranchers, and foresters at USDA service centers and improve and expand service delivery channels by establishing an effective framework to serve customers in-person and online.

Overview

Challenges

- Continue to work cultural and organizational change as a new office; includes defining roles and responsibilities, key priorities, and resourcing across FPAC.
- Developing customer feedback processes and reporting capabilities.
- Delivering a consistent customer experience across all channels.
- Creating a customer first organizational culture.
- Finding the most appropriate technology solutions to improve customer experience.
- Aligning resources with desired customer experience initiatives.

Opportunities

- Develop an iterative, data driven customer experience model using innovative methods to understand producers and find what works for them.
- Use insights gained to drive strategic and tactical planning.
- Increase FPAC local visibility and improve interactions while acknowledging resource constraints.
- Establish Key Performance Indicators (KPIs) to monitor and assess quality of customer experiences.
- Refine KPIs over time to ensure alignment with FPAC strategic objectives and management goals and resource constraints.

Leadership

Core Team:

- Sarah Lynch, Deputy Chief Operating Officer (Enterprise Services), FPAC Business Center
- Sarah Campbell, Acting Director, FPAC Customer Experience Division
- Laurie Snow, Glenn Schafer, Janie Hudson: FPAC CX Division Customer Experience/Service Specialists, as of May 2019, 3 detailees from FPAC agencies, Customer Experience Officer to onboard 6/2/2019
- CX Champions: Mid- to senior-level employees from Natural Resources Conservation Service (NRCS), Farm Service Agency (FSA), Risk Management Agency (RMA), and Business Center who lead and support individual agency CX initiatives; have additionally identified executive leaders

Entity	Members	Responsibilities
FPAC Executive Committee	FPAC Under Secretary, FSA Administrator, NRCS Chief, RMA Administrator, FPAC Chief Operating Officer, FPAC Deputy COO (Enterprise Services), & FPAC CIO	<ul style="list-style-type: none">– Comprehensive customer experience strategy– Plan, guide, and prioritize customer experience initiatives– Resource allocation– Sets “tone at the top”
FPAC Customer Experience Division	FPAC Customer Experience Officer Customer Experience Division Staff	<ul style="list-style-type: none">– Strategy– Innovation– Business Improvement/Performance Management– Research, data, insights– Marketing/Outreach– Culture
FPAC Customer Experience Core Team	Customer Experience Officer, representatives from FPAC Program and Mission Support areas.	<ul style="list-style-type: none">– Leading customer experience initiatives– Recommending new initiatives– Field research

Strategies, Objectives, and Milestones

Strategies

	Gather Insights & Ideas	Improve Experiences	Measure Impact	Strengthen Customer Experience Office
	<p>Build empathy for producers and field staff and identify useful tools. Test the refined insights by surveying a representative group of producers and service center staff.</p> <p><i>e.g., Select regional representative farming operations and locations for co-design research.</i></p>	<p>Make programs, policies & processes producer-centric. Change systems to enhance in-person and digital engagement.</p> <p><i>e.g., Standardize terms to improve info sharing across agencies and work with program managers to update eligibility requirements.</i></p>	<p>Set metrics, assess what works and find out how to get better. Build prototypes, run quick tests with producers and staff, iterate KPIs then scale.</p> <p><i>e.g., Test interaction logs using paper and existing service center information systems.</i></p>	<p>Stand up office with appropriate resources, staff and authority to be the lead for FPAC customer experience work.</p> <p><i>e.g., Fund national and local Customer Experience (CX) Division budgets. Hire subject matter and methodology experts. Share best practices widely.</i></p>
<i>Current State</i>	<p>Research focused on targeted group of producers in different regions. All counties visited want to be involved further.</p>	<p>Pressing producer and service center staff needs and experience problems have been identified. Initial experience improvements have been ideated.</p>	<p>A set of KPIs that can be phased in over time have been scoped. Initial KPIs and data collection have been determined and goals set for future system.</p>	<p>Customer experience office for FPAC is currently in the planning stage. Initial priorities and strategy have been scoped.</p>
<i>Objectives</i>	<p>System to scout, share and scale useful tools from the field that improve producers' experiences prototyped.</p>	<p>1-2 priority experience projects in place at scale.</p>	<p>Initial KPIs, metrics and analytics tested and in place in 25-30 service centers nationwide.</p>	<p>National & local CX budget set. Staff and Subject Matter Expert (SME) hired.</p>
<i>Milestones</i>	<ul style="list-style-type: none"> • Insights Sharing • Targeted Insights Developed • Nationwide CX dialogue and office enrollment 	<ul style="list-style-type: none"> • Project Prioritization • Improvements Designed • Improvements Piloted & Refined • Improvements Scaled 	<ul style="list-style-type: none"> • Pilot Design • KPI Baseline Analysis • Rollout to Service Centers 	<ul style="list-style-type: none"> • Strategy planning • Staffing • Communication planning • Service Center meetings

Key Milestones

Strategy 1 – Gather Insights & Ideas

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Insights Sharing					
<ul style="list-style-type: none"> Sessions with key FPAC & USDA Leadership 	Q2 FY18	Complete – ongoing			None. CX Division has briefed Farm Production and Conservation (FPAC mission area senior leadership and continues to present and report plans and results.
Targeted Insights					
<ul style="list-style-type: none"> Conduct further research interviews 	Q1 FY19	Postponed until Q3/Q4 FY19			None. Work will be continued as funding permits after national producer survey data are analyzed.
<ul style="list-style-type: none"> Conduct 6-8 co-design sessions 	Q1 FY19	Postponed until Q3/Q4 FY19			
Nationwide CX Dialogue and Office Enrollment					
<ul style="list-style-type: none"> Field office Visit and Research Sessions 	Q1 FY19	Planning			None. The CX staff has visited several field offices in FY19 and is planning more visits in conjunction with CX-focused IT and User Centered Design research for Q3 and Q4.

Key Milestones

Strategy 2 – Improve Experiences

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Projects Prioritized					
<ul style="list-style-type: none"> Identify experience improvements 	Q3 FY18	Completed-ongoing			
<ul style="list-style-type: none"> Rate and prioritize improvements 	Q3 FY18	Completed - ongoing			<p>Priority improvements identified could require statutory changes. Resource constraints due to competing priorities (newly mandated programs to address market or weather conditions impacting farmers and ranchers).</p> <p>The milestone has since been completed. An initial set of improvements were identified, rated and provided to FPAC Agency CX Champions to be included in the Agency Customer Experience Improvement Plans (CXIP) that were submitted to the Department's Office of Customer Experience.</p>
Improvements Designed					
<ul style="list-style-type: none"> Identify potential system, policy, program and process improvements 	Q1 FY19	In progress			System capabilities limitations. Internal resources to implement process improvements may be limited due to competing priorities such as implementation of the next Farm Bill.
<ul style="list-style-type: none"> Prototype tools and other changes 	Q1 FY19	In progress ongoing			The prototyping of the producer survey and data collection methods has been started and changes to the producer survey are in progress. The CX Division plans to expand the producer survey pilot and data collection efforts throughout Q3 and Q4 FY19 to a nationwide scale.
Improvements Piloted and Refined					
<ul style="list-style-type: none"> Test improvements 	Q1 FY19	In progress	Postponed to Q3-Q4 (in progress)		The FPAC CXD is working with FPAC service centers that were part of the co-designing session and field office engagement events to validate and test identified process improvement projects.
<ul style="list-style-type: none"> Refine improvements based on feedback 	Q1 FY19	In progress	In progress		The FPAC CXD was able to better refine some identified process improvements, either championed by the CX Division or the mission area agencies, with agency leadership (State Conservationists and State Executive Directors) during the FPAC 2018 Leadership Summit in Oklahoma. With the additional feedback the division was able to make some changes to the identified process improvements and producer survey. Producer Survey has been further refined and is planned for nationwide scaling by Q4 FY 19.
Improvements Scaled					
<ul style="list-style-type: none"> Convene teams to scale improvements 	Q2 FY19	Not Started	In progress		
<ul style="list-style-type: none"> Finalize scale improvements 	Q2 FY19	Not started	Not started		
<ul style="list-style-type: none"> Conduct training sessions for staff 	Q3 FY19	Not Started	Not started		

Key Milestones

Strategy 3 – Measure Impact

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Pilot KPI design		Started - ongoing			
• Create prototype data collection tools	Q4 FY18	Completed			None. The CX Division collected the initial producer pilot survey data and tracked initial KPI metrics (See the Attachment).
• Collect initial KPI data	Q4 FY18	Completed			
KPI baseline analysis					
• Measure performance	Q1 FY19	Started-ongoing	Scaling; planned for deployment Q4 FY19		None. The initial CX producer survey focused on “relational” data. From the limited and preliminary data, we have identified a few themes; however, the CX Division plans to expand and increase the producer survey pilot before finalizing key trends, patterns, and outcomes associated with the data collected.
• Identify trends and patterns	Q1 FY19	Started—ongoing			
Rollout to Service Centers					
• Refine data collection methods	Q2 FY19	Not started	In Progress		Determining means for roll out through standing up FPAC Committee in Q3.
• Training for employees responsible for collecting and reporting data	Q2 FY19	Not Started	Not started		

Key Milestones

Strategy 4 – Strengthen Customer Experience Division

Milestone Summary					
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Strategy Planning for Customer Experience Division	Q2 FY18	Completed – ongoing			The milestone has since been completed. The CX Division will provide a limited set of core services and functions in support of the FPAC CX mission and goals. The CX Division action plan is being developed.
Establish Customer Experience Division	Q1 FY 19	Completed			The FPAC Business Center agency/organization was effective October 15 th . The FPAC CX Division is one of the Divisions/functional areas included in the FPAC Business Center. It will continue to mature as an organization over time to support the diverse set of customers and the multi-faceted program agencies within the FPAC mission area.
Communication Planning	Q2 FY18	In progress	ongoing		Communication planning is ongoing and through regular internal communications. Specific plans will be developed for each major initiative/project as necessary.
Service Center Meetings	Q4 FY19	In progress	Postponed. Delaware completed.		The FPAC CX Division staff and the FPAC IT User Design Teams were scheduled to visit 3 Service Centers (DE, VA, and ID) to conduct field office engagement activities, which include enrolling service centers in the producer survey pilot, producer interviews, co-design sessions, and customer experience journey mapping. CXD is currently limited in terms of staffing bandwidth, funding and agency appetite for increased qualitative and service center focused research.

Key Performance Indicators

To measure producers' experiences, FPAC is developing a balanced set of KPIs based on 3 categories: relationships, processes, and outcomes. These KPIs are aligned with producers' core values.

The table below includes the initial set of KPIs. Additional KPIs will be developed over time.

KPI Category	Metrics of Success and Trend Goals	Data Source	Frequency
Relationships: Producers and staff have strong trusted connections with each other.	▲ Number of local education events attended by Service Center staff	Service Center Interaction Log ¹	Monthly
	▲ Number of first time program participants	Service Center Staff Survey ¹	Monthly
Process: Program tasks can be understood and completed without hassles.	▼ Average processing time for direct farm loans	FSA Direct Loan System	Monthly
Outcomes: Results from engagements meet producers' goals within program objectives.	▲ Post-engagement customer satisfaction	Producer Electronic Survey ¹	End of Engagement

¹ Data sources, collection methodologies, and baseline data being developed in FY19. The KPIs are being tested and are still under development.

Summary of Progress Q1 and 2 FY 19

- CX Division has developed its work plan, mission, and scope for FPAC.
- CX Division hired an additional Customer Experience Specialist, has two detailees starting 5/26/19, is in the process of hiring a GS-15 Customer Experience Officer, and is developing position descriptions for additional support staff. These actions will significantly increase the team's capacity by the end of the FY.
- Developed external customer experience survey instrument with a statistically relevant stratified random sample to gather data on producer experiences with FPAC programs and agencies at the local level to gain insights into their relationship with FPAC and areas of opportunity for CX improvements. Submitting through new USDA OMB Paperwork Reduction Act CX clearance request process by 5/31.
- Developed approach and plan for FPAC's first internal customer satisfaction survey to gather data on internal customer satisfaction for review by leadership. Estimated deployment is Q4.
- CX Division is heavily involved in FPAC's farmers.gov initiative. Two staff spend approximately 60% of their time on farmers.gov; the acting Division Director is also a business owner and attends Program Increment planning and weekly meetings. CX Division staff are supporting both the public-facing pages and authenticated portal development of a wide range of applications.
- CX Division engages with the Department's Office of Customer Experience, agency CX Champions, and agency leadership to coordinate with the Department and supports department wide efforts to improve CX, including assisting with the Voice of the Customer project, CX dashboard development, and projects such as the CoE Farm Loans Journey Map research project.
- CX Division supported individual agency efforts and projects that were included in agencies' CX Improvement Plans, such as USDA's Farm Service Agency (FSA) development of the View Loans/My Financial Info tool and the Farm Loans Discovery Tool.
- CX led High Impact Service Providers (HISPs) in their CX Self Assessments and quarterly reporting for OMB's A-11 requirements, and serves as a liaison to OMB and the agencies to foster communication and accurate reporting.
- CX Division supported the New and Beginning Farmer Coordinator function for the Department and has responded to stakeholder and internal department inquiries regarding New and Beginning Farmers at USDA.
- CX Division has represented customers and provided Voice of the Customer and producer insights on agency ¹¹ projects/initiatives including NRCS of the Future and FSA's Serving Distressed Producers training for field employees.

Data Accuracy and Reliability

Data sources and collection methodologies for KPIs, with the exception of the average processing time for direct farm loans, are being developed in FY 2018

Average processing time for direct farm loans.

- Data source: FSA Direct Loan System. A direct loan processing report in the FLP Enterprise Performance Management System is used for this performance measure. Data is available nationally and at the state and local level.
- Data quality: Data is high quality and there are no known data limitations.

Contributing Programs

Organizations:

- Farm Production and Conservation Mission Area: Farm Service Agency (FSA), Natural Resources Conservation Service (NRCS), Risk Management Agency (RMA), FPAC Business Center

Program Activities:

- Conservation, disaster assistance, farm loans, income support, and crop insurance

Stakeholders

FPAC stakeholders include, but are not limited to:

- Primary customers - farmers, ranchers, producers, and landowners
- Commodity Organizations (American Farm Bureau, National Cotton Council, et al.)
- Soil and Water Conservation Districts
- Crop Insurance Providers
- Lending organizations/banks
- State Departments of Agriculture
- Land Grant Colleges and Universities
- USDA officials
- Office of Management and Budget
- Government Accountability Office
- Congress/congressional staff

External Communications Plan

An initial internal communications plan was completed in early Q2 FY 2019.

An External Communications plan will be included in FPAC Business Center communications planning as appropriate. A final date for this plan is to be determined.