



## **Improving Customer Experience with Federal Services**

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

**OST Trust Beneficiary Call Center**

*June 2019*



## 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: 3 / 6

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

*Drafted OST Strategic Plan to develop a beneficiary centered culture at OST. The plan includes the following actions,*

- *2019-2020: Establish Voice of the Customer (VOC) program to initially measure "post transaction" satisfaction at TBCC.*
- *2021: Conduct baseline satisfaction survey for front line services. Engage with Beneficiary Service Council regarding baseline survey results to identify improvements for delivery of beneficiary experience.*

What are you most proud of?

*OST leadership's understanding the need for after transaction" surveys .*

What nascent / ongoing activities do you hope to grow?

1. *TBCC will continue meeting the monthly performance metrics which define the level of service we provide to our beneficiaries:*
  - *Average Speed to Answer: 50 sec.*
  - *Call Abandoned Rate: <9%*
  - *Average Handle Time: 4:00 min*
  - *First Line Resolution: 85%*
2. *Contracted for an IVR survey, developed sampling strategy and finalized the survey questionnaire*
3. *Begin collection of VOC "after call" feedback mid June 2019.*
3. *Augment or improve the level of service using VOC feedback.*

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

*Continued funding for collecting customer feedback.  
Need to implement appropriate clearance to share survey results publicly.*

### Governance: 2 / 6

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

*Drafted OST Strategic Plan to develop a beneficiary centered culture at OST. Specifically the plan identifies using the baseline "current state" customer journey, (yet to be documented), to define the "future state" beneficiary experience/vision that OST aspires to deliver to our Indian trust beneficiaries.*

What are you most proud of?

*OST leadership's understanding of the need for defining the "future state".*

What nascent / ongoing activities do you hope to grow?

*Creation of Beneficiary Service Officer and Council.  
Creation of "current state" customer journey maps.*

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

*We are awaiting the formal rollout of the OST Strategic Plan.*

What else would you like to share?



What else would you like to share?



## Organization & Culture: 3 / 6

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

*Drafted OST Strategic Plan to develop a beneficiary centered culture at OST. Specifically the plan identifies a Beneficiary Service Officer position and cross functional Beneficiary Services Council. The anticipated outcome will be a community of practice, with a shared purpose, where all staff take ownership in the delivery of consistent services so that the beneficiary has a positive government experience*

What are you most proud of?

What nascent / ongoing activities do you hope to grow?

*Creation of Beneficiary Service Officer position and Beneficiary Services cross functional Council to - focus all OST staff, (customer facing staff, customer supporting staff and leadership) on "what matters" to the beneficiary. The outcome will be achieving and maintaining an OST cultural change in which we all own the OST Beneficiary Experience.*

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

*We are awaiting the formal rollout of the OST Strategic Plan.*

What else would you like to share?

## Customer Research: 0 / 6

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

*Drafted OST Strategic Plan to develop a beneficiary centered culture at OST. Specifically, the plan identifies developing "current state" customer journey maps. The resulting customer journey maps will document and visualize the "current state" of the beneficiaries' journey as they interact with OST at all touchpoints.*

What are you most proud of?

*OST leadership support for the development of a "future state" beneficiary journey map.*

What nascent / ongoing activities do you hope to grow?

*FY'19 Q3,4: Fully define research goal to better understand how potential and current beneficiaries become aware of and utilize OST services.  
Q4: Identify personas, i.e., millennial, seniors. Identify research locations.  
Q4: Identify 3rd party external touchpoints (BIA, VA, SSA, HUD, Medicaid).  
Q4: Recruit beneficiaries for focus groups.  
Q4: Conduct interviews with key beneficiaries during 6 focus group sessions to identify goals, needs and motivations.  
Q4: Identify the ecosystem of people, processes and tools that enables the current journey.*

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

What else would you like to share?

*The current state journey map will be shared across the OST organization and used to identify improvements, increase empathy and increase employee engagement.*





## Service Design: 0 / 6

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

*Drafted OST Strategic Plan to develop a beneficiary centered culture at OST. Specifically the plan includes building a roadmap/plan for implementing the "future state" beneficiary experience. Components of the roadmap include:*

- Designing applications and services based on user centered design techniques*
- Identifying innovative processes that can be redesigned quickly so that it is easier for the beneficiary to interface with OST.*
- Improving touchpoint performance by identifying the technologies, training and data needed to support each touchpoint.*

What are you most proud of?

What nascent / ongoing activities do you hope to grow?

- 1. Upgrading OST public website to meet IDEA Act website modernization requirements.*
- 2. Developing a plan for implementing digital forms to be used at customer facing offices to meet IDEA Act digital government requirement.*
- 3. Develop a plan for campaigning the roll out of OST's web based self service banking application to meet IDEA Act digital service delivery requirement.*

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

*These initiative will require additional resources.*

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.

### Example HISP Customer Profile

*Who is one of the primary customer served by your HISP? What goal(s) is this customer trying to accomplish by interacting with your service? Indian trust beneficiaries with a fractional ownership in an allotment producing oil and gas, receive scheduled monthly royalty distributions. The only way for these mineral owners to immediately ascertain the amount of the royalty, distributed to their Individual Indian Money account, (IIM), is to call the Trust Beneficiary Call Center (TBCC) on the day that the royalty posts to the account.*

### Customer Needs + Frustrations

*What makes the difference for this customer when they're interacting with your service (ex. clear guidance upfront, knowledgeable employee to help them pull together an application, a fast processing time)? What common blockers might they face when interacting with your service? Delays to the scheduled royalty distributions are frustrating for both the beneficiary mineral owner and the TBCC staff. The beneficiary needs the amount of the royalty because they have plans for their funds; and the Call Technicians must manage beneficiary expectations by offering an explanation for the delay and an expected time for resolution.*

### HISP Implementation Challenge(s)

*What can make it difficult for your HISP to meet this need? Is it an internal IT system, process, or unclear guidance?*

*The Office of the Special Trustee for American Indians (OST) does not have control of the external systems and processes causing the delays, even though we provide the customer services associated with managing the IIM accounts. Unfortunately, the delays result in reduced beneficiary satisfaction and are a poor reflection on the TBCCC.*

### Stats

*What data do you have that documents this experience/service? Could be something like "Less than 1/3 of our customers are connected to internet or smartphones," or "Employee engagement scores on FEVS dropped two points last year"*

*When delays occur, the TBCC receives approximately 1,800 calls between the hours of 7:00 am and 12:00 pm. During delays, the high volume of callers on hold, waiting for assistance, makes it difficult for all callers to receive timely assistance. The long wait time is reflected by the high abandoned call rate, (i.e., 30%). An additional reason for the long hold time is that the call length is increased when callers question the reason for the delay in receiving their royalty funds.*

## Action 1

### Focus Area: Governance

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

*The Beneficiary Service Council will operate in a cross functional governance role and shall be empowered to: a.) create oversight across OST silos for the purpose of ensuring that the beneficiary experience is consistently being improved, b.) tactically engage, across silos, in the decisions regarding applications, services and acquisitions to ensure that OST's intended beneficiary experience is being delivered, c.) align OST leadership on customer experience priorities and goals, d.) align external entities that impact the services or information that OST is delivering.*

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

##### **FY20:**

*Q1: Form Council, create Council Charter, engage with OST business lines to institutionalize CX.*

*Q2: Beneficiary Services Council - Align with external entities to strategize on a solution to processing delays.*

*Q3-4: Beneficiary Services Council - Participate in workshops with internal and external teams to collaboratively build a shared vision of the beneficiary experience.*

##### **FY21:**

*Q1: Beneficiary Services Council - Identifies internal and external Policies and Procedures requiring updates due to improvements being made for beneficiaries.*

*Q2-4: Engage Beneficiary Service Council to drive improvements to beneficiary experience based on results of baseline survey of satisfaction with front line services.*





## 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.

### Example HISP Customer Profile

*Who is one of the primary customer served by your HISP? What goal(s) is this customer trying to accomplish by interacting with your service?*

*Individual Indian Money (IIM) accounts for which the current address of the beneficiary is unknown are placed on a "Whereabouts Unknown" (WAU) list. As of June 1, 2019, there were 60,679 IIM beneficiaries are on the list. Some beneficiaries were added to the list when mail was returned to OST. Other beneficiaries were added when estates go to probate and the location of heirs is undetermined. 15% of the individuals on the WAU list have > \$1,000 in their Individual Indian Money accounts, (IIM).*

### Customer Needs + Frustrations

*What makes the difference for this customer when they're interacting with your service (ex. clear guidance upfront, knowledgeable employee to help them pull together an application, a fast processing time)? What common blockers might they face when interacting with your service? Beneficiaries are unaware that they have an IIM trust account, or are unaware of OST's offices and services.*

### HISP Implementation Challenge(s)

*What can make it difficult for your HISP to meet this need? Is it an internal IT system, process, or unclear guidance?*

*OST has taken the following steps to locate the WAU beneficiaries : publishing the WAU list on the OST public website, conducting outreach events, implementing projects and utilizing contractors to locate beneficiaries. Despite these efforts, the number of missing beneficiaries remains relatively steady. It is hypothesized that assessing and understanding the beneficiaries' end to end experience may identify the root cause for why some beneficiaries are unaware that they have an IIM account.*

### Stats

*What data do you have that documents this experience/service? Could be something like "Less than 1/3 of our customers are connected to internet or smartphones," or "Employee engagement scores on FEVS dropped two points last year" SEE CUSTOMER PROFILE SECTION.*

## Action 2

### Focus Area: Customer Research

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

*Customer journey maps will developed to document, model and visualize the "current state" of the beneficiaries' journey as they interact with OST at all touchpoints and through all communication channels. The resulting journey maps are expected to provide insight into beneficiary perceptions, beneficiary goals and what matters to the beneficiaries. The journey maps will be used to find and fix problems with touchpoints and transactions. In addition, it is anticipated that they may answer questions about the WAU beneficiaries.*

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

##### **FY19:**

*Q3,4: Identify and plan for types of data to collect and where to collect it.*

*Q4: Identify personas, and 3rd party external touchpoints (BIA, VA, SSA, HUD, Medicaid).*

*Q4: Recruit beneficiaries for focus groups.*

*Q4: Conduct interviews with key beneficiaries to identify goals, needs and motivations.*

*Q4: Identify the ecosystem of people, processes and tools that enables the current journey.*

##### **FY20:**

*Q1,2: Continue interviews with key beneficiaries..*

*Q2: Translate experience scenarios and beneficiary goals into draft journey map.*

*Q2: Identify pain points and possible improvements.*

*Q2: Review, refine and validate to finalize journey maps.*

*Q3,4: Conduct workshops to share Journey Map findings across OST. The outcome is expected to resolve pain points and engage employees*

