



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

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

**Office of Personnel Management  
Retirement Services**

*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: 4 / 6

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

Retirement Services has modified the Services Online survey to mirror the questions in OMB guidance, and will have three quarters of the data by the end of the fiscal year. Retirement Services has also modified its annual survey to align with OMB guidance and will implement it in the final two quarters of FY 2019.

What are you most proud of?

RS is in the process of identifying specific services across the program where CX feedback will be collected at the point of interaction. This will allow RS to collect more detailed CX feedback across more of the program.

What nascent / ongoing activities do you hope to grow?

RS hopes to expand its collection of CX feedback to include implementing a survey immediately following a customer's interaction with our call center.

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

Ensuring the right talent, technology, and other resources are available to dedicate to customer experience.

What else would you like to share?

### Governance: 3 / 6

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

CX has become a focus for RS's executive leadership, but RS has not yet defined a full CX strategy. RS continues to work with other agencies when customer journeys overlap to improve the overall experience.

What are you most proud of?

What nascent / ongoing activities do you hope to grow?

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

Ensuring the right talent, technology, and other resources are available to dedicate to customer experience.

What else would you like to share?





## Organization & Culture: 0 / 6

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

During new hire onboarding, RS provides training on RS customers, the importance of the RS mission, and the RS employee's role in providing an outstanding customer experience.

What are you most proud of?

At RS's recently held annual management offsite, the speaker, a former Fortune 100 company employee, addressed RS's approach to CX and how the agency can improve team performance by establishing a CX-focused culture.

What nascent / ongoing activities do you hope to grow?

RS hopes to establish additional CX training, make it available to all RS employees, and formally evaluate performance against role-specific CX measures.

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

Ensuring the right talent, technology, and other resources are available to dedicate to customer experience.

What else would you like to share?

## Customer Research: 0 / 6

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

RS has not engaged in focused human centered design efforts to better understand customer behavior or specify detailed personas that make up the customer base.

What are you most proud of?

What nascent / ongoing activities do you hope to grow?

In FY 2020, RS plans to capture customer feedback for different RS services at the point of interaction. This will provide RS with customer segmented data for future analysis and will help RS to identify trends in customer behavior.

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

Ensuring the right talent, technology, and other resources are available to dedicate to customer experience.

What else would you like to share?





## Service Design: 1 / 6

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

Using an agile, iterative design process, RS is developing a proof-of-concept for an Online Retirement Application.

What are you most proud of?

The development process for the Online Retirement Application has been successful to date and human-centered design is a foundational element.

What nascent / ongoing activities do you hope to grow?

RS hopes to be able to implement the Online Retirement Application in phases initially, but Government-wide eventually.

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

Resource constraints. The ongoing and iterative technical development of the online application is contingent upon funding.

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

A recent retiree from Federal service whose goal is to receive their full annuity payment within 60 days of their non-disability retirement.

### Customer Needs + Frustrations

Expectation setting is important. Via the Services Online website, RS communicates the status of the retirement application in the adjudication process. Examples of challenges include: incomplete information in the retirement package delaying its adjudication; the volume/inventory of the RS workload; and instances when the retirement application includes a court order that requires that the benefits be apportioned.

### HISP Implementation Challenge(s)

Staffing shortages; technology limitations; complete, timely, and accurate payroll data.

### Stats

Retirement cases requiring additional steps or development take longer to adjudicate.

## Action 1

### Focus Area: **Service Design**

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

Receive electronic data from one payroll center

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

- Successful completion of comparative analysis/quality assurance
- Definition of new business processes
- Creation of revised operational environments
- Completion of technical environment
- Training and creation of new standard operating procedures

#### **Other Notes:**

Sufficient funding will be required to implement and maintain operational changes.





## 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

Customers calling the customer service center to either understand a decision made about their case or ask about timeframes.

### Customer Needs + Frustrations

Currently, OPM is focused on reducing the wait time for customers. Higher wait times may result in frustration and call abandonment.

### HISP Implementation Challenge(s)

While OPM is working to improve technology by strengthening call center infrastructure, resource constraints limit the number of call center staff that the agency can hire.

### Stats

Data collected from regular customer surveys, data collected by the call center reporting technology for average speed of answer (wait time).

## Action 2

### Focus Area: **Measurement**

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

Implement a customer satisfaction survey at the RS call center, providing the agency with a means to collect CX feedback across the entity's entire purview.

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

- Establish funding (funding dependent)
- Perform contracting actions
- Identify vendor
- Work with CIO to create implementation plan
- Build out
- Train
- Monitor

**Other Notes:**

