

U.S. DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C. 20250

| | |
|--|-----------------------------------|
| DEPARTMENTAL REGULATION | NUMBER: DR 1270-001 |
| SUBJECT: U.S. Department of Agriculture Customer Experience Policy | DATE: June 17, 2022 |
| OPI: Office of Customer Experience (OCX) | EXPIRATION DATE: June 17, 2027 |

| <u>Section</u> | <u>Page</u> |
|---|-------------|
| 1. Purpose | 1 |
| 2. Special Instructions/Cancellations | 2 |
| 3. Scope | 2 |
| 4. Background | 2 |
| 5. Policy | 3 |
| 6. Roles and Responsibilities | 6 |
| 7. Inquiries | 8 |
| Appendix A – Acronyms and Abbreviations | A-1 |
| Appendix B – Definitions | B-1 |
| Appendix C – Authorities and References | C-1 |

1. PURPOSE

- a. This Departmental Regulation (DR) permanently authorizes the United States Department of Agriculture (USDA) Office of Customer Experience (OCX) to facilitate and support cross-Department collaboration on issues pertaining to customer experience (CX).
- b. The DR is in support of USDA’s commitment to provide the highest quality experience and trust for customers and employees. OCX works across the Department to coordinate and execute USDA’s CX vision, goals, and priorities. Additionally, OCX hardwires and institutionalizes insights and feedback from customers and employees into USDA’s strategy and decision-making.
- c. The DR sets forth the objectives, policies, requirements, and responsibilities for USDA’s CX program to empower, enable, and collaborate with USDA’s diverse customer base – farmers, scientists, children, families, foresters, state governments – to provide innovative and human-centered solutions that deliver services more equitably and efficiently with a focus on the actual experience of the individuals it is meant to serve.

2. SPECIAL INSTRUCTIONS/CANCELLATIONS

- a. This DR will be in effect until superseded or the expiration date.
- b. This policy complements the following USDA Departmental directives:
 - (1) Departmental Manual [\(DM\) 3107-001](#), *Management of USDA IT Enterprise Initiatives Procedures*;
 - (2) [DR 1230-001](#), *U.S. Department of Agriculture Evaluation Policy*;
 - (3) [DR1496-001](#), *Digital Strategy Governance*;
 - (4) [DR1497-001](#), *Approval of Communications/Information Products and Service*;
 - (5) [DR3107-001](#), *Management of USDA IT [Information Technology] Enterprise Initiatives*;
 - (6) [DR3130-010](#), *United States Department of Agriculture Enterprise Information Technology Governance*; and
 - (7) [DR3430-001](#), *Web Site Development and Maintenance*.

3. SCOPE

This DR applies to all USDA Mission Areas, agencies, staff offices, employees, contractors, cooperative partners, and others working for, or on behalf of, the USDA.

4. BACKGROUND

- a. USDA is committed to providing the best customer experiences in its Departmentwide delivery of programs and services to USDA's diverse customer base. Ensuring a more positive experience for customers and employees alike increases the likelihood they will access products and services, increases trust in Government, and has the potential to decrease mission delivery costs all while improving service delivery. A customer's experience interacting with the Federal Government directly contributes to their trust in Government itself.
- b. The head of each Mission Area, agency, and staff office will take the responsibility to ensure that every interaction a member of the public has with their organization demonstrates competence and builds trust. The establishment or modification of USDA regulations and policies must reflect how each Mission Area, agency, and staff office will include positive and equitable customer experiences and service delivery as part of

their missions. To deliver upon this commitment, USDA has established CX as a core capability in the Department and charged OCX as USDA's lead CX organization.

- c. Improving CX in the Federal Government is both mandated by policy and motivated by the demand for more efficient services and positive experiences from customers, employees, and stakeholders. The policies highlighted in Appendix C, *Authorities and References* are a sampling of Governmentwide guidance supporting the ongoing need for developing an organized approach to improving USDA CX.

5. POLICY

- a. USDA is committed to providing a world-class CX to its customers, employees, stakeholders, and partners. USDA recognizes that a positive CX leads to improved organizational performance, and therefore endorses the importance of hardwiring, scaling, and sustaining CX capabilities at USDA now and in the future. It is USDA policy to implement and sustain CX across the Department through three facets:
 - (1) Apply a CX framework and core capabilities for service delivery and design;
 - (2) Institute CX governance to hardwire customer insights into USDA strategy and decision-making; and
 - (3) Implement CX accountability to ensure that metrics are tied to organizational and individual performance, budget decisions, and strategic planning.
- b. Each of USDA's Mission Areas, agencies, and staff offices have a responsibility to manage the customer experiences of their customers and stakeholders. OCX, as the Departmentwide CX office, sets USDA's CX vision, shares CX best practices and tools, elevates CX successes, and sets organizational policies and standards. USDA will incorporate CX into new and existing policies, perform strategic and tactical decision-making to deliver exceptional customer experiences to its diverse customer base, and empower employees with the tools to provide those experiences.
- c. USDA CX Framework and Core Capabilities
 - (1) CX Human-Centered Design Framework
 - (a) Based on industry and other best practices, USDA should employ the Human-Centered Design (HCD) framework (Source: IDEO, [*IDEO Design Thinking*](#)) to serve as an interdisciplinary methodology of putting people, including those who will use or be impacted by what one creates, at the center of any process to solve challenging problems. This framework is built around two guiding principles: leverage industry and other CX best practices; and listen to and design service delivery around the customer.

- (b) This CX framework, which begins with leveraging industry and other CX best practices, is coupled with qualitative customer insights captured through a HCD process and is enabled by the core CX capabilities of data and technology and is designed to drive improvements in service recovery and system-wide performance.
- (c) USDA will apply this framework to ongoing and future improvements to its programs, services, policies, and products.

(2) CX Core Capabilities

(a) Data

To maintain a view of USDA's performance in CX, OCX has created a Voice of the Customer (VOC) program to baseline and measure CX. The VOC program allows USDA to understand customers' overall trust, as well as the ease, effectiveness, and emotional resonance of customers' interactions with any USDA Mission Area, agency, or office through the development and implementation of Departmentwide feedback capabilities based on real-time and in-depth surveys, data analysis, and quantitative research. It provides a global benchmark of the USDA brand and customers' perspectives on their relationship.

(b) Tools

OCX implements tangible tools for collecting feedback from external customers and employees, and utilizes HCD practices in order to have the foundation necessary to leverage customer and employee insights to make data-driven decisions. These tools include employee training in CX, leadership best practices, and other concrete products and programs that address specific pain points identified by USDA's diverse customer base through CX data and HCD insights.

(c) Technology

To enable the delivery of effective customer experiences across multiple communication channels that are on par with industry standards, USDA will drive an integrated platform and Departmentwide technology through OCX. Such initiatives include a unified strategy and implementation of Contact Center Modernization, Digital Modernization, and Enterprise Data Management which results in one singular point of entry for all USDA customers from multiple channels (e.g., phone, web form, chat, and email).

e. CX Governance

- (1) USDA is made up of more than 30 agencies and staff offices that serve an increasingly diverse customer base. Due to the wide variety of USDA's programs and services, in order to institutionalize CX at USDA and hard-wire customers experience data and insights into USDA strategy and decision-making, and elevate customer pain points and needs to the Mission Areas, agencies, and staff offices, OCX must serve as an aggregator and leverage existing governance structures that are chaired at the Office of the Secretary (OSEC), Mission Area, and Office of the Chief Information Officer (OCIO) organizational levels, such as the OSEC Sub-Cabinet, the Performance, Evaluation, and Evidence Committee (PEEC), the Chief Information Officer Council, and the IT Investment Review Board.
- (2) USDA's existing governance structures enable USDA leadership to assess CX program progress, resolve performance problems, and focus on top priorities and problems while ensuring that USDA is infusing CX data and insights into how USDA addresses and resolves cross-cutting, Departmentwide issues. These solutions then must be incorporated into Departmentwide, Mission Area, agency, and staff office-specific governance structures.

f. CX Accountability

(1) Performance Planning

USDA will incorporate CX performance into organizational and individual performance plans through enterprise and transactional metrics, and aligned to the USDA Evaluation Policy (DR 1230-001). The enterprise metric's purpose is to provide an understanding of CX globally across USDA. The transactional metrics provide an understanding of CX that is specific to each Mission Area, agency, and staff office in order to perform individual service recovery and make actionable improvements system-wide.

(2) Budget Implications

USDA will also incorporate CX performance into budget strategy and prioritization. Specifically, in addition to balanced score card elements of operational, financial, and personal metrics, CX-related metrics such as ease, effectiveness, emotion, and trust, will have a more active role in USDA resource decision-making, ensuring resource allocation determinations are informed by what matters most to customers.

(3) Strategic Planning

Lastly, USDA will incorporate CX performance into strategic planning. In addition to providing real-time CX qualitative and quantitative data, the strategic re-design of back-end business processes will enhance both employees' and customers' experiences. Efforts in this area ensure the CX data, and new real-time and

predictive capabilities this provides, are utilized for timely service recovery and system-wide performance improvements.

6. ROLES AND RESPONSIBILITIES

a. USDA's Chief Customer Experience Officer will:

- (1) Advise the Assistant Secretary on CX matters;
- (2) Implement this directive;
- (3) Develop USDA policy and procedures for CX in conjunction with USDA Mission Areas, agencies, and staff offices and ensure these policies and procedures are consistent and current with Federal law, regulations, and USDA strategic goals and plans;
- (4) Provide subject matter expert consultation and services on best practices of CX and provide necessary guidance and resources to support the execution of this directive across USDA Mission Areas, agencies, and staff offices;
- (5) Provide evidence-based CX data, tangible CX tools, integrated, multi-channel technology, and promote engagement to support USDA in improving CX;
- (6) Ensure CX is a driver in USDA strategic planning, performance improvement efforts, budget formulation, policy, and other initiatives to improve the experience with USDA's delivery of services;
- (7) Scale and sustain CX as a permanent, foundational, and cross-cutting capability at USDA, including through design and deployment of CX education, training programs, innovation, and communication by working in collaboration with USDA stakeholders and other partners; and
- (8) Review and assist in the development of CX action plans on CX programs, initiatives, and efforts. Effective action plans will clearly indicate goals, objectives, strategies, and measurement necessary to achieve the initiative or effort.

b. The Assistant Secretary for Administration will:

- (1) Provide executive leadership and oversight for the Department's CX Program;
- (2) Provide Departmentwide coordination for efforts to improve customer service; and
- (3) Advise the Secretary on CX matters.

- c. Under Secretaries, Agency Administrators and Heads, and Staff Office Directors will:
 - (1) Deliver improved customer experiences by collecting, analyzing, and acting on qualitative and quantitative CX data, perceptions, and concerns;
 - (2) Use CX data and insights to develop and implement action plans to improve the experience in coordination with OCX;
 - (3) Promote the use of HCD methods and approaches to rapidly develop concepts and test them with users in order to ensure products, services, and systems meet user needs;
 - (4) Support employees and empower them with the knowledge, skills, and tools to provide outstanding experiences to diverse customer base; and
 - (5) Incorporate CX performance metrics into employee performance plans.
- d. The Chief Information Officer (CIO) will:
 - (1) Provide technical support for CX;
 - (2) Support achievement of USDA's CX goals by offering agile, world-class technology solutions to its stakeholders and apply innovative approaches to recruiting and developing a highly skilled workforce; and
 - (3) Invite USDA's Chief Customer Experience Officer to key governance meetings (i.e., the CIO Council and the Investment Review Board).
- e. The Director, Office of Budget and Program Analysis (OBPA) will:
 - (1) Incorporate CX performance into budget strategy and prioritization;
 - (2) Incorporate CX into Departmental strategic plans, policies, and procedures; and
 - (3) Invite USDA's Chief Customer Experience Officer to key governance meetings (i.e., the PEEC).
- f. The Director, Office of Human Resource Management (ORHM) will:
 - (1) Incorporate CX performance metrics into employee performance plans; and
 - (2) Incorporate CX performance metrics into performance plans for Senior Executives who oversee and manage USDA's delivery of services to customers.

g. USDA Supervisors will:

- (1) Support employees and empower them with the knowledge, skills, and tools to provide outstanding experiences to USDA's diverse customer base; and
- (2) Support implementation of CX best practices and utilize CX data, tools, and other capabilities to deliver outstanding customer experiences.

h. USDA Employees will:

- (1) Provide the best experience possible to customers;
- (2) Demonstrate commitment to USDA's Core Values;
- (3) Support implementation of CX best practices and utilizing CX data, tools, and other capabilities to deliver outstanding customer experiences; and
- (4) Understand of how their roles and responsibilities affect the customer's experience.

7. INQUIRIES

Please direct questions and comments concerning the requirements of this regulation to the OCX via email at CustomerExperience@usda.gov.

-END-

APPENDIX A

ACRONYMS AND ABBREVIATIONS

| | |
|--------|---|
| APG | Agency Priority Goal |
| CFR | Code of Federal Regulations |
| CIO | Chief Information Officer |
| CX | Customer Experience |
| DM | Departmental Manual |
| DR | Departmental Regulation |
| EO | Executive Order |
| FACE | Federal Agency Customer Experience |
| HCD | Human-Centered Design |
| HISP | High Impact Service Provider |
| IDEA | Integrated Digital Experience Act |
| IT | Information Technology |
| LGBTQ+ | Lesbian, Gay, Bisexual, Transgender, and Queer |
| OBPA | Office of Budget and Program Analysis |
| OCIO | Office of the Chief Information Officer |
| OCX | Office of Customer Experience |
| OHRM | Office of Human Resource Management |
| OMB | Office of Management and Budget |
| OSEC | Office of the Secretary |
| PEEC | Performance, Evaluation, and Evidence Committee |
| P.L. | Public Law |
| PMA | President's Management Agenda |
| RD | Rural Development |
| TIPS | Trust in Public Service |
| USDA | United States Department of Agriculture |
| VOC | Voice of the Customer |

APPENDIX B

DEFINITIONS

Customer – Any individual, business, or organization (such as a grantee or State, local, or Tribal entity) that interacts with an agency or program, either directly or through a federally-funded program administered by a contractor, nonprofit, or other Federal entity. (Source: Executive Order [\(EO\) 14058](#), *Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government*)

Customer Experience (CX) – The public’s perceptions of and overall satisfaction with interactions with a Mission Area, agency, staff office, product, or service. (Source: EO 14058)

Customer Life Experience – Each important point in a person’s life at which that person interacts with one or more entities of Government – like turning 65, having a child, or applying for a small business loan. (Source: Adapted from EO 14058)

Equity – The consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, Indigenous and Native American persons, Asian Americans and Pacific Islanders, and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality. (Source: [EO 13985](#), *Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*)

Human-Centered Design (HCD) – The “How” – An interdisciplinary methodology of putting people, including those who will use or be impacted by what one creates, at the center of any process to solve challenging problems. (Source: Adapted from IDEO, [IDEO Design Thinking](#) website)

High Impact Service Provider (HISP) – Federal entities, as designated by the Office of Management and Budget (OMB), that provide or fund customer-facing services that have a high impact on the public, whether because of a large customer base or a critical effect on those served. (Source: EO 14058)

Journey Map – Forrester Research, Inc. defines journey maps as “documents that visually illustrate customers’ processes, needs and perceptions throughout their relationships with a company.” Journey maps are developed through HCD research and present a common set of moments that matter most to customers in their experience and display bright spots and pain points as they interact with USDA for care, services, and benefits. Journey maps should be used in conjunction with quantitative data to prioritize CX initiatives and efforts. (Source: Forrester Research, Inc., [Mapping the Customer Journey](#) web page)

Service Delivery – Actions by the Federal Government related to providing a benefit or service to a customer of a Federal Government entity. Such actions pertain to all points of the Government-to-customer delivery process, including when a customer applies for a benefit or loan, receives a service such as health care or small business counseling, requests a document such as a passport or Social Security card, files taxes or declares goods, uses resources such as a park or historical site, or seeks information such as notices about public health or consumer protection. (Source: EO 14058)

Time Taxes – The cost associated with the lost time an individual faces when they interact with the Government. For example, when a disaster survivor, single parent, immigrant, small business owner, or veteran waits months for the Government to process benefits to which they are entitled, that lost time is a significant cost not only for the individual but in the aggregate, for the Nation as a whole.

Trust – Merriam-Webster defines trust as the “assured reliance on the character, ability, strength or truth of someone or something.” Trust can be publicly reported USDA-wide through CX metrics made up of the following components: ease, effectiveness, and emotion. (Source: Merriam-Webster, [Dictionary](#) website, retrieved April 18, 2022)

APPENDIX C

AUTHORITIES AND REFERENCES

Improving CX in the Federal Government is both mandated by policy and motivated by the demand for more efficient services and positive experiences from customers, employees, and stakeholders. The policies highlighted below are a sampling of Governmentwide guidance supporting the ongoing need for developing an organized approach to improving USDA CX.

[7 Code of Federal Regulations \(CFR\) 2.24](#), *Assistant Secretary for Administration*

21st Century Integrated Digital Experience Act (21st Century IDEA), [Public Law \(P.L.\) 115-336](#), December 20, 2018

[EO 13571](#), *Streamlining Service Delivery and Improving Customer Service*, April 27, 2011

[EO 13985](#), *Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*, January 20, 2021

[EO 14058](#), *Transforming Federal Customer Experience and Service Delivery to Rebuilt Trust in Government*, December 13, 2021

Forrester Research, Inc., [Mapping the Customer Journey](#) web page

Foundations for Evidence-Based Policymaking Act of 2018, [P.L. 115-435](#), January 14, 2019

IDEO, [IDEO Design Thinking](#) website

Merriam-Webster, [Dictionary](#) website

Office of Management and Budget (OMB) [Circular A-11](#), *Preparation, Submission, and Execution of the Budget*, Section 280, *Managing Customer Experience and Improving Service Delivery*, August 2021

The President's Management Agenda ([PMA](#)) website

USDA, [DM 3107-001](#), *Management of USDA IT Enterprise Initiatives Procedures*, May 18, 2016

USDA, [DR 1230-001](#), *U.S. Department of Agriculture Evaluation Policy*, March 1, 2022

USDA, [DR1496-001](#), *Digital Strategy Governance*, November 21, 2012

USDA, [DR1497-001](#), *Approval of Communications/Information Products and Services*, October 29, 2014

USDA, [DR3107-001](#), *Management of USDA IT Enterprise Initiatives*, May 12, 2016

USDA, [DR3130-010](#), *United States Department of Agriculture Enterprise Information Technology Governance*, April 20, 2021

USDA, [DR3430-001](#), *Web Site Development and Maintenance*, May 19, 2004

USDA, [Strategic Plan Fiscal Years 2022-2026](#), Strategic Goal 6, Objective 6.3, *Promote USDA Operational Excellence Through Better Use of Technology and Shared Solutions*