

**Request for Approval under the “Generic Clearance for Improving  
Customer Experience: OMB Circular A-11, Section 280  
Implementation”  
(OMB Control Number: 2900-0876)**

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**TITLE OF INFORMATION COLLECTION:**

MAPPING THE CROSS-AGENCY CUSTOMER EXPERIENCE JOURNEY: A collaboration of more than 10 Federal agencies led by the Customer Experience (CX) Cross-Agency Priority Goal Team

**PURPOSE OF COLLECTION:**

*What are you hoping to learn / improve? How do you plan to use what you learn? Are there artifacts (user personas, journey maps, digital roadmaps, summary of customer insights to inform service improvements, performance dashboards) the data from this collection will feed?*

***Why we’re doing it***

This Federal team, driven as a result of the CX CAP goal (co-owned by the Office of Management and Budget and the Department of Veterans Affairs) is focused on shifting perspective on Federal service design and delivery from one focused completely on Federal/State/Local government organizational structures to one more focused on the customer and how they interact with government due to occasions and events in their lives. These experiences could include events like retirement, having a child, becoming unemployed or buying a home.

Imagine if the U.S. government understood how each of its services were part of a broader customer journey. How might federal agencies change their approach or even work together? How might citizens think differently about those services and their overall experience with government?

Our hypothesis is that a human-centered perspective will yield better results. We are building off our first pilot project (link here: <https://www.performance.gov/mapping-cx-journey/>) of a more deliberately coordinated inter-agency research effort to understand their customers during a life experience and how their various programs may be interacted with. This can help to identify moments or opportunities that are most meaningful to actual people to improve. It could also identify things that are working really well that should be grown or replicated. Staff from OMB and VA will lead the effort, with design and methods consultation from GSA and the Lab@OPM.

Staff from OMB and VA will lead the effort, with design and methods consultation from GSA and the Lab@OPM. A contractor will help to scale the effort by scrubbing in with teams to conduct

research, interviews, and synthesis.

***What we'll make***

This project will result in two customer journey maps: an individual surviving a national disaster (steered by FEMA, SBA, USDA, and HUD) and an individual born with a developmental disability (steered by DOL, SSA, ED, and CMS).

We will also produce a set of recommendations based on common themes and elements we see in *both* journeys that could improve government-wide customer experience. For example, is there a way that the Federal government requires reporting of State implementation activities that can make it more difficult? Is there an opportunity for the Federal government to better collaborate with a delivery system (that includes different levels of government or even nonprofits / service organizations)? Is the distributed ownership of multiple parts of a process causing increased navigation on the part of the customer?

We expect the set of artifacts to include: 2 journey maps, 1 presentation, 1 report, a set of customer profile cards (an illustration or photograph of an example customer with a short paragraph explaining their story) and 1 write-up for our project website.

***How we'll use it and share it***

These recommendations for actions will inform the next government planning cycle and President's Management Agenda, which will aim to build off of significant progress and gains implemented in the 2018 President's Management Agenda.

Additionally, by involving Federal agencies in the research process itself, we are encouraged that this will generate buy-in and immediate line of sight into what we learn. Our central team may take specific recommendations that could improve these two particular life experiences and coordinate across the Federal government to improve a moment - as we did with the Veterans' employment map project that resulted in a \$1M challenge competition hosted by DOL, with support from DOD and VA (link here: <https://www.challenge.gov/challenge/vets-match/>).

We will share the artifacts listed above on performance.gov/cx. We will also conduct dissemination sessions with appropriate staff from implicated Federal agencies to share what we learned of relevance to their work.

**TYPE OF ACTIVITY:** (Check one)

**Customer Research (Interview, Focus Groups)**

- Customer Feedback Survey
- User Testing

## ACTIVITY DETAILS

1. How will you collect the information? (Check all that apply)

- Web-based or other forms of Social Media
- Telephone + Videoconference**
- In-person
- Mail
- Other, Explain

2. Who will you collect the information from?

*Explain who will be interviewed and why the group is appropriate for the Federal program / service to connect with. Please provide a description of how you plan to identify your potential group of respondents and if only a sample will be solicited for feedback, how you will select them(e.g., anyone who provided an email address to a call center rep, a representative sample of Veterans who received outpatient services in May 2019, do you have a list of customers to reach out to (e.g., a CRM database that has the contact information, intercept interviews at a particular field office?)*

For each of journey map:

- We hope to conduct 20-30 customer interviews
- We will also conduct 2-3 Subject Matter Expert (SME) workshops/knowledge sharing sessions - this will include individuals from nonprofits, service organizations, and state and local governments
- Finally, we may also send out a survey to Subject Matter Experts (SMEs) at the Federal Level (beyond those participating in the project itself)

*Individual surviving a natural disaster:*

FEMA is currently conducting an analysis of their customer population to help us understand how we may sample 20-30 individuals that have interacted with the agency. While it will in no way be representative or statistically significant, we will seek to reach out to a number of individuals that represent a mix of: type of natural disaster experienced, physical location, household size, household income, race, whether or not assistance was approved / not approved, amount and type of assistance received, residence type, application channel (web / phone / mobile / etc.), insurance holder, and type of home damage.

Through FEMA's network, they will also help us to identify POCs that coordinate with FEMA from nonprofits, and we will interview

these staff members in SME workshops to understand how they support individuals navigating services during recovery efforts.

*Individual born with a developmental disability:*

We have begun to coordinate with the Ohio Association of County Boards of DD (OACB), a 501(c)6 non-profit organization that provides advocacy, communications, professional development, and technical assistance to all 88 of Ohio's county boards of developmental disabilities. They are helping to connect us with individuals that include clients of OACB, their family members that assist with their navigation of services, and case managers. Again we seek to connect with a diverse range of individuals of different genders, ages, type of disability, services received, and time interacting with OACB.

Additionally, the Departments of Labor, Education, and Lab@OPM have begun to connect us with local, state, and nonprofit entities that they collaborate with to help us connect with further SMEs and individuals across the country.

We will share a non-identifying, aggregate count of the individuals and descriptive statistics of the individuals interviewed, so that the public may understand the bias or any caveats of the journey map's perspective. (e.g., "53% of those interviewed were women", "40 interviews: 23 individuals, 13 family members, 4 case managers")

**3. How will you ask a respondent to provide this information?**

*(e.g., after an application is submitted online, the final screen will present the opportunity to provide feedback by presenting a link to a feedback form / an actual feedback form)*

If individuals are willing to participate following an introduction made by one of our collaboration partners (e.g, Federal agency, OACB - see question 5), we will provide them with a link to a scheduling software where they can sign-up for a 1 hour interview time block that works for them. They will provide their First Name, Last Initial, and an email address (if they have one). If they have an email address and are able to, we will send them a calendar invite with a videoconferencing link. If they are unable to do a video, they can provide a phone number and we can conduct a telephone interview at the time they requested.

During the interview at least two members of the research team will be present. One will conduct the interview, while the other team member will type notes of what is said.

**4. What will the activity look like?**

*Describe the information collection activity - e.g. what happens when a person agrees to participate? Will facilitators or interviewers be used? What's the format of the interview/focus group? If a survey, describe the overall survey layout/length/other details? If User Testing, what actions will you observe / how will you have respondents interact with a product you need feedback on?*

The format of the interview will be unstructured. We will have a set of guiding questions, but will allow the stories shared to drive where it goes. In general, the purpose is to capture actual user stories - you will see in the questions below that we seek to allow individuals to share their own stories. Later, during our synthesis stage, we will look at all of these stories together and find common threads: barriers that multiple people faced, or helpful "bright spots" that really made a difference, and draw out meaningful themes that can enable the Federal government to improve experiences.

In advance of the interview, we will share an overview of the project, the types of questions we will ask, the names of the interviewers and some information about them, to enable the individual to know what to expect. We absolutely encourage the use of an advocate or family member to attend if this will enable an individual to feel more comfortable and provide assistance. Particular for the customers with developmental disabilities, we will follow the lead of the collaborating organizations on how best to conduct these interviews, and will seek their feedback on materials and questions.

For more on the methods we'll follow, please see the Human Centered Design Discovery Guide here:  
<https://www.gsa.gov/cdnstatic/HCD-Discovery-Guide-Interagency-v12-1.pdf>

5. Please provide your question list.

*Paste here the questions or prompts presented to participants in your activity. If you have an interview / facilitator guide, that can be attached to the submission and referenced here.*

### ***What we'll provide to individuals***

*Individual organizations are making connections to their customers for us to interview. We have provided general email text (attached to this ICR submission) for them to forward. However, once that introduction is made, we will follow-up with additional information:*

Thank you for your consideration to connect with our team. We are supporting a cross-government Federal effort to better understand the journey of people like you, and how we might improve the way in which we design and deliver services. To learn more about this effort, please visit: <https://performance.gov/2020cxmaps>.

### Overview

Our goal for this session is to capture your unique story and experiences. Together with others, we will identify common barriers, bright spots, and meaningful moments we can improve or build upon. We would like to spend up to 60 minutes with you and gather insights that will remain anonymous and synthesized in order to help support an enhanced customer experience.

If you are interested in being interviewed by our team, please sign-up for a time that works for you here: [insert link]

### What to know

Taking part is voluntary: Participation in this conversation is completely voluntary. You may inform us that you wish to end your participation in the conversation at any time. You can take a break, choose not to answer any question(s), stop and continue at a later time, or stop altogether. If you decide to withdraw from this conversation, we will ask you if the information already collected can be used. If you tell us no, we will not use that information.

**Confidentiality and Privacy:** We minimize the personal information that we collect and will not identify you as a source of information (i.e., we will not use any personally identifiable information such as last name, social security number, etc.). In addition, disclosure of any private details to us is at your discretion and you are not obligated to provide any information you are not comfortable sharing. We respect your privacy. In the United States, the Paperwork Reduction Act requires the Federal government to outline how information collections like these will be conducted, and how that information will be used. You can find more about our "PRA statement" at the website listed above, and the control number this collection has been approved under is 2900-0876.

**How we'll use the information:** We will create a customer journey map that aggregates insights we learn across customer stories. An example of what this looks like can be found here:

<https://www.performance.gov/mapping-cx-journey/> We also plan to create customer cards (example of which can also be found at the above website), that share summaries of individual stories, but will not attribute it in a way that is identifying. If you are comfortable, at some point we may ask if you are ok with us

taking pictures and using these pictures in the project summary materials.

Types of questions we'll ask: The questions below are a notional example of the types of questions our team might pose during an interview. These questions are subject to change based on individual situations and contexts.

#### *Kicking it Off*

- Tell us a bit about yourself and your family
- What type of work or hobbies do you enjoy?
- Tell us a bit about your neighborhood/community

#### *Interacting with Services*

- How did you learn about [disability/disaster assistance and services] (e.g. through friends/family, school, community providers, hospitals, etc.)?
- In the past month/year/appropriate timeframe, what services or benefits have you received?
- How do the services and benefits you receive help you?
- What people or places have been most important / helpful to you?

#### *High Points and Low Points*

- Can you describe any memorable moments or experiences related to receiving these services?
- Tell us about a time when you felt stress or worry related to your care or services
- Describe a time that you felt supported by your case worker, or someone else assisting you?
- What are some barriers or challenges you've faced related to these services / benefits?

#### *Family and Community*

- How do you family or friends assist you with getting the care or services you need?
- Where do you go in your community or neighborhood to receive care or services?

#### *Reflection*

- When you think about the care and services you receive, how do you usually feel?
- If you could change anything about how you receive care or services, what would you change?
- If you could give advice to someone else seeking care or services, what advice would you give?

6. When will the activity happen?

*Describe the time frame or number of events that will occur (e.g., We will conduct focus groups on May 13,14,15, We plan to conduct customer intercept interviews over the course of the Summer at the field offices identified in response to #2 based on scheduling logistics concluding by Sept. 10<sup>th</sup>, or "This survey will remain on our website in alignment with the timing of the overall clearance.")*

August - September 2020

7. Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants?

Yes  No

If Yes, describe:

**BURDEN HOURS**

Category of Respondent	No. of Respondents	Participation Time	Burden Hours
Individuals surviving a natural disaster	25	60 mins	25
Individuals born with a developmental disability	25	60 mins	25
5 SME Workshops	10 (50 total)	90 mins	75
<b>Totals</b>	100		125

**COST**

The project is being funded through \$400,000 of FY20 CAP Goal funds.

**CERTIFICATION:**

I certify the following to be true:

1. The collections are voluntary;
2. The collections are low-burden for respondents (based on considerations of total burden hours or burden-hours per respondent) and are low-cost for both the respondents and the Federal Government;
3. The collections are non-controversial and do not raise issues of concern to other Federal agencies;
4. Any collection is targeted to the solicitation of opinions from respondents who have experience with the program or may have experience with the program in the near future;
5. Personally identifiable information (PII) is collected only to the extent necessary and is not retained;
6. Information gathered is intended to be used for general service improvement and program management purposes; and,



7. Information gathered will only be shared publicly in the manner described in the umbrella clearance of this control number.

Name: Christopher Corpruel and Scott Weiss, Presidential Innovation Fellows, VA

**All instruments used to collect information must include:  
OMB Control No. 2900-0876  
Expiration Date: 3/31/2023**