

**SBA OFO CX Evaluation
Funding Options Customers Focus Group Discussion Guide**

Introduction

Thank you for taking the time to talk with us today about your customer experience with the U.S. Small Business Administration’s Office of Field Operations district office. My name is [NAME OF FOCUS GROUP DISCUSSION LEAD], and I’m a researcher at 2M Research, a consulting firm specializing in research, program evaluation, and technical assistance. I am joined by my colleague [NAME OF NOTE TAKER], who will be taking notes during our discussion.

SBA has contracted 2M Research to conduct an evaluation of customer experiences with the district offices. As part of our evaluation efforts, we’re interviewing a sample of SBA customers. During this focus group session, we will ask about your customer experience with SBA’s district offices and recommendations you have for improving those experiences. The information will be used to develop a better understanding of customer experience and to inform the SBA process for collecting customer experience data and assessing customer satisfaction.

Confidentiality

Your personal information will be kept confidential. We will organize responses from this discussion into general themes, and no individuals will be identified by name in reports.

Permission to Record

We’d like to record today’s interview so that we can ensure that our notes are accurate. We will not share the recording with anyone outside of the evaluation team. Do we have your permission to record? [ASK PERMISSION OF ALL PARTICIPANTS]

[IF ALL STATE YES] Thank you. We’ll start the recording now.

[IF ONE OR MORE STATE NO] That’s fine. We’ll rely on our notes for this interview.

Do you have any questions before we begin?

Background

Let’s begin by taking a minute or two for introductions. Please tell us your name, which SBA district office you interact with, and what information about options to fund your business you have needed from SBA district offices.

What has your customer experience been?

Let’s talk now about your interactions with SBA district offices.

1. Could you talk about why you do or do not believe the need for information about options to fund your business you just mentioned was addressed?
2. What about your experience made it easy or difficult to complete what you needed to do?

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3. Could you discuss the amount of time it took to do what you needed to do?
4. Results from the District Office Customer Satisfaction Survey indicated that employees were helpful, even in cases where customers were less satisfied with other aspects of their experience. Could you talk about how employees were helpful or how they could have been more helpful?

How can SBA district offices improve?

I'd like to ask specifically about next steps for SBA district offices.

5. Do you have any recommendations for how SBA district offices can improve experiences for customers like you? [Prompt: office-based processes, agency rules and procedures, agency messaging, employee training, etc.]

How can SBA better understand experiences?

Finally, I'd like to get your thoughts about how SBA can better understand and improve customer experiences.

6. What are the most important services SBA provides, and how do you prefer to receive information about those services?
7. What do you want SBA to know about common problems you experience related to sustaining or growing your business?

That completes our interview. I appreciate you taking the time to speak with me today. Thank you again!