

**Request for Approval under the "Generic Clearance for SBA Customer Experience Data Collections"
(OMB Control Number: 3245-0404)**

TITLE OF INFORMATION COLLECTION: Small Business Administration - Field Operations Customer Experience Online Survey

PURPOSE:

What are you hoping to learn / improve? How do you plan to use what you learn? Include any artifacts your team may develop as a result of this collection.

Per guidance in OMB A-11, the SBA look to better understand the experience of our customers and the voice of the customer. We intend to use the data to refine customer personas and subsequently develop journey maps. All is with the intent to inform service improvements and modifications in delivery. The data will be wrapped up broadly as a dashboard for leaders to use as a tool for improvement. This field operations collection of information is currently approved under SBA's *Generic Clearance for the Collection of Qualitative Feedback on SBA Service Delivery* (OMB Control Number 3245-0398. SBA requests approval to move it to the captioned *Generic Clearance for SBA Customer Experience Data Collections*. ~~replaces the collection approved under.~~

TYPE OF ACTIVITY: (Check one)

- Customer Research
- Customer Feedback Survey *(if selecting this option, include survey instrument tool with this submission)*
- User Testing of Services and Digital Products

DESCRIPTION OF ACTIVITY

1. How will you collect the information? (Check all that apply)
- Web-based surveys
 - Telephone interviews and focus groups
 - In-person
 - Mail
 - E-Mail
 - Other, Via Survey Link on Website, via QRC on collateral, and web link shared during services.

For Customer Feedback Survey:

Explain who will be surveyed and why the group is appropriate for the Federal program / service to connect with. Do you somehow have a list of customers to reach out to (e.g., email addresses of individuals who have visited a service center in the past month)? 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.

Access to the web-based survey will be provided in various forms to all SBA District Office customers. Forms of access may be a link in the body of an email, QR codes in training slides, or links on District Office webpages. As the SBA does not keep a definitive customer list and provides assistance to new customers on a daily basis, the SBA District Office staff will proactively send out the survey link to customers after assistance is provided, trainings are held, or other interactions are completed (such as 8(a) Annual Reviews).

DESCRIPTION OF INSTRUMENTS

Generally describe the information collection activity - e.g. will facilitators or interviewers be used? What will respondents be asked? Or, what actions will you observe / how will you have respondents interact with a product you need feedback on?

When the person agrees to participate, they will access a short web-based survey evaluating perception of the service rendered and where and when the service was received. Demographic information is requested ~~collected~~ but not mandatory to provide. Participation in the survey is optional and a participant may choose to not respond to any question.

Gifts or Payments:

Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants? [] Yes [X] No

BURDEN HOURS

Per individual respondent, we estimate 5 minutes for participation. Total burden hours for individuals participating is approximate 12,500 hours.

Category of Respondent	No. of Respondents	Participation Time*	Burden
Small Business or Aspiring Entrepreneur Clients	150,000	5 min	12,500 hours
Totals	150,000		12,500 hours

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
7. Upon agreement between OMB and the agency, all or a subset of information may be released as part of A-11, Section 280 requirements on performance.gov. Summaries of customer research and user testing activities may also be included in public-facing agency publications.

Name: Victor Parker

Title: Deputy Associate Administrator OFO

APPENDIX: Data Collection Materials and Preliminary Version of Interviews and Surveys

All instruments used to collect information must include:

OMB Control No. 3245-0404

Expiration Date: 02/28/2021