

# Customer Experience and Digital Communications Findings and Recommendations

*for Quality Service Management Offices*

*Final Deliverable – July 2021*

# Purpose, Value, and Intended Use

The table below provides an overview of the purpose, benefits, and guidance on how QSMOs can use the **QSMO Customer Experience (CX) and Digital Communications (Comms) Findings and Recommendations**.

<p><b>Purpose of the QSMO CX and Comms Findings and Recommendations</b></p>	<ul style="list-style-type: none"> <li>The purpose of the CX and Comms Findings and Recommendations document is to present the Customer Journey Maps, Customer Segments, and the Customer Engagement and Communications messages. These findings contribute to recommendations that will help QSMOs in different stages of their marketplace maturity by identifying messages and techniques to attract and retain customers. The recommendations emphasize the value of continuous improvement and cross-QSMO coordination, and how to strengthen the cross-QSMO customer experience.</li> </ul>
<p><b>Benefits the QSMO CX and Comms Findings and Recommendations</b></p>	<ul style="list-style-type: none"> <li>Improving the customer experience includes improving the entire experience from engagement to communications. Adopting the recommendations and understanding the findings will result in improved customer satisfaction and increase brand awareness of the QSMOs. Customers who have positive interactions with the QSMOs are more likely to become a repeat and loyal customer, as well as advocates for the QSMOs.</li> </ul>
<p><b>How to Use QSMO CX and Comms Findings and Recommendations</b></p>	<ul style="list-style-type: none"> <li>The QSMOs can use the <b>Customer Journey Maps</b> as a tool to visualize the end-to-end of the customer; <b>Customer Segment</b> findings should be used as part of the <b>Customer Engagement and Communications</b> to tailor marketing to attract customers; and the <b>Recommendations</b> can be used to understand additional areas for QSMO coordination and improvements.</li> <li>The <b>Customer Experience Guidebook</b> should be used in parallel with the <b>CX and Comms Findings and Recommendations</b> – each document introduces unique, yet complementary information that can be used by QSMOs as they navigate each phase of the QSMO customer journey. The <b>Customer Experience Guidebook</b> provides an understanding of how to execute key priorities from the <b>CX and Comms Findings and Recommendations</b>.</li> </ul>

# Table of Contents

This document is intended for the QSMOs to understand the Customer Experience and Communications content. Each section contains further detail and expands upon the executive summary. There is additionally an appendix containing information regarding the background and approach.

The sections in this document are:

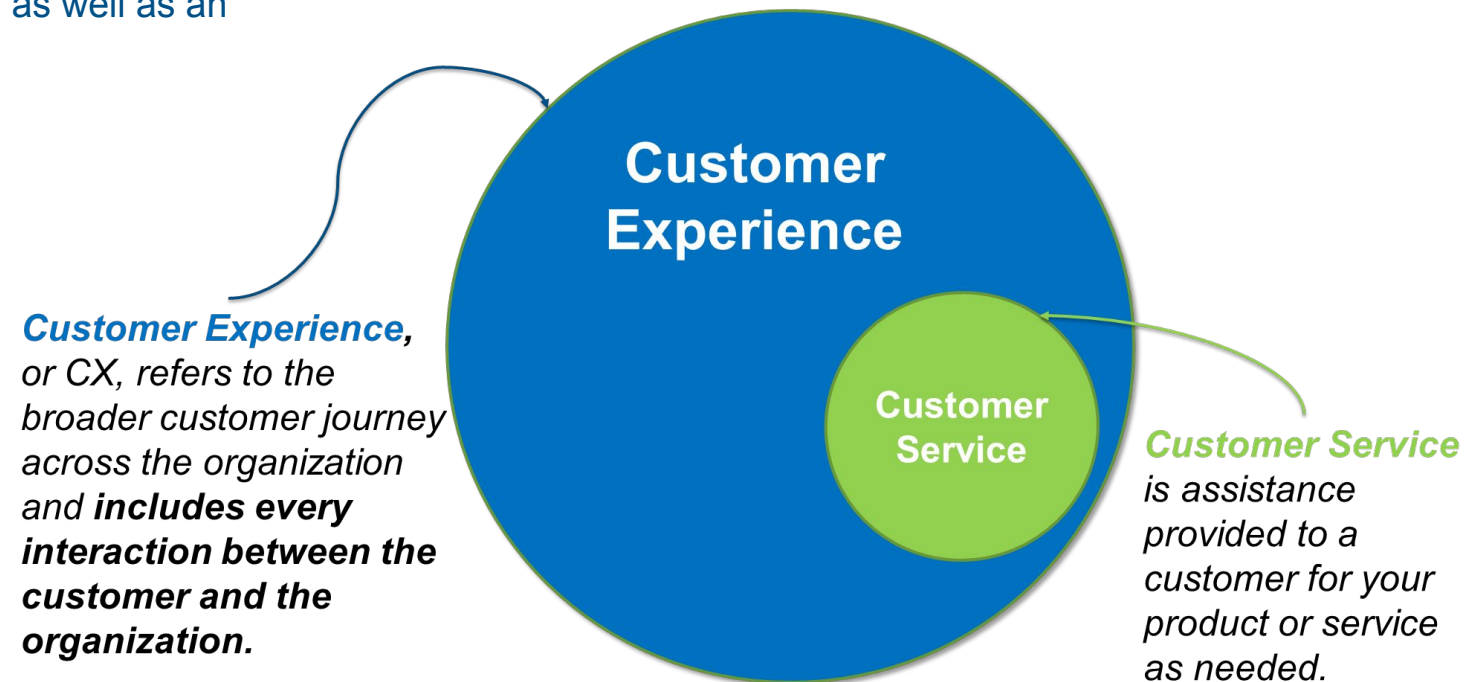
1. [Executive Summary](#)
2. [Customer Journey Maps](#)
3. [Customer Segments](#)
4. [Customer Engagement and Communications](#)
5. [Recommendations](#)
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# What is Customer Experience?

Customer experience (also known as CX) is defined by the interactions and experiences a customer has with an organization throughout the entire customer journey, from first contact to becoming a happy and loyal customer.

Focusing on the entire experience is important because a customer who has positive interactions with an organization or service provider is more likely to become a repeat and loyal customer, as well as an advocate for the organization.

To develop this loyalty, it is critical to build a trusted, positive relationship with customers in order to understand how to engage with them and what their needs are throughout their journey. If the goal is acquiring and maintaining loyal customers, investments have to be made in their entire customer experience.



# Why Does Customer Experience Matter?

Providing a good customer experience is key to promoting the trust between customers and an organization that better enables agency missions. QSMOs have a wide variety of customers that are complex, want specialized solutions, and have multiple hurdles to implementation of a marketplace solution. Good customer experience starts with an understanding of the customers.

**Customer segmentation** allows for an understanding of the different characteristics shared by customers. QSMOs will be able to tailor marketing strategies to attract customers in different segments.

**Customer journey mapping** illustrates the process that customers will engage with the QSMOs. By understanding the customer journey, QSMOs can gain an understanding of the pain points that customers currently have, and begin to solution and remedy those issues.

**Engaging and communicating** with customers is the key actions taken as part of customer experience. Customers will evaluate the QSMOs during every interaction, such as how well their needs are met. A confused or disgruntled customer will share their experience with other potential customers. QSMOs must communicate early and often to their customers to build trust and promote transparency.



# Customer Journey Maps

## Definition

Customer Journey Maps are diagrams that illustrate the step(s) customers go through in engaging with a company, product, online experience, service, or any combination. A customer journey map maps out the current process from first to final touchpoint.

## How to Use

As a QSMO, use the Customer Journey Maps as a tool to visualize the end-to-end process a customer goes through when using the QSMO marketplace. The journey maps contain identified problems and questions that the customers currently have. By understanding the customer journey, QSMOs can gain an understanding of the pain points that customers currently have.

## Key Resources

- M3 Playbook – includes additional details on the customer’s responsibilities
- Marketplace Capabilities Framework
- Customer Experience Guidebook
- Marketplace Integration Guidebook

## How to Apply

- ✓ Identify customer pain points to develop a backlog of projects to improve customer experience over time
- ✓ Prioritize projects and goals based on first two phases of the journey
- ✓ Identify additional areas for improvement such as, business process improvements, customer communications, resources, and tools
- ✓ Use journey map to answer customer questions about the process of engaging with the QSMO

QSMO Key Tasks
Review Customer Journey Maps
Develop artifacts and FAQs that address potential roadblocks, questions and concerns, and resources and support identified in Journey Maps
Review Customer Experience Guidebook for priority actions
Iteratively collect feedback from customer to update potential roadblocks, questions and concerns, and resources and support and refresh journey maps
Develop artifacts to address new changes

# Customer Segments

**Definition**  
 Customer Segmentation is the process of dividing customers into groups based on common characteristics so companies can market to each group effectively and appropriately.

**How to Use**  
 QSMOs can use the Customer Segment findings to identify what segments currently exist. Customer Segment findings can be used as part of the customer engagement and communications strategy to tailor marketing to attract customers.

- Key Resources**
- M3 Playbook – includes additional details on the customer’s responsibilities
  - Marketplace Capabilities Framework
  - Customer Experience Guidebook
  - Marketplace Integration Guidebook

- How to Apply**
- ✓ Identify customer segments such as size of agency, regulatory requirements, agency culture, etc.
  - ✓ Target specific customer segments based on their needs with tailored communications and branding
  - ✓ Prioritize engagement projects and goals
  - ✓ Analyze segments for understanding of future behavior and needs

QSMO Key Tasks
Review Customer Segments
Conduct Stakeholder Analysis if not already completed
Identify Customer Segment characteristics for each stakeholder, especially potential future customers
Identify dedicated resource(s) to focus on customer engagement
Develop and execute targeted communications and engagement based on customer segment
Collect feedback on communications and engagement, and capture whether there was an increase in new customers in the QSMO marketplace

# Customer Engagement and Communications

<p><b>Definition</b> Customer Engagement is the different ways of interacting with customers, both online and offline. This includes formal and informal outreach, such as focus groups, lunch and learns, website interactions, executive briefings, emails, calls, slick sheets, newsletters, etc.</p>	<p><b>How to Use</b> Use the key messages in the Customer Engagement and Communications section as a starting point to draft and execute communications for customers. These can be customized in order to encourage awareness and engagement. Utilizing shared messages will strengthen the QSMO presence by communicating similar messages.</p>	<p><b>Key Resources</b></p> <ul style="list-style-type: none"> <li>• M3 Playbook – includes additional details on the customer’s responsibilities</li> <li>• Customer Experience Guidebook</li> <li>• Performance Management Guidebook</li> <li>• Performance Management Framework</li> </ul>	<p><b>How to Apply</b></p> <ul style="list-style-type: none"> <li>✓ Utilize key messages to create artifacts (white paper, email message, etc.) to disseminate among customers</li> <li>✓ Provide relevant resources and artifacts to address customer pain points</li> <li>✓ Leverage relationships to gather ongoing feedback for continuous improvement efforts</li> <li>✓ Utilize ADKAR model to better understand how to meet customers where they are, and what kinds of communications will help increase their understanding of the QSMO marketplace and support for the QSMOs</li> </ul>
<p><b>QSMO Key Tasks</b></p>			
<p>Identify dedicated resource(s) to focus on customer engagement</p>			
<p>Create Engagement and Communications Plan with inputs from the Customer Segmentation, Customer Journey Maps, and key messages in the Customer Engagement and Communications section</p>			
<p>Execute against the Engagement and Communications Plan to increase customer engagement</p>			
<p>Alert other QSMOs and OSSPI to upcoming communication or engagement opportunity during QSMO roundtable, receive reviews as needed</p>			
<p>Collect feedback on communications and engagement, and to identify areas that require additional communications and engagement support</p>			

# Recommendations

<p><b>Definition</b> Recommendations are suggestions for QSMO consideration on how to improve customer engagement and communications throughout the customer journey.</p>	<p><b>How to Use</b> QSMOs can use the recommendations to understand additional areas for QSMO coordination and improvements. Recommendations should also be used in conjunction with reviewing the Customer Experience Guidebook.</p>	<p><b>Key Resources</b></p> <ul style="list-style-type: none"> <li>• M3 Playbook –includes additional details on the customer’s responsibilities</li> <li>• Customer Experience Guidebook</li> <li>• Marketplace Integration Guidebook</li> <li>• Performance Management Guidebook</li> </ul>	<p><b>How to Apply</b></p> <ul style="list-style-type: none"> <li>✓ Develop strategic Engagement and Communications plan based on recommendations and findings</li> <li>✓ Use recommendations as a starting point to develop a Customer Experience maturity model for the GSA QSMO</li> <li>✓ Build a roadmap to visualize activities and milestones</li> <li>✓ Apply customer experience recommendations across all workstreams and other activities</li> <li>✓ Utilize recommendations to improve cross-QSMO coordination</li> </ul>
<p><b>QSMO Key Tasks</b></p>			
<p>Create or execute against Engagement and Communications Plan</p>			
<p>Develop artifacts that address findings and recommendations</p>			
<p>Review Customer Experience Guidebook for priority actions</p>			
<p>Iteratively collect feedback from customer to identify potential improvement areas and customer needs</p>			
<p>Develop artifacts to address customer feedback</p>			

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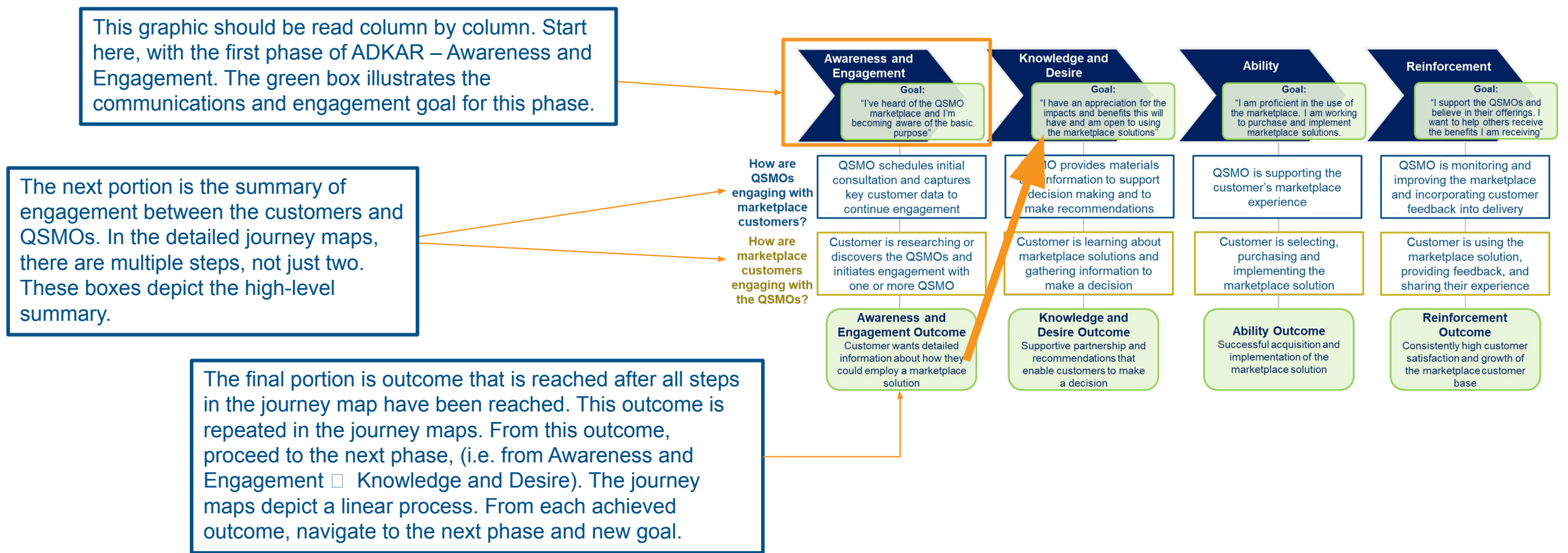
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# Understanding The Summary Customer Journey Maps

Below are tips on how to read and understand the summary graphic of the Customer Journey Maps. On the next slide, there are key tips for reading and understanding the detailed journey map slides. The journey map is divided into four distinct phases and strengthened by the ADKAR framework. More information on the ADKAR framework can be found in the Customer Engagement and Communications section.



# Understanding the Detailed Journey Maps

After the summary graphic, there are detailed Customer Journey Maps as depicted below. The journey map is divided into four distinct phases as aligned to the ADKAR framework. Each of the four phases has two slides that comprise its journey map. Below are tips for reading and understanding the Customer Journey Map slides.

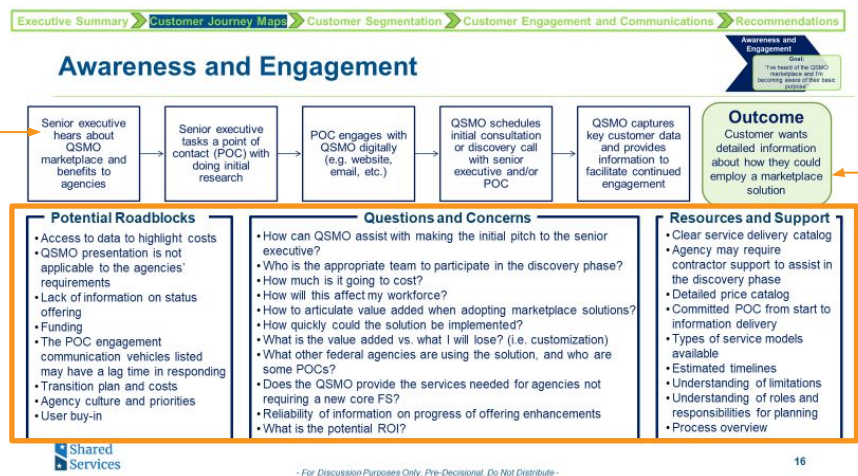
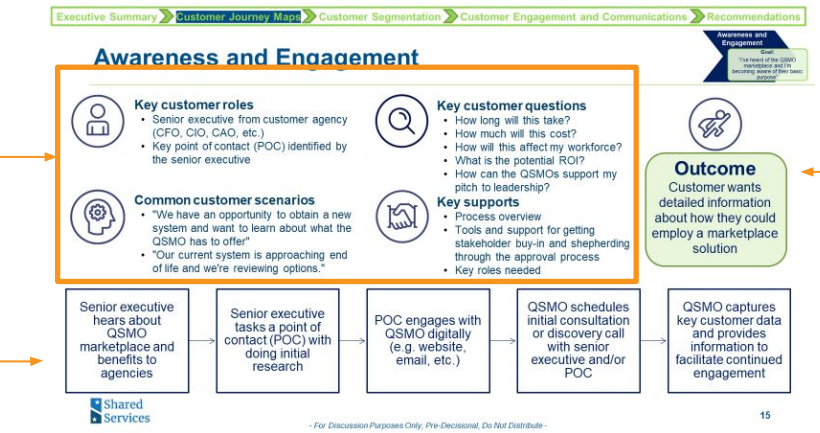
On the first slide, there are informative details on the customer's perspective. This section contains the key customer roles involved with this particular portion of the journey, key questions that customers may be asking themselves, and key support tools to provide to customers. There are additionally common scenarios that the customer may find themselves in. Additional details on customer scenarios can be found in the [customer segmentation section](#) of this findings report.

These two locations show the customer journey map. It is the same journey map on both slides.

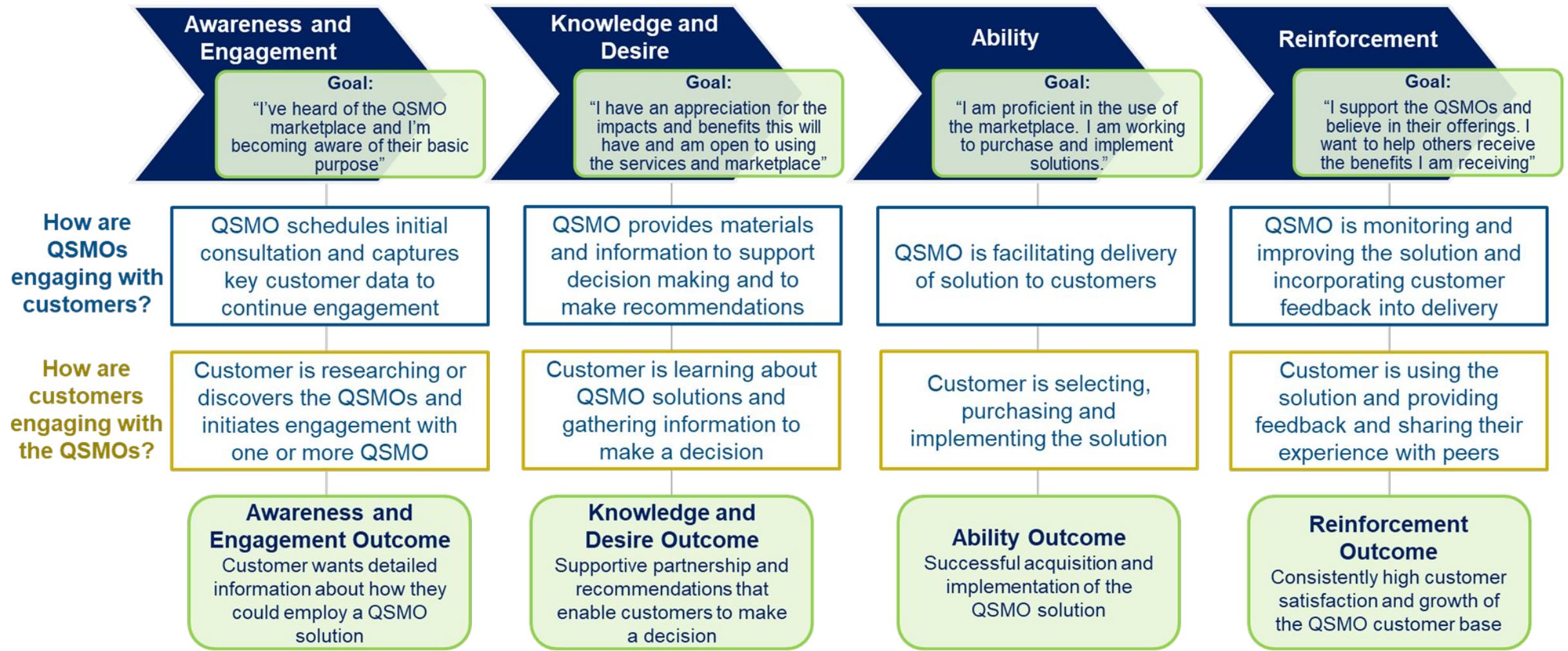
In the upper right hand corner, there is a graphic to show the goal of the particular ADKAR phase. This can be found on both slides.

Similar to the journey maps, the outcome will be the same on each slide.

On the second slide, there are additional details that help explain the customers perspective. It is structured into potential roadblocks, questions and concerns, and resources and support. This slide is meant to be used as a starting place for recommendations and potential artifacts to create to support customers.



# Summary Customer Journey Maps



**Awareness and Engagement**

Goal:  
"I've heard of the QSMO marketplace and I'm becoming aware of the basic purpose"

# Awareness and Engagement



## Key customer roles

- Senior executive from customer agency (CFO, CIO, CAO, etc.)
- Key point of contact (POC) identified by the senior executive



## Key customer questions

- How long will this take?
- How much will this cost?
- How will this affect my workforce?
- What is the potential ROI?
- How can the QSMOs support my pitch to leadership?



## Common customer scenarios

- "We have an opportunity to obtain a new system and want to learn about what the QSMO has to offer"
- "Our current system is approaching end of life and we're reviewing options"



## Key supports

- Process overview
- Tools and support for getting stakeholder buy-in and shepherding through the approval process
- Key roles needed



**Outcome**

Customer wants detailed information about how they could employ a marketplace solution



# Awareness and Engagement

**Awareness and Engagement**

Goal:  
"I've heard of the QSMO marketplace and I'm becoming aware of the basic purpose"



**Outcome**

Customer wants detailed information about how they could employ a marketplace solution

- Potential Roadblocks**
- Access to data to highlight costs
  - QSMO presentation is not applicable to the agencies' requirements
  - Lack of information on status offering
  - Funding
  - The POC engagement communication vehicles listed may have a lag time in responding
  - Transition plan and costs
  - Agency culture and priorities
  - User buy-in

- Questions and Concerns**
- How can QSMO assist with making the initial pitch to the senior executive?
  - Who is the appropriate team to participate in the discovery phase?
  - How much is it going to cost?
  - How will this affect my workforce?
  - How to articulate value added when adopting marketplace solutions?
  - How quickly could the solution be implemented?
  - What is the value added vs. what I will lose? (i.e. customization)
  - What other federal agencies are using the solution, and who are some POCs?
  - Does the QSMO provide the services needed for agencies not requiring a new core FS?
  - Reliability of information on progress of offering enhancements
  - What is the potential ROI?

- Resources and Support**
- Clear service delivery catalog
  - Agency may require contractor support to assist in the discovery phase
  - Detailed price catalog
  - Committed POC from start to information delivery
  - Types of service models available
  - Estimated timelines
  - Understanding of limitations
  - Understanding of roles and responsibilities for planning
  - Process overview

**Knowledge and Desire**

**Goal:**  
 "I have an appreciation for the impacts and benefits this will have and am open to using the marketplace solutions"

# Knowledge and Desire



## Key customer roles

- Key point of contact (POC) identified by the senior executive



## Key customer questions

- How does this work?
- How can QSMOs be a strategic partner in executing our vision?
- Does this fit within my budget?



**Outcome**

Supportive partnership and recommendations that enable customers to make a decision



## Benefits desired

- Reduce cost / cost avoidance / increase value
- Resolve privacy/security concerns
- Increase efficiency



## Key supports

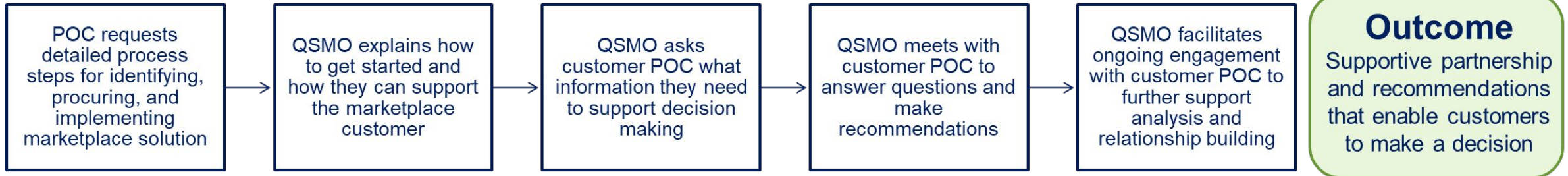
- Recommendations for balancing multiple priorities
- Consultations with QSMOs
- Communications and change management



# Knowledge and Desire

**Knowledge and Desire**

**Goal:**  
 "I have an appreciation for the impacts and benefits this will have and am open to using the marketplace solutions"



## Potential Roadblocks

- Lack of firm budgetary planning information
- Depending on how mature the agency team is, will the right questions be asked?
- Budget timeline – could be 2 years or more out
- Complexity of current solutions / processes
- Agency resources
- Leadership support and buy In
- Funding available for this phase
- Too much emphasis on cost savings over cost avoidance

## Questions and Concerns

- Has the agency performed an alternatives analysis?
- How difficult is it to pull information from feeder systems?
- How can we implement a new service given current workload?
- Can we influence investment decisions in a timely manner?
- Does it fully embrace government-wide initiatives?
- What ability do we have as customers for our choices in service to influence the price of offerings?
- What budgetary impacts should the agency plan for? What can actually be accomplished within budget?
- How can the QSMO solution be specific to my agencies needs and future state needs?
- Are the right protections in place for interfacing systems?
- What are the impacts and risks if the arrangement doesn't work out?
- How long will this take?

## Resources and Support

- Mature Cost Model for forecasting
- Historical Cost / Volume Data
- Assistance with alternatives analysis
- Guidance for agencies to facilitate understanding of cost avoidance vs cost savings
- Identified change management and communication needs
- Clear information on licensing
- Workforce impact and skillset assessments
- Tools for getting stakeholder buy-in and through the approval process

# Ability

**Ability**

**Goal:**  
 "I am proficient in the use of the marketplace. I am working to purchase and implement marketplace solutions."



### Key customer roles

- Contract specialist and/or supervisor
- Program manager



### Key customer questions

- How do I make sure my end users' needs are met?
- What can I learn from other agencies with similar challenges?
- What choices and customization do I have?



### Common customer challenges

- Acquisition challenges
- Need leadership support or buy-in from multiple internal organizations



### Key supports

- Recommendations for mitigating potential barriers
- Acquisition support
- Implementation support



**Outcome**

Successful acquisition and implementation of the marketplace solution



# Ability

**Ability**

**Goal:**  
"I am proficient in the use of the marketplace. I am working to purchase and implement marketplace solutions."



**Outcome**

Successful acquisition and implementation of the marketplace solution

**Potential Roadblocks**

- Availability of agency FTE and contractor support to conduct procurement actions and implementation
- Funding for the implementation
- Program Management Office to handle workload
- Acquisition support from QSMO
- FEDRAMP certification that may delay acquisition
- Alignment to leadership / new leadership priorities and modernization plans



**Questions and Concerns**

- During this phase, is there Agency Executive Level, OCIO and other offices support for the implementation
- Will there be demos from prospective vendors? How will we be made aware of these?
- Underlying terms and conditions influencing offering
- To what degree will communications plans with internal and external customers be provided?
- Can others be added to the configuration? How customizable is it? Is there a real need for customization?
- What is the entire lifecycle (including end of life)?
- Will there be process improvement support or opportunities to automate manual processes?
- How will we make sure end user needs are met?
- How can QSMOs be a partner in executing our vision for standard mission support systems?
- Can we engage with other agencies to share best practices?

- For Discussion Purposes Only, Pre-Decisional, Do Not Distribute -

**Resources and Support**

- Assistance with change management during implementation
- Communication plan with internal and external customers
- Demos from prospective vendors
- A negotiation mediator
- Would need a good integrator
- Training resources
- Future State Roadmaps
- Functional and Technical Resources
- QSMO consultations

# Reinforcement

**Reinforcement**

**Goal:**  
 "I support the QSMOs and believe in the marketplace solutions. I want to help others receive the benefits I am receiving"



## Key customer roles

- Key point of contact (POC) identified by the senior executive
- Program manager
- System end users



## Key customer questions

- Is the QSMO solution and provider meeting our needs? End users?
- Is the QSMO adding value as an intermediary between our organization and the provider?



## Common customer priorities

- Continuous delivery of high quality service
- Ongoing operations and maintenance (O&M) services and support



## Key supports

- Ongoing O&M services
- Feedback mechanisms



**Outcome**

Consistently high customer satisfaction and growth of the marketplace customer base



# Reinforcement

**Reinforcement**

**Goal:**  
 "I support the QSMOs and believe in the marketplace solutions. I want to help others receive the benefits I am receiving"



**Outcome**

Consistently high customer satisfaction and growth of the marketplace customer base

- Potential Roadblocks**
- Availability of QSMO O&M template to ensure proper procurement action for SAAS
  - Problems with the implementation concerns carried over to O&M
  - Funding
  - QSMO disengagement after implementation is underway
  - Implementation plan includes provision for eventual migration to yet another provider
  - Provider resource bandwidth

- Questions and Concerns**
- How would QSMO help to resolve issues between service provider and agency?
  - Ensuring A-123 / FISMA controls are appropriately inherited
  - Is the process reversible if the results are undesirable?
  - O&M contract includes proper performance measures / metrics agency can oversee and process for 'get well' plans
  - How will QSMOs collect and integrate customer feedback?
  - Can we engage with other agencies to share best practices? Can we connect and hear how others dealt with similar problems and how they were solved?

- Resources and Support**
- Assistance with change management during implementation
  - QSMO liaison focused on our organization
  - If PaaS is selected FTEs and/or contractor support for O&M

# Customer Segments

**Definition**  
 Customer Segmentation is the process of dividing customers into groups based on common characteristics so companies can market to each group effectively and appropriately.

**How to Use**  
 QSMOs can use the Customer Segment findings to identify what segments currently exist. Customer Segment findings can be used as part of the customer engagement and communications strategy to tailor marketing to attract customers.

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# Key Customer Segments

During a series of QSMO workshops, the following question was asked: What attributes will impact the way that customers engage with and experience the QSMOs? The answer: Engagement Trigger, Benefits Sought, and Agency Characteristics.

The customer community of practice was also asked the same questions and expanded upon the QSMO's answers. The subsequent slides present the answers to these questions, as well as stakeholder mapping activities.

## Engagement Trigger

What event(s) prompted the customer to engage with the QSMOs?

## Benefits Sought

What value or benefit does the customer want/expect from working with the QSMOs?

## Agency Characteristics

What traits or unique characteristics of an agency will impact the way they engage with QSMOs?

# QSMO Stakeholders Identified in 1:1 Interviews

**Who is a stakeholder?**  
 A person with an interest or concern in something, especially a business. The below are key stakeholders cited by the QSMOs and customers in workshops.

Marketplace End Users	Executive Councils and Steering Committees	QSMO Communities of Practice	Office of Shared Services and Performance Improvement	Congress
System/Solution Buyers	System/Solution End Users (Gov't & Citizens)	Shared Services Providers (Industry & Gov't)	Office of Management and Budget	Office of Personnel Management
Office of the Chief Information Officer	Office of the Chief Financial Officer	Supervisors	Specialists	Executive/SES
Risk Offices	Policy Offices	Data Offices	Procurement Offices	Budget Offices

Most frequently cited Least frequently cited



# QSMO Stakeholder Onion Diagram

## Who is a marketplace customer?

- Individuals
- Direct buyers purchasing marketplace solutions
- Direct interactions with QSMOs

## Who is an indirect customer?

- Indirect buyers who influence buying decisions
- Indirect interaction with QSMOs
- May be described at an organizational level

## Who is an indirect stakeholder?

- Influences QSMO operations
- Utilizes some QSMO service, but does not buy marketplace solutions

### Direct Customers

- FM, HR, Cyber, and/or Grants program specialists, supervisors, SES, and Program Managers
- Procurement specialists and managers

### Indirect Customers

- CFO Act Agency Senior Accountable Point of Contact (SAPOC)
- Customer Agency CIO, CFO (Budget), Policy, Data, Risk, and Innovation Offices

### Indirect Stakeholders

- CIO, CFO (Budget), Policy, Data, Risk, and Innovation Offices
- Oversight bodies
- Individuals using standards



# What event prompted the customer to engage with the QSMOs?

## Engagement Trigger



**Shared Services**  
Blue outline indicates input from QSMOs

Orange outline indicates input from customers

# What value or benefit does the customer want/expect from working with the QSMOs?

## Benefits Sought

Resolve privacy concerns	Speedy implementation	Replacement for subpar current provider	Automation / modernization	Flexibility- customizable solution
Increase efficiency	Adhere to regulatory requirements	Alignment to leadership / new guidance	Cost savings	Seeking to reduce or outsource administrative burden
Consultation, reviews, recommendations, assessments	Leveraging existing resources / inventory	Improve a business process	Leveraging pre-existing contracts with vendors and service providers	Improve IT security (for systems – related needs)



Blue indicates input from QSMOs

Orange indicates input from customers

## What traits or unique characteristics of an agency will impact the way they engage with QSMOs?

# Agency Characteristics



Green indicates input from QSMOs

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# Customer Engagement and Communications

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## Interconnectedness of Customer Engagement, Change Management, and Communications

Effective change management guides how to plan and support individuals that are undergoing a change to successfully adopt and adhere to the new changes. In the case of the QSMOs, effective change management will help the QSMOs plan for, and support individuals to successfully adopt and adhere to the changes brought about by the QSMO marketplace.

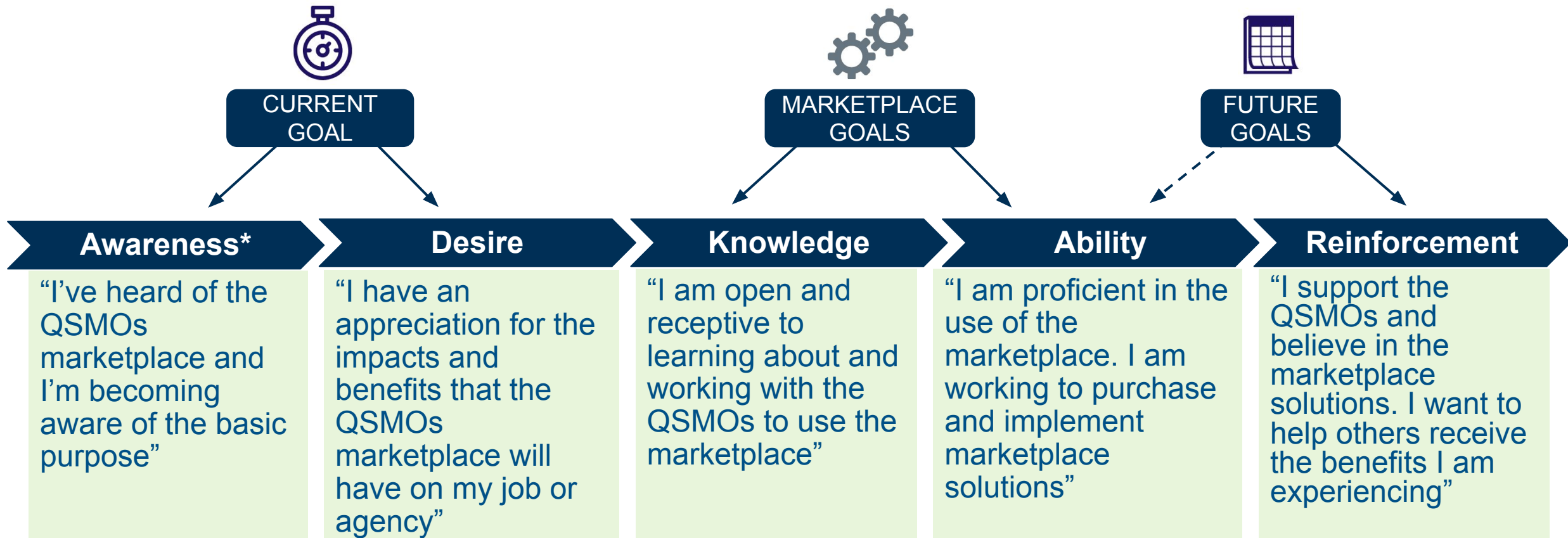
Without consideration for change management and how to manage it – communications are created that don't meet the mark in terms of where the customers are today. By understanding customer pain points, and what they're confused by, the communications can directly respond to existing needs. Ultimately, this improves our customer's engagement with the QSMOs.

This is why the change adoption curve was selected, also known by the acronym ADKAR: Awareness, Desire, Knowledge, Ability, and Reinforcement. This curve is incredibly useful for the customer experience as well as communications. It depicts the change adoption that individuals naturally go through but provides a useful way to think about how to add variety and change up engagement and communications strategies over time.

Just as communication is not simply sending out an email, customer experience is not just certain parts of a customer's experience. Customer experience (also known as CX) is defined by the interactions and experiences a customer has with an organization throughout the entire customer journey, from first contact to becoming a happy and loyal customer. Focusing on the entire experience is important because a customer who has positive interactions with an organization or service provider is more likely to become a repeat and loyal customer, as well as an advocate for the organization.

# ADKAR Phases

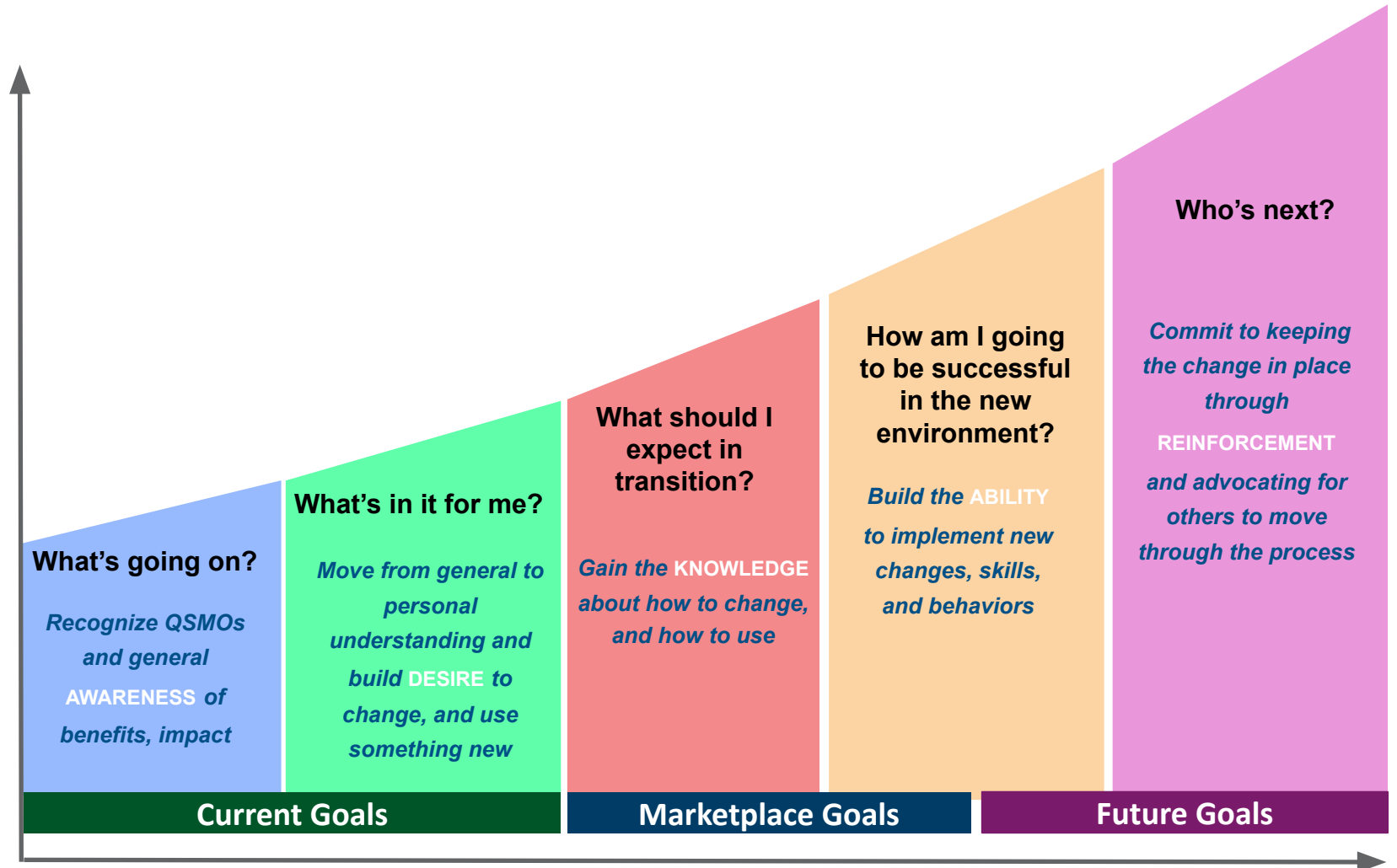
Change is personal and it can be hard. Understanding change as a process can help the QSMOs help others transition to the QSMO Marketplace. “ADKAR” represents five phases of the change process people experience at their own pace.



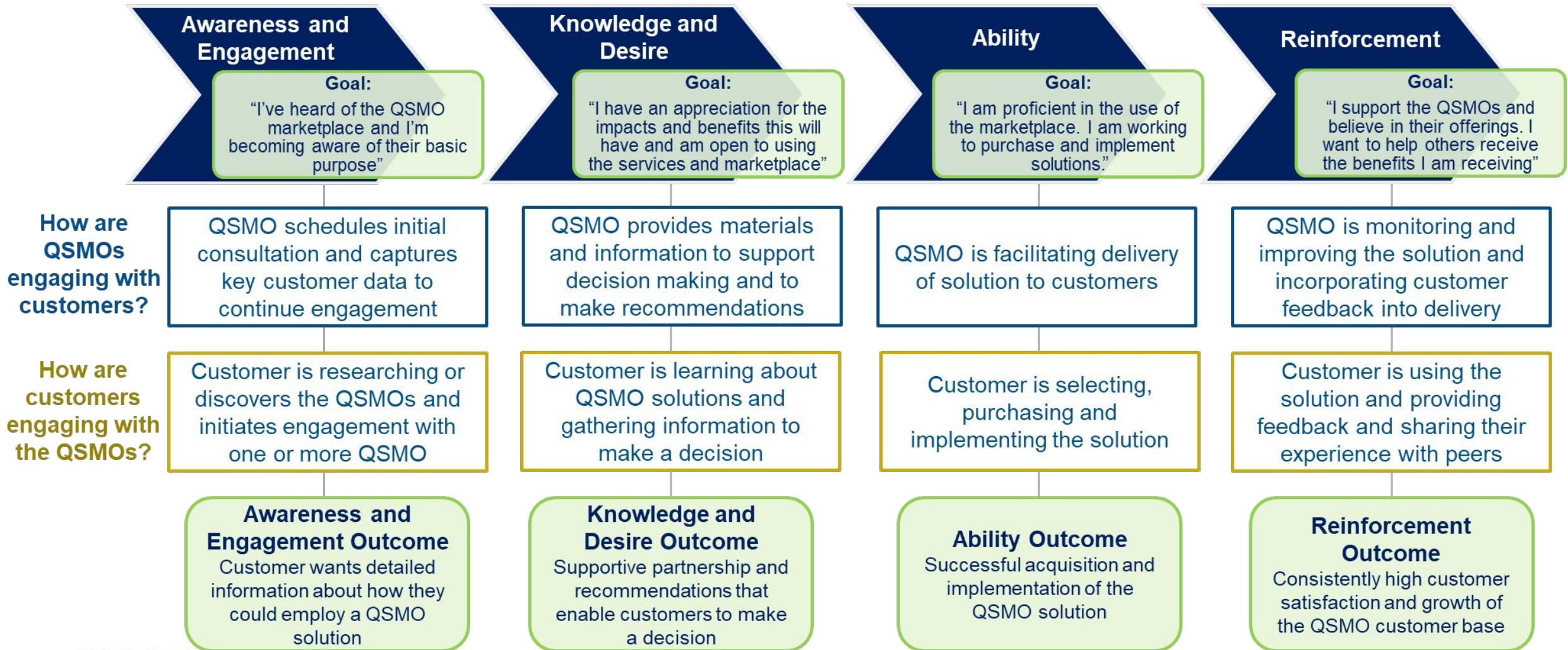
\* Given the unique nature of the QSMOs, it is not enough to simply achieve awareness of the QSMOs with our target customers. We must also include striving for increasing engagement with our customers. This is why awareness and engagement are shared component within this document.

# ADKAR Change Curve

- ❑ Individuals will move through the ADKAR framework at different paces.
- ❑ Sometimes, customers may go through the entire process multiple times. This is especially true for process improvement. Customers will need to be made aware of new changes or additional improvements, and may start part of the change curve from the beginning.
- ❑ Some individuals will need less communications than others to reach the desire phase. Others may need more frequent communications.
- ❑ Additionally, the change curve may need to be revisited after the marketplace is stood up. There are many communications that can be done now during creation, but there may need to be new awareness and desire campaigns after the marketplace is live.



# Summary Customer Journey Maps



**Awareness and Engagement**

Goal:  
 "I've heard of the QSMO marketplace and I'm becoming aware of the basic purpose"

# Key Messages – Awareness and Engagement

Below are key messages for pre-marketplace engagement and communications.

## Build Awareness of the QSMOs and Marketplace Offerings

- QSMO websites are up to date and have relevant information
- Discuss status of QSMO progress and major initiatives
- Showcase how solutions are following government wide standards and policies
- Develop and demonstrate the QSMO value proposition

## How QSMOs Can Help Customers

- QSMOs are here to help marketplace customers better serve their agency's customers
- QSMOs can help marketplace customers leverage standards to meet their mission more effectively
- QSMOs are building a consultation support service as the marketplace is being built

## Strengthen Partnerships

- Establish credibility and trust
- Continuous engagement from standup to operation of marketplace
- Showcase best practices being utilized
- QSMOs want to be valued partners
- Agencies can help design marketplace solutions
- Ask for help in understanding the pain points of the customers of the QSMOs

## Engagement

- Promote confidence in QSMOs creation
- Invitations to participate in workshops or community of practices or other sessions
- Notice about upcoming events where the QSMOs are speaking
- Continuous engagement from standup to operation of marketplace
- Showcase best practices
- Showcase QSMO values, such as being agile and iterative to provide enhancements that customers are looking for

**Awareness and Engagement**

Goal:  
 "I've heard of the QSMO marketplace and I'm becoming aware of the basic purpose"

# Key Messages – Awareness and Engagement

Below are key messages for post-marketplace engagement and communications.

## Build Awareness of Updates

- Highlight major updates to additional tools such as M3, IPG, among others
- Highlight marketplace and catalog, and any updates
- Showcase new service offerings or enhanced capabilities

## Strengthen Partnerships

- Showcase credibility and trust through engagement during standup
- Showcase best practices being utilized
- Promote reliable service delivery
- Ask for help in understanding the pain points of the customers of the QSMOs

## Continued Engagement

- Highlight desire for continued feedback and improvement areas
- Invitations to participate in workshops or community of practice or other sessions
- Invites to events to learn more about the marketplace
- Notice about upcoming events where the QSMOs are speaking
- Invites to events to learn more about the marketplace

# Key Messages – Knowledge and Desire

## Pre-Marketplace

- Responsive to market needs as well as solutions presented through vendor and federal agency partnerships
- We can help marketplace customers improve current modernization efforts
- Timeline of marketplace
- Our standardized solutions will save money, or help with cost avoidance depending on the unique situation
- QSMOs can help with modernization planning
- Engagement criteria
- Guidance to agencies on marketplace adoption
- QSMOs provide advice and consultation to help agencies successfully prepare for their transitions and major decision making

## Post-Marketplace

- Ease of adoption
- Standardized data elements
- Showcase how marketplace solutions can be integrated. We are here to help with navigating the marketplace solutions
- Available solutions and services and alignment to identified needs or challenges
- We are here to ensure all solutions will be secure
- Potentially separate channels to agencies and to industry partners
- Working together to achieve government wide shared goals
- Promoting QSMO benefits of efficiency, standardized data elements, timeliness of service, reduction in burden to the customer's agency
- Promote reliable service delivery

**Goal:**  
 "I am proficient in the use of the marketplace. I am working to purchase and implement marketplace solutions."

# Key Messages – Ability

## Marketplace Solutions and Usage

- Demos of marketplace, how to access
- Showcasing customer-centric approach
- Ease of use with marketplace, FAQs, how to's, etc.
- Performance management / SLAs
- Monthly newsletter with usable content
- Adaptive solutions and services based on feedback
- Available solutions and services and alignment to identified needs or challenges
- Have the ability to cross organizational boundaries for solutions
- Showcase how marketplace solutions can be integrated

## QSMO Values

- It's all about helping customers meet their needs
- Showcase QSMO values, such as being agile and iterative to provide enhancements that customers are looking for
- Highlight desire for continued feedback and improvement areas

## Post-Marketplace

- Acquisition Options
- Easy and existing acquisition solutions
- Simplified procurement processes
- Detailed guidance on procurements and how to run them through the QSMOs
- Provide information clearly and respond to customer inquiries in a timely manner
- Explain how services can be optimized

Reinforcement

Goal:  
 "I support the QSMOs and believe in the marketplace solutions. I want to help others receive the benefits I am receiving"

# Key Messages – Reinforcement

## Pre-Marketplace

- Thank you for the feedback! We heard you!
- Promote new initiatives
- Conduct ongoing portfolio management and facilitate continuous improvement
- Conduct ongoing performance monitoring and measure return on investment
- Reduces implementation unknowns and risk
- Engage with the QSMOs on additional requirements development as identified
- Benchmarking against commercial and government best practices
- Capturing customer stories of – “QSMOs were really helpful with my search and support even though I didn’t buy anything”

## Post-Marketplace - Success Stories

- Build upon lessons learned from other implementations
- React to new guidance and strategy requirements and how the QSMOs fit within that
- Customer success stories to continue positive messaging
- QSMOs received this particular customer feedback. Thank you, we heard you, QSMOs are taking this into consideration and our planning. Make people feel heard after they give feedback!
- Identify and leverage other government efforts that have achieved success
- Agencies can help design marketplace solutions
- QSMOs can help share best practices and lessons learned
- Knowledge Exchange
- Information about best practices and lessons learned

## Present and Future – Importance of Feedback

- Want to make people feel heard and make sure they keep giving feedback so QSMOs can continuously improve
- Continuing to reiterate that the feedback is helpful and QSMOs appreciate customers using, or trying to use the QSMO marketplace

# Communication Channels

# Communications Channels

On this slide and the subsequent slide are some examples of communications channels to explore. QSMO Agencies may provide use guidance for recommend channels captured below. Please review the [QSMO Roundtables Recommendations](#) for how to communicate planned communications across QSMOs.

Channel / Vehicle Name	Description / Usage	Vehicle Type	Audience	Owner(s)
Convening CXO Councils	<ul style="list-style-type: none"> <li>Ongoing updates</li> <li>User stories</li> <li>Priorities and progress</li> <li>Links to tools and resources</li> <li>Links to websites</li> </ul>	Website and Listservs	Government Only	OSSPI, can assist with coordinating OPM – CHCO Council
Ussm.gsa.gov	<ul style="list-style-type: none"> <li>User stories</li> <li>FAQs</li> <li>Blogs</li> <li>Priorities and progress as appropriate for the public</li> <li>Links to QSMO specific content</li> </ul>	Website	Government Public	OSSPI Website Administrator Contractor Support
Performance.gov	<ul style="list-style-type: none"> <li>Ongoing updates</li> <li>User stories</li> <li>FAQs</li> <li>Blogs</li> </ul>	Website	Government Public	OSSPI Katie Miller
Max.gov	<ul style="list-style-type: none"> <li>Ongoing updates</li> <li>User stories</li> <li>FAQs</li> <li>Blogs</li> <li>Priorities and progress</li> <li>Tools and resources</li> <li>Links to QSMO specific content</li> </ul>	Website	Government	OMB, but anyone can create a page and invite people to view their posts. Customers have indicated they are only using OMB Max and not using acquisition gateway.

# Communications Channels

Channel / Vehicle Name	Description / Usage	Vehicle Type	Audience	Owner(s)
C Suite Quarterly Newsletter	<ul style="list-style-type: none"> <li>Ongoing updates</li> <li>User stories</li> <li>FAQs</li> <li>Links to blogs</li> <li>Priorities and progress</li> <li>Links to tools and resources</li> </ul>	Newsletter	Government	OSSPI
LinkedIn	<ul style="list-style-type: none"> <li>Quick updates</li> <li>Summary message</li> <li>Alerts to other key posts, resources, and blogs</li> <li>Capture potential government users</li> </ul>	Social Media	Government Public	All OSSPI and QSMO Users GSA / OMB Page Administrators
Twitter	<ul style="list-style-type: none"> <li>Quick updates</li> <li>Summary message</li> <li>Alerts to other key posts, resources, and blogs</li> <li>@PerformanceGov</li> <li>@USGSA</li> </ul>	Social Media	Public	All OSSPI and QSMO Users GSA / OMB Page Administrators
Instagram	<ul style="list-style-type: none"> <li>Quick updates</li> <li>Summary message</li> <li>Alerts to other key posts, resources, and blogs</li> <li>Username: USGSA</li> </ul>	Social Media	Public	GSA Page Administrators
Pulse Surveys	<ul style="list-style-type: none"> <li>Gather insights on current communication, questions, suggestions</li> </ul>	Surveys	Government Public	Creator of Survey
Chatter Page	<ul style="list-style-type: none"> <li>Latest Developments</li> <li>FAQs</li> <li>Potential for OSSPI/HR QSMO to highlight other QSMOs</li> <li>For use biannually or quarterly</li> </ul>	Website	GSA Only	Office of Customer & Stakeholder Engagement

# Recommendations

**Definition**  
 Recommendations are suggestions for QSMO consideration on how to improve customer engagement and communications throughout the customer journey.

**How to Use**  
 QSMOs can use the recommendations to understand additional areas for QSMO coordination and improvements. Recommendations should also be used in conjunction with reviewing the Customer Experience Guidebook.

**Key Resources**

- M3 Playbook  
 –includes additional details on the customer’s responsibilities
- Customer Experience Guidebook
- Marketplace Integration Guidebook
- Performance Management Guidebook

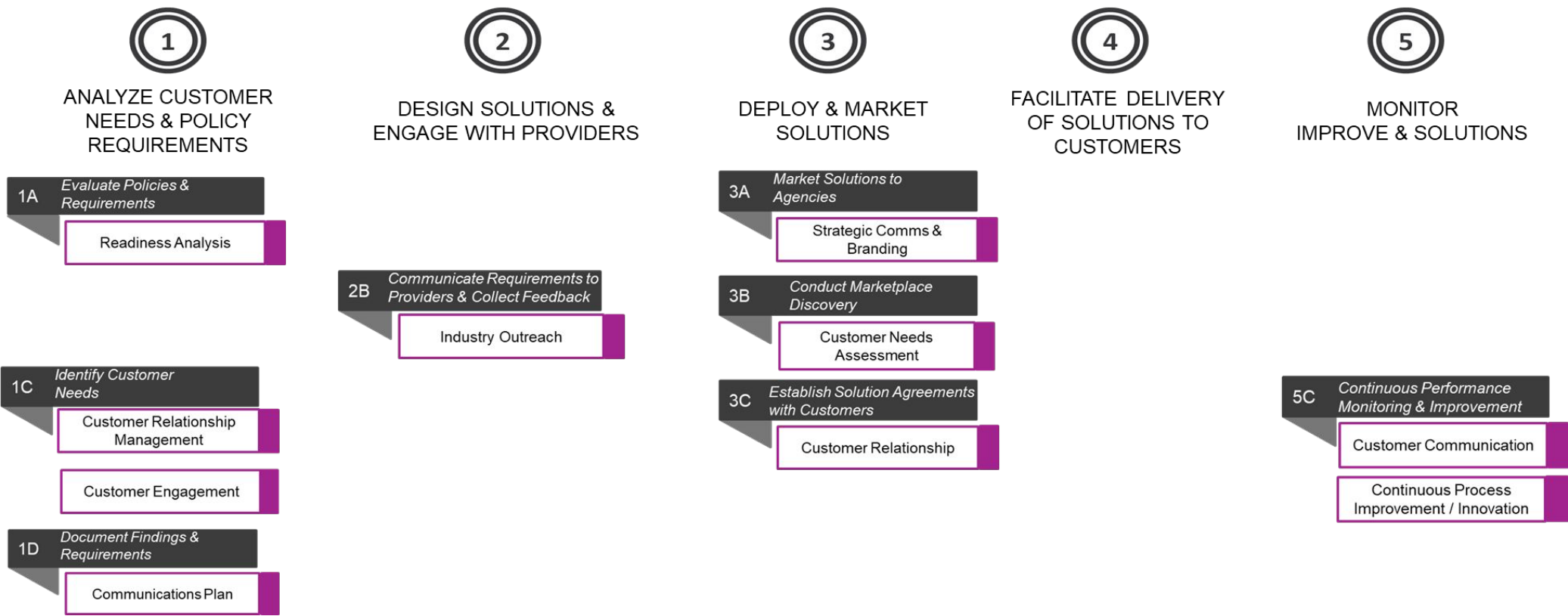
**How to Apply**

- ✓ Develop strategic Engagement and Communications plan based on recommendations and findings
- ✓ Use recommendations as a starting point to develop a Customer Experience maturity model for the GSA QSMO
- ✓ Build a roadmap to visualize activities and milestones
- ✓ Apply customer experience recommendations across all workstreams and other activities
- ✓ Utilize recommendations to improve cross-QSMO coordination

QSMO Key Tasks
Create or execute against Engagement and Communications Plan
Develop artifacts that address findings and recommendations
Review Customer Experience Guidebook for priority actions
Iteratively collect feedback from customer to identify potential improvement areas and customer needs
Develop artifacts to address customer feedback

# QSMO Business Architecture – Capability Recommendations

The recommendations in this deliverable align to the QSMO Business Architecture Capabilities. This recommendation section addresses the below items in different degrees of detail.



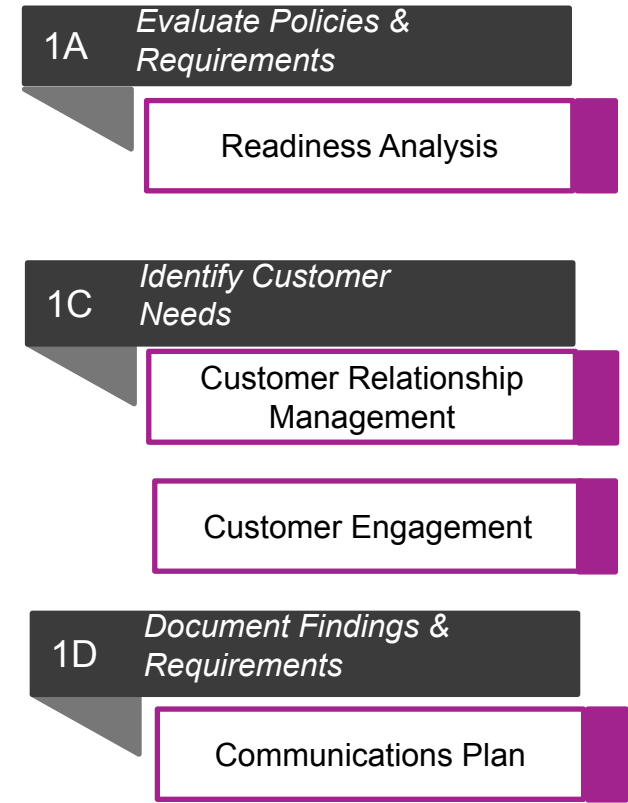
# Phase 1 Customer Needs and Policy Requirements

Phase 1 of the Value Chain requires the QSMO's to Analyze Customer Needs and Policy Requirements. Again, many of these efforts have already started and are currently being executed by the QSMOs. Below are recommendations to find additional details on the following four customer capabilities. The following slides will provide further details for each capability area.

- ❑ For 1A Readiness Analysis, please refer to Section 1.1 in the M3 for guidance on how to execute this type of analysis. This covers how to assess existing solutions and identifying gaps in business needs. This can be found in Phase 1: Readiness.
- ❑ For 1C Customer Relationship Management (CRM), QSMOs are working to procure and implement their own CRM solutions. Due to the separation of the tools, it will be incredibly important to communicate key customer updates across all the QSMOs. It may also be useful for OSSPI to acquire and maintain a centralized, QSMO-wide CRM tool to house customer information relevant to the broader QSMO effort. Please view the slide on the QSMO roundtables for more details. [Linked here.](#)
- ❑ For 1C Customer Engagement, please view the subsequent slides for customer engagement tips and considerations.
- ❑ For 1D Communications Plan, please refer to Section 1.8 in the M3 for additional guidance on developing a communications plan. It is important to execute purposeful communications. Please refer to the Customer Engagement Tips, as well as the included [Communications Planning Template](#). Please additionally review the [Reviewing Communications Success](#) for tips on how to continue to improve communications over time.



## ANALYZE CUSTOMER NEEDS & POLICY REQUIREMENTS



1C Identify Customer Needs

Customer Engagement

# Guiding Principles for Customer Engagement

<b>Listen</b>	▶	People want to be heard. Pay attention to feedback and respond appropriately. Be sure to share it with the other QSMOs during the QSMO Roundtables
<b>Seek to understand</b>	▶	Why are they feeling this way? Even resisters often have a good idea or solutions
<b>Once isn't enough</b>	▶	One touchpoint or briefing won't do the trick. People need information and messages repeated often and in different ways to absorb and understand. Offer to meet with folks one on one after key communications go out. Build and nurture relationships with these individuals
<b>Plan what you say; words matter</b>	▶	The QSMOs need to communicate a unified message and consistent information – it's worth meeting to discuss how everyone can get on the same page at frequent intervals. This additionally applies to your QSMO staff and teammates – ensure your team is all on the same page when participating in meetings with potential customers
<b>Show the benefits, but accurately represent the limitations</b>	▶	Be real and transparent, change is hard. The path toward change itself often changes. It's ok to acknowledge the challenges. It will build credibility and trust amongst your customers

# Guiding Principles for Customer Engagement

- ❑ **Follow the ADKAR Process:** Use the journey maps to develop tools and support structures for customers. Change is difficult and individuals will move through it at different phases. The more QSMOs engage with customers, the more they will continue to hear about customer needs to refresh what tools and support are provided as part of the QSMO marketplace.
- ❑ **Prioritize Communications:** Communicate proactively and often with stakeholders. Leadership will pay equal attention to the communications effort as to the design and implementation effort if the transformation is to be successful. Potential customers must be guided through the process with strong communications so they can adopt the new processes. As soon as the implementation milestones and timeline are defined, QSMOs must communicate the specifics and details to appropriate stakeholders, including news, updates, possible changes, and expectations.
- ❑ **Goal-Specific Communications:** All communications initiatives and materials should be created with a specific goal in mind. Keep in mind “ADKAR” when drafting communications. Does this information provide them awareness of a new offering? Does it provide them an opportunity to engage with the QSMOs? Reference the key messages for ideas and themes.
- ❑ **Optimize Amount and Type of Information:** The purpose of a coordinated engagement strategy is to optimize the frequency and type of information received by stakeholders in order to limit misinformation. QSMOs may need to deliver the same message multiple times before it is received.
- ❑ **Transparency:** Be upfront, honest, and transparent about what is known, what is not known, and when people can expect to know. Communicating early and often, even if all the facts or details are not known, is better than letting rumors and misinformation spread. Customers appreciate it when brands engage with them in a transparent manner.
- ❑ **Vary Engagement Opportunities:** Do not solely rely on one form of communication or engagement. Invite them to attend working sessions or utilize different methods of presenting information. Inform customers when any QSMO, especially unique customers of the QSMOs, are speaking on a panel. This will help customers to see what progress is being made, and access information on their own time.

# Engagement and Communications Strategy

Use communications channels and understanding of the customer to build a customer-centric culture. The following recommendations outline recommended content to include in the engagement and communications plan.

- Utilize existing QSMO mission/vision to develop specific goals/objectives as stepping-stones to achieve the mission/vision
- Host leadership-led working sessions to finalize QSMO value proposition
- Develop QSMO value proposition artifacts (white paper, email message, etc.) to disseminate among staff and customers
- Utilize key themes in the customer engagement and communications section to create artifacts (white paper, email message, etc.) to disseminate among customers
- Develop and facilitate Customer Experience workshops and training for leadership as change begins with strong champions in leadership positions
- Develop Customer Experience workshops and training for staff
- Develop cadenced service offering and update messages to engage customers on a regular basis
- Leverage customer base to gather feedback on a quarterly basis

# Communications Planning Template

Utilize this planning template for planning a new communication. This will help to ensure the communication is providing value to the receiver of the message, in addition to developing a well thought out plan for how to execute the communication. To gather ideas, use the key messages and themes identified in the Customer Engagement and Communications Section.

<b>Communication Name</b>	(The name or type of communication)	
<b>Primary Message</b>	(The primary message the needs to be communicated to the stakeholder group. Describe – who, what, when, where, why)	
<b>Stakeholder Group / Target Audience</b>	Primary: (Describe primary audience)	Secondary: (Describe secondary audience)
<b>Identify Communications Vehicle</b>	(Options: <ul style="list-style-type: none"> <li>o <b>Digital Formats:</b></li> <li>o Email, press release, blog posts, newsletters, intranet/SharePoint, social media post</li> <li>o <b>Non-digital formats:</b></li> <li>o Small meetings, speeches, presentations, roadshow campaigns</li> <li>o Lunch &amp; Learn, Questions with QSMOs, media interviews</li> <li>o Posters, fact sheets, slick sheets</li> </ul>	
<b>Responsibility for Preparation</b>	(OSSPI, QSMO, Combination, OMB).	
<b>Reviews and Assistance Needed?</b>	(Whose help or assistance do you need? Is this a collaborative communication? What do you need from OSSPI?)	
<b>Purpose</b>	(Describe the purpose)	
<b>Frequency</b>	(Frequency, is it recurring?)	
<b>Feedback Mechanism</b>	(Propose goals, metrics)	
<b>Delivery Date</b>	(Preferred timeline; include any firm deadlines or events)	

# Reviewing Communications Success

- ❑ When planning for communications and disseminating communications, remember to capture the overall goal for the communication.
- ❑ QSMOs should then develop performance measures that are realistic and reportable. As possible, communication initiatives should be assigned metrics that are regularly tracked and reported during QSMO round-tables as desired. QSMOs can use the table below as an example of sample communication performance measures.
- ❑ After communications have been disseminated collect and analyze stakeholder feedback to adjust communications as needed. This should be done iteratively to ensure that stakeholders’ needs are met and that issues are addressed as they occur.
  - ❑ Opportunities for feedback include:
    - ❑ Status meetings with government partners, QSMO teams, and contractors
    - ❑ Brown Bag Sessions, including topics such as meet and eat, lunch and learn, what’s new, and how-to’s.
    - ❑ Surveys
  - ❑ Consider using the following questions to frame stakeholder discussions and solicit feedback:
    - ❑ Alignment: Does the stakeholder understand how this information aligns with their work?
    - ❑ Effectiveness: How well does the stakeholder understand QSMO vision and goals?
    - ❑ Desire: Does this communication increase or decrease desire to partner with the QSMOs?
    - ❑ Frequency: How frequently has this stakeholder been communicated with?
    - ❑ Methods: Which communication methods have been the most effective?
    - ❑ Response: Have stakeholder questions or concerns been answered promptly?

[Sample Performance Measure]

Metric	[Engagement %, traffic, delivery, feedback, event attendance, other measure]
Goal	[SMART]
Related initiative	[Tie into ?, SOW deliverables if possible]
Frequency	[Weekly/monthly/quarterly?]
Performance threshold/success criteria	[What criteria? How will it be communicated: colors, graphics, other?]
Data sources	[What team/what source?]

# Industry Outreach

## Pre-Marketplace

- Conduct market scan to understand current vendors in the market
- Engage industry leaders through individual conversations to understand their current role in the market, explain the QSMO marketplace, and gauge initial commitment to participate in the QSMO marketplace
- Use CRM tool to manage industry contacts and relationships, share important details and information with other QSMOs
- Periodically engage industry leaders through individual and group conversations to update on latest marketplace developments
- As appropriate, issue RFIs for industry feedback as the marketplace is being developed
- As appropriate, issue marketplace RFPs or publish vendor certification criteria depending on acquisition approach

## Post-Marketplace

- Engage vendors selected to be a part of the QSMO marketplace for initial kickoff
- During marketplace kickoff, explain expectations, roles, and if appropriate the need for a baseline configuration
- Compile vendor information that can be publicized on marketplace website for customers
- As QSMOs engage customers through the ADKAR phases, provide vendor information as necessary
- Assist with customer solicitations and provider selection as appropriate
- Support onboarding and ongoing performance management of solutions and vendors as appropriate

# Key Elements of Drafting Communications

- ❑ Key messages provide the high-level benefits and rationale of QSMO efforts; they help to give vision and guiding direction to stakeholders when executing day-to-day program operations. The key messages can be found in the [Customer Engagement and Communications Section](#).
- ❑ When executing communications, writers should consider the following criteria:
  - ❑ **Keep it Simple:** All technical jargon must be eliminated and setting unrealistic expectations must be avoided. Messages should be written in simple, plain English. (See <https://plainlanguage.gov/>.)
  - ❑ **Use metaphors, analogies, and examples:** A verbal picture is worth a thousand words.
  - ❑ **Leverage multiple forums:** Big meetings and small, memos and newsletters, formal and informal interaction, "town-hall" meetings
  - ❑ **Make it repetitive:** Ideas sink in deeply only after they have been heard many times.
  - ❑ **Lead by example:** Behavior that is inconsistent with the vision overwhelms other forms of communication.
  - ❑ **Explain perceived inconsistencies:** Unaddressed inconsistencies undermine the credibility of all communication.
  - ❑ **Be willing to give-and-take:** Two-way communication is always more powerful than one-way communication.

# Shared Brand

It should be a goal to strive towards consistent branding of the QSMOs, including message creation, delivery channels, and feedback processes, should be consistent across all QSMOs and among all stakeholder groups. If this cannot be achieved, strive for consistent branding within your QSMO, and coordinate across-QSMOs where possible.

- ❑ One of the most important things that can be completed towards a shared brand is slick sheet creation. Create a slick sheet or one-pager with centralized information about the QSMOs for OSSPI and QSMOs to share with customers and agencies. Update at least quarterly. Slick sheets could include:
  - ❑ All designated and pre-designated QSMOs
  - ❑ Benefits / value proposition of using a QSMO
  - ❑ Emphasis on neutrality of QSMOs and strategic support that can be provided
  - ❑ Current and planned service and solution offerings
  - ❑ How to contact the QSMOs

# Shared Brand

QSMOs discussed why having a shared brand is important. QSMOs additionally discussed the potential challenges around having a shared brand. This slide lists those items. QSMOs will need to work in tandem with OSSPI to overcome some of these challenges and perceptions.

## Why Having a Shared Brand is Important

- Sense of uniformity and common purposes across QSMOs
- Informs where in an organization you are
- Common, trusted experience
- Tells customer what they can expect, and hopefully positive feelings
- Instant recognition
- Represents expertise (QSMOs were designated by OMB)
- Demonstrates authority
- Represents our promise to customers

## Potential Challenges

- Different scopes for each QSMO
- Different target customer personas
- Uncertainty / changing priorities about where shared services sits within new administration priorities
- Limitations within home agency websites
- QSMOs have already established a “brand” within their communities through outreach and messaging
- Status quo is easier to manage than change
- Balancing being part of the whole govt against differentiating the experience

## Ways to Mitigate

- QSMO more likely to be more of a certification of mark than a program brand
- Develop a shared “why”
- Emphasize commonalities (e.g. strong stewardship, informed decision making, etc.)
- Leverage USDS design standards
- All QSMOs continue to tag to M-19-16 messaging (if we agree those still apply)
- Develop priority list of messaging and brand opportunities
- Leverage IT modernization, digitization, cyber, strategic investments in modernization, and cloud migration as a hook within QSMO branding
- OSSPI could assist with creating branding in general, and defining guiding principles on branding that the QSMOs can use within their agency guardrail branding requirements

# Customer Needs Assessment

## Pre-Marketplace

- Continue to engage with working groups to understand current customer needs. As new customer needs emerge, be sure to communicate key changes that may affect all the QSMOs, or potential integrated solutions. Please view the slide on the [QSMO roundtables](#) for more details.
- Use CRM tool to manage industry contacts and relationships.

## Post-Marketplace

- Customer needs will change over time. Continue to engage with customers to capture their needs, and utilize post-implementation feedback surveys. More information on surveys can be [found here](#).
- Monitor and identify solutions and offerings that are rarely or under utilized. Work with these providers to change marketing strategies or to provide more opportunities to learn about those offerings.
- Develop transition plan for services, solutions, and offerings that are no longer meeting customers needs or are not performing to set standards.

# Customer Relationship

## Pre-Marketplace

- ❑ QSMOs are already engaging with customers on a regular basis to capture their needs. While increased engagement is good, be careful of burning any workshop participants out. Be sure to coordinate during the QSMO roundtables meetings when there are meeting with particular groups and who is involved to avoid participant feedback burnout.
- ❑ As mentioned earlier, QSMOs are working to procure and implement their own CRM solutions. Due to the separation of the tools, it will be incredibly important to communicate key customer updates across all the QSMOs. As needs change, be sure to communicate key changes that may affect all the QSMOs, or potential integrated solutions. Please view the slide on the [QSMO roundtables](#) for more details.
- ❑ All of the tips and tricks for [customer engagement](#) apply. Let customers know what is coming, and when, so that they can understand expectations and anticipate the solutions and marketplace offerings going live.

## Post-Marketplace

- ❑ As customers progress through ADKAR and as QSMOs utilize customer journey map information, customers will reach the Ability and Reinforcement Phases. Utilize the key messages and journey maps to build trust and resolve their anticipated challenges early. As mentioned, sometimes customers may go through the ADKAR phases multiple times. This is especially true for additional improvement and changes.
- ❑ Assist customers who show interest in marketplace solutions by sharing all options and working to provide customers with all the information they need to make a decision.
- ❑ Ensure any individuals that are interacting with customers are able to be customer focused and have undergone some basic customer experience training. Some tips for positive customer experiences can be found on the next slide.

# How to Work with Customers

- 1** Aim to exceed customers' expectations and deliver quality.
- 2** Value all customers equally and treat them with dignity and respect.
- 3** Make the customers' experience easy.
- 4** Commit to fully resolving their need.
- 5** Deliver speedy and efficient services with a purpose.
- 6** Practice honesty and be transparent with clear expectations.
- 7** Practice empathy in all customer interactions and solutioning.
- 8** Be timely, consistent, and reliable.
- 9** Be attentive and always maintain a focus on the customer.
- 10** Engage in continuous improvement.
- 11** Practice active listening, patience, and be polite.
- 12** Collaborate as a team to support customers.

# Continuous Process Improvement

In order to drive continuous improvement, QSMOs will need to collect customer feedback at various points of the process. At first, QSMOs may not be able to action any of the feedback. As outlined in the Customer Engagement and Communications section, be sure to create communications to let customers know that their feedback was heard and received, and appreciate the opportunity for continuous improvement.

- One way to continue to improve is to create surveys that customers can take during various points of the process – i.e. during decision making in the ability phase, or after reinforcement. It can even be valuable to capture feedback of perceptions during the awareness and desire phases.
  - Questions may include:
    - What was your experience navigating the QSMO marketplace?
    - How did interactions with the QSMO positively or negatively contribute to your experience?
    - Did the QSMOs help you reach the outcome you desired?
    - If you did not end up choosing a marketplace solution, what could have changed your mind?
    - What do you like about the marketplace solution selected?
      - What is working well?
      - What specific features do you like?
    - What don't you like about the marketplace solution selected?
      - What does not seem to work well for you?
      - Which specific features do you like least?
    - Overall, what impact would you say using marketplace solutions has on your day-to-day job?
    - What support or resources during your engagement with the QSMOs did you find most valuable? What other support or resources do you wish you had?
    - Do you have any success stories to share with us?
    - Would you be interested in talking to potential new customers about your experiences?

# Continuous Process Improvement

QSMOs discussed the worst possible impressions that customers, and what behaviors will need to stop in order to improve. This slide lists those items. QSMOs will need to work in tandem with OSSPI to overcome some of these challenges and perceptions.

## Worst Possible Impressions that Customers May Have

- QSMO has no authority
- Marketplace products that don't meet customer needs. They have no solutions I need
- Don't add value, don't support mission
- Just another hoop to jump through for me to get my job done
- The days before QSMOs were better, faster and cheaper
- I don't understand how to work with the QSMOs
- QSMO adds no value to my work
- QSMO isn't neutral
- Going to the marketplace to acquire a solution is not more efficient
- QSMO is told to stop at inconvenient times in the process
- QSMOs didn't listen to my needs
- The role of the QSMOs isn't clear

## Current Behaviors, Actions, Practices that Could Contribute to Negative Outcomes

- We speak in terms of compliance rather than benefits
- Lack of or unclear communications
- Taking too long to establish marketplace
- We are so early in development of the marketplace that we can't meet customer needs now
- We don't have a distinct benefit to sell NOW
- Lack of guidance
- No consequence if agencies don't consult with QSMOs
- No ability to find resources or artifacts for products that are needed

# QSMO Roundtables Recommendations

❑ Improve upon existing QSMO Roundtables by developing recurring agenda items for key topic areas such as:

- ❑ **Upcoming Communications and Engagement Opportunities.** Use the [communications planning template](#) for this purpose.
  - ❑ Who are the customers or target audience?
  - ❑ What is the forum? When is it?
  - ❑ What materials are being presented?
  - ❑ Ask if there are any up to date talking points to convey regarding the other QSMOs.
    - ❑ There is a key coordination opportunity to advertise and market the other QSMOs. It only takes a few minutes to mention that you are representing one of the QSMOs, and to list the others by name.
- ❑ **Progress to Date**, any key updates to report?
- ❑ **Current Challenges**, what challenges need to be addressed to move forward? What challenges may be approaching on the horizon?
- ❑ **Cross-functional Community of Practice Topics**, what key topic areas should be addressed during the cross-functional CoP? Any cross-functional reviews that may be needed?
- ❑ **Customer Feedback**
  - ❑ As the QSMOs work towards developing their own CRM tools, it is important to share key feedback across the QSMOs. Feedback such as:
    - ❑ What are you hearing from customers lately? What feedback needs to be shared with the other QSMOs?
    - ❑ What are the QSMOs going to do about the feedback?
    - ❑ If the customer has a valid complaint, share it with this forum to figure out what, if anything, the QSMOs can do about it.
    - ❑ What we're hearing from customers lately. Feedback. What are we going to do about it?
    - ❑ Customer has a valid complaint – who decides whether the QSMOs do anything about this complaint or not? This is an excellent topic to bring to this forum to figure it out.

## Shared Services Cross-Functional Customer Community of Practice Recommendations

5C

Continuous Performance  
Monitoring & Improvement

Customer Communication

- ❑ It should be noted that currently, “the Shared Services Customer CoP is a customer-centric forum that provides a platform to engage the Voice of the Customer (VOC) in providing input and feedback on behalf of the Shared Services Governance Board (SSGB). The CoP will support the SSGB in its responsibilities to coordinate across agencies in support of shared services planning and adoption and serve as a customer voice in providing feedback on cross-cutting marketplace initiatives. This CoP does not take the place of the individual QSMO CoPs.”\* The CoP was established by OSSPI to support shared services initiatives in support of execution of OMB Memo 19-16.
- ❑ All recommendations regarding the Shared Services Cross-Functional Customer Community of Practice will require communication and coordination with OSSPI.
- ❑ While currently, the QSMOs have additional individual CoPs, this CoP was used to gather much of the customer feedback captured in this document. Given how helpful this feedback has been, there may be a use to further utilize the cross-functional CoP for QSMO related customer communications.
- ❑ Over the course of the last year, the Customer Community of Practice has grown. At this time, it may be worth it to revisit membership and see if there are any other key individuals that could prove to be useful for the QSMO efforts. QSMOs may want to nominate additional participants who have been excellent contributors in their own CoPs.
- ❑ While there are roles and responsibilities for the Shared Services CoP, QSMOs may want to consider developing a pitch for why their CoP participants should join the larger cross-functional CoP. This content may be different than the current documented pitch of who should participate and why. It will be useful to capture why participating in a cross-functional CoP will further improve the QSMOs individual efforts.
- ❑ As new members are added, be sure to periodically (twice a year, or after a large membership surge) revisit charters and other governance materials to increase accountability. While this may be redundant for more tenured members, this will be important level setting for new members.
- ❑ Given that some CoP members are part of the cross-functional CoP and individual QSMO CoPs, be mindful of the frequency of meetings. Don’t meet just to meet. Have a purpose and important topics to cover, even if they are just updates. Sessions don’t always need to be interactive. It is better to have a packed session once a quarter, than be struggling to fill content. Sometimes every other month can still be overwhelming for customers.
- ❑ Try to alert customers ahead of time whether it will be an interactive session, or an update session. If not enough individuals attend an interactive session, feel free to host it again with the same content to gather more feedback.
- ❑ Work in networking and getting to know each other conversation. This is challenging in the virtual environment, but just as important to establish comradery and engagement. This will help to relax participants and prime them to share their feedback. This is a unique opportunity with the cross-functional CoP, as all participants may not know each other.

# Appendix

# Background

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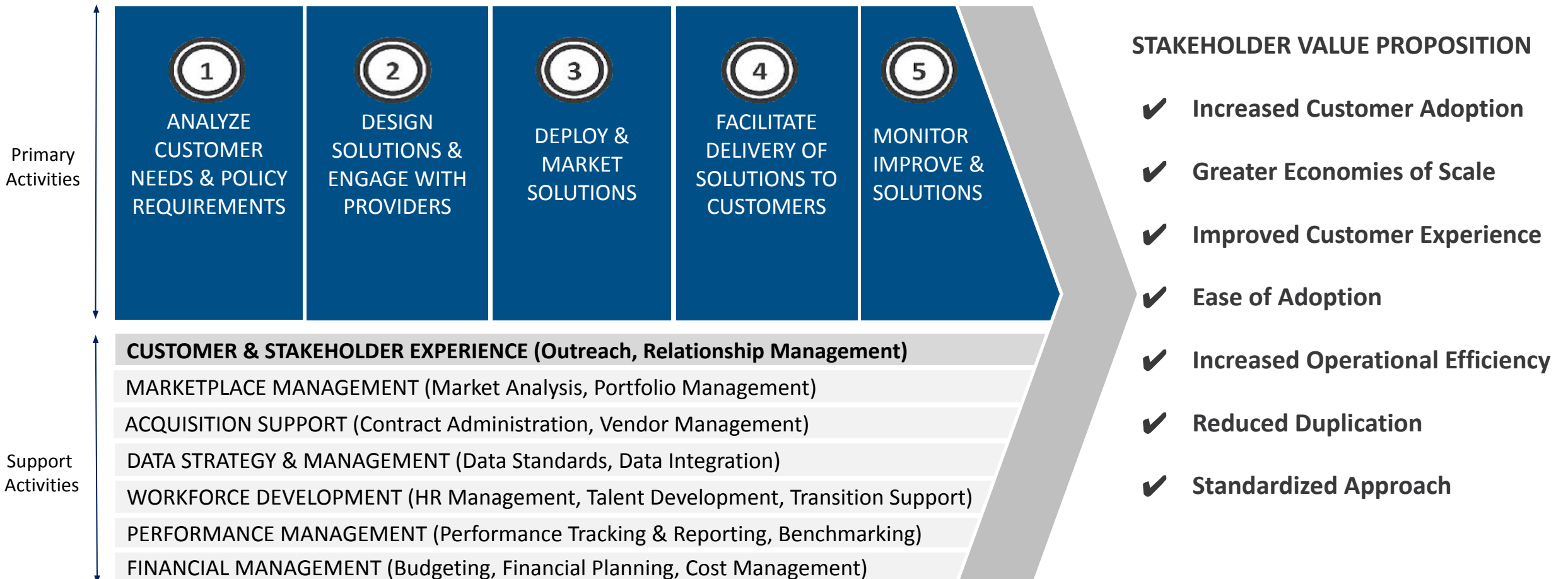
The designated and pre-designated Quality Services Management Offices (QSMOs), jointly with the Office of Management and Budget (OMB) and the General Services Administration (GSA) Office of Shared Solutions and Performance Improvement (OSSPI) are leading a transformation of shared services. Expansive efforts have gone into coordinating the establishment of QSMOs to provide modern solutions to drive standardization and efficiency across the government.

The QSMOs are working diligently to stand up their marketplaces as soon as possible in order to deliver value across the federal government. In support of those efforts, OSSPI is working to simplify, deconflict, and integrate QSMO activities, improve decision making, and provide additional support as needed.

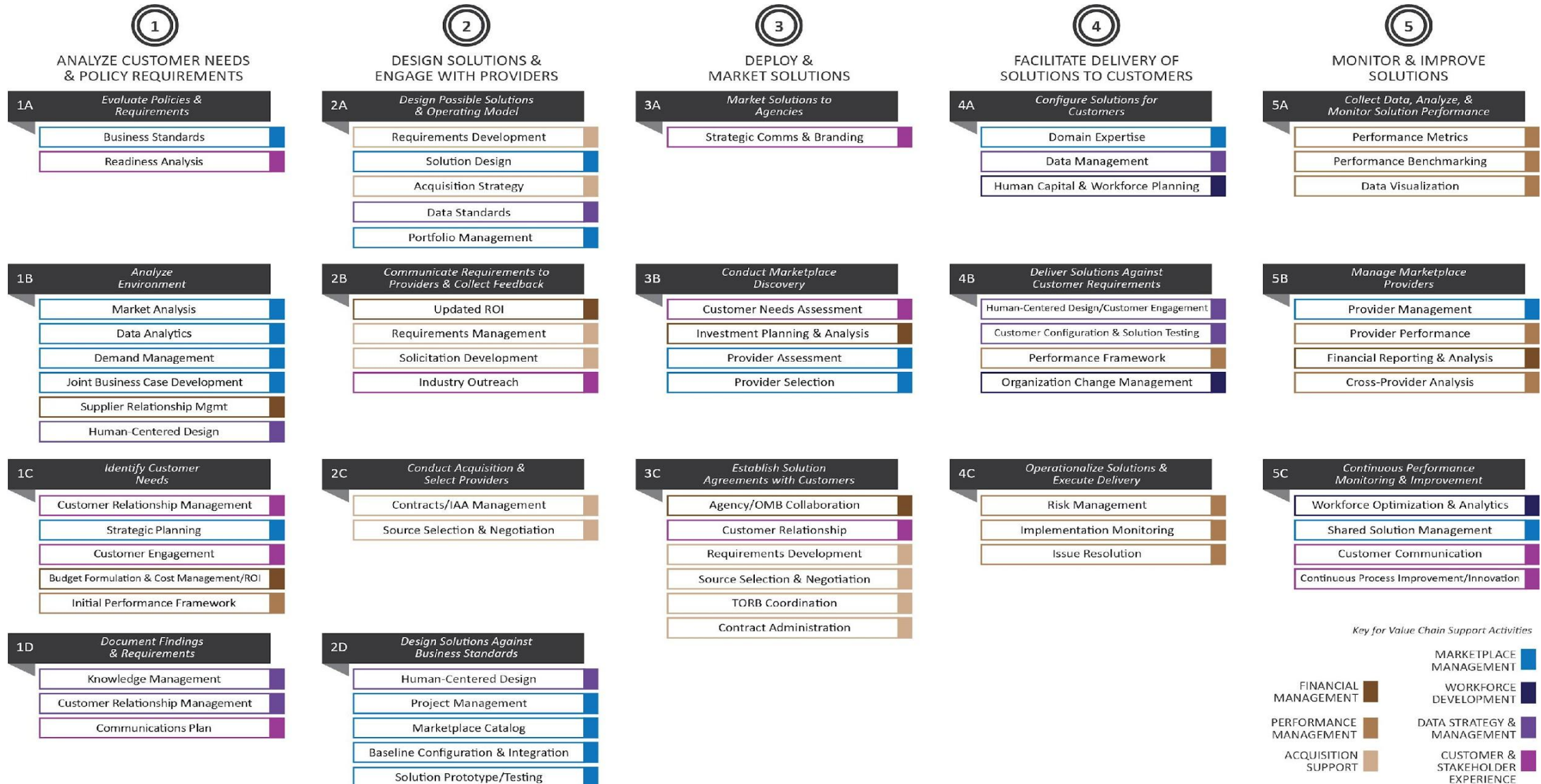
In 2020-2021, OSSPI continued their efforts to create a standard experience for customers, providers, and other stakeholders. Some of those activities have included M3 updates and revisions, developing a marketplace operating model, creating common QSMO capabilities, among other activities.

# QSMO Business Architecture Value Chain

The Value Chain below is the premise of the QSMO Business Architecture. The following slides detail the capabilities within Customer & Stakeholder Experience.



# QSMO Business Architecture – Capability View



# QSMO Business Architecture – Capability View



## ANALYZE CUSTOMER NEEDS & POLICY REQUIREMENTS

**1A** *Evaluate Policies & Requirements*

Readiness Analysis

**1C** *Identify Customer Needs*

Customer Relationship Management

Customer Engagement

**1D** *Document Findings & Requirements*

Communications Plan



## DESIGN SOLUTIONS & ENGAGE WITH PROVIDERS

**2B** *Communicate Requirements to Providers & Collect Feedback*

Industry Outreach



## DEPLOY & MARKET SOLUTIONS

**3A** *Market Solutions to Agencies*

Strategic Comms & Branding

**3B** *Conduct Marketplace Discovery*

Customer Needs Assessment

**3C** *Establish Solution Agreements with Customers*

Customer Relationship



## FACILITATE DELIVERY OF SOLUTIONS TO CUSTOMERS



## MONITOR IMPROVE & SOLUTIONS

**5C** *Continuous Performance Monitoring & Improvement*

Customer Communication

Continuous Process Improvement / Innovation

# Customer Experience Research Approach



Research the customer experience strategy to understand where customers are, what customers need, and figure out how to utilize knowledge gained to better communicate and improve customer satisfaction. Progress through the following phases to arrive at recommendations.

## Customer Analysis

What data or information do we have about marketplace customers?

How can we gain an understanding of customer needs/preferences for a QSMO marketplace?

## Customer Segmentation

What are the key attributes that we want to use to categorize marketplace customers?

How do we distill key customer segments into personas?

## Customer Journey Map

How will customers procure marketplace solutions?

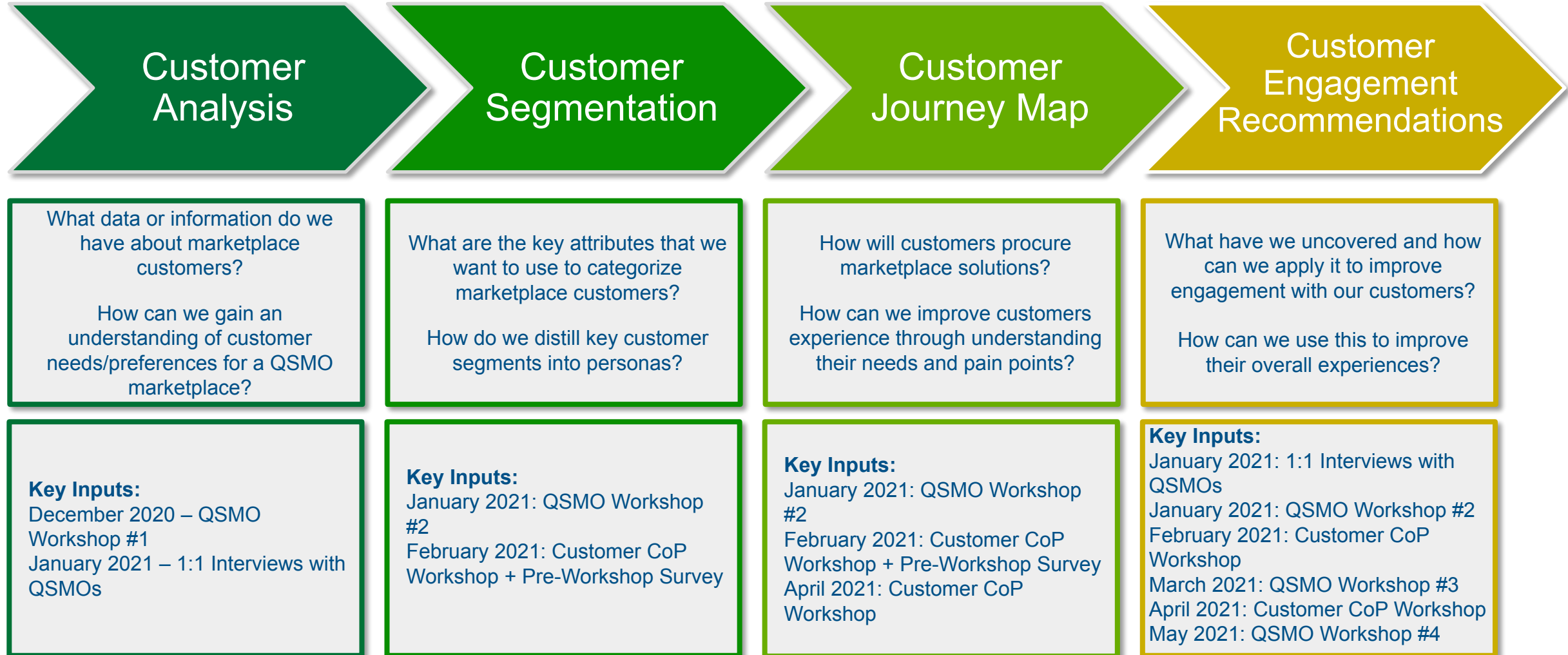
How can we improve customers experience through understanding their needs and pain points?

## Customer Engagement Recommendations

What have we uncovered and how can we apply it to improve engagement with our customers?

How can we use this to improve their overall experiences?

# Customer Experience Research Approach



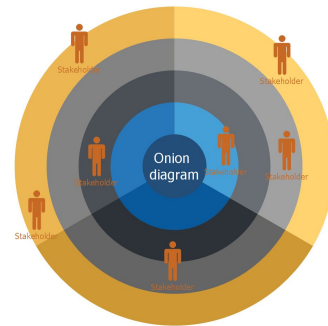
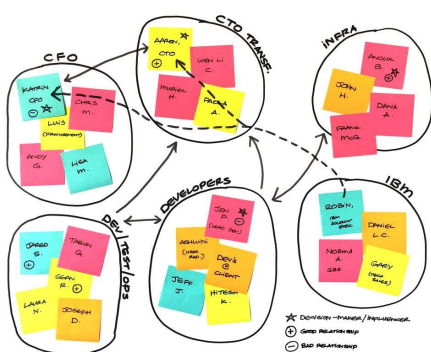
# Phase 1: Customer Analysis

## Customer Analysis

- What information do we have about marketplace customers and their expectations for a marketplace?
- Who are the QSMO marketplace stakeholders? Which, among these, are customers?
- What are some key attributes of these stakeholders?
- What common scenarios do potential customers find themselves in when they seek marketplace solutions? How do they become aware of marketplace solutions? How do they make buying decisions?

## Stakeholder Mapping

1. Identify anyone involved with or impacted by the QSMOs
2. Cluster and label similar groups
3. Plot stakeholders onto onion diagram to show proximity to illustrate prioritization



## Key outputs

1. **Stakeholder map** illustrating who QSMO marketplace stakeholders are and how strongly they're connected to the QSMOs
2. **Stakeholder analysis** summarizing of QSMO marketplace customer attributes, scenarios (pre-QSMO journey), needs, and preferences collected by OSSPI and QSMOs

# Phase 2: Customer Segmentation

## Customer Segmentation

- What story is the data telling us about marketplace customers?
- What are the key attributes we should use to categorize/organize marketplace customers?
- Which customer segments do we need to prioritize for journey mapping?
- How can we use the data we've collected and the segments we've created to develop personas?

### Potential Segmentation Attributes

- Individual demographics
- Agency firmographics
- Agency mission (*e.g. civilian, defense, etc.*)
- Benefits sought (*e.g. cost savings*)
- Engagement trigger
- Interest level (*e.g. browsing vs decided*)

### Key Outputs

1. **Customer segments** that allow us to target specific groups of customers and identify opportunities to address their unique needs/interests
2. **Key customer personas** assigning a story to each segment that enables us to develop human-centered solutions

# Phase 3: Customer Journey Map

## Customer Journey Map

- What are the key phases of the customer journey?
- Who are the key players within each phase of the customer journey? What are they doing, thinking, and feeling throughout?
- What key considerations QSMOs should keep in mind
- How can we engage key personas at each phase?

### Key Phases of QSMO Customer Journey

- Awareness and engagement
- Knowledge and desire
- Ability
- Reinforcement

*Based on Prosci's ADKAR model*

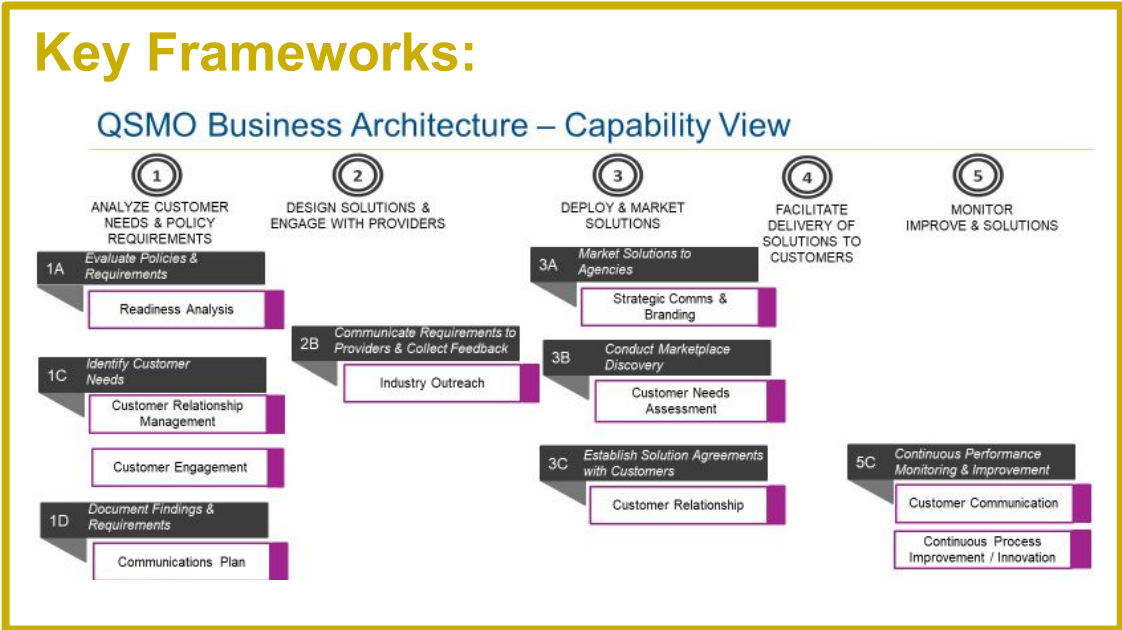
### Key Outputs

1. **Understanding of the customer journey** that allow us to map out key decision points throughout the customer journey
2. **Recommendations for engaging key personas** at each phase of the customer journey

# Phase 4: Customer Engagement Recommendations

## Customer Engagement Recommendations

- What have we uncovered and how can we apply it to improve engagement with our customers?
- What preferences were expressed during the workshops?
- What themes did we uncover?
- What information is still unclear to customers and needs to be communicated?
- How can we use this information to improve their overall experiences?



- ### Key Outputs
- Key Messages for Customer Engagement and Communications**
  - Detailed Recommendations** for improvement areas