

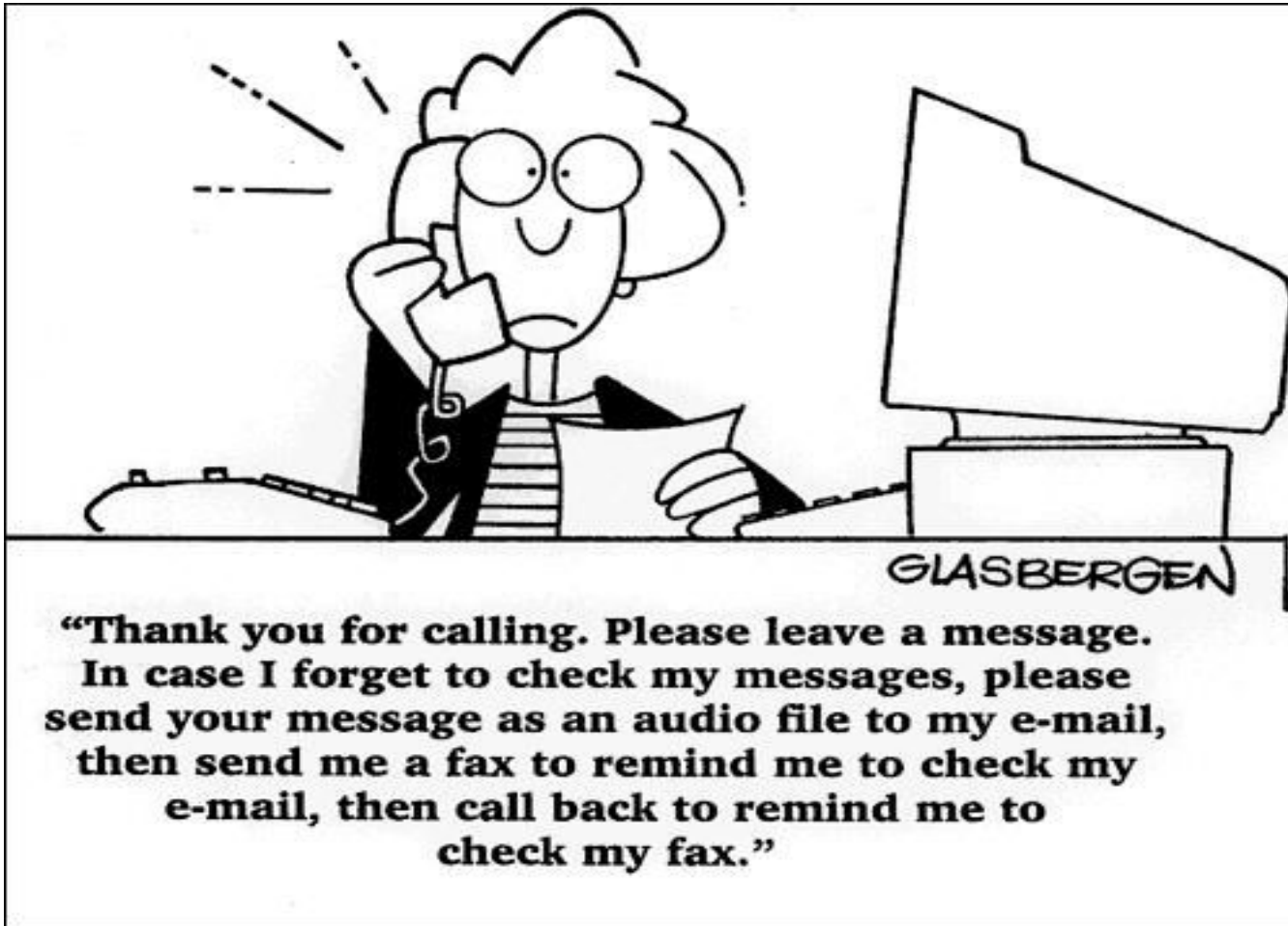


BUREAU OF THE  
**Fiscal Service**  
U.S. DEPARTMENT OF THE TREASURY

# Customer Experience Why It Matters!

Dalton Ferrell  
May 11, 2017





# Agenda

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- I. What is “Customer experience”?
- II. Why it matters
- III. Recent efforts
- IV. Next steps

# I. Our Definition

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The efforts **we take together** to identify and address your questions, problems and needs to create seamless interactions throughout the entirety of our partnership.

## II. Why It Matters

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Our ongoing dedication to:

- Continuous improvement – i.e. improvements in efficiency/effectiveness of our services
- Increased transparency in our processes
- Data-driven decision-making
- Improved communication and partnership

## II. Why It Matters

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### Alignment with current mandates:

- Budgetary reductions
- Reform initiatives
  - Leaner government
  - Better performance management
  - Data based decision making
  - Elimination of redundancies
  - Increased use of shared servicing options

# III. Recent Efforts

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## Customer Experience Project

# III. Recent Efforts

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## Project Goals

- Focus on “in the process” feedback from transactional customers
- Leverage technology
- Keep it simple through short concise questioning

# III. Recent Efforts

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## Available Surveys

- My Position Classification Experience
- My Job Analysis & Assessment Experience
- My Hiring Selection Experience
- My Overall Hiring Experience

# III. Recent Efforts

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## Data Captured from Survey

- ARC Customer Represented (optional)
- Quality of Communication and Services
- Effectiveness of E-mails and Job Aids
- Quality of Assistance provided by our specialists
- Specific Areas for Improvement
- Recommend our Services?

# III. Recent Efforts

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## Roles & Responsibilities Project

# III. Recent Efforts

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## Project Goals

- Clear definition of the roles and responsibilities within the governmental hiring process as outlined in the Code of Federal Regulations, and benchmarked in the Office of Personnel Management 80 day hiring model.
- Creation of job aids and tools to help clarify and simplify process

# III. Recent Efforts

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## Project Goals

- Formalized way to educate everyone involved as to best practices identified
- Increased transparency to help drive for reduction of time in the process

# III. Recent Efforts

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## Job Aids

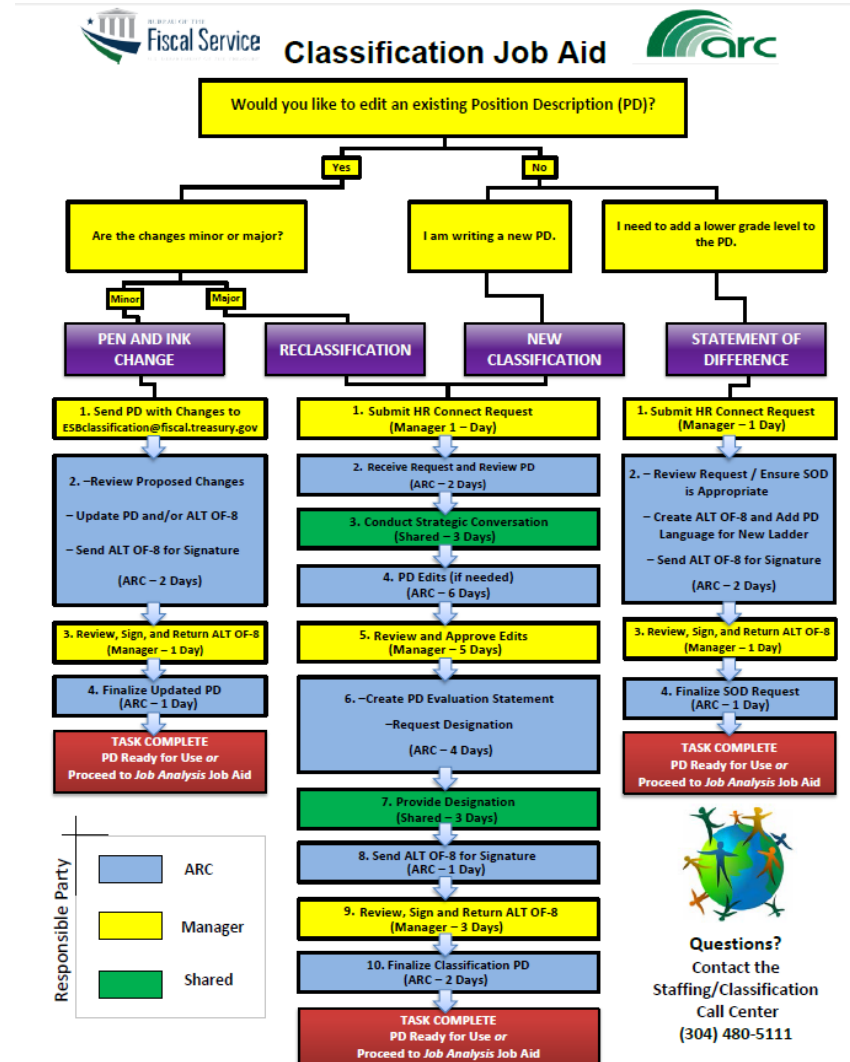
- Provide simple, easy to follow instructions
- Outline and define the process
- Provide associated timeframes
- Support customer requests for more transparency and information
- Build knowledge in the industry

# III. Recent Efforts

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- Classification
- Job Analysis/Assessment (JA/A)
- Hiring Process

# Classification Job Aid



# Classification Job Aid



## Classification Job Aid

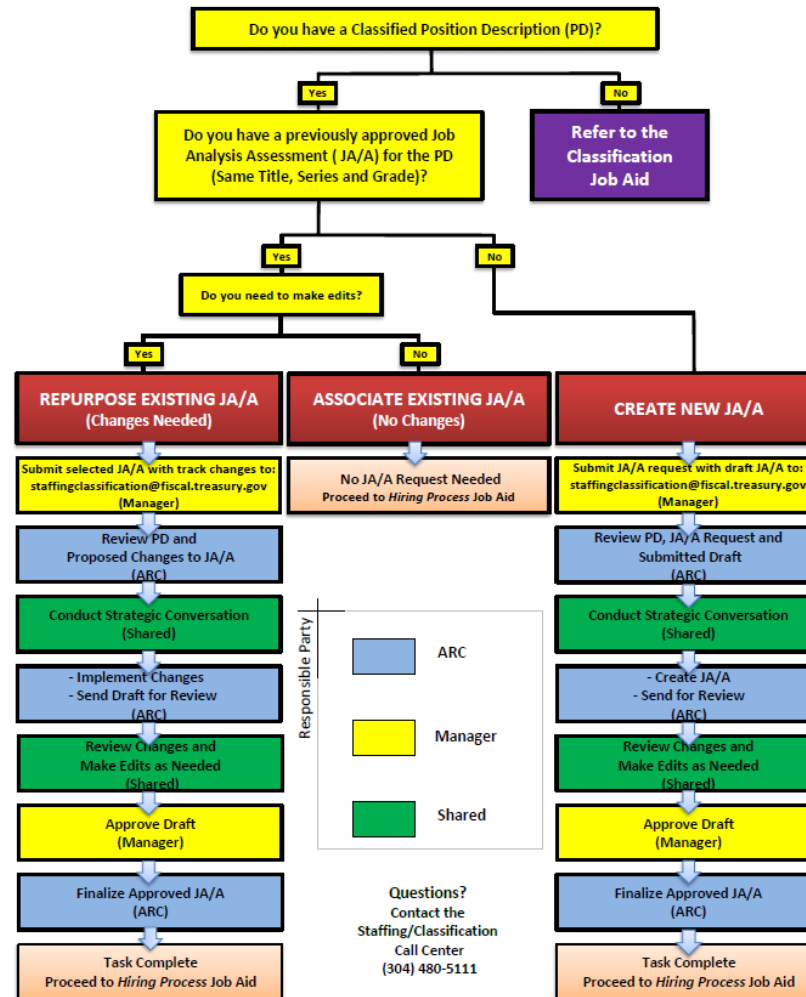


Pen and Ink	Responsible Party	Business Days	Definitions
1. <b>Send Position Description (PD) with Changes</b> to <a href="mailto:ESBClassification@fiscal.treasury.gov">ESBClassification@fiscal.treasury.gov</a> Manager will e-mail the PD, with changes, to ARC. Be sure to utilize the "Track Changes" feature in MS Word when submitting your modified PD. The subject line of your email should be in the following format: "Pen and Ink Request for PD # [insert PD #], [Insert Agency Name]"	Manager	1	Pen and ink changes are very minor changes to a position description that would not have a potential impact on the title, series or grade of the position. Pen and ink changes are not evaluated, nor do they result in a new PD. The PD is simply changed, and the records are updated.
2. <b>Review Proposed Changes:</b> ARC will review the proposed changes and determine if the action is, in fact, a pen & ink change or a reclassification. <i>If it is determined that the action is a reclassification, ARC will change the request to follow the Reclassification process as described below (beginning with step 2).</i> - <b>Update PD and/or ALT OF-8:</b> ARC will update the PD and ALT OF-8 to incorporate the requested changes. - <b>Send ALT OF-8 for Signature:</b> ARC will send the ALT OF-8 and updated PD, via email, to the manager for review and signature.	ARC	2	
3. <b>Review, Sign, and Return ALT OF-8:</b> The manager will review, sign, and return the ALT OF-8 to ARC.	Manager	1	
4. <b>Finalize Updated PD:</b> ARC will update applicable systems to include the final PD and will send a copy to the manager.	ARC	1	
<b>Task Complete: PD Ready for Use</b>	<b>TOTAL</b>	<b>5</b>	
Reclassification or New Classification			
1. <b>Submit HR Connect Request:</b> Manager will login to HR Connect and select <i>ESTABLISH NEW POSITION</i> . (This option is located at the bottom of the page under the "Positions" heading.) Be sure to include a draft PD which contains an introduction, listing of major duties, and factor level descriptions. For further instructions regarding the proper PD format, please email: <a href="mailto:ESBClassification@fiscal.treasury.gov">ESBClassification@fiscal.treasury.gov</a>	Manager	1	A reclassification action takes place when an existing position description (PD) is changed/edited significantly enough that the specialist must
2. <b>Receive Request and Review PD:</b> ARC will conduct a preliminary review of the draft position description, organizational structure, and any other relevant information in preparation for a strategic conversation with the manager.	ARC	2	

# Job Analysis Job Aid



## Job Analysis Job Aid



# Job Analysis Job Aid



## Job Analysis Job Aid

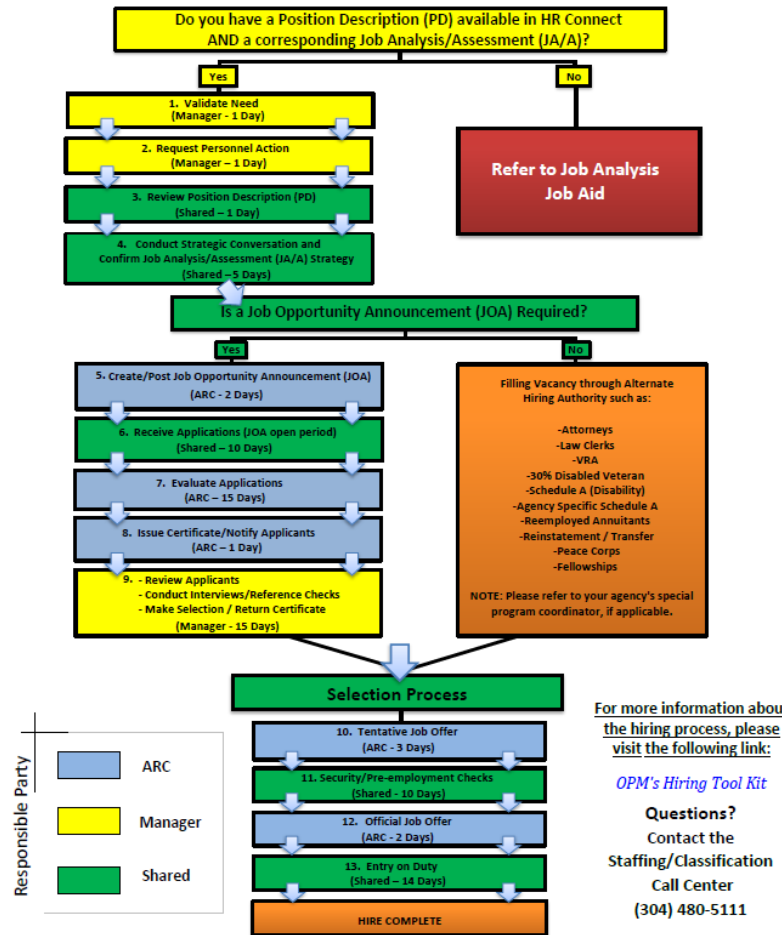


REPURPOSE (Use a previously approved job analysis making minimal edits)	Responsible Party
1. Submit selected JA/A with track changes to: <a href="mailto:staffingclassification@fiscal.treasury.gov">staffingclassification@fiscal.treasury.gov</a> : The subject line of your email should be in the following format: "Repurpose JAA request, PD number and Agency Name."	Manager
2. Review PD and proposed changes to JA/A: ARC will review proposed changes to JA/A against PD.	ARC
3. Conduct Strategic Conversation: ARC will contact the manager to conduct a strategic conversation to obtain all information needed for the development of the JA/A. Areas discussed will include: <ul style="list-style-type: none"> <li>• <b>Major competencies</b> - Group duties into major skill sets that will be used to rate and assess applicants. All competencies must be directly related to the duties listed in the PD.</li> <li>• <b>Minimum qualification requirements</b> - Specialized experience must be concrete, valid, and measurable.</li> <li>• <b>Questions to identify best qualified applicants</b> - Must be above minimum qualification requirements. Questions should measure skill or competency level and distinguish best qualified from minimally qualified applicants.</li> </ul>	Shared
4. Implement changes and send draft for review: ARC will evaluate JA/A against the OPM Qualification Standards in order to determine the standard minimum qualification requirements (i.e., educational, medical, age, experience, etc.) for each occupational series. ARC will send the edited draft JA/A and any additional samples to the customer for review.	ARC
5. Review changes and make edits as needed: Manager will review the presented JA/A and make edits (if required). Collaboratively, ARC and manager will develop the final document.	Shared
6. Approve draft: Manager will review the JA/A and send approval to ARC.	Manager
7. Finalize approved JA/A: ARC will finalize and send JA/A for manager's record.	ARC
Task Complete - Proceed to Hiring Process Job Aid	
ASSOCIATE (Use a previously approved job analysis without edits)	
If you are associating a JA/A that has already been approved, a JA/A request is not required. When ready to recruit, simply note the JA/A Number in the comments section of your HR Connect Request.	Manager

# Hiring Process Job Aid



## Hiring Process Job Aid



Time frames shown above reflect OPM's 80 day hiring model.

# Hiring Process Job Aid

Pre-Posting Process	Best Practice Opportunity (if applicable)	Responsible Party	Calendar Days
1. <b>Validate Need:</b> During this initial stage, the manager determines that there is a vacancy to be filled and obtains internal approval (e.g. managerial approval, budget approval, etc.) as needed.	<i>Implementation of an effective workforce planning process in order to identify workforce gaps (or surpluses) and develop strategies to meet current or future organizational workforce needs.</i>	Manager	1
2. <b>Request Personnel Action:</b> Manager will submit an official request to initiate hiring process. Be sure to include relevant information with the request, such as the finalized Position Description (PD) and Job Analysis/ Assessment (JA/A).		Manager	1
3. <b>Review Position Description (PD) :</b> ARC and Manager together will review the position description (PD) to ensure it is accurate, current, and classified appropriately. This review will also include verifying the risk level designation, sensitivity level, and clearance eligibility of the PD.		Shared	1
4. <b>Conduct Strategic Conversation and Confirm Job Analysis/Assessment (JA/A)</b> <b>Strategy:</b> ARC and Manager will confirm the validity of the JA/A and discuss options for filling the vacancy such as: <ul style="list-style-type: none"> <li>• Is a Job Opportunity Announcement (JOA) required?</li> <li>• Can an Alternate Hiring Authority be used?</li> <li>• Area of consideration/Locations</li> <li>• Grade levels</li> </ul>	1) <i>Utilization of stand-alone JA/A process. Removes JA/A approval time from time to hire metrics.</i> 2) <i>Increase re-use of existing JA/As.</i> 3) <i>Utilization of SMEs in the evaluation and approval process.</i>	Shared	5
Job Opportunity Announcement (JOA) Process (If no JOA required, proceed to Selection Process)			
5. <b>Create / Review / Post Job Opportunity Announcement (JOA):</b> Based on the information obtained during the Strategic Conversation, ARC will draft a JOA and send it to the manager for review and approval. Once the manager has approved the draft, ARC will post it to the USAJobs website.	1) <i>Supplement USAJobs posting with other recruiting efforts.</i> 2) <i>After JOA opens, manager should begin preparing interview questions and blocking off calendar time for interviews.</i>	ARC	2
6. <b>Receive Applications &amp; Notify Applicants:</b> During this stage, the JOA is open for candidates to apply. The recommended posting period, according to OPM's 80-Day Hiring Model, is 10 calendar days. However, customer policy may vary.	<i>Utilize shorter posting times and increase use of applicant cut-off limits. Please refer to your customer policy for posting period requirements.</i>	Shared	10

# III. Recent Efforts

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## Where Can I Find the Job Aids?

- Links to the Job Aids are embedded in the PAWS emails
- Job Aids are available on the [ARC Customer Webpage](#)

# III. Recent Efforts

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## External Training

# III. Recent Efforts

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## Goal

- Being a good partner in supporting the goal of good government includes educating not only our own employees, but also working with our customers to help meet their training needs, as well as helping to educate those in the HR Community in general.

# III. Recent Efforts

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## Customer Training Offered

- Staffing Options
- Hiring Process
- Veterans' Preference
- Category Rating
- Job Analysis
- Strategic Conversation/Developing the JOA

# III. Recent Efforts

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## Customer Training Offered

- Roles & Responsibilities
- Wage Grade
- Classification 101
- How to Write a PD

# III. Recent Efforts

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## Virtual HR Conference Presentations

- A Practical Approach to Job Analysis
- Better Data, Better Decisions
- A Functional Guide to SES Hiring
- Strategic Conversation
- Using BPM to Improve Processes
- Veterans' Preference in the Hiring Process

All video presentations are available on the [ARC Customer webpage](#).

# III. Recent Efforts

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## Internal Training

# III. Recent Efforts

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## Internal Training Opportunities

- Qualifications Training
- Job Analysis Training
- Job Opportunity Announcement (JOA) Training
- Veterans' Preference Training
- Classification Factor Level Evaluation Training
- Classification Cross Training

# III. Recent Efforts

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## Qualification Task Force

# III. Recent Efforts

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Project Goal: Increase standardization of our qualifications process for job applicants by

- Assessing training needs
- Standardizing the way we document qualification determinations for job applicants
- Updating our internal procedures
- Ensuring the quality of the qualification service that we provide

# III. Recent Efforts

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## Customer Partnering Opportunities

# III. Recent Efforts

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- Hiring Process Mapping
- Job Analysis Assessment Strategy
- Classification Process Improvements
- Regular and Recurring Customer Status Calls
- Onsite Customer Visits and Training
- JA/A & PD Workshops
- Hiring Surge

# III. Recent Efforts

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## Hiring Surge

- 656 Hires in January 2017
- 140% more than the next highest January
- 20% more than the highest total on record

# III. Recent Efforts

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How we did this:

- Collaboration between customers and ARC led to the success
- Partnership in strategic decisions
  - Led to Best practices: Shorter posting periods, application limits, one AOC (status or public), one grade level, etc.

**Let's work together to continue these best practices!**

## IV. Next Steps

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The key to improved customer experience:



## IV. Next Steps

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Strengthened partnership between HR organizations



## IV. Next Steps

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- Define what success looks like under current mandates for leaner and more cost efficient environment



## IV. Next Steps

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- Continue documenting feedback received



## IV. Next Steps

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- Set realistic goals for improvement based on defined metrics, data-based decisions, and environmental scan



# Contact Information

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