

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT



# Customer Service Plan

April 2012

*a New Day for Federal Service*

## MESSAGE FROM THE DIRECTOR



I am pleased to present the United States Office of Personnel Management Customer Service Plan. Customer service is at the forefront of our work at OPM, and we continue to seek ways to improve the customer experience. Our goal at OPM is to create the best workforce for the American people. This plan equips us with a customer service strategy to do just that.

We have revamped our federal jobs database, making federal job openings more visible and federal jobs easier to apply to. We have initiated and will continue an Educational Outreach Program to increase the accessibility of our healthcare and insurance programming, and deliver information about our services through social media sites such as Facebook, YouTube, and Twitter.

A new Retirement “Escalation Management Team” will increase the accountability and responsiveness of our retirement process, making it faster and easier for federal workers. Finally, our refreshed and revitalized website — OPM.gov — will provide a comprehensive, responsive and informative one-stop shop for our more than 60 million annual visitors.

Together, these programs will make our system more accessible, accountable, and responsive to the American people. I am confident that through this Customer Service Plan, our dedicated and talented employees will continue to rise to the challenge of building a world-class workforce to serve our Nation. The American people deserve nothing less.

Sincerely,

John Berry  
Director  
April 2012

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## EXECUTIVE SUMMARY

### SIGNATURE INITIATIVE- NEW OPM WEBSITE

**Overview:** OPM's main website – OPM.gov – receives over 60 million visits annually. The site has not undergone an overhaul in more than 7 years. Previous attempts at modernization and simplification have been superficial at best, leaving behind our current website that contains a patchwork of mini-sites and navigation tools that make it difficult for visitors to quickly find information.

OPM has approached the website overhaul from scratch. The goal is to have a new and improved website with consistent design, navigation, and information architecture that allows users to access valuable information quickly and easily. The new OPM.gov will contain a modern and attractive design that conveys information in a clear and consistent manner. The new mechanics of the site significantly streamline maintenance and updating processes, saving costs while allowing OPM to provide up-to-date information more quickly. The new site also makes it easier for users to communicate with one another and with OPM to provide valuable feedback, seamlessly connecting users to OPM via social media outlets and to partnering agencies and programs.

OPM has also added a category to the About Us section, called JoinUS that is devoted to recruiting the next generation Federal workforce. JoinUS uses video content to put a face on Federal employees, to show the wide array of ways to serve, and to encourage visitors to check USAJOBS for the latest job listings. This section is consistent with and fulfills the agency's mission to recruit, retain, and honor a world-class workforce to serve the American people.

**Timing:** OPM will launch the new site internally at its May Town Hall Meeting and solicit feedback from our employees and conduct user-acceptance testing. OPM intends to do a public launch in mid- to late-June via a side-by-side beta whereby the existing site will remain live and users will have the option. After a period of 4 to 6 weeks of testing and collecting feedback, OPM will move the beta to production and archive the existing website. After the public launch of the new website, OPM will review our broader web presence to ensure that all the sites the agency owns and operates are aligned with one another and serve our customers to the highest possible standards.

### SERVICE 1: EMPLOYEE SERVICES CUSTOMER SATISFACTION INITIATIVES

**Overview:** The Employee Services (ES) Division of OPM manages a wide variety of initiatives and supporting methods that best serve its customers, including: the public seeking to apply for Federal jobs, federal agencies and federal employees. Two of the key hiring customer service initiatives within ES are the USAJOBS 3.0 System and Hiring Reform Implementation.

**Key Customer Groups:** The key stakeholder groups for the Employee Services division are federal agencies, applicants applying to positions in the federal government, federal employees, hiring managers, and federal Senior Executive Service (SES) employees.

**USAJOBS 3.0:** In October 2011, the US Office of Personnel Management (OPM) went live with USAJOBS 3.0, a comprehensive web-based capability that provides a supporting information system application displaying all open US government jobs to the public, and allows members of the public to submit applications and associated documents, such as resumes, DD-214s, and transcripts.

**HIRING REFORM IMPLEMENTATION:** OPM spearheaded the government-wide initiative to reform recruiting, hiring and retention policies and procedures. The reform effort encompassed multiple years requiring sweeping changes to streamline and improve the hiring process. Agencies were directed to assess their hiring processes and procedures, identify their barriers to hiring and develop action plans to address those barriers. Several specific actions were also directed: streamlining job opportunity announcements; creating JOAs in plain language; using resumes and cover letters; eliminating KSAs; using of category ratings, and improving and increasing manager involvement. In order to effectively measure progress and success, we have established tools, measures, metrics and targets. We implemented several surveys to measure applicant satisfaction with the hiring process and manager satisfaction with both the hiring process and applicant quality. These surveys solicit stakeholder views/perceptions at key points in the hiring process. Other tools and processes implemented to solicit customer feedback were a semi-annual hiring review with the CHCO agencies. These reviews use data, trends, and anecdotal information provided by the agencies to measure success in implementing the reforms and to learn from the customer what might not be working or what might better work, whether it is a process, procedure or technique that can be shared with others as a best practice.

**Challenges:** Given the increasing speed at which information moves today, it is increasingly important to be able to receive and

acquire accurate, real-time information, analyze it and respond to the issue as soon as possible. Our ability to manage expectations is critically important to the success of our systems. During the launch of USAJOBS 3.0, the number of customer service inquiries substantially exceeded anticipated projections and because of that, current staffing levels were not able to respond and solve the increased volume of customer service issues in a timely manner. ES is currently analyzing resourcing levels for the USAJOBS 3.0 system. ES is in the process of conducting resourcing-mission analysis to determine the required level of staffing to sustain the customer service effort. This will include consideration for management and interface of social media as a method to reach customers both in a proactive way and to keep them informed and to provide information to their queries. We clearly recognize the importance and significance of social media as a key element of any communications process related to USAJOBS 3.0.

**Featured Actions:** The new and developing processes and methodologies used within the USAJOBS 3.0 system and Hiring Reform Implementation (HRI) effort are intended to solicit, acquire and analyze data in a "direct touch," integrated approach that leverages both technical as well as process and subject matter experts. During the first month after the launch of USAJOBS 3.0, OPM established a Social Media Active Response Team (SMART) that responded to customer issues and inquiries around the clock in real time on Facebook, Twitter, e-mail and over the phone. The SMART team was able to substantially reduce the level of customer service issues going to USAJOBS customer service representatives and use social media to solicit feedback from users which was directly incorporated into modifications and updates for USAJOBS 3.0. The methodology that we evolved to leverage social media as a major avenue to address and inform customers was groundbreaking. The scope and speed at which we matured our social media response capability is now viewed a possible model for future initiatives.

The USAJOBS 3.0 and HRI staff in conjunction with their business partners continues to assess and develop ways to increase effectiveness of the customer response system and processes. Streamlining approaches related to customer service is an ongoing effort. ES Staff continues to assess ways to address increasing customer volume and the scope of issues that have been identified to date. This includes developing additional "high-touch" or outreach methods and techniques like direct call, direct email and others. These new methods and techniques are as much about educating our customers as it is about improving the system and associated processes and procedures. To date, the level of energy going in to the customer support aspects of USAJOBS 3.0 implementation have paid off as evidenced by customer satisfaction survey responses.

## **SERVICE 2: HEALTHCARE & INSURANCE CUSTOMER SERVICE INITIATIVES**

*Customer Service Initiatives from the Healthcare & Insurance Division of OPM, Federal Employee Insurance Operations (FEIO) / Individual Benefits and Life*

**Overview:** The Healthcare and Insurance Division of OPM (HI) provides Federal employees, retirees, and their families with benefit programs that offer choice, value, and quality to help maintain the Government's position as a competitive employer. The benefits programs include insurance for health, dental, vision, long term care, life, and flexible spending accounts.

The Federal Employee Insurance Operations (FEIO) group is highly dedicated to expand and improve customer outreach and education for the three programs that participate in the annual Open Season: the Federal Employees Health Benefits (FEHB) Program, the Federal Employees Dental and Vision Insurance Program (FEDVIP) and the Federal Flexible Spending Account Program (FSAFEDS), through effective utilization of technology and social media outlets. Open Season is the period between mid-November and mid-December each year where federal employees and annuitants can make changes to their enrollments under the FEHB Program, FEDVIP and FSAFEDS for the next benefit year. Throughout the 2012 Open Season period, FEIO will design, organize and implement an educational outreach program that engages customers through online webcasts with experts answering consumer questions in real-time, as well as through social media outlets such as Facebook, YouTube and Twitter. The goal is to engage customers, increase awareness of the programs that participate in the annual Open Season, especially FEDVIP and FSAFEDS while encouraging federal employees to make better informed decisions.

FSAFEDS is a program for active Federal employees to use pre-tax dollars for medical and other expenses. FEIO is dedicated to further encourage insurance carriers and federal employees to utilize paperless reimbursement to accelerate service delivery to customers while saving costs. Paperless Reimbursement (PR) is a filing option that obviates manual claims from employees for expenses. Claims are handled automatically by participating carriers. PR saves enrollees, carriers and the FSAFEDS contractor significant time and resources.

**Key Customer Groups:** Key Customer Groups for Healthcare and Insurance are Federal employees, retirees, and their families.

Other Key Customer Groups include Federal agencies, who also partner with OPM by enrolling employees in these programs and withholding premiums from employee pay, and Congressional offices. Insurance carriers under contract to OPM partner with HI to provide insurance coverage to enrollees.

**Challenges:** Current challenges in utilizing technology and social media outlets to educate and outreach to customers include effectively reaching customers who seldom engage in social media or have limited access to social media technology (many of which are Federal retirees) and garnering support from agencies in encouraging their employees to utilize social media to learn more about available the programs that participate in the annual Open Season. Many agencies currently block access to social media sites on their office networks and because of that many agencies fail to inform their employees of FEIO's educational resources such as the Open Season webcasts and other resources that are available on YouTube, Facebook and Twitter.

In regards to paperless reimbursement in the FSAFEDS program, current challenges are that: (1) not all carriers have the systems or infrastructure to handle electronic claims on behalf of employees; and (2) some employees prefer manual claims filing.

**Featured Actions:** FEIO plans to design, organize and continue to implement and improve a comprehensive /educational program during the 2012 Open Season period that utilizes live webcasts, YouTube videos and customer community forums on Facebook and Twitter. FEIO will analyze and track customer engagement and feedback during the outreach efforts during the 2011 Open Season to construct an outreach and education effort for the 2012 Open Season, which will be presented internally for approval by the end of Q2, FY 2012 for implementation beginning in November of 2012. The outreach efforts include live webcasts on a variety of topics related to the benefit programs that participate in the annual Open Season that allow users to e-mail questions to subject-matter experts to be answered in real time, as well as improving the Open Season home page on the web to allow for easier navigation and access to valuable resources. Also during the 2011 Open Season, in correlation with OPM's green initiatives, insurance carriers no longer mailed hard copies of plan brochures to members (only by member request or when an employee joins a new health plan). All plan brochures continued to be available online for download. This allows employees to instantly and easier access their plan brochures while significantly saving administrative costs of running the FEHB Program.

The Healthcare and Insurance Division of OPM plans to engage in the following activities to improve the quality of the FSAFEDS program: (1) Market PR to more carriers, (2) Market PR to more enrollees via the participating carriers, affinity groups, agency human resource offices, benefits fairs and social media, (3) Improve systems interfaces and file handling at the FSAFEDS administrator and at the carriers.

### SERVICE 3: RETIREMENT SERVICES CUSTOMER SERVICE INITIATIVES

**Overview:** The Retirement Services (RS) Division of OPM provides Federal employees, retirees, and their families with services that offer choice, value, and quality to help maintain the government's position as a competitive employer. RS consists of two programs, Administrative Operations and Retirement Operations, and two offices that report directly to the Associate Director: Quality Assurance, and Special Inquiries. RS has created several customer service initiatives designed to decrease the average processing time for retirement applications, centralize communications from call centers to various departments to increase resolution rates of customer service issues, and utilize technology to reduce dependency on manual paper processes and increase the flow of information between RS and the public

**Key Customer Groups:** The Key customer groups in the Retirement Services Divisions are retired Federal Government employees, their families, and Federal Employers (agencies).

**Challenges:** Key challenges regarding customer service in Retirement Services are high call volumes and wait times, timeliness in case processing due to a backlog of retirement claims plus high numbers of new retirement applications, and current dependencies on manual, paper processes.

**Featured Actions:** RS is continuously working to address Customer Service challenges and currently has initiated several strategies designed to increase feedback from customers, improve the overall customer experience, use customer service metrics to set performance standards and increase service quality, and streamline agency processes to reduce costs and accelerate delivery. RS is utilizing technology to streamline correspondence processes and educate the public through websites and social media forums while soliciting valuable feedback. Within RS's Customer Service branch, RS has created a Tier 2 Escalation Management Team that manages customer service inquiries that cannot be resolved by frontline representatives, simultaneously increasing resolution rates

while making it easier and faster for frontline representatives to handle common customer inquiries. RS has also created and implemented a Performance Management Scorecard that addresses targets and metrics employees in the Customer Service branch are accountable for. The scorecard is currently being used to track manager-level performance and based on analysis of its effectiveness; they will be later implemented to other employees within the customer service branch.

## **SIGNATURE INITIATIVE- NEW OPM WEBSITE**

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OPM has also added a category to the About Us section, called JoinUS that is devoted to recruiting the next generation Federal workforce. JoinUS uses interactive tools and video content to put a face on Federal employees, to show the wide array of ways to serve, and to encourage visitors to check USAJOBS for the latest job listings. This section is consistent with and fulfills the agency's mission to recruit, retain, and honor a world-class workforce to serve the American people.

### ***Impact and Benefits***

The new OPM.gov will provide a more user-friendly experience by getting users to information quickly and intuitively through multiple means. It will be easier and more efficient to maintain which will allow OPM to provide the public with accurate, up to date information on our products and services in a timely manner.

The new design is modern in its look and feel. Its imagery highlights the dedicated people who work in the federal government everyday to serve the public as well as the citizens we serve. The driving design of the entire website is to focus on the information and conveying it in a clear and consistent manner. The new website is being created with three main principles in mind: Design, Navigation, and Information Architecture. The new website incorporates these three principles to significantly save time and resources on building and maintaining the new, easy to use website.

*Design* – The design of the site is simple and user friendly with a consistent look and feel for all of OPM.gov. On the administration side, the web team has added a content management system that allows content owners to update content within the confines of the design. This new Content Management System will streamline changes and updates significantly while lowering the costs of maintaining the website.

*Navigation* - A top-line navigation bar will be present everywhere on the site, providing users a quick way to navigate from one section to another. Users will have the option to get to content via quick links for audience groups, navigation by intuition, or a search that's been enhanced.

*Information Architecture* - The information architecture is, in plain terms, the way the content is organized. The new site is organized strictly around subject matter, and links are provided to direct user groups to the most requested content for that audience. The top-line navigation bar, from left to right, will read as follows: About Us — Policy – Insurance – Retirement – Investigations - Services – News. Ranging from an overview of the agency to our core offerings, these labels are clear, intuitive, and subject-oriented. Because we have multiple user groups, we have also developed a quick tool on the home page for users to identify themselves and receive suggestions for the top-three most relevant links for that particular group.

In addition to overhauling the website, OPM has added a new category to About Us called JoinUS that is devoted to recruiting the next generation Federal workforce. JoinUS uses video content to put a face on Federal employees, to show the wide array of ways to serve, and to encourage visitors to check out USAJOBS for the latest job listings. This section is consistent with and fulfills the agency's mission to recruit, retain, and honor a world-class workforce to serve the American people.

### ***Key Milestones and Timeline***

The overhaul effort was started in earnest in the summer of 2011. OPM plans to debut the new website internally at its May 2012 Town Hall Meeting. This allows the web team to collect feedback from our employees and to conduct user-acceptance testing. Content owners will review and make changes to their content, and senior leaders will be engaged to provide final review and approval before public launch via a side-by-side beta release in mid- to late-June. By using a side-by-side beta model, which is considered a best practice, OPM will give users the option of using the new or old site for a period of 4 to 6 weeks to socialize the new site, to test content and links, and to collect feedback. Going forward from there, OPM will continue to refine the new site and clean up rough edges. Next up will be a review of OPM's broader web presence to ensure that all the sites the agency owns and operates are aligned with one another and serve our customers to the highest possible standards.

## **SERVICE 1: EMPLOYEE SERVICES CUSTOMER SATISFACTION**

*Customer Service initiatives from the Employee Services Division of OPM*

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**Challenges:** Given the increasing speed at which information moves today, it is increasingly important to be able to receive and acquire accurate, real-time information, analyze it and respond to the issue as soon as possible. Our ability to manage expectations is critically important to the success of our systems. During the launch of USAJOBS 3.0, the number of customer service inquiries substantially exceeded anticipated projections and because of that, current staffing levels were not able to respond and solve the increased volume of customer service issues in a timely manner. ES is currently analyzing resourcing levels for the USAJOBS 3.0 system. ES is in the process of conducting resourcing-mission analysis to determine the required level of staffing to sustain the customer service effort. This will include consideration for management and interface of social media as a method to reach customers both in a proactive way and to keep them informed and to provide information to their queries. We clearly recognize the importance and significance of social media as a key element of any communications process related to USAJOBS 3.0.

**1. Increase Feedback from Customers**

- **USAJOBS 3.0 Activity (Direct-touch Outreach)** - The USAJOBS PMO continues to reach out to applicants and agencies on a daily basis. The staff engages its customers by the most effective means available to address the issue at hand. "Direct-touch" approaches include real-time/near real-time email responses, direct phone calls to applicants who submit issues/concerns to the helpdesk, ES level direct phone calls to agencies, providing status updates and soliciting feedback to/from agencies via the CHCO Council and thru the use of social media sites.
- **Hiring Reform Implementation Activity (Agency Progress Reviews)** – ES staff continues to improve its methods for engaging its hiring reform partners/customers. Following successful implementation on 1 Nov 2010, ES initiated an agency progress review program. Twice a year, agencies meet with representatives from OPM and OMB to review the status of agency efforts related to implementing the President's hiring reform initiatives. These meetings provide an opportunity to review progress using accurate, current data, share insight into current and emerging hiring practices and policy related efforts and to gain insight from the agencies on what is working for them, what challenges they might have and to identify any "best or useful" practices that may merit sharing with the rest of the Federal agencies. Any agency processes, procedures or tools deemed a potential best practice is further developed and provide to the CHCO Council for consideration on how best to utilize it across the Federal government.

**2. Adopt Best Practices for Improving Customer Experience**

- **USAJOBS 3.0 Activity (Reassess Helpdesk Requirements and Associated Procedures)** - One area we identified in going from the USAJOBS 2.0 to the USAJOBS 3.0 system was responsiveness to customer questions/issues. To that end, we are re-assessing the requirements and our process related to our helpdesk support capability. This entails a complete review and analysis based on a multitude of data sources. We leveraged several subject matter experts in our efforts to define/re-define what is needed for a robust, responsive, user friendly process and the associated resources to achieve a high level of success from a user perspective.
- **Hiring Reform Implementation Activity (Business Analytics)** – Up until June, 2009 when agencies were asked by OPM and OMB to assess their hiring processes and procedures and map against the End-to-End model to; identify hiring barriers, streamline Job Opportunity Announcements and develop action plans to address the same, formal analysis of the "state of hiring" was ad hoc at best. Parallel to the agency's efforts, OPM and OMB collaborated on methodologies and measures to effectively measure and analyze the progress. With the President's Hiring Reform Initiative released in May of 2010, the methodologies were further refined and institutionalized in various performance reporting vehicles. We view the next step in this effort as developing a robust, comprehensive business analytics capability that considers integrated "cause and effect" as a core part of any/all data analysis associated with Federal hiring processes and procedures; this includes all actions starting with Workforce Planning through the On-boarding phase of a hiring action.

**3. Set, Communicate, and Use Customer Service Metrics and Standards**

- **USAJOBS 3.0 Activity (Social Media)** – ES has been at the forefront in leveraging social media sites to address user concerns in real-time and, in some cases, pre-empt potential negative postings by posting information before the event; simply put, by keeping users informed and thus managing their expectations. The current process of addressing social media has been mentioned by some as a potential best practice for others to emulate. Our operating procedures and the personnel responsible for tracking and responding to posts on social media has been invaluable to the implementation of USAJOBS 3.0. Our procedures have set standards/criteria for response times, flow of issues for resolution and documentation procedures to ensure reliable and accurate audit trails are available if needed. This has been an unmitigated communications success.

**4. Streamline Agency Processes to Reduce Costs and Accelerate Delivery**

- **USAJOBS 3.0 Activity (Help Desk Operations)** – As part of the enhanced USAJOBS 3.0 launch, the helpdesk operations were studied for requirements validation/revalidation. As well, the operating procedures were assessed for effectiveness, efficiency and responsiveness. The review identified a number of areas associated with help desk operations that will be changed ranging from the number of people and types of skills required, to operating procedures and associated standards for customer service. Once fully implemented, the new help desk operation will reduce costs while improving customer service both in the quality of responses as well as response times.

- **Hiring Reform Implementation Activity (Best Practices)** – The initial rounds of agency reviews resulted in the identification of several agency practices that are being considered as best practices. Efforts to fully understand the practices include working with the CHCOC and CHCO Academy. The criteria used to determine if a procedure might be a best practice include but are not limited to a procedure that: streamlines a current hiring process, improves effectiveness and or efficiency not at the expense of the other, and/or reduces costs while increasing the associated benefit.

## **SERVICE 2: HEALTHCARE & INSURANCE CUSTOMER SERVICE INITIATIVES**

*Customer Service Initiatives from the Healthcare & Insurance Division of OPM, Federal Employee Insurance Operations (FEIO) / Individual Benefits and Life*

**Overview:** The Healthcare and Insurance Division of OPM (HI) provides Federal employees, retirees, and their families with benefit programs that offer choice, value, and quality to help maintain the Government's position as a competitive employer. The benefits programs include insurance for health, dental, vision, long term care, life, and flexible spending accounts.

The Federal Employee Insurance Operations (FEIO) group is highly dedicated to expand and improve customer outreach and education for the three programs that participate in the annual Open Season: the Federal Employees Health Benefits (FEHB) Program, the Federal Employees Dental and Vision Insurance Program (FEDVIP) and the Federal Flexible Spending Account Program (FSAFEDS), through effective utilization of technology and social media outlets. Open Season is the period between mid-November and mid-December each year where federal employees and annuitants can make changes to their enrollments under the FEHB Program, FEDVIP and FSAFEDS for the next benefit year. Throughout the 2012 Open Season period, FEIO will design, organize and implement an educational outreach program that engages customers through online webcasts with experts answering consumer questions in real-time, as well as through social media outlets such as Facebook, YouTube and Twitter. The goal is to engage customers, increase awareness of the programs that participate in the annual Open Season, especially FEDVIP and FSAFEDS while encouraging federal employees to make better informed decisions.

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**Key Customer Groups:** Key Customer Groups for Healthcare and Insurance are Federal employees, retirees, and their families. Other Key Customer Groups include Federal agencies, who also partner with OPM by enrolling employees in these programs and withholding premiums from employee pay, and Congressional offices. Insurance carriers under contract to OPM partner with HI to provide insurance coverage to enrollees.

**Challenges:** Current challenges in utilizing technology and social media outlets to educate and outreach to customers include effectively reaching customers who seldom engage in social media or have limited access to social media technology (many of which are Federal retirees) and garnering support from agencies in encouraging their employees to utilize social media to learn more about available the programs that participate in the annual Open Season. Many agencies currently block access to social media sites on their office networks and because of that many agencies fail to inform their employees of FEIO's educational resources such as the Open Season webcasts and other resources that are available on YouTube, Facebook and Twitter.

### **1. Increase Feedback from Customers**

- FEIO plans to increase feedback from customers by holding more live webcasts which allow listeners to e-mail questions to subject-matter experts who answer those customer questions in real time. During the 2010 benefit year, one webcast was done on the implementation of the Affordable Care Act in which thousands of viewers listened in and asked questions. This clearly showed the need to provide more webcasts on variety of topics related to the benefit programs and that webcasts were a highly effective way to educate and reach our customers. During the 2011 Open Season, FEIO held five webcasts covering

topics such as, "Introduction to Open Season", FEDVIP, FSAFEDS, "Do I Have the Right Health Plan", and "Medicare and FEHB." Subject matter experts answered questions in real time that were e-mailed by consumers during the webcasts. Over 20,000 initial hits were recorded during the live broadcast of the five webcasts and as of January of 2012 have been viewed on YouTube more than 35,000 times. FEIO plans to analyze consumer questions and feedback during the 2011 Open Season to design and propose further webcasts to be held during the 2012 Open Season.

- FEIO has a number of processes already in place to glean customer feedback from the FSAFEDS program. These include enrollee surveys, call center dialogue and correspondence (that routinely surfaces anecdotal observations and preferences), web site visit feedback, and periodic agenda-based focus groups with enrollees, carriers, and Federal agencies. To enhance our confidence in PR information and broaden our perspectives FEIO will: 1) examine and mine data already collected for additional issues and significance, and look at it with fresh approaches, such as variations in preferences or participation by demographics, 2) modify collection methods and instruments as appropriate to triangulate on specific issues, and 3) add categories to surveys, questionnaires, and dialogue with customers to help pinpoint attitudinal and other factors that encourage or inhibit participation in PR. The information will inform the interventions we need to make in marketing and systems changes to increase participation and satisfaction.

## 2. Adopt Best Practices for Improving Customer Experience

- FEIO is engaging in research efforts to learn how to best monitor its social media websites and respond to consumers while encouraging community discussion among users to make better informed decisions regarding the programs that participate in the annual Open Season. Based on preliminary research, FEIO created a Twitter feed called "insurefeds" to increase outreach and feedback from FEIO's customer base. FEIO also holds daily meetings regarding the management of their social media sites to discuss how to effectively manage content on the sites while timely responding to customer questions and feedback. FEIO's facebook page and Twitter feed are monitored on a nearly 24/7 basis and FEIO employs a hybrid approach to answer customer questions while encouraging facebook users to communicate and discuss among one another to create an online community to discuss healthcare choices. FEIO has also updated their Open Season homepage based on industry standards to allow for better navigation throughout the site and easier access to other valuable online resources.
- FEIO will: 1) partner with more *participating* carriers in educating their enrollees and increasing PR enrollment, 2) encourage *non-participating carriers* to support PR and invest in systems which can handle PR by incentivizing them in the context of benefits and rate negotiation, contract renewal, and performance review, 3) leverage resources in reaching customers through other benefits programs and agencies (open season) and affinity groups (NARFE), 4) Make greater use of modern media (Facebook, YouTube, and other dedicated informational and transactional websites) to maximize educational outreach and feedback, and 5) use project life cycle analytics to define strategies and change initiatives, measure their impact, evaluate their effectiveness, and make appropriate periodic adjustments to marketing and outreach strategies, and benefits administration.

## 3. Set, Communicate, and Use Customer Service Metrics and Standards

- During the 2011 Open Season, FEIO set goals to utilize technology and social media to increase awareness of and participation in the programs that participate in the annual Open Season, especially the FEDVIP and FSAFEDS programs. Based on over 7 million visits to benefit program websites and over 45,000 Open Season webcast and video views, FEIO believe that significant success was achieved in getting valuable information out to federal employees, annuitants, and their families to make informed choices during the 2011 Open Season. FEIO is currently conducting an analysis of its outreach efforts in the 2011 Open Season to tailor and design outreach efforts for the 2012 Open Season. Goals and metrics for social media and outreach efforts during the 2012 Open Season will be created and presented internally for approval by the end of Q2, FY 2012.
- HI has set the following goals: by the end of Fiscal Year 2012, 14 insurance carriers will participate in paperless reimbursement in the FSAFEDS program and more than 320,000 federal employees will utilize paperless reimbursement in the FSAFEDS program. Currently, more than 270,000 Federal employees spanning thirteen different insurance carriers participate in paperless reimbursement in FSAFEDS. FEIO will use these standards in gauging the effectiveness and value of the FSAFEDS program and communicate these standards and the benefits of paperless reimbursement to its customer base through education and outreach resources.

#### 4. Streamline Agency Processes to Reduce Costs and Accelerate Delivery

- FEIO has updated the Open Season home page to allow for easier navigation throughout the website and easier access to links for other valuable online resources. Right-hand navigation links were consolidated and organized to avoid confusion between subject matter areas and to allow users to quickly access tools and resources on the website. The new home page was made public for 2011 Open Season. Also, in line with OPM's Green initiatives, insurance carriers that offer services to Federal employees no longer mail out a hard copy of plan brochures during Open Season. All plan brochures are made available online and hard copies can be made available by member request only. This initiative started during the 2011 Open Season and will continue indefinitely into the future. Having plan brochures available online provides Federal employees and annuitants with instant access to their plan brochures while saving significant administrative resources needed to run the FEHB Program.
- By increasing employee and carrier participation in PR, streamlining is expanded in the aggregate, costs are lowered, and service is faster. PR by its very nature improves quality, economy and efficiency by eliminating redundant data entry and additional manual processing steps, while decreasing the potential for human, procedural and process errors, and the re-work associated with such errors. (Customers don't have to complete a claim form, copy supporting documents, mail or FAX them, and wait on confirmation, and staffing costs are reduced because processes are made more economical or eliminated.) By reducing / eliminating the use of paper itself, the environmental and materials cost impacts of PR are significant, and consistent with OPM Green initiatives.

### **SERVICE 3: RETIREMENT SERVICES CUSTOMER SERVICE INITIATIVES**

*Customer Service initiatives from the Retirement Services Division of OPM*

**Overview:** The Retirement Services (RS) Division of OPM provides Federal employees, retirees, and their families with services that offer choice, value, and quality to help maintain the government's position as a competitive employer. RS consists of two programs, Administrative Operations and Retirement Operations, and two offices that report directly to the Associate Director: Quality Assurance, and Special Inquiries. RS has created several customer service initiatives designed to decrease the average processing time for retirement applications, centralize communications from call centers to various departments to increase resolution rates of customer service issues, and utilize technology to reduce dependency on manual paper processes and increase the flow of information between RS and the public

**Key Customer Groups:** The Key customer groups in the Retirement Services Divisions are retired Federal Government employees, their families, and Federal Employers (agencies).

**Challenges:** Key challenges regarding customer service in Retirement Services are high call volumes and wait times, timeliness in case processing due to a backlog of retirement claims plus high numbers of new retirement applications, and current dependencies on manual, paper processes.

#### 1. Increase Feedback from Customers

- Activity 1- RS will utilize technology such as social media to communicate with customer base and educate the public about Retirement Services by the beginning of FY 2012. RS plans to establish a dedicated blog and Twitter Feed for Retirement Services where retirees and the public can access timely updates and new information on RS's services, while providing a forum for the public and RS' customer base to submit questions and feedback. The intended benefit is to create an ongoing conversation between RS' customers, the public, and RS that will improve the quality of customer service.
- Activity 2- RS will conduct a pilot program during Q1 of FY 2012 during Open Season for the Federal Employee Health Benefits Program to allow customers to communicate with RS through an instant messaging/live chat platform. The intended benefit is to analyze the pilot for effectiveness and timeliness with using instant messaging technology to handle customer service inquiries. The analysis of the pilot throughout the rest of FY 2012 will determine if live chat technology can be affordable and effectively used within RS to timely communicate with customers and to better resolve disputes in real-time.

**2. Adopt Best Practices for Improving Customer Experience**

- Activity 1- RS will begin implementation of a Tier 2 Escalation Management Team in the RS Customer Service branch by the end of Q1 of FY 2012 that addresses customer inquiries that cannot be resolved by a frontline representative. The intended benefit of the Tier 2 Escalation Management Team is increase the overall resolution rates of customer service call inquiries while centralizing communication by decreasing call transfers to other RS departments from frontline call center representatives.
- Activity 2- RS will start monthly focus groups by the end of Q1 FY 2012 with high-performing customer service representatives as facilitators to build on best practices. Practices to be discussed will include customer call handling times, call quality and top performance techniques in customer service, effective case analysis and time management. Throughout FY 2012, RS will use the focus groups to design a way to incorporate practices discussed in the focus groups into training new customer service representatives.

**3. Set, Communicate, and Use Customer Service Metrics and Standards**

- Activity 1- By the end of Q2 FY 2012, RS will establish targets and measures for customer service branch performance based on customer service metrics such as average handle time, average speed of answer, grade of service, etc and measure at the manager level. The metrics will be reported back on a weekly basis and the intended benefit is to improve productivity and quality of customer service throughout RS.
- Activity 2- By the end of Q2 FY 2012, RS will design and implement a Performance Management Balanced Scorecard to track targets and metrics in the Customer Services department at the manager level on a monthly basis. The scorecards will address targets and metrics that each manager in the customer service department is accountable for. The scorecards will be incorporated into one on one discussion with managers and their supervisors. Targeted items will be centered around productivity, efficiency, volume, and quality (for example, number of calls handled, average talk time, calls per hour, and quality assurance). Once the scorecards have been fully implemented on the manager level, the scorecard will be analyzed and modified before expanding use of the scorecards to the agent and representative level within the Customer Service branch.

**4. Streamline Agency Processes to Reduce Costs and Accelerate Delivery**

- Activity 1- RS will have over 60% of customer service staff utilize electronic faxing for all outbound faxing to streamline correspondence by the end of Q2 FY 2012. The intended benefit is to allow for instant communication updates and saved paper resources to save costs, as well as provide better tracking features for correspondence with RS's Customer Service branch.
- Activity 2- RS will design and implement a coaching log tool within the Customer Service Branch of RS to provide a documentation and discussion log trail for follow-up and performance or conduct related issues by the end of Q3 FY 2012. The intended benefit is to simplify the current documentation system and eliminate the need for redundant handwritten or verbal recollections while also improving the consistency in tracking and documenting follow-up and conduct issues.



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This plan satisfies the requirements  
of Executive Order 13571