NARA is requesting input on a draft Customer Research Agenda that outlines agency-wide customer research priorities in support of the agency’s Strategic Plan and Action Plan to Advance Customer Experience at NARA for FY 2022 - 2026.

The National Archives’ core values are: collaborate, innovate, learn, act with integrity, and advance diversity. We are developing this Customer Research Agenda to achieve these values with and for the customers we serve, both today and in the future. We want to connect with you, our customers and stakeholders, to improve, design, and deliver equitable and effective services for all.

Our efforts support government-wide initiatives to improve federal customer experience and service equity as represented in the President’s Management Agenda, Executive Order 13985, Executive Order 14058, and the Office of Management and Budget Circular A-11 §280.

Specifically, NARA Strategic Goal 2: Connect with Customers commits the agency to collaborating with, innovating for, and learning from our customers to equip and empower us to act with integrity as we design and deliver world-class services that advance diversity. We can’t do that without hearing from you. Your voices drive our success as an agency.
WHAT THIS IS

This is a draft of NARA’s Customer Research Agenda (CRA). It describes what we need to learn, as an agency, about our customers in order to deliver equitable and effective services for all. Once published, the Customer Research Agenda will fulfill a portion of NARA’s Strategic Goal 2: Connect With Customers, Objective 2.1.

HOW YOU CAN HELP

NARA is requesting your input on its draft Customer Research Agenda. The agenda presents questions that will help us explore ways to achieve service excellence from the customer perspective and fulfill our vision to provide equitable and effective services for all.

We’re asking you to help us refine these questions. We’ll also ask you to help us answer them soon, but for now, we want you to help us understand which of the questions you think are particularly important, or if there are any you think we’re missing. We want your feedback whether you are a current NARA customer, want to be a NARA customer, or don’t even know how to be a NARA customer. You can help by:

1. Reading this draft, and

2. Submitting your feedback to: customer_experience@nara.gov

Thank you for reviewing our draft Customer Research Agenda. We look forward to hearing from you.
WHO ARE OUR CUSTOMERS?

NARA serves individuals, communities, organizations, and other federal agencies. We refer to our customers by many names depending on the service provided; however, we refer to all of these groups collectively as “customers” to maintain consistency with government-wide priorities to improve customer experience across all federal agencies.

Here are a few examples. Our customers as individuals include employees, visitors, researchers, and veterans. A for-profit research entity is a business or corporate customer. Local, state, federal government agencies, or private nonprofits are an example of organizational customers. All are defined as customers given they are interacting with the agency to consume or make use of NARA’s information, products, or services.

NARA’s draft Customer Research Agenda focuses on internal and external customers. It also supports agency-wide efforts to advance service equity by focusing on our diverse prospective customers as well. Prospective customers are individuals, businesses, and organizations, including underrepresented and underserved individuals and communities with an interest, need, or willingness to interact with the agency but have not.
WHAT IS A CUSTOMER RESEARCH AGENDA?

A customer research agenda is a tool that documents ways for NARA to deepen its understanding of its customers and services in order to improve customer experience and help us better coordinate our resources to improve service delivery.

WHY A CUSTOMER RESEARCH AGENDA?

NARA is creating a Customer Research Agenda so we can serve you, our customers, better. We recognize that our services may not currently be meeting your wants, needs, and expectations as well as they could. We want to change that, and we want to be sure that change is driven by your voices.

We want to provide you with the most effective and equitable services we can, whether you are seeking a veteran’s record, researching the history of our country or your family, visiting one of our museums, storing your agency’s records with us, or interacting with us in some other way.

If we aren’t currently serving you, this Agenda is for you as well. We know we aren’t reaching everyone we could be, so the Agenda includes questions that explicitly focus on helping us understand how we can expand access and participation. We want to ensure that our services are available to all, including socially disadvantaged or socially excluded groups we may currently be missing.
WHAT ARE THE CUSTOMER RESEARCH FOCUS AREAS?

The Customer Research Agenda describes three main areas of focus for NARA as we deepen our understanding of our customer wants, needs, and expectations:

- **The overall quality of NARA services**: We want to connect with our customers to better understand how to make our services as valuable and effective as we can.

- **The process of obtaining NARA services**: We want to connect with our customers to better understand how we can make using our services as easy, efficient, and equitable as possible.

- **The people delivering NARA services**: We want to connect with our customers to better understand how we can equip and empower NARA service providers to be as warm, helpful, and competent as possible.
HOW CAN WE EXPAND OR MODERNIZE SERVICE OFFERINGS TO BETTER MEET CUSTOMER WANTS, NEEDS, AND EXPECTATIONS?

Many aspects of serving you well start at the basics: making sure we offer the services you want, how you want them, to the best of our ability. The questions in this section will help us better understand what services you want from NARA, and how you want them.

What do our customers want and need from us as an agency?

We want to more deeply understand what our customers want and need from NARA services. In the coming years, we plan to ask you more directly what services you’d like from us and what versions of those services would be valuable to you. There may even be cases where you can help us actually design services.
How do our customers want and need to interact with us as an agency?

We’ve heard that, at times, customers expect NARA services to function differently than they are designed or intended to. We want to better understand what our customers expect from and assume about NARA services so that we can more effectively prevent and resolve misunderstandings.

How do our customers seek information about how to interact with us as an agency? What are our customers’ communication needs and preferences?

We’ve also heard that some customers currently lack critical information they need to clearly understand NARA services, properly set expectations, or fully articulate service standards. NARA staff have consistently noted that both internal and external customers are not receiving essential information to empower positive, memorable customer experiences.

This does not necessarily mean NARA is not communicating or customers are not listening. It simply means there is a breakdown at one or multiple points of the communication process that is diminishing the quality of information moving from sender to receiver. We want to better understand how you seek, find, and prefer to receive information from and about NARA so that we can communicate with you more effectively.
HOW CAN WE MINIMIZE CUSTOMER EFFORT, IMPROVE SERVICE EFFICIENCY, AND ENHANCE SERVICE EQUITY BY CREATING A SINGLE POINT OF ENTRY FOR ALL NARA SERVICES?

Some NARA services may not be as easy, efficient, and equitable as they could be. Questions in this section will help us understand how we might improve NARA services by creating a streamlined approach to accessing all the agency has to offer.

How easy or difficult is it for our customers to initiate or use NARA services? What are their initiation and use preferences?

We’ve learned that we may be losing some potential customers before they even start using our services because it is too difficult to figure out how to interact with us. Even if customers know they want a specific service NARA offers, they may struggle to find an entry point to begin the process. We want to explore ways to make our services easier to find and start using.
How do our customers currently navigate NARA services? How are they journeying across NARA’s diverse service offerings?

Once customers successfully begin the service process, they may still need to navigate a number of complex steps to get what they are seeking. They may also be required to complete process steps that feel arduous, even when services have relatively straightforward processes. We want to better understand the overall lifetime of interactions our customers have across agency services so that we can streamline customer service journeys.

What are the social determinants of service for NARA’s existing and potential customers? How can we better connect with them where they are?

All NARA customers come from a set of unique personal circumstances that inform their expectations and desires as well as influence what they are able to do and how they may want to interact with the agency. NARA staff shared a number of these circumstances during sessions, both for NARA’s external customers and for themselves as internal customers. They also described some of the many ways that these circumstances serve as “social determinants” of service engagement by shaping customers’ expectations as well as their desire and ability to interact with NARA.

Understanding existing and prospective customers’ social determinants is critical for NARA to eliminate barriers to full and equal participation by all eligible individuals and ensure our services offer fair, just, and impartial treatment. We hope to enhance NARA’s existing efforts to more adequately capture, consider, and address the social determinants of our current, and especially prospective, customers. This work will not only help us make the delivery of NARA services more equitable but will also allow the agency to more effectively reach a wider range of customers.
HOW CAN WE BETTER EQUIP NARA SERVICE REPRESENTATIVES TO BEST SERVE AND SUPPORT CUSTOMERS?

Sometimes we may not have the right people where you need them, when you need them. Questions in this section will help us understand when, where, and how we can position NARA staff to best serve you.

When do our customers need customer service or support? At what point in their journey is this support most critical by way of human interaction or otherwise?

Customers interact with NARA staff members for a variety of reasons across our diverse lines of business. In some cases, they are required to interact with someone as a part of the design of a service. In other cases, they seek customer service or support in navigating a process or for help when something goes wrong. We want to better understand when customers want help from a person as they use our services so that we can position NARA staff effectively.
What do our customers expect NARA service providers to be able to do when they interact with them?

Sometimes, once our customers are able to reach a human, NARA staff may not be able to properly help them because the staff member lacks or misunderstands the information available to them. We want to better understand what our customers expect from NARA’s customer service so we can better design and equip service channels and service providers.

How do our customers prefer to interact with NARA service providers?

NARA currently offers a variety of service channels that offer varying levels of one-on-one human help. However, some NARA service channels may be overburdened or outdated, which creates difficulties for customers trying to reach someone. We want to understand more about how our customers need or prefer to receive human help when they need it.
HOW WE DEVELOPED THE DRAFT QUESTIONS

NARA facilitated Listening Sessions with managers, supervisors, and subject matter experts across the agency’s diverse lines of business. Over 250 staff attended a Listening Session, and 80 percent of them actively contributed input.

We analyzed the data we collected from the Listening Sessions and presented our findings to NARA’s Customer Experience Executive Council, NARA’s CX Champions, and all NARA staff. We integrated feedback from these three groups, combined our data with existing customer experience data collected by program offices, and used all of that information to create the customer research focus areas and questions in this document.

WHAT’S NEXT

Right now, we want your feedback on this draft. Send your comments to customer_experience@nara.gov to help shape our focus and priorities.

After we’ve collected your feedback, NARA’s Customer Experience division will work with agency staff and leadership to finalize the first Customer Research Agenda, which will be published by the end of FY 2024. After that, the Agenda will be updated annually so that we can keep working together to make sure NARA is applying its efforts where they are needed most.
GUIDING PRINCIPLES

We will put the people we serve at the center of our service design and improvement process. The following principles will guide our learning:

- **Empathy:** We want to understand you, our customers, in a deep and real way—to deeply understand what you think and feel—so we can effectively meet you wherever you are as we deliver services.

- **Empowerment:** We will empower our customers to participate in the development and improvement of NARA products and services by participating in our research and directly co-designing services with us.

- **Representativeness:** We want our insights from customers to be as representative as possible; this includes how we think about and recruit participants, the teams we assemble to conduct data collection and analysis, the people we include in the process of designing NARA services/service improvements, and the audiences and processes for sharing information about the sprints.

- **Rigor:** We will use a wide range of methods to learn from our customers and communicate our findings. We will use the most vetted, cutting-edge, and rigorous approaches possible to ensure that we gather and amplify our customers’ voices in effective, reliable, and valid ways.
RELATED EFFORTS

There are several additional efforts underway at NARA that further support customer understanding and customer experience enhancement:

− NARA’s Strategic Plan for FY 2022-2026
− NARA’s Action Plan to Advance Customer Experience
− NARA’s Equity Action Plan