



Action Plan to Advance  
**Customer Experience**

at NARA | FY 2022–2026

JULY 2022

# MESSAGE FROM THE ARCHIVIST

I am pleased to present the 2022–2026 Action Plan to Advance Customer Experience at the National Archives and Records Administration (NARA). The Action Plan continues NARA’s longstanding efforts to provide world-class customer service by addressing the entire customer experience. The Action Plan details agency-wide strategies to better understand customer needs and expectations and modernize services and communications channels.

NARA is fully committed to providing easy, effective, and equitable access to the records in our custody through the broad range of services we provide for our diverse customers—educators, federal agencies, genealogists, researchers, students, veterans, visitors, and more. We know these records play an important role in the lives of the individuals, organizations, and communities interacting with us by telephone, online, and in our research rooms, libraries, and museums. Ensuring NARA has the organizational capacity to consistently deliver the experience our customers expect and to do so with the excellence they deserve is one of my highest priorities.

We developed the Action Plan after assessing our organizational capacity to implement the federal customer experience management model outlined in [OMB Circular A-11 Section 280, \*Managing Customer Experience and Improving Service Delivery\*](#). Throughout this process, we identified several specific opportunities to grow and translated them into [NARA’s Strategic Goal 2: Connect with Customers](#). Additionally, we developed a set of priority actions to focus our efforts on improving core Customer Experience functions including Governance, Customer Understanding, Culture and Organization, Strategy, Service Design and Improvement, and Measurement.

Over the next four years, we will better position the agency to serve our customers by improving organizational accountability, learning more about needs and expectations, designing products and services from a human-centered perspective, and consistently capturing customer feedback. Our ability to meet customers’ expectations when and where they need us is mission critical and key to defining our success.

Sincerely,



DEBRA STEIDEL WALL  
Acting Archivist of the United States

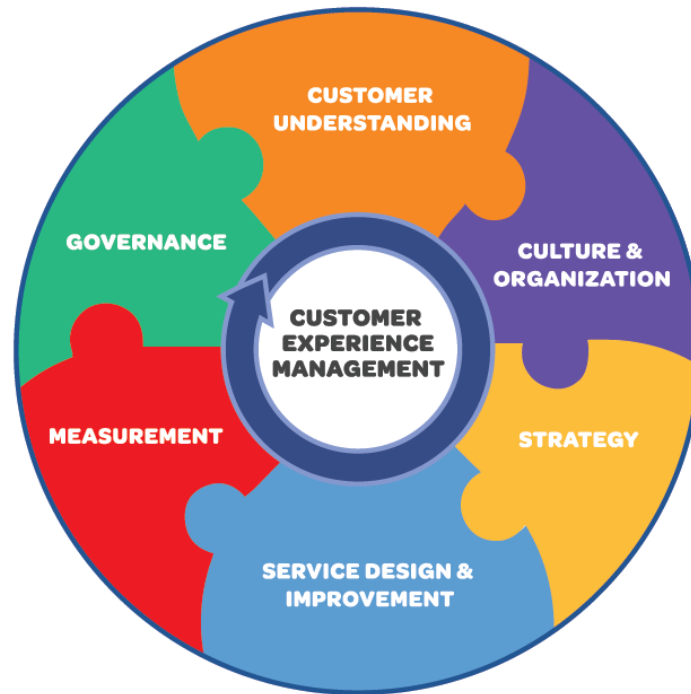
# EXECUTIVE SUMMARY

The National Archives and Records Administration has a long-standing commitment to and record of improving customer experience by listening to its customers and using that information to improve products and services. Over the last 12 years, NARA has transformed itself to become a truly customer-focused organization. NARA is a leader in the government's transition to a digital future, electronic records management, and the principles of Open Government. It has served customers in new and innovative ways, including increasing public access and engagement through the online Catalog and social media; streamlining service to veterans; expanding access to museums, exhibits, and public programs in person and virtually; and establishing civic literacy initiatives. NARA has fostered strong relationships with partner organizations and increased outreach to traditional and new stakeholders. Throughout, the agency puts the customer at the center of all it does.

In July 2019, NARA created a dedicated Customer Experience division and hired its first-ever Chief Customer Experience Officer. In 2020, the Archivist established the Customer Experience Executive Council as the agency-level governing body to guide and oversee the way forward. NARA leadership is dedicated to continually expanding opportunities to connect with customers, cultivating and supporting an organizational culture of service excellence, and identifying ways to modernize operations to improve service delivery.

In 2021, the White House released the [President's Management Agenda](#) to serve as the Administration's roadmap for ensuring an equitable, effective, and accountable federal government that delivers results for all. Delivering excellent federal services and improved customer experience is one of three critical areas for transformation listed in the opening letter from President Biden.

We recognize NARA's role in achieving the Administration's vision, and we continue working to implement the federal customer experience management model published in [OMB Circular A-11 Section 280.9](#). The model features six interconnected core functions—Governance, Customer Understanding, Culture and Organization, Strategy, Service Design and Improvement, and Measurement.



- **Governance:** Institutionalizing Customer Experience (CX) by identifying executives and leaders responsible, organizing supporting resources, defining the processes by which strategic decisions incorporate customer perspective, and aligning CX strategy and activities with business decisions, initiatives and investments within the agency’s broader mission and strategic priorities.
- **Customer Understanding:** Identifying the main occasions that result in the public making use of or interacting with federal services and conducting qualitative and quantitative research across organizational silos to map intra-agency customer journeys, as well as cross-agency journeys where applicable, to build and continually refine a knowledge base of the agency’s customer segments and needs, integrating disparate customer interaction and administrative data.
- **Culture and Organization:** Acquiring and developing the talent required to incorporate and improve CX within agency activities, and empowering all employees to adopt a CX mindset through training, performance measurement, and rewards.
- **Strategy:** CX intent, approach, and standards. Vision, mission, and tactical alignment.
- **Service Design and Improvement:** Adopting a customer-focused approach to the implementation of services, involving and engaging customers in iterative development, leveraging digital technologies and leading practices to deliver more efficient and effective interactions, and sharing lessons learned across government.
- **Measurement:** Defining and instituting CX outcome measures, as well as service operational measures, to ensure accountability for improving service delivery and communicating performance across the organization and to the public, routinely analyzing and making use of this data.

In FY 2020, NARA's Customer Experience Executive Council applied the model to assess organizational capacity to manage customer experience and improve service delivery. Over the course of FY 2021, the Council used the results of the assessment to identify priority actions to advance customer experience management across the agency between FY 2022 and FY 2026. NARA's Action Plan introduces a number of commitments to address the latest and most pressing challenges to achieving world-class services, including:

- Institutionalize customer experience through enterprise-wide policy and standards
- Enhance understanding of customers through ongoing research in multiple customer segments
- Share customer insights to inform human-centered design and improvement of products and services from the customer's perspective
- Implement an enterprise customer experience measurement framework to continuously capture customer feedback
- Equip and empower employees to meet the needs of customers and achieve service excellence

By taking these actions, NARA will increase its organizational capacity to proactively manage customer experience and improve service delivery. The priority actions outlined in this plan will also contribute to achieving [NARA's Strategic Goal 2: Connect with Customers](#) and better position the agency to fulfill [Executive Order 14058 Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government](#), and support agency initiatives related to fulfilling [Executive Order 13985 Advancing Racial Equity and Support for Underserved Communities Through the Federal Government](#).

The President's Management Agenda and NARA's Strategic Plan both prioritize the importance of improving customer experience. How we carry out our mission matters. Our customers should be able to trust and depend on NARA to consistently deliver highly effective and easy to navigate services. We commit to providing world-class customer service across the agency and throughout the entire customer experience.

# MISSION, VISION, AND VALUE STATEMENT

NARA provides a broad range of internal and external services for diverse individuals, organizations, and communities. Ensuring that those who receive services from NARA have an excellent customer experience is mission critical. Customer Experience (CX) is embedded in the agency's mission, vision, and values.

## MISSION STATEMENT

We drive openness, cultivate public participation, and strengthen our nation's democracy through equitable public access to high-value government records.

*Our mission is to provide equitable public access to federal government records in our custody and control. Equitable access to government records strengthens democracy by allowing all Americans of all backgrounds to claim their rights of citizenship, hold their government accountable, and understand their history so they can fully participate in their government.*

## VISION STATEMENT

We will be known for cutting-edge access to extraordinary volumes of government information and unprecedented engagement to bring greater meaning to the many different American experiences.

*We collaborate with other federal agencies, the private sector, the public, and diverse communities to offer information—including records, data, and context—when, where, and how it is needed and transform the American public's relationship with their government. We will lead the archival and information professions to ensure archives thrive in a digital world.*

## CUSTOMER EXPERIENCE VISION STATEMENT

We will deliver equitable and effective services for all.

*Our internal and external customers are at the center of everything we do. We will connect with individuals, organizations, and communities, including those who are underserved and underrepresented, to deepen our understanding of their wants, needs, and expectations of NARA and continuously improve service design and delivery from their perspective.*

## NARA VALUES

NARA's values reflect shared aspirations that support and encourage the agency's long-standing commitment to public service, openness and transparency, and the government records that NARA holds in trust.

<b>Collaborate</b>	Create an open, inclusive work environment that is built on respect, communication, integrity, and collaborative teamwork.
<b>Innovate</b>	Encourage creativity and invest in innovation to build our future.
<b>Learn</b>	Pursue excellence through continuous learning and become smarter all the time about what we know and what we do in service to others.
<b>Act with Integrity</b>	Build trust by acting with honesty, fairness, and transparency.
<b>Advance Diversity</b>	Model diversity, inclusion, equity, and accessibility throughout the agency and expand participation by staff and customers of all backgrounds in NARA programs and decision-making.

## TRANSFORMATIONAL OUTCOMES

NARA's transformational outcomes describe the organizational culture that NARA must build to meet the challenges of the future, improve organizational performance, and better serve the American people.

<b>One NARA</b>	We will work as one NARA, not just as component parts.
<b>Out in Front</b>	We will embrace the primacy of electronic information in all facets of our work and position NARA to lead accordingly.
<b>Agency of Leaders</b>	We will foster a culture of leadership, not just as a position but as the way we all conduct our work.
<b>Great Place to Work</b>	We will transform NARA into a great place to work through trust and empowerment of all of our people, the agency's most vital resource.
<b>Customer-Focused Organization</b>	We will create structures and processes to allow our staff to more effectively meet the needs of our customers.
<b>An Open NARA</b>	We will open our organizational boundaries to learn from others.
<b>A Diverse and Inclusive NARA</b>	We will embrace diversity, equity, inclusion, and accessibility so that our workforce and our customers of all backgrounds are valued and supported.

# ACTION PLAN TO ADVANCE CUSTOMER EXPERIENCE AT NARA (FY 2022–2026)

## GOAL 1: Governance *Organizational accountability*

**Strategy 1.1:** By FY 2024, NARA will institutionalize customer experience management.

**Priority Actions:**

- Develop and implement an enterprise customer experience and service equity policy.
- Integrate customer experience and service equity across all relevant agency policies as appropriate.
- Develop internal resources and guidance to implement best practices for managing customer experience and improving service delivery at the agency and service level.

**Strategy 1.2:** By 2024, NARA will define and implement enterprise customer experience standards.

**Priority Actions:**

- Identify the drivers of customer experience across all services.
- Define the foundational knowledge, skills, and behaviors associated with the drivers of customer experience, and translate them into a set of enterprise customer experience standards.
- Share agency-level customer experience standards with all employees, customers, and stakeholders.

\* Aligned with [Strategic Goal 2: Connect with Customers](#) as it appears in NARA's Strategic Plan FY 2022–2026



## GOAL 2: Customer Understanding

*Learn more about our customers*

**Strategy 2.1:** By FY 2024, NARA will establish an enterprise customer research agenda. \*

**Priority Actions:**

- Conduct a high-level assessment of all major lines of business/services.
- Collaboratively identify agency-level opportunities to improve service.
- Develop and publicly maintain a prioritized list of service improvement projects.

**Strategy 2.2:** By FY 2026, NARA will conduct research engaging with customers from at least four customer segments to enhance our understanding of their wants, needs, expectations, and journeys across the agency.\*

**Priority Actions:**

- Design and conduct customer research projects to improve service delivery.
- Create an internal repository of customer insights and artifacts.
- Share customer insights with staff and stakeholders.

\* Aligned with [Strategic Goal 2: Connect with Customers](#) as it appears in NARA's Strategic Plan FY 2022–2026

## GOAL 3: Service Design and Improvement

*Design world-class products and services*

**Strategy 3.1:** By FY 2024, NARA will adopt a customer-focused approach to service design and delivery. \*

**Priority Actions:**

- Implement an enterprise customer experience framework.
- Increase organizational access to human-centered design expertise.
- Increase customer, employee, and other stakeholder engagement in service design initiatives.

**Strategy 3.2:** By FY 2026, NARA will modernize at least one enterprise service channel to enhance customer experience.

**Priority Actions:**

- Use customer insights and feedback to identify agency-level opportunities to modernize enterprise service channels for improved customer experience.
- Leverage human-centered design methods to support customer-focused service channel modernization.

\* Aligned with [Strategic Goal 2: Connect with Customers](#) as it appears in NARA's Strategic Plan FY 2022–2026

## GOAL 4: Measurement

### *Service excellence from the customer's perspective*

**Strategy 4.1:** By FY 2024, NARA will develop an enterprise customer experience measurement framework. \*

**Priority Actions:**

- Identify enterprise customer experience metrics, including an organizational trust measure.
- Develop agency guidance to support implementation of customer experience metrics at the agency and service level.

**Strategy 4.2:** By FY 2025, NARA will assess and modernize at least two enterprise service channels to consistently collect customer feedback. \*

**Priority Actions:**

- Define requirements for collecting and managing enterprise customer feedback.
- Determine the best approach to support leveraging technology to integrate an enterprise feedback management system across diverse service channels and touchpoints.

**Strategy 4.3:** By FY 2026, NARA will publish enterprise customer experience metrics and improvements on Archives.gov. \*

**Priority Actions:**

- Create an annual communication plan outlining the agency's approach to sharing customer experience metrics and how the agency is using customer feedback to improve service delivery.
- Develop and implement a customer experience data dashboard highlighting key customer experience performance metrics.
- Design and launch a customer experience landing page on Archives.gov to share the dashboard and related customer experience information, announcements, and case studies.

\* Aligned with [Strategic Goal 2: Connect with Customers](#) as it appears in NARA's Strategic Plan FY 2022–2026

## GOAL 5: Culture and Organization

### *Equip and empower employees*

**Strategy 5.1:** By FY 2025, NARA will offer customer-focused professional development and training for staff.

**Priority Actions:**

- Integrate enterprise customer experience standards in agency on-boarding activities.
- Design and deliver a competency-based customer experience training program.

**Strategy 5.2:** By FY 2025, NARA will champion customer-centric recruitment, staffing, and performance measurement.

**Priority Actions:**

- Identify the impact each job function/role at NARA has on customer experience.
- Embed customer experience in existing and future position descriptions and vacancy announcements across the organization.
- Develop strategies and tools to attract customer-focused candidates and assess prospective employees for customer centricity.

**Strategy 5.3:** By FY 2025, NARA will increase recognition and rewards for customer-centric employee accomplishments.

**Priority Actions:**

- Regularly highlight how employees are achieving service excellence or contributing to customer experience initiatives across the agency.
- Compensate employees for customer-centric accomplishments and advancements as part of the agency's formal award structure.

\* Aligned with [Strategic Goal 2: Connect with Customers](#) as it appears in NARA's Strategic Plan FY 2022–2026

