



**CUSTOMER**

**RESEARCH**

**AGENDA**

**2023**

The National Archives and Records Administration (NARA) Customer Research Agenda reflects the agency's commitment to learn more about its customers in three focus areas prior to making improvements to services. NARA's approach to service improvement includes three steps: discover, design, deliver. The Customer Research Agenda is a set of questions that will be used during each discovery phase. The feedback collected from the questions will deepen NARA's understanding of its customers to improve design, service delivery, and overall customer experience.

NARA created a Customer Research Agenda so that it can better serve its customers. NARA recognizes that its services may not currently be meeting customer wants, needs, and expectations as well as they could. NARA wants to change that, and it wants to be sure that change is driven by customer voices.

NARA intends to provide its customers with the most effective and equitable services it can, whether they are seeking a veteran's record, researching the history of their family or our country, visiting one of our museums, storing an agency's records, or interacting with us in some other way.

The Customer Research Agenda also includes questions that explicitly focus on helping the agency understand how it can expand access and participation. NARA wants to ensure that its services are available to all, including socially disadvantaged or socially excluded groups it may currently be missing.

# CUSTOMER RESEARCH FOCUS AREAS

The Customer Research Agenda describes three main focus areas for NARA to use while conducting research to deepen its understanding of customer wants, needs, and expectations:

- **The overall quality of NARA services:** NARA wants to connect with its customers to better understand how to make services as valuable and effective as possible.
- **The process of obtaining NARA services:** NARA wants to connect with its customers to better understand how it can make using services as easy, efficient, and equitable as possible.
- **The people delivering NARA services:** NARA wants to connect with its customers to better understand how it can equip and empower NARA service providers to be as warm, helpful, and competent as possible.



## **OVERALL QUALITY OF NARA SERVICES: EXPAND OR MODERNIZE SERVICE OFFERINGS TO BETTER MEET CUSTOMER WANTS, NEEDS, AND EXPECTATIONS**

*Many aspects of serving customers well start with the basics: making sure NARA offers the services they want and delivers how they want them, to the best of the agency's ability. The questions in this section will help NARA better understand these aspects.*

### **What do NARA customers want and need from the agency?**

NARA seeks to more deeply understand what its customers want and need from its services. In the coming years, NARA plans to ask its customers more directly what services they'd like and what versions of those services would be most valuable. There may even be cases where customers will be able to help design services.

## **How do NARA customers want and need to interact with the agency?**

Some customers expect NARA services to function differently than they are designed or intended. NARA wants to better understand what its customers expect from and assume about NARA services so that it can more effectively prevent and resolve misunderstandings.

## **How do NARA customers seek information about how to interact with the agency? What are NARA customers' communication needs and preferences?**

Some customers currently lack critical information that they need in order to clearly understand NARA services, properly set expectations, or fully articulate service standards. This does not necessarily mean NARA is not communicating or customers are not listening. It simply means that a breakdown at one or multiple points of the communication process is diminishing the quality of information moving from sender to receiver. NARA wants to better understand how customers seek, find, and prefer to receive information from NARA so that it can communicate effectively.



## **PROCESS OF OBTAINING NARA SERVICES: MINIMIZE CUSTOMER EFFORT, IMPROVE SERVICE EFFICIENCY, AND ENHANCE SERVICE EQUITY**

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

### **How easy or difficult is it for NARA customers to initiate or use services? What are customers' initiation and use preferences?**

NARA learned that it may be losing some potential customers before they even start using services because it is too difficult to figure out how to interact with the agency. Even if customers know they want a specific service NARA offers, they may struggle to find an entry point to begin the process. NARA wants to explore ways to make its services easier to find and use.

## **How do NARA customers currently navigate 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. NARA wants to better understand the overall lifetime of interactions customers have across agency services so that it can streamline customer service journeys.

## **What are the social determinants of service for NARA's existing and potential customers? How can NARA 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 can do and how they may want to interact with the agency. 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 that services offer fair, just, and impartial treatment. NARA hopes to enhance existing efforts to capture, consider, and address the social determinants of its current and prospective customers. This work will not only help make the delivery of NARA services more equitable, it will also allow the agency to more effectively reach a wider range of customers.



## **PEOPLE DELIVERING NARA SERVICES: EQUIP NARA SERVICE REPRESENTATIVES TO BEST SERVE AND SUPPORT CUSTOMERS**

*Sometimes NARA may not have the right people where and when customers need them. Questions in this section will help position NARA staff to best serve customers.*

### **When do NARA customers need customer service or support? At what point in the process is human or other support critical?**

Customers interact with NARA staff members for a variety of reasons across diverse lines of business. In some cases, customers are required to interact with staff. In other cases, customers seek support in navigating a process or require help when something goes wrong. NARA wants to better understand when customers want help from staff as they use services so that NARA staff are positioned effectively.



## **What do customers expect NARA service providers to be capable of when they interact with them?**

Sometimes NARA staff may not be able to properly help customers because staff lack or misunderstand information available to them. NARA wants to better understand what customers expect so it can better design service channels and equip service providers.

## **How do NARA customers prefer to interact with service providers and customer service representatives?**

NARA currently offers a variety of service channels at varying levels of personal interaction. However, some NARA service channels may be overburdened or outdated, which creates difficulties for customers trying to reach a service provider or customer service representative. NARA wants to understand more about its customers' needs and preferences when receiving help through personal interactions.

## RELATED EFFORTS

NARA's 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, innovating, and learning from our customers to equip and empower its staff to act with integrity as they design and deliver world-class services that advance diversity.

Several additional efforts underway at NARA 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](#)



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