Customer Journey Map

Engaging with the Financial Management Quality Service Management Office

BACKGROUND
Definition of this map and how to use it

What is a Journey Map?

A journey map helps to visually tell the story of the customer experience while walking through a process.

This Map Shows:

How an agency customer can engage with the FM QSMO to assess modernization needs and leverage the FM Marketplace.

Use This Map To:

- Understand the end-to-end process for leveraging the FM Marketplace
- Discover when to reach out for support from the FM QSMO
- Describe the FM QSMO process to your agency's FM, Procurement, and CIO teams

STAGES
Phases of the FM QSMO Customer Journey

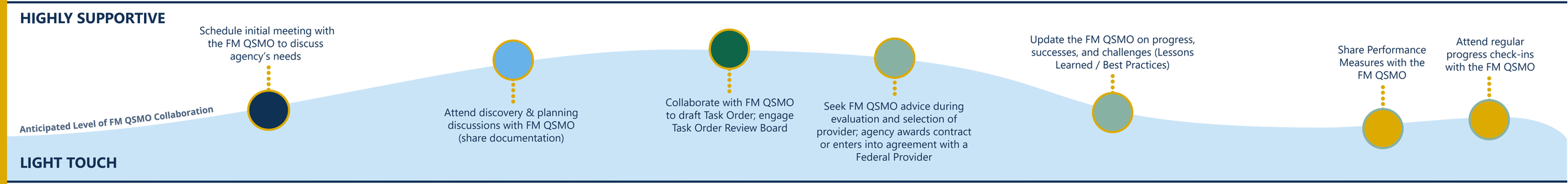
GOALS
Overall purpose of the stage, customers will accomplish this before moving to next stage

STEPS
Steps taken by the customer throughout the FM modernization journey

1 RESEARCH	2 PREPARE	3 CHOOSE	4 PLAN	5 OPERATE
Research your agency's need and available budget	**Prepare planning documentation**	**Choose which product, service or solution best meets your agency's needs**	**Finalize & execute implementation plan**	**Implement, operate and maintain new solution; conduct continuous improvement**
Assess your agency's FM needs and define your goals	Find, sort and synthesize the data you've researched into planning documentation	Review agency requirements against Marketplace solutions	Onboard the provider / gain implementation support	Configure the software, product, or solution
Research the quality and capabilities of modernized FM systems, products & services	Create documentation required (e.g., business case for investment See M3 here	Assess which FM Marketplace solutions best meets agency's needs	Finalize the implementation plan with provider(s)	Implement solution & decommission legacy systems, if needed
Conduct budget and investment research pertaining to your agency's needs / vision See IPG here	Establish budget for modernization	Submit Task Order for FM QSMO review* *N/A if aiming for a Federal provider and creating an IAA	Create target concept of operations	Implement Operations & Maintenance (O&M) Plan
		Solicit and award the contract, or enter into an agreement with a Federal provider		Review performance against expected benefits, share experiences & issues with FM QSMO
				Conduct continuous improvement

TOUCHPOINTS
Meetings and information sharing between the FM QSMO and customers

Touchpoints between customers and the FM QSMO may range in support level from highly supportive to light touch interactions



For more information, please visit the FM QSMO website

For any questions, please contact us at fmqsmo@fiscal.treasury.gov

Bureau of the Fiscal Service

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