

Customer Journey Map | Engaging with the Financial Management Quality Service Management Office

Background:

The Department of the Treasury is the Office of Management and Budget (OMB) designated Quality Service Management Office (QSMO) for core financial management.

The FM QSMO is helping agencies by:

- Managing a marketplace of solutions and services to help meet agency financial management needs
- Working to standardize and streamline common requirements to give agencies the flexibility to invest in unique mission-oriented business needs
- Being a valued partner in planning and supporting financial system modernization journeys

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 their needs and acquire an FM solution or service.

Use This Map To:

- Understand the end-to-end process for acquiring a solution or service from the FM QSMO 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

Contact Us:

Visit our website at www.fiscal.treasury.gov/FMQSMO

Request a consultation at www.fiscal.treasury.gov/FMQSMO/contact.html

If you have feedback about this, share it with us at FMQSMO@fiscal.treasury.gov

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 journey of acquiring an FM QSMO solution or service

TOUCH POINTS

Meetings and information sharing between the FM QSMO and customers

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

SUPPORTING TOOLS

Guidance developed by the FM QSMO to assist customers

CUSTOMER INSIGHTS

Input and feedback from FM QSMO customers



HIGHLY SUPPORTIVE

Schedule initial meeting with the FM QSMO to discuss agency's needs

Attend discovery & planning discussions with FM QSMO (share documentation)

Collaborate with FM QSMO to draft Task Order; engage Task Order Review Board

Seek FM QSMO advice during evaluation and selection of provider; agency awards contract or enters into agreement with a Federal Provider

Update the FM QSMO on progress, successes, and challenges (Lessons Learned / Best Practices)

Share Performance Measures with the FM QSMO

Attend regular progress check-ins with the FM QSMO

LIGHT TOUCH

Watch an Overview of the FM QSMO

Read How Your Agency Can Get Started

Watch FMCF 101 Introductory Video

View FMCF 101 Training

Take the FM QSMO Marketplace Readiness Assessment

Learn How to Obtain Offerings from the Marketplace

Visit Marketplace Acquisition Hub

See Marketplace Offerings at a Glance

Visit the FM QSMO Marketplace Catalog

View FM QSMO Best Practices & Lessons Learned

As a customer agency, I need the FM QSMO to provide structure and support, but I want to retain responsibility and ownership of the modernization process.

I need a user-centric and navigable catalog of solutions and services to help my agency evaluate FM QSMO offerings and services.

I need the FM QSMO to be my valued partner and guide me to the marketplace solutions and services that meet my agency's needs.

I need a set of guidance and guardrails, like processes, templates, and examples to help me navigate obtaining marketplace solutions and services.

I look to the FM QSMO to provide marketplace solutions and services that meet baseline federal requirements, while I define my agency-specific requirements.

I need the FM QSMO to help alleviate the pressure of implementation and testing by providing time-saving and quality processes.

I want to collaborate with agencies, providers and the FM QSMO to mature marketplace offerings, ensuring standards, agency needs and best practices are considered.