

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

CHOOSE

Choose which product, service or solution

best meets your agency's needs

creating an IAA

Work collaboratively with

FM QSMO to draft Task

Order; engage Task Order

Review Board

Post Task Orde

Onboard the

provider / gain implementation

Seek FM QSMO advice during

evaluation and selection of

provider; agency awards contract

or enters into agreement with a

Federal Provider

Background:

The Department of the Treasury was designated by the Office of Management and Budget as the Quality Service Management Office (QSMO) for core financial management. The FM QSMO is helping agencies by:

- Creating 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 missionoriented 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 OSMO
- Describe the FM QSMO process to your agency's FM, Procurement, and CIO teams

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

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



Phases of the FM QSMO Customer Journey

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

Steps taken by the customer throughout the journey of acquiring an FM QSMO solution or

POINTS

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

Input and feedback from FM QSMO customers

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

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

<u>Visit</u>

I look to the FM QSMO to provide marketplace solutions and agency-specific requirements.

PLAN

Finalize & execute

implementation plan

Finalize the

implementation

Create target

concept of

Discuss progress with

FM QSMO for feedback

(Lessons Learned / Best

Practices)

<u>Visit</u>

alleviate the pressure of processes.

implementation and testing by

I need the FM QSMO to help providing time-saving and quality

OPERATE

Implement, operate and maintain new solution;

conduct continuous improvement

with FM QSM(

Performance

Measures discusson

with the FM QSMO

Regular progress

check-ins with the

FM QSMO

<u>Visit</u>

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

STAGES

GOALS

STEPS

TOUCH

Meetings and

the FM QSMO to assist

SUPPORTING TOOLS Guidance developed by

View an Overview of the FM QSMO **Read How Your Agency Can Get Started with the FM QSMO Visit FMCF 101 Training**

Anticipated Level of FM QSMO Collaboration

ssess your agency

olutions & services

and define your

HIGHLY SUPPORTIVE

LIGHT TOUCH

RESEARCH

Research your agency's need

and available budget

Research the quality

of modernized FM

ystems, products &

Visit the FM QSMO Marketplace Catalog

Conduct budget

and investment

esearch pertaining

to your agency's

See IPG here

Initial meeting with the

FM QSMO to discuss

agency's needs

CUSTOMER INSIGHTS



Visit FM QSMO Best Practices & Lessons Learned



Take the FM QSMO Marketplace Readiness Assessment

PREPARE

Prepare planning

documentation

Create

documentatio

required (e.g.

See M3 here

Establish

budget for

Discovery & Planning

discussions with

FM QSMO (share

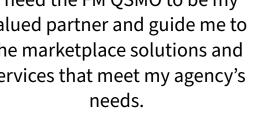
documentation)

<u>View</u>

<u>Open</u> 🗟

<u>Visit</u>

Find, sort and





Read the Agency Acquisition Guide





