

# **Patent Public Advisory Committee Quarterly Meeting**

## **Introduction to Customer Experience**

Chelsea D'Angona – Patents Customer Experience Administrator  
May 2, 2019

UNITED STATES  
PATENT AND TRADEMARK OFFICE



# Customer experience (CX) overview

By the end of this introductory briefing, participants should have an understanding of the following:

- CX key terms
- Patents CX background and context
- Value of customer-focus to organization and individuals
- Relationship between employee and customer success
- Ways contribute to excellent Patents customer experiences

## Key terms

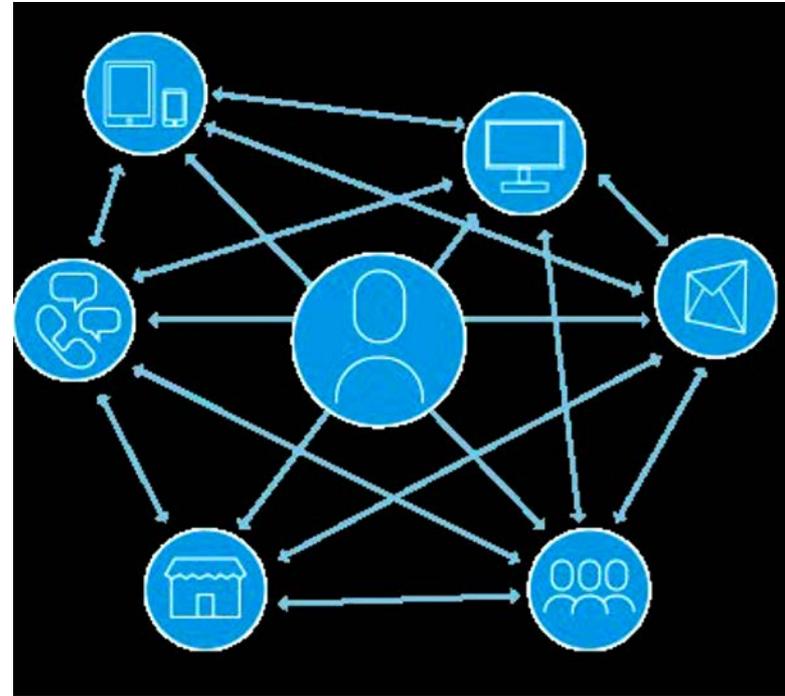
Background

Impacts

External drivers

# What is customer experience (CX)?

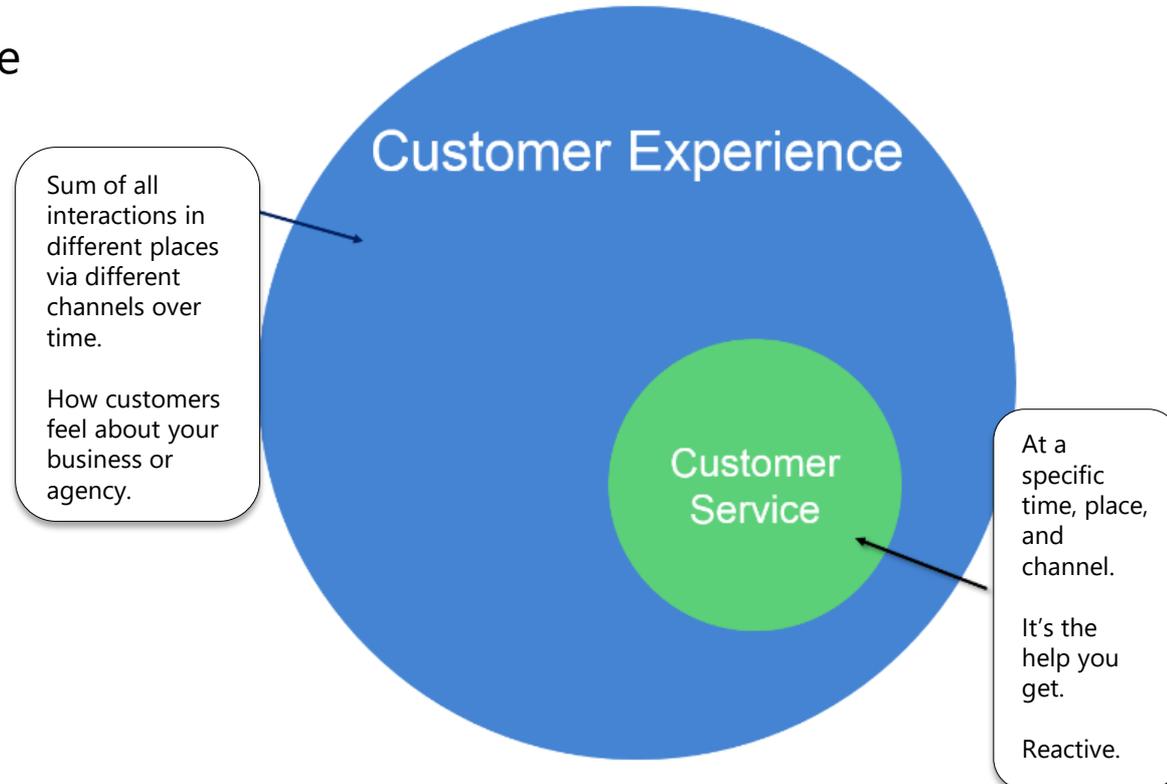
Customer experience encompasses what a customer **thinks, feels, and does** during interactions with an organization across multiple touchpoints and channels throughout the duration of the relationship with the organization.



# How does **CX** differ from customer service?

Customer service is **one** of the four pillars of customer experience, which are:

- 1) Product
- 2) Value
- 3) **Service**
- 4) Brand



# Who are Patents' customers?

- Inventors
- Entrepreneurs
- Small business owners
- Corporations
- Attorneys
- Paralegals
- Other IP professionals

# Who are Patents' users?

- Employees and internal groups
- Other federal agencies
- Academics
- Researchers
- Economists
- Journalists
- Third parties



Key terms

**Background**

Impacts

External drivers

# 2016 CX study

## Background

- In 2016, USPTO engaged Deloitte Consulting to perform a current state assessment, create a future state vision, and provide recommendations for exceptional customer experience.

## Summary of Results

- Segmented Patents' customers based on unique behaviors, goals, and capabilities
  - Defined customer personas for each segment
- Visualized Patents' customers' experiences in the form of a journey map
- Identified seven major pain points along customers' journeys

# CX strategic links

- Department of Commerce (DOC) includes CX in its strategic goal five, “Deliver Customer-Centric Service Excellence”
  - “Improve the customer experience” falls under Strategic Objective 5.1 – Engage Commerce Employees
- The U.S. Patent and Trademark Office (USPTO) includes CX in goal one, “Optimize Patent and Trademark Quality and Timeliness”
  - “Enhance Patent Customer Experience” is the first initiative listed under Patents Objective 3 – Foster Innovation through Business Effectiveness

# USPTO CX vision

By 2022, the USPTO strives to be a leader in enhancing its customers' experiences in areas such as value, good service, quality, reliability, consistency, and ease of doing business.

## Key aspects of providing a good customer experience include:

- Bringing customers to the center of all that we do
- Making every customer touchpoint consistent, clear, and intuitive
- Enhancing the customers' communication with the agency
- Encouraging employees to work together to amplify impact on customer-experience efforts
- Measuring and tracking customer metrics, engagement, and insights
- Partnering to provide services outside core capabilities

CUSTOMER  
CUSTOMER  
CUSTOMER

# Patents CX vision

The Patent Office is committed to being a **customer-oriented** organization that applies customer and user feedback to **continuously improve** its **processes, products, tools, and communications** in order to deliver an **outstanding** customer experience.

# Patents CX mission

Patents will deliver a **consistent, clear, and intuitive** customer experience that contributes to USPTO's mission of being the global leader in intellectual property (IP).



# Patents CX strategic goals

1. Bring customers to the center of all we do.
2. Make every customer touchpoint consistent, clear, and intuitive.
3. Enhance customers' communication with the agency.
4. Measure and track customer metrics, engagement, and insights.
5. Work together across Patents to maximize customer experience efforts and demonstrate results.
6. Partner with stakeholders to provide services outside core capabilities in order to further the mission.

Key terms

Background

**Impacts**

External drivers

# Why do **customer** and **employee** experience matter?

## Customer focus



Increased mission achievement



Increased likelihood to purchase  
(a.k.a., apply for patent)



Increased customer loyalty



Deeper employee engagement

## Employee focus



Increased likelihood to stay at the organization



Increased likelihood to be productive at work



Greater likelihood to recommend products / services



Greater likelihood to recommend a job or organization



## Sources:

- 1) PwC Consumer Intelligence Series – Customer Experience Report – [www.pwc.com/futureofcx](http://www.pwc.com/futureofcx)
- 2) McKinsey 2018 Public Sector Benchmark Survey, Global results from Canada, U.S., Mexico, U.K, France, and Germany
- 3) Forrester Report – The Employee Experience Imperative (Dec, 2017)

# What drives great CX in the U.S.?

In 2018, U.S. public sector customers identified the following things as the top drivers of great CX (by order of importance):

1. Simplicity
2. Consistency and reliability
3. Service transparency
4. Speed
5. Clarity of instruction
6. Employee professionalism
7. Employee responsiveness

Key terms

Background

Impacts

**External drivers**

# The CX improvement mandate

## Executive Branch<sup>1</sup>



OMB Circular A-11

## Legislative Branch<sup>2</sup>

H. R. 5759

One Hundred fifteenth Congress  
of the  
United States of America

AT THE SECOND SESSION

*Begun and held at the City of Washington on Wednesday,  
the third day of January, two thousand and eighteen*

An Act

To improve executive agency digital services, and for other purposes.

*Be it enacted by the Senate and House of Representatives of  
the United States of America in Congress assembled,*

SECTION 1. SHORT TITLE.

This Act may be cited as the "21st Century Integrated Digital Experience Act" or the "21st Century IDEA".

SEC. 2. DEFINITIONS.

Sources:

- 1) [https://www.performance.gov/PMA/Presidents\\_Management\\_Agenda.pdf](https://www.performance.gov/PMA/Presidents_Management_Agenda.pdf)
- 2) <https://www.congress.gov/bill/115th-congress/house-bill/5759/text>

# What it means for Patents

## Required to:

- Conduct a CX program maturity self-assessment and submit results to OMB annually.
- Continuously collect customer feedback following transactions using a set of seven government-wide topics that include:
  - (1) Satisfaction; (2) Confidence/Trust; (3) Quality; (4) Ease/Simplicity; (5) Efficiency/Speed; (6) Equity/Transparency; and (7) Employee Helpfulness
- Submit those results to OMB quarterly for publication in dashboard form.
- Update a CX Action Plan annually and provide a copy to OMB for publication.

