

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

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 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

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

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



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

Initial meeting with the FM QSMO to discuss agency's needs

Discovery & Planning discussions with FM QSMO (share documentation)

Work collaboratively 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

Discuss progress with FM QSMO for feedback (Lessons Learned / Best Practices)

Performance Measures discussion with the FM QSMO

Regular progress check-ins with the FM QSMO

Anticipated Level of FM QSMO Collaboration

LIGHT TOUCH

[Visit the FM QSMO Marketplace Catalog](#) [Visit](#)

[View an Overview of the FM QSMO](#) [View](#)

[Read How Your Agency Can Get Started with the FM QSMO](#) [Open](#)

[Visit FMCF 101 Training](#) [Visit](#)

[Take the FM QSMO Marketplace Readiness Assessment](#) [Visit](#)

[Read the Agency Acquisition Guide](#) [Open](#)

[Visit FM QSMO Best Practices & Lessons Learned](#) [Visit](#)

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.