# Overview Guide: How to Hire a CX Strategist
## *Cross-Government Hiring: Customer Experience Strategist, GS-0301-13*

> ### This guide is designed to provide the following for HISP POCs:
> 1) **An overview of this Federal governmentwide recruitment effort**
> 2) **What agencies are required to do to hire from the cross-government certificate**
> 3) **What steps the Hiring Manager needs to take to hire from this cert**

*\*\*Please note: This guide is designed to provide a high-level overview of this process, but each agency may have different approaches and specific steps not articulated here. Questions should be raised with your agency HR points of contact to ensure you are following the appropriate protocols.\*\**

## 1. Overview of the Federal governmentwide recruitment for GS-13 Customer Experience Strategists

The OPM Hiring Experience Group (HX) partnered with OPM Human Resources Solutions to support a Federal governmentwide recruitment for Customer Experience Strategists, GS-0301-13. The job opportunity announcement (JOA) is included at the following link for your reference, and this JOA may be a useful tool for updating and/or developing a position description (PD) for using the hire from this cert: CGA-DE-12339419-24-MS (www.usajobs.gov/job/781968300)

### *HOW WERE APPLICANTS DETERMINED TO BE QUALIFIED?*

Applicants were assessed through a training-and-experience-based application questionnaire, competency- based online assessment (USA Hire), and structured resume review by Federal subject matter experts (SMEs), for the required specialized experience, otherwise noted as minimum qualifications. The minimum qualifications (specialized experience) and competencies listed below were included in the JOA (also shown in the link above).

**Minimum Qualifications (Specialized Experience):**
1. Leading customer experience projects that involve multidisciplinary teams and multiple research methods (e.g., qualitative and quantitative);
2. Solving problems or improving processes that cross organizational boundaries (e.g., department, group) using a human-centered design approach that includes multiple phases of the design process (e.g., research, synthesis, or prototyping) and multiple stakeholders;
3. Creating design artifacts (e.g., journey maps, personas, wireframes, storyboards) using an iterative process of incorporating customer perspectives to improve product or service delivery; an
4. Developing and facilitating workshops or other interactive sessions using inclusive methods and practices (e.g., interviews, co-design) to build buy-in and gather experience insights among customers/stakeholders.

**Competencies** (Technical and Nontechnical/General from USA Hire):

| | |
|---|---|
| ▪ Customer Experience Measurement | ▪ Integrity/Honesty |
| ▪ Human-Centered Design Practices | ▪ Interpersonal Skills |
| ▪ Stakeholder Engagement | ▪ Reading Comprehension |
| ▪ Attention to Detail | ▪ Reasoning |
| ▪ Decision Making | ▪ Self-Management |
| ▪ Flexibility | ▪ Teamwork |

## *ONCE DETERMINED TO BE QUALIFIED, WHERE DO APPLICANTS GO?*

Once applicants are determined to be qualified by SMEs, they move into the next stage where agencies are able to review resumes and select candidates for interviewing. The following terms, tools, and roles are good to know to understand what happens after applicants are determined to be qualified.

### *ROLES AND TERMS*

- **Agency Shared Certificate Coordinator:** All agencies have at least one Shared Certificate Coordinator that has completed the necessary requirements (e.g., certification, role, training). Agency Shared Certificate Coordinators are responsible for submitting a Talent Pool request through the ATP. OPM maintains a list of Agency Shared Certificate Coordinators; please email CrossGovHiring@opm.gov to access this list.
- **Hiring Manager:** Agency program staff (e.g., HISP lead) that has a vacancy to hire a CX Strategist
- **HR Recruitment and Staffing Specialist:** The agency HR partners you work with to complete a hiring action.
- **Position Description (PD):** The agency document that enables the hiring of a candidate. In order to hire using a PD, it must be classified by the time a selection is made for a final candidate. PDs can be tailored according to agency needs.
- **Selecting Official Interview (Fit Interview):** The interview conducted with candidate(s) by **Hiring Manager** or relevant stakeholder(s) to ensure that the candidate is a good fit for the position.
- **Talent Pool:** A talent pool is a list of qualified candidates who are already on an approved shared hiring certificate (cert) and ready to be hired. These candidates have opted-in to share their Federal application with Federal agencies who are hiring for similar positions. You can use talent pools to find candidates that fit your hiring need. Anyone interested in reviewing can use the portal, and it is recommended to have your account established *prior* to the certificate release.
- **USAJOBS Agency Talent Portal (ATP):** The system used to review, select, interview, and select candidates within a talent pool. You must have a USAJOBS Agency Talent Portal (ATP) account to participate in governmentwide hiring actions and access a talent pool. To request an ATP account, please contact your agency administrator or email recruiter-help@usajobs.gov and indicate your role: Shared Certificate Coordinator or Agency User (Hiring Manager, HR Specialist, recruiters).

### *RELEVANT FORMS*

- **Talent Pool Request Form:** the first of two forms that must be completed by the **Agency Shared Certificate Coordinators,** working with a **HR Staff (who will work with the Hiring Manager)**, and submitted via ATP/emailed to CrossGovHiring@opm.gov (see Appendix A for example form). Completing this form is required to access the Talent Pool. To complete the form, you must:
  - Complete the Specialized Experience and Competency Verification Form (see definition below)
  - Ensure that separate, duplicative agency examining is not being conducted for the same position, grade, and duty location
  - Verify that your agency's category rating policy is in place
  - Send the classified position description (PD) to CrossGovHiring@opm.gov
- **Specialized Experience and Competency Verification:** The second of two forms that must be completed by the **Agency Shared Certificate Coordinators,** working with a **HR Staff (who will work with the Hiring Manager)**, and submitted via ATP/emailed to CrossGovHiring@opm.gov. This form certifies that the specialized experience and competencies listed are important for successful job performance and required upon entry in the position the agency is filling (see Appendix B for example form).

## 2. What agencies are required to do to hire from the cross-government certificate

### *PHASE 1: WORKING WITH YOUR AGENCY SHARED CERTIFICATE COORDINATOR TO ACCESS THE TALENT POOL*

- **Step 1**: **Hiring Manager** (e.g., HISP staff) and their HR staff (e.g., recruiter, HR specialist) work together to:
  - Identify their agency-specific classified position description (PD) in the 0301 job series, GS-13 (or equivalent). If no classified PD can be found within the agency, you can develop a new PD.
    - *Note:* Your PD does not need to be classified for you to receive access to the Talent Pool and begin reviewing resumes to interview candidates, but your PD must be classified by the time you make a selection of a final candidate to extend a job offer.
    - HR staff can also request copies of sample GS-0301-13, Customer Experience Strategist PDs for use in classification, from [CrossGovHiring@opm.gov](mailto:CrossGovHiring@opm.gov)
  - If an existing PD is identified, verify/update the PD so that the OPM specialized experience and competencies are appropriate for qualification; if it is determined that no existing classified PD exists and a new PD will need to be classified, existing PDs can also be modified/customized for agency use.
- **Step 2**: **HR Staff** notifies **Agency Shared Certificate Coordinator** of the **Hiring Manager's** interest in hiring from the shared certification, and the **Agency Shared Certificate Coordinator** requests access to the certificate on ATP.
- **Step 3**: **Agency Shared Certificate Coordinator** works with the HR Staff and **Hiring Manager** to verify that the hiring information is correct and to submit a Talent Pool Request Form through the USAJOBS ATP; a copy should also be emailed to [CrossGovHiring@opm.gov](mailto:CrossGovHiring@opm.gov).
  - **Hiring Manager** and **HR Staff** should ensure that the information on the Talent Pool Request Form is accurate to ensure that the shared cert coordinator has all the information that they need for submission.
  - Complete the attached *Specialized Experience and Competency Verification Form* (Form B.)
  - To see qualified candidates, you must have a funded FTE slot to fill from this Talent Pool.

### *Phase 2: Working with HR Staff to Interview and Hire Candidates*

- **Step 4**: **Hiring Manager(s)** contacts qualified candidates to schedule and complete the selecting official interviews.
- **Step 5**. Once the **Hiring Manager** elects to make a selection (i.e., extend a formal offer to a candidate) from the Talent Pool within ATP, they notify their HR Staff; the HR staff then sends an email to [CrossGovHiring@opm.gov](mailto:CrossGovHiring@opm.gov) to notify them of the desire to make a selection.
  - **NOTE:** agency selection and hiring rules and policies should be followed when reviewing the Talent Pool and making selections. Agency unique hiring practices and the standard HR process will need to be considered as part of this recruitment.
- **Step 6:** CrossGovHiring individual releases applicant selection material in USA Staffing to allow the HR Staff and **Hiring Manager** to gain access to the candidate's application material for case file records.
- **Step 7**. OPM will verify selection(s) made by the **Hiring Manager** (i.e., check that we have the agency's classified PD and candidates haven't withdrawn) and confirm with agency HR Staff via email.
- **Step 8:** **Hiring Manager** works with HR Staff to make tentative job offers and onboard selectees using agency standard HR pre-employment process. OPM must be informed by agency HR Staff of the result of the tentative offer (i.e., acceptance or declination). Once selections are approved, agency HR staff will need to consider:

- o OPM is unable to flow selectees to your agency USA Staffing Onboarding system, so agency HR staff will need to manually build a New Hire record.
  https://help.usastaffing.gov/USAS/index.php?title=Creating_a_new_hire_request
- o USA Staffing customers may need to switch their tenants to find the recruitment:
  https://help.usastaffing.gov/HiringManager/index.php?title=Switching_between_tenants
- o Following agency onboarding procedures. Your HR is responsible for sending offers, requesting SF-75 & confirming Federal employment (if applicable), setting pay, etc.
- o Use agency policy for # of days the selectee has to accept an offer; include the due date in the offer.
- o OPM tracks tentative offer acceptances / final offer acceptance/ onboarding date/ declinations. Email CrossGovHiring@opm.gov regularly with updates. Before a candidate is *Withdrawn from Consideration*, OPM needs to know if they declined your agency *only* / withdrew from *all* agencies. Forward any documentation to CrossGovHiring@opm.gov.

## 3. What steps the Hiring Manager needs to take to hire from this cert

- ➢ **Make sure you have an active USAJOBS Agency Talent Portal Account**. You must have a USAJOBS Agency Talent Portal (ATP) account for pooled hiring access. *To request an ATP account, please contact your agency administrator or email recruiter-help@usajobs.gov and indicate your role: Shared Certificate Coordinator or Agency User (Hiring Manager, HR Specialist, Recruiters).*
- ➢ **Reach out to your HR staff/talent team partner** to align on steps, requirements, and timelines; review the forms included in this document to make sure you are familiar with the required information.
- ➢ **Confirm with your HR staff/talent team partner if your agency has a classified PD that can be used for this hiring action**
- ➢ **Work with your Agency Shared Certification Coordinator and HR staff/talent team partner to confirm details on the required forms are correct**
- ➢ **Begin reviewing resumes** once you get access to ATP
- ➢ Determine your plan for **interviewing for fit**
- ➢ **Once you have selected a candidate, reach out to your HR Staff** to contact OPM to validate your selection
  - o Once OPM validates your selection: move forward on hiring!

**Form A. Talent Pool Request Form**

*HR Official—**Have you…?: (Please *X* the boxes.)***

☐ Received the completed Specialized Experience and Competency Verification Form certifying the experience and competencies assessed are appropriate for the position?

☐ Verified agency's category rating policy is in place?

☐ Completed **ALL** required information below? (We must collect for audit purposes.)

**POSITION INFORMATION**

**Title:** _____

**Series:** 0301          **Grade:** GS-13 or equivalent

**Duty Location(s):** _

**Appointment Type:** Competitive Service, Permanent

**Reemployment Priority List (RPL) Cleared?:**     ☐ **Yes**

There is a hiring freeze in effect, per the President's action.
To proceed with accessing an existing Talent Pool/certificate of eligibles, you must personally verify that the position you are trying to fill is exempt from the hiring freeze.
To confirm, please select one of the options below and then check "I confirm." If you are unsure if your agency has an exemption to fill this position, you must contact your supervisor for clarification and approval before moving forward.
   ☐ This certificate will be used to fill a position directly related to immigration enforcement, national security, or public safety.
   ☐ This certificate will be used to fill a position directly related to the provisioning of Social Security, Medicare, or Veterans' benefits.
   ☐ This certificate will be used to fill a position exempted by the Acting Director, Office of Personnel Management, explicitly and in writing.
Contact tracking@opm.gov with any questions.
☐ I confirm  /  ☐ I cannot confirm

**REQUESTING AGENCY INFORMATION – HR OFFICIAL**

**Agency:**_____

**Name:**_____

**Email and Phone:**_____

**Signature and Date:**_____

*If your agency HR, hiring managers, selecting officials, or others involved in the hiring process, don't already have USAJOBS Agency Talent Portal accounts as described on the previous page, please email [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov) to request their Agency User access, so they may view Talent Pools shared with your agency.*

## Form B. Specialized Experience and Competency Verification Form

Job opportunity announcement: CGA-DE-12339419-24-MS ([www.usajobs.gov/job/781968300](www.usajobs.gov/job/781968300))

Completion of this form is mandatory for agencies that are interested in reviewing certificates resulting from the action and potentially making selections. This form should be completed and placed within the agency case file for the hiring action. Failure to complete this form, or otherwise participating in the hiring action without sufficient verification support, places the agency at significant risk for hiring unqualified candidates.

OPM makes no assertion as to the appropriateness of the use of the referenced job opportunity announcement (JOA) with or without the completion of this form. The agency bears sole responsibility as to the appropriateness of the use of the JOA for filling vacancies within the agency.

The specialized experience and competencies that were identified as important and required at entry for the position referenced above are provided on the following pages. To participate in this cross-government recruitment, these specialized experience and competencies **must** be important and required at entry for the referenced position in your agency. Use this form and the instructions provided to complete the verification process.

**Specialized Experience Verification:** Review the specialized experience statements in the following table. For each specialized experience, indicate if the experience is important for successful performance in the targeted position and if the experience is needed upon entry. By checking *Yes* in the second and third columns, you certify the specialized experience is important and needed upon entry for the targeted position. To participate in this recruitment, each specialized experience listed below must be both important and needed upon entry for the position referenced above.

| Specialized Experience Statement | Experience is Important for Successful Performance | Experience is Needed Upon Entry |
|---|---|---|
| Leading customer experience projects that involve multidisciplinary teams and multiple research methods (e.g., qualitative and quantitative). | Yes ☐  No ☐ | Yes ☐  No ☐ |
| Solving problems or improving processes that cross organizational boundaries (e.g., department, group) using a human-centered design approach that includes multiple phases of the design process (e.g., research, synthesis, or prototyping) and multiple stakeholders. | Yes ☐  No ☐ | Yes ☐  No ☐ |
| Creating design artifacts (e.g., journey maps, personas, wireframes, storyboards) using an iterative process of incorporating customer perspectives to improve product or service delivery. | Yes ☐  No ☐ | Yes ☐  No ☐ |
| Developing and facilitating workshops or other interactive sessions using inclusive methods and practices (e.g., interviews, co-design) to build buy-in and gather experience insights among customers/stakeholders. | Yes ☐  No ☐ | Yes ☐  No ☐ |

**Competency Verification:** Review the competency name and definition in the following table. For each competency, indicate if the competency is important for successful performance in the position and if the competency is needed upon entry. By checking *Yes* in the second and third columns, you certify the competency is both important for successful performance and needed upon entry for the position. To participate in this recruitment, all competencies listed must be both important for successful performance and needed upon entry for the position the agency is planning to fill.

| Competency Name and Definition | Competency is Important for Successful Performance | Competency is Needed Upon Entry |
|---|---|---|
| Customer Experience Measurement: Knowledge of the methods and tools for designing protocols and collecting and analyzing information to evaluate customer experiences for users with all abilities, including qualitative and quantitative data, lab-based user testing, remote testing, and ethnography. | Yes ☐  No ☐ | Yes ☐  No ☐ |
| Human-Centered Design Practices: Knowledge of practices, methods, and design techniques that focus on human-centered solutions to problems and processes through a system-wide view, including service design, content design, product design, usability, and accessibility (e.g., 508 standards). | Yes ☐  No ☐ | Yes ☐  No ☐ |
| Stakeholder Engagement: Knowledge of the concepts and practices used to cultivate relationships with internal and external stakeholders and enable successful cooperation across all levels of an organization, including executive leadership. | Yes ☐  No ☐ | Yes ☐  No ☐ |

**Agency:** _____

**Hiring Manager (HM) or Subject Matter Expert (SME) Name:** _____

**HM or SME Email and Phone:** _____

**HM or SME Signature and Date:** _____