



DCMA MANUAL 3101-04

CUSTOMER ENGAGEMENT

Office of Primary Responsibility:	Integrating Capability - Program Support
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Approved by:	David G. Bassett, LTG, USA, Director

Purpose: This issuance, in accordance with the authority in DoD Directive 5105.64, "Defense Contract Management Agency (DCMA)," implements policy, assigns responsibilities, provides and defines procedures for:

- Customer engagement
- Customer satisfaction
- Distinguished Visitor notification

SUMMARY OF CHANGES

This Manual has been rewritten. Users and stakeholders should read this Manual in its entirety. The following identifies the most notable changes:

- Changed Manual name from “Customer Support” to “Customer Engagement”
- Updated Section 2, “Responsibilities,” to reflect changes in organizational structure
- Updated Section 3, “Customer Engagement,” procedures
- Deleted Section 5, “Memoranda of Agreement (MOAs) for Contract Management Support,” which will be incorporated in DCMA Manual 4501-05, “Enterprise Agreements”
- Added new Section 5, “Distinguished Visitors,” to clarify the process when a Distinguished Visitor conducts a visit to a contractor’s facility in a DCMA Contract Management Office area of responsibility

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SECTION 1: GENERAL ISSUANCE INFORMATION

1.1. APPLICABILITY. This issuance applies to all DCMA activities involved with customer engagement (CE) unless higher-level regulations, policy, guidance, waivers, or agreements take precedence. For CE activities involving classified contracts with higher-level security requirements, DCMA Special Programs will meet the intent of this Manual where it cannot comply.

1.2. POLICY. It is DCMA policy to:

a. Deliver global acquisition insight for all programs and high visibility commodities by providing objective, independent, relevant, timely, and actionable information to the Defense Acquisition Enterprise.

b. Develop robust relationships with internal and external customers to understand requirements; provide integrated, independent insight; inform and influence acquisition decisions; address issues; and host Distinguished Visitors (DV).

c. Execute this Manual in a safe, efficient, effective, and ethical manner.

SECTION 2: RESPONSIBILITIES

2.1. DIRECTOR, DCMA. The DCMA Director will conduct CEs with strategic customers to understand the DoD acquisition environment challenges, risk, issues and opportunities.

2.2. EXECUTIVE DIRECTOR, PORTFOLIO MANAGEMENT AND BUSINESS INTEGRATION. The Executive Director, Portfolio Management & Business Integration (PM&BI) will:

- a. Establish and provide oversight of the strategic CE process.
- b. Build coalitions with key customers and provide customer intelligence to the DCMA enterprise.
- c. Interface via Customer Engagement Division (CED) Directors with strategic customers including the OSD, the Office of the Under Secretary of Defense (Acquisition and Sustainment) (A&S), the Office of the Under Secretary of Defense (Research and Engineering) (R&E), military services, joint and defense organizations, non-DoD organizations and industry at the strategic level.
- d. Advise DCMA executive leadership on CE issues and assess overall customer relationships for the Agency.
- e. Instill a culture of learning both within the PM&BI Directorate and across the Agency in the areas of strategic customer, acquisition enterprise, and DV engagements.

2.3. DIRECTORS, CUSTOMER ENGAGEMENT DIVISIONS. The CED Directors will:

- a. Maintain oversight and conduct Strategic CE with Service Acquisition Executives (SAE), Agency Acquisition Executive Directors, and their staffs, in order to ensure DCMA support meets expectations and to address program concerns or issues.
- b. Maintain strategic acquisition enterprise teaming and collaboration to assess customer satisfaction (CS) and effectiveness of Agency support to their staffs.
- c. Support PM&BI Executive Director on engagements with strategic customers.
- d. Lead the development of the annual Customer Engagement Plan (CEP) ensuring that strategic CEs are planned and synchronized to drive a “one team, one voice” result.
- e. Review and recommend the CEP for the PM&BI Executive Director’s approval.
- f. Lead the quarterly review of the CEP with CE stakeholders to include the status of open actions and determine effectivity for closure and oversight of updates to the CEP.

- g. Provide annual CE input to the CEP for their portfolios to systematically and proactively engage with customers in an efficient and effective manner.
- h. Prepare Contract Management Office (CMO) Commanders or Directors and Operational Units (OU) for OSD forums and overarching integrated product team (OIPT) meetings.
- i. Support the CE process by providing resources, expertise and coordinating mission execution.
- j. Lead the in-depth analysis of historical agency CE data.
- k. Manage the Training, Outreach, and Education (TOE) briefing slide repository supporting education of external customers on the Agency's mission, organizational structure, functional capabilities and services.
- l. Monitor the execution of the CEP and ensure that ongoing customer intelligence is collected and distributed via CE tool to ensure current, complete, and accurate data in support of the CE planning.

2.4. DIRECTOR, CORPORATE INTEGRATION BRANCH. The Corporate Integration Branch Director will:

- a. Serve as the DCMA and OSD lead for integrated Corporate Assessments of DoD contractor performance as the focal point to collect and integrate corporate performance data in collaboration with HQ Components, Region/Operational Commands, and CMOs.
- b. Provide systemic trends, predictive insights, and risk assessments in order to inform and influence DoD acquisition leaders.
- c. Support PM&BI Executive Director on engagements with strategic customers.
- d. Provide input to functional Component Heads and OU Commanders or Directors to support their CEs related to DoD corporate suppliers.
- e. Provide CE input to the CEP process to systematically and proactively engage with major customers.

2.5. DIRECTOR, INDUSTRIAL ANALYSIS DIVISION. The Industrial Analysis Division Director will:

- a. Support PM&BI Executive Director on engagements with strategic customers.
- b. Conduct strategic industrial base engagements across DoD and provide insights to CEDs when requested to support customer engagements.
- c. Support CED and OU Directors with information needed to perform their CEs.

2.6. DIRECTOR, FOREIGN MILITARY SALES AND DOD REIMBURSABLE AND PROGRAM MANAGEMENT DIVISION. The Director, Foreign Military Sales (FMS) and DoD Reimbursable Program Management Division will:

- a. Maintain oversight and conduct strategic CE with DoD FMS Implementing Agencies, other DoD stakeholders, and international organizations/foreign governments involved with FMS, Direct Commercial Sales (DCS), and DoD Reimbursable programs.
- b. Support PM&BI Executive Director on engagements with strategic customers.
- c. Coordinate and collaborate with Agency Acquisition Executive Directors, OU Commanders, CMO Commanders, and their respective staffs, to ensure DCMA FMS/DCS/DoD Reimbursable support meets expectations and to address appropriate concerns or issues.
- d. Provide FMS/DCS/DoD Reimbursable programs input to functional Component Heads and OU Commanders or Directors to support their CEs related to DoD corporate suppliers.
- e. Support the CE process by providing resources, expertise and coordinating mission execution.

2.7. DIRECTOR, PM&BI POLICY GUIDANCE AND COMPETENCY PLANNING DIVISION. The Director, PM&BI Policy Guidance and Competency Planning Division must support the Agency's internal and external CS survey process and systems by publishing results on a monthly and annual basis.

2.8. CUSTOMER ENGAGEMENT DIVISION PROGRAM MANAGERS. The CED Program Manager (PM) supports the mission of the CED Directors and will:

- a. Provide (annual) CE input to the CEP building process.
- b. Maintain a Service/Agency focused Customer Outreach Effectiveness Scorecard.
- c. Monitor the execution of portfolio focused CE events.
- d. Coordinate, monitor, and report all aspects of CEs involving Agency leadership.
- e. Prepare and finalize all CE briefings, reports, and products used by Agency personnel during their CE activities.
- f. Conduct strategic level CEs, when delegated by the CED Directors.
- g. Analyze strategic customer issues and develop solutions that meet customer expectations.

h. Manage Agency support to a Military Services, DoD agencies and non-DoD customers portfolio of programs with a focus on Major Defense Acquisition Program and high visibility programs.

i. Plan external and internal senior leader meetings and engagements.

j. Shape Agency policy positions for senior leader engagements with external customers.

k. Monitor the CE Inbox for CE or DV notifications.

2.9. SENIOR ACQUISITION ANALYST. The Senior Acquisition Analyst (SAA) will:

a. Engage with customer organizations (e.g., Service Program Executive Officers (PEO), Heads of Contacting Activity, Program Managers, etc.) in order to provide DCMA leadership with situational awareness of significant changes (cost, schedule, performance, funding, etc.) to Service and Agency acquisition programs.

b. Facilitate CEs for DCMA leadership.

c. Update the Customer Outreach Effectiveness Scorecard each quarter to assess the quality of the relationship between the customer and DCMA office of primary responsibility (OPR) with a Green, Yellow or Red rating. Measures of the scorecard will be assessed at the end of each quarter (January, April, July, and October).

d. Develop a TOE Plan for incorporation into their portfolio division's annual CEP.

e. Provide awareness to DCMA functional proponents on customer initiatives, organizational structures, business processes, and other key information to benefit Agency mission accomplishment.

f. Assist OU, CMO leadership and functional specialists to clarify and resolve customer concerns identified during customer engagements.

g. Provide TOE to external customers.

2.10. DIRECTOR, CORPORATE OPERATIONS. The Director, Corporate Operations will:

a. Ensure DCMA Organizational Chart in the standard DCMA "About Us" briefing is up-to-date.

b. Review and approve for release documents such as the "DV Read Ahead" package, corrective action requests, corrective action plans, etc., to members of the U.S. Congress and their staff.

2.11. OPERATIONAL COMPONENT HEADS. Operational Component Heads will:

- a. Provide annual CE input to the CEP building process and identify CE stakeholder(s).
- b. Provide functional/operational/tactical support to strategic CEs with senior customers (OSD/SAE/PEO/Buying Command leadership) and foreign customers when major DCMA operational issues/improvement opportunities exist, when there is evidence of significant customer dissatisfaction, when direct commercial sale support is required or requested by the Executive Director, PM&BI.
- c. Systematically and proactively engage with major customers and industry counterparts at their office locations, functional forums, symposiums, and conferences to understand strategic and operational customer issues, concerns, requirements, and levels of satisfaction affecting their components.
- d. Advise the Agency of substantive customer issues gathered during their CEs.
- e. Provide subject matter experts (SME) and staff assistance to the SAAs for updating TOE material annually.
- f. Provide OU SMEs and staff assistance to support CE Staff on CE issues upon request.
- g. Assign an Operational Customer Support Administrator (OCSA) and alternate to manage and process CS surveys, DV notifications for the respective region using the link provided on the Resource Page.

2.12. COMMANDERS/DIRECTORS, CMO AND CENTER DIRECTOR. The Commanders/Directors, CMOs and Center Directors will:

- a. Provide Operational Component Heads with any tactical level CE information needed for higher-level PEO strategic engagements.
- b. Systematically and proactively engage with major customers, industry and host nation counterparts at their office locations, and at other meeting location opportunities within the CMO's area of responsibility (AOR), to understand tactical customer issues, concerns, requirements, and levels of satisfaction affecting contractors' ability to deliver capabilities to the warfighter.
- c. Assign a CMO/Center Customer Support Administrator (CSA) and alternate to manage and process CS surveys, and DV notifications, for their respective organizations using the "Customer Support Administrator(s) Assignment" link provided on the Resource Page.
- d. Create and maintain a documented process for managing CS surveys.
- e. Coordinate, notify, document, and track action items of DV visits.

2.13. FUNCTIONAL LEADS. Functional Leads assist OCSAs with root cause analyses and validation of issues identified for their respective functional areas.

2.14. POLICY PERFORMANCE ADVOCATE. The Performance Advocate (PA) will:

- a. Manage the policy, tools, and training associated with CS processes and functions in this manual.
- b. Review surveys to ensure data integrity (current, complete, and accurate data) and, if necessary, implement actions to correct data by the 10th of the succeeding month.
- c. Conduct analysis of CS survey data; identify customer trends at the Agency level; and provide Monthly Data Analysis Report to DCMA PM&BI Directorate leadership, functional leads, SAAs and OCSAs monthly.
- d. Provide Trends Analysis Report data through DCMA Financial and Business Operations Directorate to support the Office of Management and Budget Program Assessment Rating Tool in accordance with (IAW) Government Performance and Results Act (GPRA) annually.
- e. Conduct targeted CS surveys of processes, products, and services identified by DCMA leadership.

2.15. OPERATIONAL CUSTOMER SUPPORT ADMINISTRATOR. OCSAs will:

- a. Manage and coordinate the implementation of the Customer Engagement Manual. Address issuance issues/concerns of the DV, CS, and CE processes to the Integrating Capability Inbox.
- b. Review the CSA and alternate assignments quarterly to ensure they are up to date using the Customer Support Administrator Assignment link provided on the Resource Page.
- c. Review surveys pertaining to their organization to assure timely:
 - (1) Reassignment of misrouted surveys.
 - (2) Correction of unidentified process, product/service, and customer organization.
 - (3) Closeout of survey.
- d. Assist CSAs with root cause analysis, validation of issue, and acceptable corrective action to ensure customer concerns are addressed in a timely fashion for maintaining good customer relations.
- e. Take immediate action to remedy the situation with the respective organization when the corrective action is incomplete or untimely.

2.16. CUSTOMER SUPPORT ADMINISTRATORS. CSAs will:

- a. Manage their organization's CS survey program:
 - (1) Review, distribute, and close CS surveys.

(2) Coordinate with their customer and other organizations, as needed. Document corrective action for low rated surveys (surveys with negative comments or a rating of 3 or below) in the “Corrective Action” field provided in the Agency’s authorized CS tool.

(3) Coordinate and seek support from their organizations, as needed, to validate customer issue(s) and determine appropriate action(s).

b. Support the execution of DV requirements:

(1) Coordinate the DV visit.

(2) Prepare (tailor) the “DV Read Ahead” package.

(3) Coordinate with the DCMA Director of Strategic Communications and the DCMA Office of General Counsel prior to releasing any materials to Congressional Members.

(4) Report substantive customer issue(s) during the DV visit that warrants DCMA Leadership visibility.

(5) Document the DV engagement.

(6) Ensure DV issues are properly resolved in cases where CMOs can closeout the action.

2.17. DCMA EMPLOYEES. DCMA employees will:

a. As appropriate, solicit feedback from customers for DCMA products and services utilizing the Agency’s authorized Customer Satisfaction Survey Tool (CSST).

b. Include the following statement in cover letters or emails accompanying all product transmittal documents or in emails after providing a service: “DCMA appreciates your feedback. Please complete a brief survey at (use the link “Customer Satisfaction Survey Link for External Customers” provided on the Resource Page).”

c. Submit feedback using the DCMA CSST regarding internal procedures, processes or products used to perform duties, generate external products, and deliver services to the customer. The link to the DCMA CSST is provided on this Manual’s Resource Page.

SECTION 3: CUSTOMER ENGAGEMENT

3.1. OVERVIEW.

a. DCMA organizations across the Agency conduct CE to facilitate the collection of customer information. DCMA uses the information to properly align contract administration services to the requirements of the defense acquisition enterprise in order to improve effectiveness, efficiencies, operational capability, and capacity. DCMA leaders determine the appropriate level of engagement, plan, and execute CEs as outlined within this issuance. CE occurs at all levels of the Agency and are either formal or informal events. Additionally, organizations will conduct CEs with external and/or internal customers. This section applies to formal CE activities and provides guidance for the development of an annual CEP and execution of the formal CEs.

b. Formal engagements occur when DCMA senior leaders meet with strategic customers from OSD, Military Service SAEs, PEOs, commanders of buying activities, combatant commanders, representatives of foreign governments, and industry leaders.

c. Informal engagements occur regularly and routinely as DCMA executes its mission. DCMA documents informal CEs in emails, contract files, meeting minutes and other documentation.

3.2. ANNUAL CUSTOMER ENGAGEMENT PLAN.

a. **Overview.** DCMA organizations should develop an annual CEP to interact with customers. The CEP should cover the period of a fiscal year, October 1, 20xx to September 30, 20xx. The CEP can include CEs for external and internal customers to collect information on priorities, goals, objectives, future acquisitions, issues and/or concerns. They should also seek feedback on DCMA products or services that these customers utilize. The following paragraphs provide the recommended steps to develop a CEP.

b. **Determine Customer Base.** DCMA organizations should analyze the customers that they provide products and services to understand and determine who are their significant customers. The analysis should include a review of those buying activities that assign contracts to a DCMA CMO for administration. DCMA CMOs will review programs for which they provide Program Support (PS) through a Program Support Team or contract administration services (CAS) for a non-Major Defense Acquisition Program. DCMA CMOs might also want to review delegations that they execute or send to other CMOs when assessing internal customers. For DCMA components, they should consider the recipients of a service or product that they provide as an external or an internal customer.

c. **Analyze Customer Information.** DCMA organizations should analyze historical CE data identifying strategic/functional/operational issues, opportunities, customer goals, initiatives, priorities, objectives, training gaps/needs and customer (dis)satisfaction. They should review the recipients of their products and services to understand whom they support.

This analysis will provide indicators to prioritize which customers with whom the DCMA organization should plan to conduct CEs.

d. **Develop CEP.** DCMA organizations should develop a CEP to engage with customers based on the analysis IAW Paragraphs 3.2.a, 3.2.b, and 3.2.c. An example CEP is located on this Manual's Resource Page. This Manual does not dictate a specific format or tool for documenting and maintaining the CEP. Organizations executing a CEP should use a format that meets their organizational needs. They can use many of the applications in DoD 365 such as OneDrive, SharePoint, Teams, etc., to maintain their plan.

(1) Identify Customers for Engagements. DCMA organizations should identify which customers they plan to engage within their organizationally focused CEP. When identifying customers, DCMA organizations should consider the following:

- Date since last formal engagement
- Existing or past customer issues/concerns
- Volume of workload (contracts, programs, etc.)
- Customer requests for formal engagements
- Frequency for conducting formal engagements
- Strategic themes/messages to communicate
- Past CS feedback (see section 4 of this manual)
- High risk processes/suppliers/workload/resource indicators
- Length of time since prior formal engagements
- Planned industry/customer conferences and symposiums

(2) Document CEP. Organizations can document their CEP utilizing one of the Microsoft tools mentioned in Paragraph 3.2.d. The CEP should include the information listed below and any additional data that the organization needs to execute their plan:

- Customer Organization
- Customer Name
- Purpose for Engagement (e.g., CE, Executive Steering Group, Executive Management, PS, etc.)
- Frequency (monthly, quarterly, annually, biannually, etc.)
- DCMA Point of Contact Conducting CE
- Position of DCMA Point of Contact Conducting CE
- Planned Fiscal Year Quarter for CE
- Planned Date of CE
- Actual Date of CE

e. **Maintain CEP.** The CEP is a "living" plan. Many factors might cause an organization to make changes to their CEP. Some of those factors include but are not limited to:

- Organizational leadership changes
- Significant increase in customer contract activity

- Elevated customer concerns/issues
- Changes in DCMA policy and/or execution
- Significant changes to DCMA initiatives
- Any other significant event where increased CE is needed to facilitate communication between organizations

f. **Review and Update.** Organizations should review and update their CEP throughout the fiscal year at a frequency that best fits their needs. Updates include adding information for CEs executed as well as changes to planned CEs. Updates to the CEP should be encouraged and viewed as modifications to enhance communication with customers.

3.3. CONDUCTING CUSTOMER ENGAGEMENTS.

a. **Pre-Engagement Preparation.** Preparation is the key to conducting successful CEs. Prior to the meeting, CE stakeholders will:

(1) Verify the schedule, location, and other logistical arrangements of the visit and notify the appropriate personnel of any changes.

(2) Coordinate with external and internal stakeholders and develop an agenda based on customer issues, concerns, topics of interest, and other topics as needed.

(3) Develop and distribute appropriate documentation to support the CEs. The documentation might include briefing slides, talking points, information memorandums, etc.

(4) Review and finalize agenda, briefing slides and all other documents required for the meeting.

b. **Conduct the Engagement.** DCMA executes CEs to understand customer priorities, goals, objectives, issues and concerns. The insights gained from the CEs are used to improve the development and delivery of DCMA products and services. CEs also provide DCMA with an opportunity to share significant DCMA initiatives and lines of effort. During CEs, DCMA organizations should:

(1) Listen to understand customer priorities, goals, objectives, issues and concerns.

(2) Convey DCMA successes and opportunities to highlight the working relationships and operations between the two organizations.

(3) Obtain direct customer feedback on Agency performance.

(4) Identify opportunities for improvement.

c. Document the Engagement. DCMA organizations should document the results of CEs utilizing one of the applications in DoD 365 such as OneDrive, SharePoint, Teams, etc. The results of CEs can be analyzed and used in support of future CEs. Documentation should include but not be limited to:

- Customer Organization
- Customer name
- Name of DCMA person conducting engagement
- Date of CE
- Major topics discussed (details of the engagement)
- Any commitments made by DCMA or the customer (include OPR, office of coordinating responsibility and need date)
- Estimated date for next engagement if needed

3.4. CUSTOMER ENGAGEMENT RECORD RETENTION. Records supporting CE will be maintained and dispositioned IAW DCMA Manual (DCMA-MAN) 4501-04, Volume 1, “Records and Information Management Program,” and DCMA-MAN 4501-04, Volume 2, “Records Retention Schedule.”

SECTION 4: CUSTOMER SATISFACTION

4.1. OVERVIEW.

- a. Supported by the Agency authorized CSST, this process solicits feedback from both external customers (DoD, civilian agency, and contractor personnel) and internal customers (DCMA employees) to promote/improve an Agency-wide customer focused culture and streamline Agency processes.
- b. The Agency authorized CSST provides one measure of the overall health of the Agency. The survey measures satisfaction and importance of individual capabilities on a transactional basis. Additionally, CS Surveys provide actionable feedback regarding customer complaints and concerns that must be addressed within the Agency.
- c. When appropriate, DCMA employees will include the following statement in cover letters or emails accompanying product transmittal documents or in emails after providing a service: "DCMA appreciates your feedback. Please complete a brief survey at (use the link "Customer Satisfaction Survey Link for External Customers" provided on the Resource Page).
- d. This section establishes the CS Survey Management infrastructure, defines the process and sub-processes for gathering, processing, monitoring, assessing, and reporting of CS. This process provides guidance to CMO/Center CSAs, OCSAs on processing and handling of negative feedback and recognizing employees who receive positive feedback. The intent is to improve organizational performance as well as customer experiences by providing Agency leaders feedback to make continuous improvements on delivering the PS Capability. This Manual seeks to align our customer performance goals IAW Section 8070, Public Law 102-172, "The Department of Defense Appropriations Act for Fiscal Year 1992," Public Law 111-352, "Government Performance and Results Modernization Act of 2010," Executive Office of the President, "Delivering on the Accountable Government Initiative and Implementing the GPRA Modernization Act of 2010," and Executive Order 13571, "Streamlining Service Delivery and Improving Customer Service."

4.2. CUSTOMER SATISFACTION INFRASTRUCTURE.

a. Agency Authorized CSST. The CSST:

- (1) Captures feedback from both internal and external customers pertaining to the Agency's key capabilities to measure the quality of information (accurate and complete), meeting schedule needs (timely), employee attitude (professional/courtesy), and importance (impact on your job).
- (2) Offers all customers the opportunity to comment on satisfaction and importance of Agency capabilities; or to submit general non-capability specific feedback.
- (3) Pinpoints specific areas of CS with Agency capabilities at the transactional level.

b. Accessibility. Survey access is widely available as a link on the Agency home page, on product transmittal documents, emails to external customers, and in information technology applications frequently used by external customers.

c. Customer Satisfaction Survey. The CS Survey:

(1) Measures the quality and timeliness of capabilities; value added, and employee professionalism and courtesy in delivering PS capability. Survey feedback and employee comments are focused on providing managers the necessary information to assess and improve capabilities or organizational performance.

(2) Is a primary indicator of CS used by the cognizant Agency activities.

d. CSA Access Levels. Three types of access are defined in CSST: Administrator, Group Administrator, and Super Administrator.

(1) Administrator access is granted to CSAs for processing and reviewing surveys pertaining to their cognizant activities to assure timely responses and distribution.

(2) Group Administrator access is granted to the OCSAs for reviewing surveys pertaining to their organizations to assure timely response and acceptable corrective action.

(3) Super Administrator access is granted only to the headquarters PA and program analysts to remove invalid surveys or to correct inverted surveys.

4.3. PROCESSING CUSTOMER SATISFACTION SURVEYS.

a. Overview. The CSST is a powerful tool for collecting, assessing, and measuring the degree of CS with Agency internal and external capabilities. This section provides step-by-step guidance on monitoring CS results, documenting corrective actions, and closing CS surveys to ensure current, complete, and accurate data in the CS database. The cross-functional processes flowcharts help clarify the relationship between steps in a process and helps identify focal points. See Resource Page for process flowcharts.

b. Monitor Customer Satisfaction Results. As the customer completes the survey, the survey is automatically submitted to the CSST. CSAs and additional recipients (i.e. OCSAs, Functional Leads, and/or Commanders/Directors who are identified through the CSA Assignment function in CSST) will receive an email alert of the customer survey submitted for their organization. CSAs are empowered to manage their CS surveys in CSST will promptly review the survey and take appropriate action:

(1) **Reassign misrouted surveys.** If the survey is incorrectly attributed to an organization, notify your OCSA or the PA to reassign the survey to the correct organization.

(2) **Correct unidentified process/product/service/customer organization.** Occasionally, customers may manually type in the capabilities or their organization instead of

selecting entries from the provided dropdowns. Those data entries will show as “not reported” and will skew the data analysis.

(3) **Correct inverted surveys.** If the survey contains positive feedback but a rating of 3 or below (comments are inverted with ratings), the CSA seeks clarification with the customer and forwards new ratings with proper supported emails/documentation to the PA for correction. With that, the PA who has the Super Administrator access rights will then adjust the ratings to reflect the new (corrected) ratings.

(4) **Disseminate customer feedback:**

(a) High-Rated Survey: If the survey contains positive feedback (overall satisfaction ratings of 4, 5 or 6 and/or complimentary narrative) about DCMA functional specialists or services provided, the CSA will forward the survey to their supervisor for recognition, and then proceed to Paragraph 4.3.d to close the survey immediately.

(b) Low Rated Survey: If the survey includes a rating of 3 or below, and/or negative comment about the DCMA functional specialists or services provided, the CSA will forward the survey to supervisor for review and recommendation for improvement. CSA may proceed to Paragraph 4.3.d to close the survey if it is an internal survey, otherwise, follow the steps outlined in Paragraph 4.3.c to coordinate required corrective action, follow up, and documentation in CSST.

c. Document Corrective Actions. Required only for low rated survey from external customers, survey that includes rating 3 or below on questions 1 to 4, or there are negative comments about DCMA functional specialists or service provided. The CSA will:

- (1) Inform cognizant Activity/Manager/Supervisor.
- (2) Notify the SAAs regarding significant CS issues at their buying activity as a courtesy.
- (3) Coordinate corrective action with the appropriate functional specialist.
- (4) Initiate resolution within 5 working days.
- (5) Follow up and document corrective actions in the “CSA/OCSA FOLLOW UP” block of the survey in the Agency’s authorized CS tool using link provided in the automated notification or the “View/Follow up on Low Rated Surveys” link provided on this Manual’s Resources Page.
- (6) Assure resolution is completed.

d. Close Customer Satisfaction Surveys. The CSA will:

- (1) Close surveys within 30 days.

(2) Periodically annotate status in the "CSA/OCSA FOLLOWUP" block of the survey in the Agency's authorized CS tool regularly follows-up, and close accordingly.

e. Verify Customer Satisfaction Survey Data. The OCSA will:

(1) Monitor timely corrective action with the respective Agency field offices in cases where ratings do not meet required performance levels.

(2) Follow-up to ensure customer concerns are properly addressed in a timely manner in order to assure and maintain good customer relations.

(3) Review surveys pertaining to their Activity, at a minimum on a daily basis, to assure timely responses and acceptable corrective action by the succeeding month to synchronize the population of data compilation.

4.4. MONITORING AND REPORTING CUSTOMER SATISFACTION TRENDS.

a. Data Compilation. Is used to gain insight, from the customer's perspective, on what the Agency is doing right, what is working or not working, as well as specific problems or issues that may be identified and resolved.

b. Data Analysis. Monthly, the PA will:

(1) Review CS data for accuracy to include but not limited to the following:

(a). Misrouted surveys are properly reassigned.

(b) Unidentified – Misidentified customer organization, process, product and service entries are corrected.

(c) Corrective actions are acceptable and properly documented.

(d) Inverted CS surveys – surveys that have ratings inverted with the comments (i.e., positive comments but ratings are 3 and below) are corrected.

(2) Conduct analysis of CS survey data.

(3) Summarize ratings by Components and field offices.

(4) Identify areas for continuous improvement.

(5) Share best practices.

(6) Provide Monthly Data Analysis Report on CS ratings.

(7) Assure availability of reports/data cubes/ad hoc queries regarding CS ratings and trends.

(8) Share and disseminate data analysis.

c. Trends Analysis and Monitoring.

(1) To ensure appropriate management officials and CESs are aware of and understand customer concerns and issues, the PA conducts monthly analyses of survey data and reports findings.

(2) Functional leads assist OCSAs with root cause analyses and validation of issues identified for their respective functional areas.

(3) CESs review all surveys from their buying activity to look for issues. CESs collaboratively assist and take appropriate action to resolve negative trends that cross Agency Activities.

(4) The OCSA monitors overall CS levels and conducts further analysis of surveys. The OCSAs:

(a) Brief the Operational Component Heads.

(b) Take the following actions to document and improve their CS trends:

1. Perform root cause analysis collaboratively.

2. Notify Managers/Supervisors of negative trends.

3. Refer to the PA for resolution of customer issues/problems, which relate to Agency Issuances.

4. Coordinate with functional leads and CESs to determine the root cause(s) of customer dissatisfaction on systemic issues.

5. Provide recommendations/improvement plans to improve negative CS trends.

6. Monitor and notify Agency Activities of improvements made.

d. Performance Review.

(1) Monthly, PA reports on Agency satisfaction ratings and trends.

(2) PA provides Monthly Analysis Reports to OCSA/CSAs. OCSA/CSAs review these Monthly Analysis Reports and share data with their chain of command.

(3) PA provides data analysis annually for external surveys through DCMA Financial Business Operations to support Office of Management and Budget's Program Assessment Rating Tool IAW the GPRA.

e. Targeted Surveys. A Targeted Survey is one that is specifically designed to contain questions tailored to a specific population and issue. The PA:

(1) Collaborates with all the organizations to design tailored questions for targeted surveys directed by Agency leadership.

(2) Determines the population of employees to be surveyed.

(3) Develops a Tasking Memo for the targeted survey.

(4) Distributes the targeted survey.

(5) Collects and analyzes the survey feedback. Share and disseminate data analysis and use for improvements.

(6) Provides the analysis results to Agency leadership.

SECTION 5: DISTINGUISHED VISITORS

5.1. OVERVIEW. DV will routinely visit contractors in a DCMA CMO AOR. CMOs will notify DCMA PM&BI upon learning of a DV visit and provide a “DV Read Ahead” package to the DV. This section provides the definition of a DV, procedures for notifying DCMA PM&BI and DCMA CMO requirements.

a. DV Definition. DCMA considers an individual to be a DV if they are:

- (1) Any 3-star flag officer or higher
- (2) Any government official with rank equivalent to a 3-star flag officer or higher (Members of Congress, Tier-3 Senior Executive Service officials, etc.)
- (3) Any SAE, PEO, the Director, OSD Office of Cost Assessment and Program Evaluation.
- (4) Any foreign military officer/government official of equivalent rank/position to those listed above on an official visit (as defined by DoD Directive 5230.20, “Visit and Assignments of Foreign Nationals”).
- (5) Any other DV Group or individual identified in the current DoD Order of Precedence memorandum
- (6) Any other individual designated by the OU or CMO commander/director.

b. DV Notification. CMOs will notify DCMA PM&BI and their OU when they become aware of a DV visit to a contractor’s facility in their AOR. The CMO will send an encrypted email to DCMA Ft Lee HQ List Customer Engagement Inbox Owners (dcma.lee.hq.list.customer-engagement-inbox-owners@mail.mil) as soon as they become aware of the DV’s intended visit.

(1) DV Notification Email. The encrypted email should include the following information for the visit:

(a) Subject Line. The subject line of the message should include the words “Distinguished Visitor” followed by the name, rank, title and organization (e.g., Service, PEO, buying activity, Congress, and/or foreign government). If the DV delegation includes more than one person, use the name, rank, title and organization of the senior member of the group.

(b) Body of Message. The body of the message should include, but is not limited to, the following information:

1. Name, rank, title and organization of the visitor(s). List multiple DVs if the delegation includes more than one DV. CMOs do not need to identify members of the delegation that do not meet the requirements of a DV in Paragraph 4.1.a.

2. Week of the visit. Due to force protection requirements, do not provide a specific date of the visit. Provide the week of the meeting/visit beginning on the Monday of the week of the visit (e.g., the week of November 8, 2021).

3. Location of the visit to include contractor, city and state.

4. Purpose of the visit. Describe the purpose for the visit. Be as specific as possible when providing information on the purpose of the visit. The purpose of the visit narrative should identify any program/weapon system interest or any issues/concerns if applicable.

5. DCMA CMO point of contact to include name, telephone, email, CMO and OU.

(2) DCMA PM&BI Review and Recommendation. DCMA PM&BI CEDs will monitor the DCMA Ft Lee HQ List Customer Engagement Inbox Owners (dcma.lee.hq.list.customer-engagement-inbox-owners@mail.mil) for DV notifications from CMOs. CEDs will review notifications for completion and strategic impact or interest. Upon completion of their review, CEDs send a message to the DCMA PM&BI Executive Director and Deputy Executive Director with a recommendation to notify the DCMA Director of the planned visit. The recommendation to notify the DCMA Director is not dependent solely based on the rank of the DV(s). CEDs should review the purpose and intent of the visit to determine whether DCMA PM&BI should notify the Director.

c. Develop “DV Read Ahead” Package. CMO should use the standard “DV Read Ahead” template (located on the Resource Page) and tailor it to the facilities and/or programs specific for the DV visit. CMO should provide the “DV Read Ahead” package to the DV even in situations where DV does not visit or interact with the CMO. DV Formal Documentation User Guide is provided on the Resource Page of this issuance to detail special requirements for appropriate safeguards and dissemination of sensitive DV information or Controlled Unclassified Information (CUI) materials for visits by members of congress and visits by foreign DVs.

5.2. FOREIGN DISTINGUISHED VISITOR. Foreign DV visits to DCMA activities are normally sponsored by the foreign embassy and coordinated/processed by DCMA Security Division. Foreign DV visits must obtain approval prior to visiting cleared contractor facilities. In these cases, the foreign DV is normally sponsored by the program office, contractor, or other DoD elements and may not directly involve DCMA; therefore, they are not required to notify DCMA Security Division. Refer to DV Formal Documentation User Guide on the Resource Page for processes and procedures about preparing and sharing information with Foreign DVs.

5.3. DISTINGUISHED VISITOR RECORD RETENTION. Records supporting Distinguished Visitor engagements will be maintained and dispositioned IAW DCMA-MAN 4501-04, Volume 1 and DCMA-MAN 4501-04, Volume 2.

GLOSSARY

G.1. DEFINITIONS. Unless otherwise noted, these terms and their definitions are for the purpose of this policy issuance.

AOR. The pre-defined geographical area assigned to a CMO for providing contract administration services.

Component Head. The leader of a DCMA organization who reports directly to the Director.

Corrective Action. Improvements to an organization's processes taken to eliminate causes of non-conformities or other undesirable situations. It focuses on the systematic investigation of the root causes of non-conformities in an attempt to prevent their recurrence.

CSA. Individuals appointed by the CMO to manage the Customer Satisfaction Survey applications. CSAs review, distribute, and close surveys; coordinate with customers, as needed; and document corrective action for low rated surveys.

CUI. Government created or owned UNCLASSIFIED information that must be safeguarded from unauthorized disclosure.

Customer Satisfaction Survey. A tool that offers both internal and external customers the opportunity to comment on satisfaction and importance of DCMA processes, products, and services. It is one measure of the overall health of the Agency for reporting IAW the GPRA to the Board of Directors and the OSD Performance Contract.

DCMA Standard “DV Read Ahead” Package. A tailored Agency briefing slide deck that CMOs provide to DVs prior to a visit.

DV. A high-ranking individual from a non-DCMA organization visiting a contractor facility. See Paragraph 5.1.a of this Manual for the criteria to determine a DV.

External Customer. A non-DCMA member of DoD that submits feedback regarding DCMA capabilities delivered or provided by the Agency (DoD, civilian agency, and contractor personnel).

Foreign DV. A DV from a country other than the United States of America.

Formal CE. Formal engagements are interactions with strategic customers from the OSD, Military Service SAEs, PEOs, commanders of buying activities, combatant commanders, representatives of foreign governments, and industry leaders.

Functional Lead. A DCMA leader for an acquisition and procurement discipline (e.g., contracting, quality, engineering, earned value, production, etc.) overseeing execution of business processes in support of CAS.

High Visibility Commodity. A family or class of similar material or product, of significant interest to a customer, organized together for the purpose of managing and providing systemic insights (i.e., conventional ammunition, body armor).

Informal Engagement. Occurs daily as the Agency executes its CAS functions and other missions. Daily CEs throughout the enterprise are documented in emails, contract files, meeting minutes or other informal means.

Internal Customer. DCMA employees submit feedback regarding DCMA capabilities used to perform their duties or to generate products or deliver services to customers.

Inverted Survey. If the survey contains positive feedback but a rating of 3 or below (comments are inverted with ratings), the CSA seeks clarification with the customer and forward new ratings with proper supported emails to PA for correction.

Low Rated Survey. Surveys scored 3 or below for the overall CS where the CSA did not respond/document the initiation of corrective actions within 5 working days.

Major Defense Acquisition Program. An acquisition program within the meaning of Section 2430 of Title 10, U.S.C. The term “major defense acquisition program” means a Department of Defense acquisition program that is not a highly sensitive classified program (as determined by the Secretary of Defense) and— (A) that is designated by the Secretary of Defense as a major defense acquisition program; or (B) in the case of a program that is not a program for the acquisition of an automated information system (either a product or a service), that is estimated by the Secretary of Defense for all increments of the program to require an eventual total expenditure for research, development, and test and evaluation of more than \$525 million in Fiscal Year (FY) 2020 constant dollars or, for procurement, of more than \$3.065 billion in FY 2020 constant dollars.

OCSA. Manage and coordinate the implementation of this manual at component headquarters and centers. Assist customer engagement administrators in validation of issues, and address policy issues/concerns to the policy PA to ensure timely processing and adherence to this manual. Manage and coordinate the implementation of the CS surveys by reviewing to ensure timely processing, routing, corrective action, and closeout.

OIPT. OIPT is led by the appropriate OSD director, and composed of the PM, PEO, component staff, user/user representative, and OSD and Joint Staff members involved in the oversight and review of a particular Acquisition Category ID program.

OU. DCMA organizational entity charged with ensuring mission accomplishment for their organization.

Policy PA. A member of the DCMA Headquarters staff that is responsible for developing policy, automated tools concepts and identification and execution of training needs.

SAA. Located at Military Services, other DoD buying activities, or Headquarters, National

Aeronautics and Space Administration that are the proponents for multiple, high-dollar DoD weapon systems, sustainment logistics and support contracts.

Senior Leader. DCMA Senior Leaders are defined on the DCMA internal home page under the “About Us” menu.

SME. A person with expert knowledge and deep understanding of a particular process and function and who is an authority in a particular area or topic. SMEs are responsible for defining the business processes, policies, and the application requirements within a function.

Strategic Customers. Customer at OSD level, military service senior acquisition executives, PEO, commanders of buying activities and industry leaders.

Targeted Surveys. Surveys specifically designed to reach specific groups of people about processes, products, and services identified by DCMA leadership.

Transaction. The service (contract modification, surveillance, business system review, etc.) that DCMA provides while performing CAS to customers or a service (personnel action, policy development, funds management, etc.) that DCMA organizations perform to facilitate operations of the agency.

Transactional Basis: Conducting analysis of data at the individual transaction level instead of the aggregate level.

GLOSSARY

G.2. ACRONYMS.

AOR	area of responsibility
CAS	contract administration services
CE	customer engagement
CED	Customer Engagement Division
CEP	Customer Engagement Plan
CMO	Contract Management Office
CS	customer satisfaction
CSA	Customer Support Administrator
CSST	Customer Satisfaction Survey Tool
DCMA-MAN	DCMA Manual
DCS	Direct Commercial Sales
DV	Distinguished Visitor
FMS	Foreign Military Sales
GPRA	Government Performance and Results Act
IAW	in accordance with
OCSA	Operational Customer Support Administrator
OIPT	overarching integrated product team
OU	Operational Unit
PA	Performance Advocate
PEO	Program Executive Officer
PM	Program Manager
PM&BI	Portfolio Management and Business Integration
PS	Program Support
SAA	Senior Acquisition Analyst
SAE	Senior Acquisition Executive
SME	subject matter expert
TOE	Training, Outreach and Education

REFERENCES

- DCMA Manual 4501-04, Volume 1, “Records and Information Management Program,”
April 16, 2021
- DCMA Manual 4501-04, Volume 2, “Records Retention Schedule,” April 14, 2021
- DCMA Manual 4501-05, “Enterprise Agreements,” March 7, 2022
- Defense Federal Acquisition Regulation Supplement (DFARS), as amended
- DoD Directive 5105.64, “Defense Contract Management Agency (DCMA),” January 10, 2013
- DoD Directive 5230.20, “Visits and Assignments of Foreign Nationals,” June 22, 2005
- Executive Office of the President Memorandum, “Delivering on the Accountable Government Initiative and Implementing the GPRA Modernization Act of 2010,” April 14, 2011
- Executive Order 13571 - Streamlining Service Delivery and Improving Customer Service,
April 27, 2011
- Public Law 102-172, Section 8070, “The Department of Defense Appropriations Act for Fiscal Year 1992,” October 1, 1992
- Public Law 111-352, “Government Performance and Results Modernization Act of 2010,”
January 4, 2011
- United States Code, Title 10, Section 2430