



Improving Customer Experience (CX) with Federal Services

Goal Leaders

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Goal Statement

- Provide a modern, streamlined, and responsive customer experience across government, comparable to leading private-sector organizations.



Challenge

- Citizens and businesses expect well-designed, efficient government services that are generally comparable in quality to that of leading private-sector organizations.
- Despite some important strides to improve customer experience, many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself.



Opportunity

- Increase trust in the Federal Government by improving the experience citizens and businesses have with federal services across all service channels.
- Transform the customer experience by improving the usability and reliability of our government's most critical digital services.
- Create measurable improvements in customer satisfaction by using the principles and practices proven by leading private-sector organizations.



Approach

Modeling after the private sector, focus will be placed on the foundational components of:

- Data: Capture and analyze the voices of citizens
- Tools: Build and deliver CX tools and products across the government
- Technology: Deliver easy and effective experiences, channel agnostic



Office of Management and Budget (OMB)

- Mark Bussow, Office of Performance and Personnel Management (PPM)
- Amira Boland, PPM, Lead, Customer Experience
- Tony Garza, PPM, White House Leadership Development Fellow

Department of Veterans Affairs (VA)

- Dr. Lynda Davis, Chief Veterans Experience Officer
- Barbara Morton, Deputy Chief Veterans Experience Officer
- Lee Becker, Chief of Staff, Veterans Experience Office
- Maura Newell, Presidential Innovation Fellow
- Scott Weiss, Presidential Innovation Fellow
- Chris Corpuel, Presidential Innovation Fellow
- Ryan Forentino, Presidential Innovation Fellow

United States Digital Service (USDS)

- Jay Teitelbaum, Chief of Finance and Operations

General Service Administration (GSA)

- Matthew Ford, Acting Chief Customer Officer
- Philip Ashlock, Director, Data & Analytics Portfolio
- Boris Arratia, Senior Advisor, Office of Shared Solutions and Performance Improvement
- Lauren Ancona, Data & Analytics Portfolio
- Ryan Wold, Data & Analytics Portfolio
- Maria Dayton, Presidential Innovation Fellow
- Angelo Frigo, Presidential Innovation Fellow





Goal Structure

Provide a modern, streamlined, and responsive customer experience across government, comparable to leading private sector organizations



STRATEGY 1:

**Improve the Digital Experience
(USDS)**

Improve the usability and reliability of the government's most critical digital services

STRATEGY 2:

**Increase Transparency to Drive
Accountability
(PPM + GSA)**

Embed standardized customer metrics within high-impact programs to create government-wide performance dashboards

STRATEGY 3:

**Apply Proven Practices to Raise
the Standard of Service in
Priority Areas (PPM)**

Focus on customer experience improvement in high-impact programs, disseminate best practices government-wide using clear guidance



Supporting Strategy:

Empower Agencies to Manage Customer Experience at Enterprise Level (VA + GSA)

Develop capabilities, resources, and tools proven to enhance customer experience performance, tell and share stories of success and lessons learned



Summary of Progress in Q4

Government-wide Customer Experience Guidance

OMB has updated Section 280 guidance on Managing Customer Experience and Improving Service for the 2019 edition of OMB Circular A-11. This document is available at <https://performance.gov/CX>.

- On September 19, 2019, CX Action Plans were made publicly available on HISP Profile pages at performance.gov/CX

Ensuring Source Data for Government-wide CX Performance Dashboard

In the A-11 guidance, a set of government-wide CX metrics was established in alignment with leading practices from both the private and public sectors in an effort to develop comparable, government-wide scores that will enable cross-agency benchmarking (when relevant) and general indication of an agency's customer's overall satisfaction.

- Touchpoints, a mechanism for agencies to collect customer feedback at no cost to HISPs (Terms of Service available) is now fully operational and operating under an OMB clearance:
<https://feedback.usa.gov/touchpoints/>



Strategy 1: Improve the Digital Experience

- **Problem Targeted:** Too often, outdated tools, systems and practices make interacting with the government cumbersome and frustrating. The digital experience must be agile and keep pace with private sector advances. User-centered design and iterative development practices are needed to prioritize user needs and learn what works as quickly as possible.
- **Theory of Change:** Innovative projects coordinated by USDS will expand the use of common platforms, services and tools in order to transform critical, public facing services. USDS will rethink how the Government buys digital services to leverage shared services and economies of scale. The top technical talent in the field will be brought into civil service in order to reach these objectives.

USDS Quarterly Update:

In January 2019, USDS and OPM partnered to test Subject Matter Expert Qualification Assessments (SME-QA), a hiring process where SMEs work with HR specialists to create qualification criteria based on the SMEs' determination of what is required to be successful in the job from day one.

Following the accomplishments of the team that were included in the Q3 update, [OPM released a memo](#) to all agencies providing guidance and the team launched a [site](#) with resources on the process to support its use.



Strategy 2: Increase Transparency to Drive Accountability

- **Problem Targeted:** Many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself. Insufficient data limits government's ability to identify major customer service challenges and problem areas and the public's ability to see the quality and timeliness of specific services.
- **Theory of Change:** Agencies will use data to target improvement efforts at both the government-wide and agency level and to provide diagnostic information for use at a program-level. Making data available publicly via dashboards will help citizens set expectations and hold government accountable for improvements.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Publish initial high impact service provider dashboards	3Q FY19	Completed	Completed	PPM, Agencies, GSA	
Create centralized, government-wide data dashboard / website to post aggregate customer experience performance data publicly	1Q FY20	On track	No change	PPM, GSA	Central page created; unable to aggregate HISP data for public use at this time
Develop interactive data comparison tools (e.g., by geography, like service)	2Q FY20	On track	No change	GSA	
Develop capability of Touchpoints for automated agency certification of data for reporting, automated reporting for non-Touchpoints users	4Q FY20	On track	No change	GSA	
Publish stories of CX data use by agencies, transparency and availability through social media, blogs, and other story telling	3Q FY20	On track	No change	VA	
Integrate employee engagement metrics such as Federal Employee Viewpoint Survey data, and additional operational data (such as Digital Analytics Program, processing times) on HISP dashboards	4Q FY20	On track	No change	GSA	



Strategy 3: Apply Proven Practices to Raise the Standard of Service of High Impact Service Providers

- **Problem Targeted:** Customer satisfaction with Federal services lags behind every other industry, as measured by both Forrester and the American Customer Satisfaction Index (ACSI), causing frustration for the public and higher costs for the Federal Government. CX is too often not a priority for leadership and staff at all levels. Entities of government have diverse understandings of “what good looks like,” and practices from leading private-sector organizations are not being consistently leveraged.
- **Theory of Change:** Create government-wide CX oversight and issue uniform guidance and maturity model to ensure consistent and sustained improvements in customer experience across government. Facilitate ownership and support cross-agency journey mapping to allow critical bottlenecks to be recognized and remedied across Federal Government.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Assess plans to improve customer experience program maturity, refine planning process and guidance for following FY	3Q FY19	Completed	Completed	PPM, Agencies	
Assess and develop initial plans to improve customer experience program maturity	3Q FY19	Completed	Completed	PPM, Agencies	
Update maturity model and include case studies for annual self-assessment	1Q FY20	On track	No change	PPM, GSA	
Convene private sector CX leaders, high impact program leaders and staff to facilitate best practice knowledge sharing	1Q FY20	On track	No change	PPM, USDS, GSA, VA	
Develop action plans to improve customer experience program maturity that include routine collection, analysis and application of customer feedback	2Q FY20	On track	No change	PPM, Agencies	
Gather feedback, reassess program requirements, and revise OMB Circular A-11 Section 280	3Q FY20	On track	No change	PPM	
Review and revise HISP list to include additional high impact programs	4Q FY20	On track	No change	PPM	
Evaluate results of pilot(s) and determine project viability to scale interagency solution / replicate process with additional cross-government customer journey	4Q FY20	On track	No change	PPM, GSA, VA	





Supporting Strategy: Empower Agencies to Manage Customer Experience at Enterprise Level (1)

- **Problem Targeted:** Getting the right CX talent and services is hard. Program implementers don't necessarily have a deep understanding of their customer or their needs. No government-wide support capability exists.
- **Theory of Change:** Fostering a cultural change amongst agency leadership and staff, demonstrating the value of improved customer experience, creating government-wide customer experience oversight and support, and issuing uniform guidance will help ensure consistent and sustained improvements in customer experience across government. Performing cross-agency journey mapping will allow critical bottlenecks to be recognized and remedied across Federal Government.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Journey Map for second customer segment	3Q FY19	On hold	On hold	PPM, GSA, Agencies	Team is currently dedicated to coordinating pilots resulting from the first cross-agency journey mapping effort.
Develop interim CX buying guide / resources for HISPs	2Q FY20	Delayed	Updated Due Date	GSA	GSA determined an RFI process would better inform this resource, and conducted this at the end of FY19. They are currently reviewing submissions and updating the guide to be released in early 2020.
Establish working group to explore the creation of a CX Quality Service Management Office (QSMO)	1Q FY20	On track	No change	VA, PPM, GSA	
Develop further resources and tools to grow CX practices in HISPs, including journey mapping MOOC, low-cost actions	2Q FY20	On track	No change	GSA, VA	
Develop and disseminate trainings designed to enhance employee engagement and front-line customer service, similar to VA's Own the Moment	3Q FY20	On track	No change	VA	





Supporting Strategy: Empower Agencies to Manage Customer Experience at Enterprise Level (2)

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Develop standardized position description, job codes, and hiring plans for CX positions	4Q FY20	On track	No change	GSA, VA	
Complete the Federal Integrated Business Framework (FIBF) to provide foundation for QSMO designation	4Q FY20	On track	No change	GSA, VA	
Establish a testbed for adopting private sector best practices for public service delivery, share lessons learned for building CX talent government-wide	4Q FY20	On track	No change	VA	



CAP Goal Progress Indicators

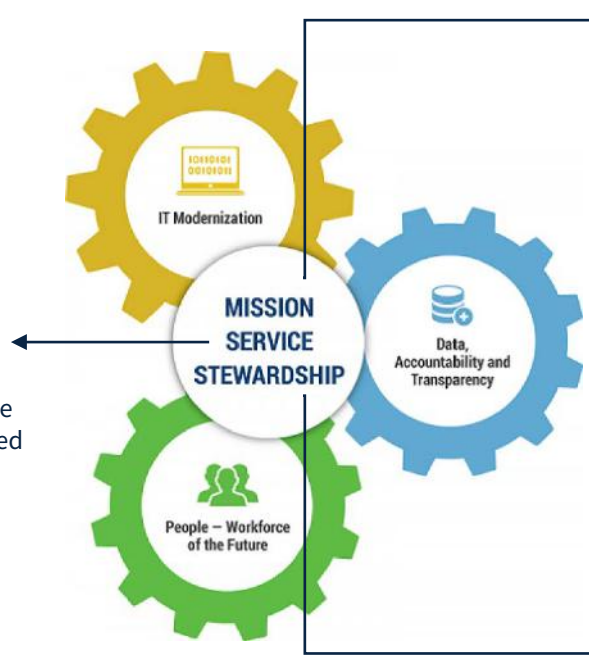
After the first round of start-up activities are completed in FY2019, progress will initially be reported as:

- Percentage of HISPs that collect customer feedback data in alignment with government-wide metrics
- Percentage of HISPs that have a plan to improve customer service shared publicly
- Usage statistics of the publicly available customer feedback data
- Burden reduction from transition to digital forms

Longer term performance indicators include:

Service

- Positive change in HISP scores across government-wide metrics in Ease, Efficiency, Equity, and Employee categories
- Positive change in HISP CX maturity score
- Positive change in Federal Government CX scores by external organizations
- Improvement in HISP operational performance metrics (e.g., digital analytics such as decreased bounce rates, reduction in error rates of form submissions due to improved clarity of guidance/instructions)



Mission

- Improvement in HISP mission performance metrics (ex. Increase in loan repayment rates, household income, employment outcomes, health outcomes)
- Positive change in HISP scores across government-wide metrics in Trust/Confidence, Satisfaction, and Quality categories

Stewardship

- Cost avoidance from streamlined customer feedback collection mechanism
- Cost savings from streamlined customer feedback collection mechanism
- Cost avoidance from solutions implemented identified through journey mapping efforts
- Cost savings from solutions implemented identified through journey mapping efforts



Department of Agriculture

U.S. Forest Service*
Farm Service Agency
Natural Resources Conservation Service

Department of Commerce

U.S. Patent and Trademark Office (Trademarks)
U.S. Patent and Trademark Office (Patents)

Department of Education

Federal Student Aid

Department of Health & Human Services

Centers for Medicare and Medicaid Services (Health Insurance Marketplace)
Centers for Medicare & Medicaid Services (Medicare)

Department of Homeland Security

Transportation Security Administration
U.S. Customs and Border Protection
Citizenship and Immigration Services
Federal Emergency Management Agency

Department of Housing and Urban Development

FHA Single Family Loans and Resources Center

Department of Interior

Trust Beneficiary Call Center, Office of the Special Trustee for American Indians
U.S. Fish and Wildlife Service

Department of Labor

Occupational Safety & Health Administration
Office of Worker Compensation Programs

Department of State

Bureau of Consular Affairs

Department of Treasury

Internal Revenue Service

Department of Veterans Affairs

Veterans Health Administration
Veterans Benefits Administration

Office of Personnel and Management

Federal Employment Services
Retirement Services

Social Security Administration

Small Business Administration

Field Operations

Interagency Initiative

Recreation.gov (U.S. Forest Service, National Park Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Bureau of Reclamation, U.S. Army Corps of Engineers, National Archives)

*The Forest Service high impact service subject to submission of data and CX Action Plan is recreation.gov, so there will be one submission for both of these listed entities.

