Customer Experience Playbook

CUSTOMER EXPERIENCE
CENTER OF EXCELLENCE

GSA

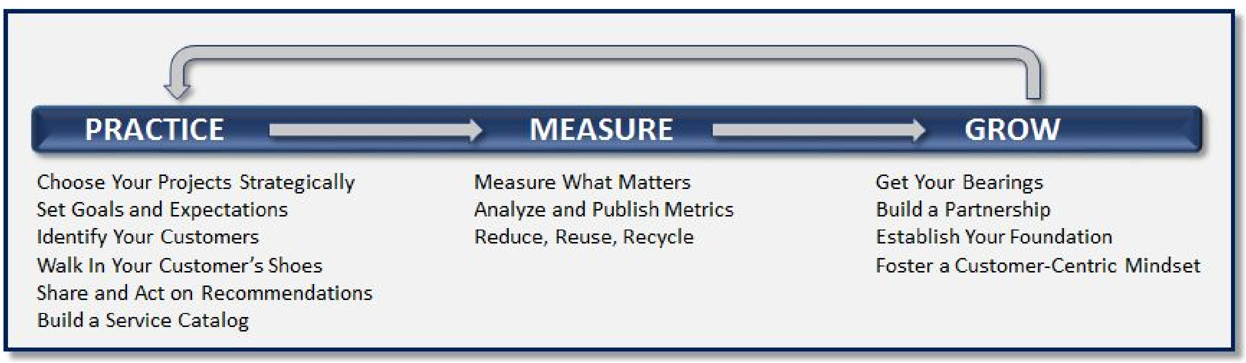
INTRODUCTION

The Customer Experience (CX) Playbook is for practitioners in all levels of government to establish or improve CX practices and foster a CX mindset within and across government agencies by getting started with small, quick wins to build up expertise and gain confidence. The plays are prepared in support of the President's Management Agenda (PMA) and Cross-Agency Priority (CAP) goals, and the General Services Administration (GSA) Customer Experience Center of Excellence (CX CoE).

CX is not a new concept – it's what industry has been doing for a long time. In fact, you may already do some of these activities. What is new is the government's central focus as part of the PMA and CAP goals to bolster support and resources towards CX practices.

This playbook represents a synthesis of ideas gathered from interviewing several subject matter experts and leaders in CX and Human Centered Design (HCD) in government. Whether you are just curious about CX, already dabbling in CX, or a professional CX practitioner, this playbook can offer insight to grow the CX presence in your agency.

The playbook is designed to allow you to dive into any play in any sequence best applicable to your needs and is organized around three focus areas: Practice, Measure, Grow. Start practicing with small projects and limited resources, and develop support over time. You don't have to have *every*thing in place to do *some*thing.



KEY CONCEPTS

Framework: A set of methodologies and approaches for delivering a product/service

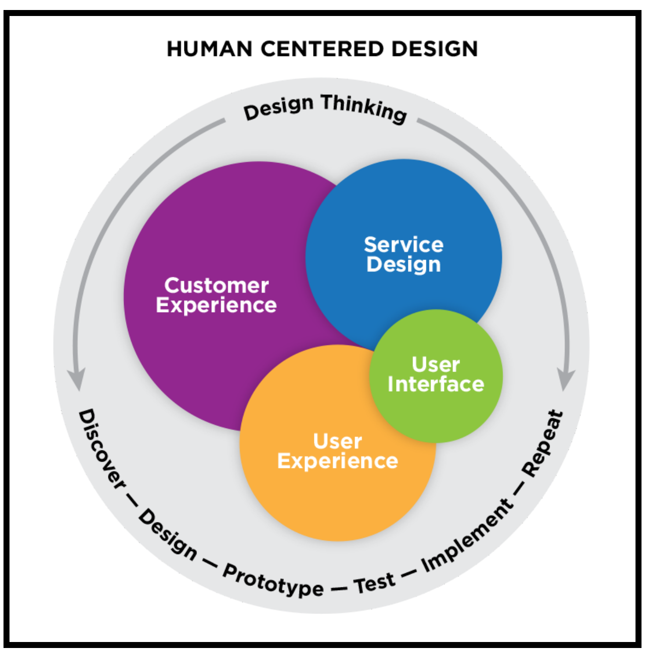
- ***Human Centered Design (HCD)*** - Framework of processes that integrates a broad set of practices around understanding the needs, wants, and limitations of people interacting with a product/service, and involves those people in the design process.
- ***User Centered Design (UCD)*** – A subset of HCD pertaining to a person's interaction with a digital product.

Methodologies: Establishes a set of rules governing the design effort, depending on the focus

- ***Customer Experience (CX)***: A human-centered design broad methodology to focus on the entire journey of a customer to achieve a particular outcome, and identify their pain points and moments of delight to help prioritize design tasks. The CX methodology encompasses the other methodologies, as needed for a particular analysis.
- ***Service Design:*** Focuses on understanding and improving the quality of various interactions between users, service personnel and backstage actors to deliver a service.
- ***User Experience (UX)*** – Focuses specifically on the end user's experience with a specific product, typically a specific digital technology, as only one part of their overall journey.
- ***User Interface Design (UI)*** – Focuses on how to maximize a person's user visual experience with a specific product/tool, often pertaining to a computer application/website.

Approach: Outlines the specific process used to execute the design and development

- ***Design Thinking:*** General human-centered methodology of discover, design, prototype, test, implement and repeat. Very collaborative and iterative with a goal to develop something of real value to end users that they will also find useful.



Customer Experience v. Customer Service v. Customer Satisfaction

Customer service is a key part of customer experience, but the two are not the same.

Customer service is an event that happens between a customer and a service provider, at a specific time and place, and is responsive to customer needs. It's the advice you get, the help you receive. Good customer service is focused on making specific interactions positive and effective. Typically, customer service represents a single touchpoint in the customer's broader experience with a service. Customer service can be interchanged with 'customer care'.

Customer experience is the sum of a person's involvement with a brand or an agency. It encompasses all their interactions in different places, via different channels, and over time. Customer experience is about a person's *perception* of their experience and their relationship with the service provider whether or not that is an accurate assessment. It's about how they feel, and what they do as a result.

Customer satisfaction is a measure of the customer's experience with a service or transaction.

Designing a good customer experience requires considering the customer's whole journey with a service from start to finish, including before and after they come to you for service.

Customer Experience Scope

A customer's experience can be narrow or broad in scope, so the focus of CX analysis can be applied at different tiers. To create the best customer experience, you should determine the scope of the customer's journey even if you can only focus on a portion of it.

1. Most readily observable, a customer interacts directly with the organization at the ***program*** tier, for instance at specific touchpoints with a service center, website, or application. Examples include obtaining a loan, getting a permit, and paying an invoice. However even when focused on a single program, there typically is interplay with other programs to deliver a complete customer experience.

2. Customer transactions also take place at the ***agency*** tier, across multiple programs or groups within a single agency. Examples include a Veteran informing several VA benefit programs about a change in address; or onboarding a new employee who needs support from Human Resources, a laptop from Information Technology and a badge from Security.

3. To complete certain transactions, a customer may need ***cross-agency*** coordination and interaction, for instance, among federal, state, and local governments and commercial companies. For example, a Service Member transitioning out of service might need medical records from the Department of Defense, benefits from the Department of Veterans Affairs and job assistance from the Department of Labor.

For More Information:

Learn more about the President's Management Agenda:

- www.whitehouse.gov/omb/management/pma
- www.performance.gov/PMA/PMA.html

Learn more about the Cross-Agency Priority Goals:

- www.performance.gov/CAP/CAP_goals.html#
- www.performance.gov/CAP/CAP_goal_4.html

Learn more about the GSA Centers of Excellence:

- https://coe.gsa.gov
- https://coe.gsa.gov/coe/customer-experience.html

PRACTICE

In this section you'll find plays to help you get started, even if you have limited resources and support. The guidance includes how to select the right project, establish common goals and expectations, and identify your customers and their characteristics so you can understand their experience. Document everything along the way and share your work and findings with leadership to help prioritize solutions to improve the customer experience. Finally, as your experience and practice grows, keep a service catalog to help others understand what your team can offer and the value it brings.

Case Study:

In the fall of 2016, Veterans Experience Office (VEO) in partnership with the Veterans Health Administration (VHA) embarked on a research project to understand how veterans experience their outpatient healthcare. The goal was to establish an end-to-end definition of patient experience. To get here, VEO identified a set of Veteran personas, and together with VHA, conducted a discovery effort, interviewing nearly 100 veterans across multiple geographies, from various genders, races, life stages, military branches, and eras of service. The Human-centered Design research captured the voices and perspectives of veterans in their own words. The design team, together with stakeholders, used the large amount of qualitative data to identify patterns and insights. The team synthesized these findings into the VA Patient Experience Journey Map. The map represents a common set of moments that veterans experience, including Moments that Matter, Bright Spots, and Pain Points. With the map and insights, VHA could identify priority areas to improve the veteran patient experience. Among other things, this work led to the national Patient Experience initiative which is poised to transform the care experience across 152 VA healthcare systems across the United States. In addition, this has led to the development of survey questions based on our veterans feedback to determine if the services that they received was effective, easy, and emotionally resonate. This provides the VA the ability to hold itself accountable to the voice of the veterans and their families, and what matters most to them.

Play 1: Choose Your Projects Strategically

Key Question: Which projects can show high value with the least effort and cost?

Checklist:

- ❏ Follow the energy to find the path of least resistance:
    - ❏ high visibility initiatives leadership is concentrating on
    - ❏ low hanging fruit (i.e. easiest/cheapest)
    - ❏ opportunities to find cost savings (e.g. consolidating similar surveys)
    - ❏ nagging customer issues
    - ❏ existing metrics that could use a CX perspective.
- ❏ Look for projects that have high customer impact, but low effort to get traction.
- ❏ Start small and get quick wins – to gain confidence, build trust and generate momentum, it helps to focus on one or two customer needs instead of their entire journey, while you learn the techniques and develop expertise.

❏ Get grounded – find projects that will have tangible, concrete results with which people can better identify.

How to Get Started:

★ Data:
  - Gather data about where the most customer interactions are concentrated.
  - Find out which programs funds the most services.
  - Obtain report of dollars currently spent on customer feedback and contact centers.
  - Collect reports from contact centers of high volume customer pain points.
  - Study journey maps for high impact customer pain points.
  - Review existing key performance metrics and indicators (KPIs).

★ Tools:
  - Review current CAP goals, leadership goals.
  - Prepare an Impact/Effort Matrix for potential projects to find high impact, low effort options.
  - Compare existing surveys to identify opportunities to reduce duplication or overlap.

★ Engagement:
  - Work with leadership to learn which projects are of highest priority to them.

Case Study:

When GSA's Chief Customer Office was stood up, the team conducted a current state analysis of customer feedback at GSA. After assessing the amount of money spent on individual feedback efforts (e.g. surveys, Contact Centers), the team advocated to invest that same money more strategically. They used these funds to launch a single agency-wide survey platform, were able to provide value to individual managers and a more holistic baseline from which to launch a customer experience practice.

Play 2: Set Goals and Expectations

Key Question: Is the objective of your research for the selected project clear to you and your stakeholders?

Checklist:

- ❏ Define a specific customer goal or research question to drive the research towards. Work backwards from the goal to plan relevant research activities. Example: “We want a person to get their passport in 7 days.”
- ❏ Determine where your stakeholders are largely focused: on technology, on business needs, or human resources. Often, your project will begin with a heavy emphasis on one of these and you may need to steer your stakeholders to rebalance these three elements.
- ❏ Provide assurance to stakeholders the purpose of the activity is not to perform an audit of current operations, but rather simply to ***listen***, above all else, to customers / staff about their experiences.
- ❏ Prepare a written agreement (e.g. engagement letter) describing the goals and approach of the activity, planned tasks and schedule, and level of participation for all parties.
- ❏ Maintain flexibility to adjust the plan as you learn more about the customer.

How to Get Started:

- ★ Data:
    - ○ Identify the business owner(s) for the focus of the CX activity.
- ★ Tools:
    - ○ Obtain a signed engagement letter, Interagency Agreement, or ad hoc/informal letter of agreement.
    - ○ Prepare a project work plan.
- ★ Engagement:
    - ○ Get executive sponsorship.
    - ○ Send communications to other stakeholders who may be affected by or interested in this project.
    - ○ Build trust among stakeholders so that you can shift your approach as needed without losing momentum.

Case Study:

The U.S. Department of State and GSA partnered to listen to their customers about the passport application and renewal process. Their research question was: “How can we improve the process to apply for or renew a U.S. passport to make it simpler and easier?” With this goal in mind, they set up online “suggestion boxes” and reached out to followers on social media and email subscribers to ask for ideas. Over 900 people offered suggestions and upvoted each others’ suggestions. Participants received emails with notifications when milestones were achieved during the project. The Department of State reviewed the recommendations and responded to each recommendation with a course of action they would take. To learn more about what they did, visit https://www.usa.gov/tell-us

Play 3: Identify Your Customers

Key Question: Who are you customers and how well do you know them?

Checklist:

- ❏ Identify who your program/agency/cross-agency consortium serve, which may include internal and external agencies, vendors, citizens, and importantly, employees.
- ❏ Document a persona (i.e. fictional representation) for each customer identified, including demographics, preferences, activities related to your program/service, and desired outcomes. Show that beyond identifying your customers, you actually **understand** them.

How to Get Started:

- ★ Data:
  - ○ Collect data about visitors to the website, but use the data cautiously - not all visitors to a website are your customers.
  - ○ Identify unique characteristics that clearly distinguish specific customers from one another (e.g. programs they participate in, products they produce, etc.)
  - ○ Review existing customer segmentation data - a persona could represent a defined segment.
- ★ Tools:
  - ○ Synthesize existing customer insights to determine who the customers are and what motivates them.
  - ○ Have workshops to select traits and a headshot that belong to each persona.
- ★ Engagement:
  - ○ Hold interviews with a sample of the customers.
  - ○ Involve a cross-functional group of stakeholders when defining personas to incorporate a variety of perspectives.

Case Study:

USA.gov defined personas to represent the behavior for seeking different information on the site, such as finding information to complete a transaction, or learn more about a specific topic or general topic, or to locate contact information. Their process to define the personas took about two weeks and involved a range of stakeholders. These personas will allow USA.gov to do some journey mapping and in-person customer research to better understand their customers and their behaviors, to be equipped in developing a better website. For more details, see: https://digital.gov/2015/04/06/using-personas-to-better-understand-customers-usa-gov-case-study/

Play 4: Walk in Your Customer's Shoes

Key Question: What does a customer experience and feel while accessing your program/service across multiple channels?

Checklist:

- ❏ Develop a customer journey map for your program/service, including activities and touchpoints with your agency, and highlighting pain points, points of delight, moments of truth, and the customer's emotional state. Be sure the journey map addresses service recovery to understand what the customer experiences when there are unexpected outcomes.
    - ❏ To build further empathy and understand the entire customer experience, consider also developing a broader journey map that describes the overall objective the customer has, of which your program may be just one step. The broader journey may even include other agencies. For example, the journey a new business owner takes with an agency to obtain a permit is just one piece of a broader journey that includes obtaining licenses, finding and building out space, having inspections, getting insurance, hiring employees, etc.
    - ❏ For a deeper dive, consider blending the journey map with your business process map to demonstrate the full design required to deliver the service depicted in the journey.
- ❏ Review existing customer feedback, both qualitative (e.g. surveys, interviews, roundtables, etc.), and quantitative (e.g. website analytics) to learn your customer's preferences directly and indirectly.
- ❏ Keep detailed documentation of your work at each step: what you did and how you did it, as a reference for future efforts and to spread knowledge of your activities.
- ❏ Hold retrospectives after each activity for continuous improvement by capturing what went well and what needs work.

How to Get Started:

- ★ Data:
    - Review existing customer feedback data: social listening reports, contact center trends.
    - Capture information about the customer journey: touchpoints, experiences, technology used.
- ★ Tools:
    - Select from various methods for working with customers and stakeholders to solicit feedback, solution options and to prioritize, described by GSA 18F here: https://methods.18f.gov/.
    - Conduct qualitative research: ethnographic interviews, customer roundtables, town halls, listening tours, surveys, journey mapping.
    - Prepare and circulate workshop reports to describe the activities and outcomes.
- ★ Engagement:
    - Provide access to and ability to build relationships with your customers **in-person**.
    - Work with leadership and customer-facing staff to help identify candidate locations and individuals to interview, and to get buy-in from local offices.
    - Hold workshops with stakeholders to keep them informed and to help prioritize upcoming activities.

Case Study:

GSA and the Customer Experience CoE team partnered with the USDA's Farm Service Agency (FSA) to understand the experience of producers and service center staff in applying for and processing direct farm loan applications. The team conducted interviews and ethnographic observations with over 40 subject matter experts and employees in Washington DC and at six service centers, and almost 40 producers in six states. Through this research, the CX CoE team built a customer journey map that reflects the experience, pain points and moments of delight of producers and loan officers as they move through a typical application. The team also hosted four workshops with stakeholders to guide the research, update the customer journey map, vet important findings, and develop recommended solutions to improve the customer experience. To see the customer journey map and final recommendations, visit: https://coe.gsa.gov/coe/farm-loans/index.html.

Play 5: Share and Act on Recommendations

Key Question: In which ways can the customer experience improve, and how will you share your findings with a broader audience to gain visibility and implement recommendations?

Checklist:

- ❏ Form insights and recommendations for improving the customer experience using various methods:
  - ❏ Develop ***tools*** that can aid in solving customer pain points (e.g. write the customer's name on a Starbucks cup to personalize the experience, provide customers a handout depicting their customer journey at the outset to reduce anxiety about expected processes and outcomes; hire the right staff to perform unique functions, train staff for specific skills, etc.)
  - ❏ Deploy ***technology*** that addresses customer preferences (e.g. vets.gov consolidates access to multiple Veteran benefits through a single portal).
  - ❏ Establish ***engagement*** opportunities for continual customer feedback (e.g. local community boards that solicit comments directly from customers; roundtable discussions).
  - ❏ Advocate for ***policy*** changes that can remove barriers to or further enhance good customer experience.
- ❏ Publish insights and recommendations, along with your methodology and approach for distribution to agency leadership and/or the public.
- ❏ Contribute articles to blogs/newsletters about your activities to spread the word and raise visibility.
- ❏ Where possible, keep the people you interviewed aware of your findings to close the loop - delivering a good customer experience for those that helped with your research.
- ❏ Brief key stakeholders about actionable recommendations to improve customer experience.
- ❏ Understand the capacity of impacted stakeholders for implementing recommendations.
- ❏ Work with stakeholders to prioritize recommendations and make plans for implementation.

How to Get Started:

- ★ Data
  - ○ Review interview notes and evaluate results from prioritization activities (e.g. card sorting exercise).
- ★ Tools:
  - ○ Use techniques, such as mind mapping, to synthesize raw notes and identify key insights.
  - ○ Write stories that represent different customer experiences to help people better relate to the findings.
  - ○ Prepare a brief to share recommendations with stakeholders.
  - ○ Use methods like an Impact/Effort Matrix to prioritize implementation opportunities.
- ★ Engagement:
  - ○ Meet routinely with the team(s) responsible for implementing recommendations to share insights and support prioritization of activities.
  - ○ Develop relationships with content channel owners to publish your materials, artifacts, and findings with stakeholders and customers along the way.

Case Study:

The Department of Veterans Affairs found that 30% of customers calling into the Interactive Voice Response (IVR) were hanging up in the IVR system. Leadership was looking for an economical way of resolving this issue. When redesigning the IVR, the team discovered callers were hanging up because they preferred to speak with a human agent. Since the IVR system did not provide any prompts to be routed to speak to someone, these callers would abandon. To act on these findings, the new IVR system was designed to provide callers a prompt to be routed to an agent, and the number of callers hanging up in the IVR was reduced to just 5%. The mindset of putting the customer first and involving customers in the design allowed for a simple and cost-effective solution to the problem.

Play 6: Build a Service Catalog

Key Question: Are potential clients aware of the work your team can support?

Checklist:

- ❏ Identify the CX services your team is capable of supporting, such as workshop facilitation, ethnographic research, survey design, journey mapping, Voice of the Customer practice, human-centered design, service design, consultation, customer data synthesis, etc.
- ❏ Make the offerings flexible enough to meet the unique demands of your clients, but standard enough that you can offer them as consistent resources.
- ❏ Publish the list of services in a catalog to provide to prospective clients and leadership.
- ❏ Meet with department heads and suggest areas that customer experience practices can help with their objectives.

How to Get Started:

- ★ Data:
    - Review and catalog prior and on-going CX efforts to-date.
    - Evaluate the skills and relevant project experience of your staff.
- ★ Tools:
    - Create repeatable processes and products that you can provide in Customer Experience engagements.
    - Prepare templates for frequently used activities.
- ★ Engagement:
    - Share the service catalog as you assemble it with your stakeholders.
    - Get feedback from prior clients regarding work your team has performed.

MEASURE

In this section, you'll find plays to produce numbers that demonstrate your success and show the impact of your work. Whether using qualitative or quantitative measures, be sure to capture the right metrics that are meaningful, useful and tell a story. Good analytics is about developing key insights and making better decisions. Equally important is to be transparent – share the metrics to provide more visibility about the team successes. And finally, review metrics periodically to determine if they are still effective or need adjusting.

Case Study:

> At the Department of Agriculture, the Data Analytics and Contact Center Centers of Excellence (CoEs) worked to streamline the data collection, reporting, and follow-up processes associated with "Tell Sonny", a web-based platform and phone contact line for individuals to submit comments or inquiries across all USDA agencies and programs. Since launch, "Tell Sonny" received over 800 responses in the form of questions or feedback. What started as a basic prototype evolved into an important aspect of the Department's focus on customer experience by incorporating improved dashboards, automating data collection, enhancing the web form for feedback, consolidating reporting, and employing a comment classification algorithm. Using Natural Language Processing and Sentiment Analysis, "Tell Sonny" comments are categorized and made automatically available for real time agency follow up. The next step is to allow agencies to add their responses to "Tell Sonny" comments using CRM tools like MS Dynamics, and based on sensitivity, these responses will be made available in the dashboards to reflect a full history of customer feedback.

Play 7: Measure What Matters

Key Question: Are you asking customers the right questions and collecting the right metrics in the right way? Are your efforts making a difference for the customer?

Checklist:

- ❏ Review your ***goals*** and work backwards to identify metrics that measure progress towards those goals. For inspiration, look at:
  - ❏ The 'moments that matter' in the customer's journey to help validate the impact of any efforts to improve the customer experience affecting those portions of the journey.
  - ❏ 'Failure demand', such as spikes in calls to the contact center, where customers have self-identified pain points in their experience.
  - ❏ Your agency's defined performance metrics and/or CAP goals.
  - ❏ The OMB A-11 circular for recommended customer experience metrics.
- ❏ Make the metric ***relevant*** by associating it with a specific customer transaction, not just about the customer's relationship with your agency.
- ❏ Adjust the metric to keep data ***unbiased***. For example, customer satisfaction is influenced by the nature of the activity – paying taxes will have lower satisfaction score than visiting national parks – so ask questions about the process instead of the outcome (e.g. Did you understand the requirements? How easy was the process? Were agents pleasant/helpful? Were issues resolved

in a timely manner? Did you understand the factors that impacted your outcome? Did you trust the individuals you worked with?)

- ❏ Keep the metric ***simple*** so it can be easily understood, tell a clear story, and enable decision makers to interpret readily what actions can be taken to reach the corresponding goal. For most effectiveness, keep surveys simple – ask few questions and ask straightforward questions.
- ❏ Assign an ***owner*** to each metric, because without accountability, the metric is meaningless.
- ❏ Clarify the ***action***(s) that can be taken to make improvements based on the outcome of a metric (e.g. an increase or decrease in value). There is no reason to measure something if you can't change the outcome.
- ❏ Decide how often the metric will be updated. The more ***timely*** the metric, the more effective any actions related to it will be.
- ❏ To assure trust in the data, have a means the capture ***reference*** information about each metric, such as: when last updated, from which system(s), how it was calculated, etc.
- ❏ Find the best ***source*** for your metric:
  - ❏ Qualitative methods like surveys and social media posts.
  - ❏ Quantitative methods like website analytics and contact center data.
- ❏ For each metric, establish a baseline for comparison with future results to understand how initiatives are impacting customer experience.
- ❏ Identify a way to have frequent "pulse checks" to understand how initiatives you undertake to improve customer experience impact customer satisfaction.
- ❏ Find opportunities to integrate customer feedback data from other channels, programs and business areas to provide a more rounded view of the customer experience (i.e. "Voice of the Customer").

How to Get Started:

- ★ Data:
  - ○ Review contact center data for customer pain points.
  - ○ Review existing sources of data for customer feedback.
- ★ Tools:
  - ○ Review the Paperwork Reduction Act (PRA) guidelines when suggesting new surveys.
  - ○ Review the customer journey map.
  - ○ Review the agency's CAP goals.
  - ○ Implement a tool to integrate feedback mechanisms and provide a central reporting approach for the 'Voice of the Customer'.
  - ○ Review the OMB A-11 circular for which questions different services should ask pertaining to customer experience. (see Resources: Understand CX/Design Standards)
  - ○ Use general surveys OMB provides (will provide) to jump start feedback collection.
- ★ Engagement:
  - ○ Develop relationships with those responsible for customer feedback across different channels to get their buy-in and support.
  - ○ Facilitate workshops with feedback channel owners and business intelligence leads to develop strategies for improving data collection agency-wide.

Case Study:

When Bing was trying to optimize their search engine towards the target metric they set (i.e. maximize searches per user), instead of developing features users preferred, they developed features that required users to perform more searches to find what they were seeking. Not surprisingly, this caused users to abandon Bing for other, more efficient search engines. Once Bing recognized they had established the wrong metric, they modified their target metric to reduce the number of queries per session for a user, and maximize the number of sessions per user. Once Bing agreed on the right metric, the search engine improved, resulting in a marked increase in the number of users, allowing Bing to become profitable. For more information about Bing's transformation, visit:
https://hackernoon.com/when-you-experiment-with-the-wrong-metrics-85c51cc594ee

Play 8: Analyze and Publish Metrics

Key Question: With whom and how are you sharing your metrics to highlight successes and drive business decisions? How transparent are your metrics?

Checklist:

- ❏ Analyze metrics for insights and success stories, however incremental, to share with agency leadership and build momentum.
- ❏ Share the metrics routinely with stakeholders and decision makers to prioritize work and drive changes towards meeting stated goals.
- ❏ Use success stories and quick wins, framed with customer-centric achievements, as a way to galvanize support for additional investment.

How to Get Started:

- ★ Data:
  - ○ Obtain data from various channels pertaining to the customer experience, including: website analytics, survey data, contact center data, social media data.
- ★ Tools:
  - ○ Develop a dashboard for access to important metrics and make available to decision makers and possibly the public.
  - ○ Publish interesting results in agency blogs and newsletters
- ★ Engagement:
  - ○ Present metrics to decision makers to provide additional context for business prioritization.
  - ○ Use measurement as an opportunity to maintain contact with the business.

Case Study:

> To position the USDA to be in alignment with the newly amended OMB A-11 circular, which boosted focus on customer experience across the federal government, the Data Analytics Center of Excellence (CoE) developed prototype feedback user interface and dashboard to capture and report on the specific questions outlined in the circular. The USDA aims to use the prototype to enhance websites to include the customer level feedback prescribed by the OMB A-11. The dashboard will enable USDA leadership to learn which aspects of customer experience need additional attention and make business decisions based on accumulated customer feedback data. To learn more about best practices for capturing and sharing metrics, see the Data Analytics CoE playbook here: https://coe.gsa.gov/coe/data-analytics.html

Play 9: Reduce, Reuse, Recycle

Key Question: How useful are the metrics and are any adjustments needed?

Checklist:

- ❏ Evaluate existing qualitative (e.g. surveys) and quantitative (e.g. website metrics) measures and methods for usefulness. Each metric should be:
  - ❏ Goal-oriented to provide a target to aspire towards
  - ❏ Relevant to a specific customer transaction
  - ❏ Unbiased by the outcome of a customer's transaction
  - ❏ Simple to understand and act on
  - ❏ Owned by a responsible business owner
  - ❏ Actionable so undesired outcomes can be corrected
  - ❏ Timely with an appropriate frequency to make effective decisions
  - ❏ Referenceable for information about the metric itself.
- ❏ Form a working group to routinely evaluate the metrics for effectiveness, compliance with government standards, and alignment with industry trends.
- ❏ Choose the disposition for each metric:
  - ❏ Keep metrics that are still useful
  - ❏ Discard metrics that are not useful or no longer needed
  - ❏ Modify metrics that can be improved
  - ❏ Add metrics that are missing.

How to Get Started:

- ★ Data:
  - ○ Review data from various channels pertaining to the customer experience, including: website analytics, survey data, contact center data, social media data.
- ★ Tools:
  - ○ Poll decision makers to learn which metrics they find useful.
- ★ Engagement:
  - ○ Hold workshops with program and agency leadership, channel owners and other stakeholders to evaluate the metrics.

GROW

In this section you'll find plays that help you grow and sustain a successful CX practice, including assessing current capabilities to identify gaps and growth opportunities, developing relationships with leadership and like-minded people, creating a vision, obtaining skilled staff and funding, and infusing customer experience thinking throughout the agency. However, all the pieces do not have to be in place or fully mature to get started, and some elements may be more applicable than others to your organization. Start small, be deliberate, and build wisely as you stabilize your efforts.

Case Study:

In 2014, GSA formed a team to focus on improving the interactions between the agency and its customers – the first agency-wide Customer Experience Office in the Federal Government. As a small, centralized resource for the agency, the mission was to use customer data to drive more effective business decisions. The team began by building relationships with stakeholders to show how focusing on CX can yield real results. Initial projects aimed to deliver small, quick wins and included centralizing and redesigning surveys to reduce the survey burden on customers, developing an action planning process to address customer feedback, and producing journey maps for each of the Federal Acquisition Service's business lines to identify major customer pain points. Eventually, the office offered training opportunities to build the CX capacity of the agency through design workshops. As the team matured, it established a vision that included these offerings: customer research and understanding, strategy and products, capacity building, and pilots. In 2016, the office was recognized officially by the Federal Government with an annual budget. Through a combination of building allegiances with the right stakeholders, defining a clear strategy, and hiring CX-minded staff, the office is now able to support GSA in improving broader journeys, such as international travel, that involve multiple agencies.

Play 10: Get Your Bearings

Key Question: To what extent is your organization able to support CX practices currently, how do they compare with industry best practices, and where can you jump in to get started?

Checklist:

- ❏ Assess what metrics are currently captured to ***measure*** CX, how they are captured, and the overall strategy for measuring CX.
- ❏ Assess the level of leadership support and ***governance*** for CX activities.
- ❏ Assess training and incentives provided to employees to foster a CX ***culture***.
- ❏ Assess the extent of ***customer research*** performed to evaluate the customer experience for programs and services.
- ❏ Assess the capacity to implement ***service design*** concepts, including staffing, business processes and technology.
- ❏ Learn from the experts – rely on and borrow from industry best practices to determine what best suits your organization.

How to Get Started:

- ★ Data:
  - Collect insights and guidance from public sector agencies that have CX expertise: GSA Centers of Excellence, Office of Personnel Management (OPM) Labs, and Department of Veterans Affairs (VA) Veterans Experience Office (VEO), etc.
  - Review and study CX practices from industry leaders: Starbucks, USAA, Marriott, Ritz, Cleveland Clinic, Mayo Clinic, etc.
  - Review studies and reports from leading research and consulting firms.
  - Review customer feedback data already being collected.
- ★ Tools:
  - Review the Office of Personnel Management A-11 Circular "Managing Customer Experience and Improving Service Delivery" for guidance on what to measure.
  - Complete the Office of Management and Budget (OMB) CX Maturity Assessment on performance.gov.
- ★ Engagement:
  - Gather input from program managers, data analytics teams, communications teams on existing measures, collection methods and infrastructure.
  - Gather input from leadership on staffing, resources, priorities and strategy.
  - Gather input from human resources on available training and incentives.
  - Gather input from program managers on current techniques for gathering customer insights.

Play 11: Build a Partnership

Key Question: Who can you partner with to develop a CX culture and presence, and do you have a common language and share a common vision?

Checklist:

- ❏ Talk frequently with leadership to get buy-in. You might cite the PMA, public and private sector case studies, and real data to demonstrate actual benefits.
- ❏ Build relationships with your internal and external stakeholders to increase integration and prevent isolation. Collaborate, don’t dictate - make allies, not demands.
- ❏ Use the same language (or decide together on the language) to ensure a common understanding and spur progress towards meeting customer needs.
- ❏ Engage continually with employees because they can be a great source of ideas and insight. There is a positive connection between customer satisfaction and employee engagement.
- ❏ Involve all the stakeholders in the co-creation process, including skeptics and dissenters – give them a stake in the game.
- ❏ Find other employees with a shared passion for focusing on customer experience and meet with them regularly to discuss ideas and form a mentor network.

How to Get Started:

- ★ Data:
    - Collect a list of key stakeholders.
    - Gather case studies from CX leaders in government and industry.
    - Review glossaries, information about the program(s) and service(s) you’ll be addressing, and information about how customers talk about these.
- ★ Tools:
    - Facilitate workshops to introduce CX and establish common language.
    - Research the return on investment (ROI) for CX efforts, such as:
        - https://blog.hubspot.com/service/customer-experience-roi
        - https://beyondphilosophy.com/5-facts-to-end-the-roi-debate-on-customer-experience/
- ★ Engagement:
    - Build relationships with the technology owners, communications channel owners, program/service owners, and contact center owners.

Play 12: Establish Your Foundation

Key Question: Do you have clear governance, adequately skilled and well trained staff, available funding and good business processes?

Checklist:

- ❏ Prepare a CX strategy, vision statement and/or mission statement to guide your team towards the same goals and mindset.
- ❏ Work together to identify your specific goals, principles and/or priorities.
- ❏ Consider the most applicable staffing approach. Decide whether it's better to train employees to practice CX or educate staff about CX and hire contractors to perform the work, and re-evaluate the approach as needed.
- ❏ Start with 1-2 employees adept at navigating the agency and building relationships. An official CX Office and/or Chief Experience Officer are not prerequisites to get started, but might be an ultimate goal for highly-service oriented agencies.
- ❏ Get creative with funding – find cost savings with small efforts like streamlining existing projects (e.g. consolidating surveys), to fund more work.
- ❏ Develop an intake process for evaluating new projects consistently, and be transparent with your selection/prioritization criteria.

How to Get Started:

- ★ Data:
  - ○ Inventory customer feedback mechanisms to seek opportunities for consolidation.
- ★ Tools:
  - ○ Publish and share your strategy/vision/mission statement.
  - ○ Prepare a statement describing your purpose or core belief, how you'll fulfill that belief, and what you will do to fulfill that belief. Here's a good reference: https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action
  - ○ Attend Lab@OPM tutorials.
  - ○ Document your intake process for new CX projects as a reference for potential stakeholders.
- ★ Engagement:
  - ○ Hold workshops to train staff about CX practices, and invite experts from government and industry for added perspective.
  - ○ Identify and connect CX practitioners throughout the agency.
  - ○ Establish a CX Champion within each business unit / program to spread knowledge and understanding about CX throughout your agency.

Case Study:

US Census Bureau in 2011 wanted to make it easier to modernize its technology through the agency. In 2014, they established the Center for Applied Technology (CAT Lab), an open space on a lower level of their building staffed with 7 technology and software experts. The intake process consisted of a simple, open invitation to enter the CAT lab and have a conversation about a technology challenge. One Census Bureau analyst came to the lab because of a struggle to manage thousands of survey respondents, which was a manual process that would take weeks. Accordingly, the lab co-developed a solution to automate the survey analysis process.

Play 13: Foster a Customer-Centric Mindset

Key Question: How well does your organization infuse customer experience into the culture?

Checklist:

- ❏ Make customer experience a top agency priority.
- ❏ Establish goals for programs and services aligned with delivering a good customer experience.
- ❏ Provide training opportunities for employees to become knowledgeable about CX and HCD.
- ❏ Create performance incentives (e.g. performance evaluation goals) for employees based on CX excellence.
- ❏ Hire people that have a customer experience attitude.
- ❏ Identify and prioritize opportunities for IT to support CX (e.g. website analytics).
- ❏ Break down walls between organizations involved in a single customer journey by inviting them to participate in your CX activities.
    - ❏ For example, collaborate with the contact center to deliver a good end-to-end experience; aim to increase the first contact resolution percentage.
- ❏ Give employees a way to make suggestions on ways to improve customer experience.
- ❏ Create a way for employees to share customer experience best practices they have developed.
- ❏ Celebrate employees and programs that demonstrate CX innovation and excellence.
- ❏ Identify your customers (See Play 3) and involve them regularly when designing programs, services, online features, etc.

How to Get Started:

- ★ Data:
    - ○ List core competencies and skills needed to practice CX.
- ★ Tools:
    - ○ Hold design workshops to train staff about CX practices.
    - ○ Implement, review and act on website metrics.
    - ○ Develop online training or study guide about CX for employees
    - ○ Review the Contact Center CoE playbook for best practices here: https://coe.gsa.gov/coe/contact-center.html
- ★ Engagement:
    - ○ Work with Human Resources to build CX incentives into employee performance. evaluations and provide access training courses about CX.
    - ○ Develop relationships with leaders from other organizations interested in created a seamless customer experience.
    - ○ Involve IT in discussions regarding adopting CX tools.

Case Study:

The United States Automobile Association (USAA) is often recognized for excellence in customer experience. The company has developed a culture of focusing on the customer's needs, starting with the mission to help facilitate the financial security of their members. Further, member satisfaction and retention are two key indicators of the memberships' experience, and USAA leads the industry in both. USAA maintains focus on the customer by training employees to analyze a member's specific situation and identify how to best help them, and by investing professional development of our member contact employees. USAA aims to deepen their focus on customer experience and exceed the unique expectations of each member by architecting personalised, multi-channel interactions that leverage what they know about members, and importantly what they know about their employees.
https://www.mycustomer.com/experience/engagement/how-usaa-leads-its-field-in-customer-experience

KEYS TO SUCCESS

1. Starting with small, but impactful projects that demonstrate value and build trust and momentum.
2. A practicing model that emulates industry best practices, adapted to government constraints.
3. An approach that involves listening to the customer. Saves time, energy and money because you end up building what the customer actually wants.
4. Documenting everything you do and sharing your progress liberally with stakeholders and leadership for transparency and to gain visibility.
5. A nimble and iterative approach that is responsive to changing needs and priorities.
6. Collaborating with others who share an interest in CX within and outside your organization.
7. Offering learning opportunities for those who wish to know more about CX.
8. Guiding leadership and staff to develop a customer-centered culture, by sharing a common focus on the customer experience and a pervasive sentiment that the customer is your top priority,
9. Developing performance-based incentives for employees to adopt customer experience-centric practices.
10. Negotiating various tensions that can pull you off track or towards more challenging paths:

    1. **Structure (Leadership and Bureaucracy):** Leadership support will stand an office up, organizational buy-in will allow it to flourish.
    2. **Data (Quantitative and Qualitative):** Quantitative data tells you what to look at, qualitative data tells you how to act on it.
    3. **Stakeholders (Internal and External):** Incorporate input from both external stakeholders (i.e. Veterans, their families, caregivers, survivors) and internal stakeholders (i.e. VA employees) to form a more complete picture of the status and develop a way forward.
    4. **Approaches (Public and Private):** Bridge the gap between private and public sector best practices to create a well-rounded point of view.
    5. **Innovation (Enterprise and Local):** Create a balanced environment in which all levels (granular and high-level) can contribute their views from their unique perspective, so the organization can benefit from innovation while staying focused on a common future.
    6. **Implementation (Ideas and Implementation):** Think big, but be aware of the organizational environment around you and how to successfully operate in that environment. Organizational models are not one size fits all, and what may work for some organizations may not be the best fit for others.
    7. **Partnership (Intra and Inter-agency):** Leverage the experience and expertise of other government offices when needed, to strengthen and diversify your internal capabilities. There is no need to reinvent the wheel when a successful blueprint already exists.

Source: Veterans Experience Office, Department of Veterans Affairs

RESOURCES

Find Experts/Partners in Customer Experience (CX) and Human Centered Design (HCD):

- Office of Personnel Management (OPM) Labs
  https://lab.opm.gov/our-services/
- Open Opportunities
  https://openopps.usajobs.gov/
- White House Presidential Innovation Fellows (PIFs)
  https://presidentialinnovationfellows.gov/
- General Services Administration (GSA) 18F
  https://18f.gsa.gov/
- GSA Customer Experience Centers of Excellence (CX CoE)
  https://coe.gsa.gov/centers-of-excellence/customer-experience/
- GSA Communities of Practice
  https://digital.gov/communities/
- GSA Innovation.gov
  https://innovation.gov/about/
- GSA Challenge.gov
  https://www.challenge.gov/toolkit/
- GSA Federal Front Door
  https://labs.usa.gov/
- GSA Digital.gov
  https://digital.gov/resources/customer-experience-toolkit/
- Partnership for Public Service
  https://ourpublicservice.org/about-us/index.php
- Federal High Impact Service Providers
  https://www.performance.gov/cx/HISPList.pdf

Understand CX / Design Standards:

- Office of Personnel Management A-11 Circular
  https://www.whitehouse.gov/wp-content/uploads/2018/06/s280.pdf

- General Services Administration Design Standards
  https://designsystem.digital.gov/

- White House United States Digital Services (USDS)
  https://playbook.cio.gov/

- United Kingdom Government Digital Service (GDS) Digital Standards
  https://www.gov.uk/service-manual/service-standard

Find Your Starting Point:

- GSA Performance.gov CX Maturity Assessment
  https://www.performance.gov/cx/A11-Companion-Metrics-Maturity-and-Action-Plan.pdf

Get Educated/Trained on Human Centered Design:

- Office of Personnel Management (OPM) Labs
  https://lab.opm.gov/class-sign-up/

- ACT-IAC CX Playbook
  https://www.actiac.org/customer-experience-playbook

- General Services Administration (GSA) 18F Method Cards
  https://methods.18f.gov/

- Insights on Customer Experience
  https://www.mckinsey.com/featured-insights/customer-experience

- Recommended Reading:
  - “Outside In: The Power of Putting Customers at the Center of Your Business” - Harley Manning, Josh Bernoff, and Kerry Bodine
  - “Wired to Care: How Companies Prosper when They Create Widespread Empathy” - Dev Patnaik

Find Support for Customer Metrics:

- Office of Management and Budget (OMB) Feedback USA
  https://ourpublicservice.org/about-us/index.php
- GSA Data Analytics Center of Excellence
  https://coe.gsa.gov/coe/data-analytics.html

Test Your Evidence:

- GSA Office of Evaluation Sciences
  https://oes.gsa.gov/about/

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INSPIRATION

One of the Cross-Agency Priority (CAP) goals identified in the President’s Management Agenda (PMA) is **improving customer experience (CX)**. The goal is “to transform the customer experience by improving the usability and reliability of our Federal Government’s most critical digital services; create measurable improvements in customer satisfaction by using the principles and practices proven by leading private sector organizations; increase trust in the Federal Government by improving the experience citizens and businesses have with Federal services whether online, in-person, or via phone; and leverage technology to break down barriers and increase communication between Federal agencies and the citizens they serve.”

The General Services Administration (GSA) Centers of Excellence (COEs) were established to accelerate IT modernization to improve the citizen experience, improve outcomes and reduce legacy IT spending across the government. The Customer Experience COE specifically aims to demonstrate the business value of customer experience as a discipline, work with agencies to develop a better understanding of their customers and their needs and help translate those findings into actions that create outstanding experiences.

This playbook was prepared by the GSA CX CoE in support of the PMA and CAP goals.