Customer Service

Goal Leaders:

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FY 2016 Quarter 3

Overview

Goal Statement

o   Increase public satisfaction and promote positive experiences with the federal government by making it faster and easier for individuals and businesses to complete transactions and receive quality services.
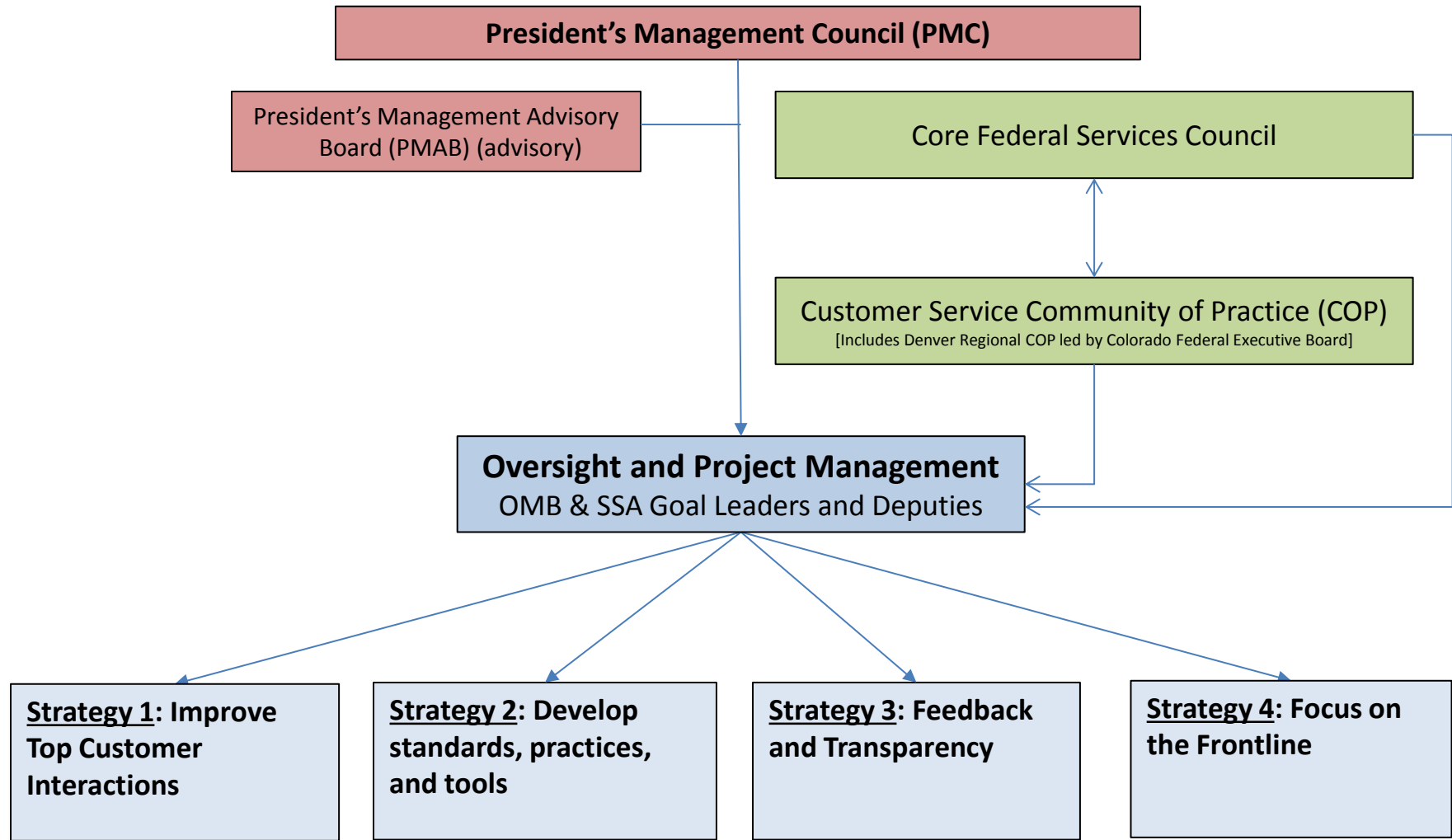
Urgency

o   Individuals and businesses expect government services to be well-designed, efficient, and generally comparable to the services they receive from leading private sector organizations.

o   Despite some important strides to improve customer service over the past 15 years, many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself.

Vision

o   Create measureable increases in timeliness and quality for top transactions, as measured by transaction-specific indicators.

o   Create measureable improvements in the public's satisfaction across government, using standard cross-agency measurements.

Goal Team and Governance Plan

President's Management Council (PMC)

President's Management Advisory Board (PMAB) (advisory)

Core Federal Services Council

Customer Service Community of Practice (COP)
[Includes Denver Regional COP led by Colorado Federal Executive Board]

Oversight and Project Management
OMB & SSA Goal Leaders and Deputies

Strategy 1: Improve Top Customer Interactions

Strategy 2: Develop standards, practices, and tools

Strategy 3: Feedback and Transparency

Strategy 4: Focus on the Frontline

Action Plan for FY 2016-17

Sub-goal	Major Actions to Achieve Impact	Key Indicators
Strategy 1: Improve Top Customer Interactions	• Identify core Federal service programs that provide significant services to citizens, businesses, and other customers. • Establish a council of leaders from major Federal public-facing programs to discuss and develop strategies to improve customer service delivery, share best practices, and receive increased support to address challenges.	• New Indicator: Percentage of core Federal service programs that complete a maturity model self-assessment *[data was collected in Q3 FY 16]**
Strategy 2: Develop and implement standards, practices, and tools	• With the guidance of the Community of Practice, develop customer service principles as well as an assessment framework for programs to use to identify strengths and weaknesses in their existing customer service. • Identify, develop, and share tools, resources, and best practices to support programs in improving customer service delivery.	• Percentage of core Federal service programs that collect customer feedback data *[data will be collected in Q4 FY 16]**
Strategy 3: Feedback and Transparency	• Make customer service feedback a standard practice for customer-facing communications. • Consider how to increase the use of voluntary customer satisfaction surveys to develop customer service improvements. • Increase the transparency of transaction times and satisfaction measures for top customer-facing transactions, and report on customer satisfaction across core customer-facing programs. • Leverage the President's Management Council (PMC) and President's Management Advisory Board (PMAB) to seek out lessons learned and best practices for increasing stakeholder acceptance of changes to service delivery models.	• Percentage of core Federal service programs that have a plan to improve customer service ~~*[data will be collected Q3 FY 16]*~~** • ~~Percentage of core Federal service programs showing improvements in their customer feedback data *[this baseline data will be collected in Q4 FY 16]**~~
Strategy 4: Focus on the Frontline	• Continue to recognize excellent customer service through awards programs. • Identify ways to promote and improve a customer service culture through the review and analysis of available data sources such as Employee Viewpoint Survey scores.	• Employee Viewpoint Survey engagement scores of core Federal service programs ~~*[initial review will occur in Q3 FY16]*~~**

* The CAP Goal team and Council identified completion of a self-assessment as a critical foundational step and have made revisions to other indicators and timelines accordingly.

** These indicators and appropriate timelines are pending further review and will be updated based on additional input from the Council.

Progress Updates

Establishment of the Core Federal Services Council and Identification of Initial Priorities

- OMB established the [Core Federal Services Council](#) on March 30, 2016 and identified, with agency collaboration, 30 major Federal programs that directly provide services to the public. The Council will identify challenges in improving customer service for their programs, share best practices to address these challenges, and identify strategies, including policy recommendations, to improve the customer experience for the core Federal programs serving on the Council.

- The Council was convened on April 19, 2016 by OMB. Following the initial meeting, Council members participated in a May conference call to learn about the Customer Experience framework and maturity model self-assessment tool developed in part by the Customer Service Community of Practice. After the call, each program worked on completing a self-assessment.

- At the second quarterly Council meeting on June 21, 2016, Council members identified key priority areas for the Council, including customer understanding, data and measurement and culture, based on a self-assessment summarizing the results of 27 of the 30 programs that identified a maturity model and path.

FeedbackUSA

- Citizenship and Immigration Services (USCIS) joined the FeedbackUSA pilot in April with 40 kiosks placed in 21 field offices across the country.

- The collection of transactional customer feedback data through FeedbackUSA also continues at 14 Social Security card centers, 10 Veteran's Administration benefits offices, and 27 State Department passport processing centers.

- The CAP Goal team conducted reviews with agencies participating in FeedbackUSA in the first year. Pilot programs stated that they liked the functionality of collecting in-person, real-time feedback. Programs thought the feedback collected provided high-level "red flag" data to identify potential issues. However, they would like to collect more detailed information from customers in order to identify root causes of dissatisfaction and other varying satisfaction levels and to make operational improvements.

- Outreach was also conducted through the Core Federal Services Council to identify other Federal programs that may participate in FeedbackUSA in the second year.

Federal Customer Service Awards

- The 2016 Federal Customer Service Awards program was announced in April with agency nominations due in July.

- The CAP Goal team will discuss long-term support and governance of this Awards program with the Core Federal Services Council before the end of the fiscal year.

Work Plan - Strategy 1: Improve Top Customer Interactions

Problem being targeted: Major government programs affect large sections of the American public (individuals and businesses). Any gap between existing service levels and customer expectations may create frustration with specific programs and agencies and with the federal government in general. Core customer programs will identify specific customer transactions (which may be refined as data sources are developed). Specific major federal transactions include TSA security screening, veterans' pension and disability applications, student-loan repayment, Social Security retirement and disability applications, and taxpayer assistance.

Theory of change: Agencies/programs are already working hard to improve services to the public. By jointly developing metrics and self-assessment tools and regularly reviewing progress, program managers with senior-level support can share best practices across government to improve key programs.

Milestone Summary			
Key Milestones	**Milestone Due Date**	**Milestone status**	**Owner**
Convene initial meeting of the Core Federal Services Council	Q3 FY16	Complete	OMB
Core Federal service programs conduct self-assessment (using resources such as Customer Service Playbook and Maturity Model) and develop strategies to improve customer service	Q3 FY16	Complete	OMB
Identify the percentage of core Federal service programs that collect customer feedback data	Q4 FY16*	Complete	OMB
Identify the percentage of core Federal service programs that have a plan to improve customer service	TBD**	Not Started	OMB
~~Core Federal service programs identify their baseline customer feedback data*~~	~~Q4 FY16~~	~~On Track~~	~~OMB~~
~~Core Federal service programs review feedback data and progress on strategies to improve customer service*~~	~~Q1 FY17~~	~~On Track~~	~~OMB~~
Identify options for long-term support for the Council	Q4 FY 16	On Track	OMB
Identify priority areas that Core Federal service programs will focus on at future quarterly meetings	Q4 FY 16	On Track	OMB

* The CAP Goal team and Council identified completion of a self-assessment as a critical foundational step and have made revisions to other milestones and timelines accordingly.

** These milestones and appropriate timelines are pending further review and will be updated based on additional input from the Council.

Work Plan - Strategy 2:
Develop and implement standards, practices, and tools

Problem being targeted: Fragmentation and silos have made it difficult to establish customer service standards and initiatives within and across agencies, and there are few mechanisms for collaboration and sharing best practices.

Theory of change: Establishing a community of practice across agencies and clarifying who is responsible for customer service will help establish an infrastructure to improve coordination and develop sustained change over time. This capacity will be used to develop standards, practices and tools that can be implemented by agencies over time.

Milestone Summary			
Key Milestones	**Milestone Due Date**	**Milestone status**	**Owner**
Conduct a year-end review of RCoP pilot to determine appropriate next steps	Q2 FY16	Complete	SSA/COP
Develop plan for federal customer service-focused collaboration platform	Q2 FY16	Complete	SSA/COP
Develop plan for Customer Service Playbook and Maturity Model	Q2 FY16	Complete	OMB/COP
Collect feedback from Community of Practice on Customer Service Playbook, Maturity Model, and related resources	Q2 FY16	Complete	SSA/COP
Pilot and evaluate ~~Customer Service Playbook and~~ Maturity Model with core Federal service programs*	Q3 FY16	Complete	OMB/COP
Disseminate and share ~~Customer Service Playbook and~~ Maturity Model with a wider audience*	Q4 FY16	On Track	OMB/COP
Launch federal customer service-focused collaboration platform**	TBD	Not Started	SSA/COP

* The CAP Goal team and Council identified completion of a maturity model self-assessment as a critical foundational step. The pilot, evaluation, and dissemination of a Customer Service Playbook is pending further review from the Council.
** Due date dependent upon plan findings

Work Plan - Strategy 3: Feedback and Transparency

Problem being targeted: There is insufficient data available to identify government's major customer service challenges or to diagnose problem areas, and often limited transparency into the quality and timeliness of specific services.

Theory of change: Data can be used to target improvement efforts at both the government-wide an agency level, and can provide diagnostic information for use at a program-level. In addition, improved transparency would help citizens set expectations and hold government accountable for improvements.

Milestone Summary			
Key Milestones	**Milestone Due Date**	**Milestone status**	**Owner**
Conduct mid-point assessment of customer feedback pilot effectiveness	Q2 FY16	Complete	OMB/SSA
Identify initial priorities and topics to focus on with the core Federal service programs	Q3 FY16	Complete	OMB
Identify the percentage of core Federal service programs that have a plan to improve customer service	TBD**	Not Started	OMB
Assess results of customer feedback pilot	Q4 FY16	On Track	OMB/SSA
Develop appropriate policy tool for full implementation (e.g., Executive Order, OMB guidance)**	Q4 FY16	Not Started	OMB
~~Core Federal service programs identify their baseline customer feedback data*~~	~~Q4 FY16~~	~~On Track~~	~~OMB~~
Expand customer feedback pilot to a broader set of core Federal service programs	Q4 FY16	Not Started	OMB
Conduct mid-point assessment of Year 2 of the pilot	Q2 FY17	Not Started	OMB/SSA
Assess results of Year 2 of the customer feedback pilot	Q4 FY17	Not Started	OMB/SSA

* The CAP Goal team and Council identified completion of a self-assessment as a critical foundational step and have made revisions to other milestones and timelines accordingly.
** These milestones and appropriate timelines are pending further review and will be updated based on additional input from the Council.

Work Plan - Strategy 4: Focus on the Frontline

Problem being targeted: Too often customer service does not feel like a priority to front-line staff and, in some cases, staff that work directly with citizens feel undervalued. Further, an insufficiently trained front-line staff can complicate efforts to improve customer service.

Theory of change: Agency executives are able to communicate to agency staff that this is a priority area for the Administration. This will be reinforced by the creation of awards programs which incentivize improvement across programs. In addition, engaging the COP to focus on workforce issues will provide agencies with tools to make improvements.

Milestone Summary			
Key Milestones	**Milestone Due Date**	**Milestone status**	**Owner**
First award recipients announced	Q1 FY16	Complete	OMB
Identify lessons learned from first year of award process and share with CoP members for comments	Q1 FY16	Complete	SSA
Announce and issue guidance on second annual customer service awards	Q3 FY16	Complete	OMB
Review Employee Viewpoint Survey data of core Federal service programs	Q2 FY17*	On Track	OMB
Identify governance structure for award program beyond CAP Goal	Q4 FY16	On Track	SSA/OMB
Announce award recipients of second annual customer service awards	Q1 FY17	Not Started	OMB
Announce and issue guidance on third annual customer service awards	Q3 FY17	Not Started	OMB

* This milestone and the appropriate timeline is pending further review and will be updated based on additional input from the Council.

Key Indicators

Indicator	Status	Data
New: Percentage of core Federal service programs that complete a maturity model self-assessment*	Complete - Data was collected in Q3 FY 16	*96.7%*
Percentage of core Federal service programs that collect customer feedback data*	On Track - Data will be reported in Q4 FY 16	N/A
Percentage of core Federal service programs that have a plan to improve customer service**	Not Started	N/A
~~Percentage of core Federal service programs showing improvements in their customer feedback data*~~	~~N/A~~	~~N/A~~
Employee Viewpoint Survey engagement scores of core Federal service programs**	Not Started	N/A

* The CAP Goal team and Council identified completion of a self-assessment as a critical foundational step and have made revisions to other indicators and timelines accordingly.
** These indicators and appropriate timelines are pending further review and will be updated based on additional input from the Council.

Contributing Agencies and Programs*

Department of Agriculture
- Office of the Secretary

Department of Commerce
- BusinessUSA.Gov
- Office of the Chief Financial Officer
- Office of Policy and Strategic Planning

Department of Education
- Federal Student Aid

Department of Health and Human Services
- Centers for Medicare and Medicaid Services

Department of Homeland Security
- Citizenship and Immigration Services
- Office of Program Analysis and Evaluation
- Transportation Security Administration

Department of Housing and Urban Development
- Office of Strategic Planning and Management

Department of the Interior
- Bureau of Indian Affairs s/b Office of the Special Trustee for American Indians
- Bureau of Land Management
- Federal Consulting Group
- Fish and Wildlife Service
- National Park Services
- US Geological Survey

Department of Labor
- Bureau of Labor Statistics
- Customer Service Program Office

Department of State
- Office of Passport Management
- Office of Performance Improvement

Department of the Treasury
- Office of Online Services

Department of Veterans Affairs
- Office of Performance Management
- Veterans Relationship Management Office

General Services Administration
- Office of Citizen Services and Innovative Technology

Office of Management and Budget
- Office of EGov
- Office of Information and Regulatory Affairs
- Performance and Personnel Management

Office of Personnel Management
- Office of Retirement Services

Small Business Administration
- Office of Field Operations

Social Security Administration
- Office of Operations
- Office of Disability Adjudication and Review

* This list represents programs that contributed to the development of the Customer Service CAP Goal. This list does not represent the members of the Core Federal Services Council.

Members of Core Federal Services Council

Department of Agriculture
- U.S. Forest Service
- Farm Service Agency
- Natural Resources Conservation Service

Department of Commerce
- Patent Approvals, U.S. Patent and Trademark Office
- Trademark Registration, U.S. Patent and Trademark Office

Department of Education
- Student Financial Aid, Federal Student Aid

Department of Health and Human Services
- Health Insurance Marketplace, Centers for Medicare & Medicaid Services
- Medicare, Centers for Medicare & Medicaid Services

Department of Homeland Security
- Airport Security Screening, Transportation Security Administration
- Immigration and Customs Inspections, U.S. Customs and Border Protection
- Citizenship and Immigration Services
- Emergency and Disaster Relief, Federal Emergency Management Authority

Department of Housing and Urban Development
- FHA Single Family Loans and Resource Center

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

Department of Labor
- Occupational Safety & Health Administration
- Workers' compensation programs, Office of Worker Compensation Programs

Department of State
- Passport Issuance & Processing, Passport Services Office, Bureau of Consular Affairs

Department of the Treasury
- Online services, Internal Revenue Service

Department of Veterans Affairs
- Veterans Health Care Benefits, Veterans Health Administration
- Veterans Pension Benefits & Veterans Disability Benefits through the Veterans Benefits Administration and the Veterans' Experience

National Archives and Records Administration

Office of Personnel Management
- Federal Employment Services, USAJobs
- Retirement Services

Small Business Administration
- Field Operations, Small Business Administration

Social Security Administration
- Social Security Card Issuance/Processing, Office of Operations
- Social Security Retirement Benefits, Office of Operations
- Social Security Disability Benefits, Office of Disability and Adjudication Services

Interagency Initiatives
- Federal Recreation Council
- Recreation.gov

Acronyms

- **CAP – Cross Agency Priority**
- **CFSC or Council – Core Federal Services Council**
- **CoP – Community of Practice**
- **EVS – Employee Viewpoint Survey**
- **GSA – General Services Administration**
- **IT – Information Technology**
- **OMB – Office of Budget Management**
- **PMAB – President's Management Advisory Board**
- **PMC – President's Management Council**
- **RCoP – Regional Community of Practice**
- **SSA – Social Security Administration**
- **TSA – Transportation Security Administration**
- **USCIS – U.S. Citizenship and Immigration Services**
- **VA – Veteran's Administration**