

Cross Agency Priority Goal

Quarterly Progress Update

Customer Service

Goal Leaders:

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FY2015 Quarter 2

Goal Statement

- Increase citizen 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

- Citizens and businesses expect government services to be well-designed, efficient, and generally comparable to the services they receive from leading private sector organizations.
- Despite some important strides to improve customer service over the past 15 years, many federal government services fail to meet the expectations of citizens and businesses, creating unnecessary hassle and cost for citizens, businesses, and the government itself.

Vision

- Create measureable increases in timeliness and quality for top transactions, as measured by transaction-specific indicators.
- Create measureable improvements in citizen satisfaction across government, using standard cross-agency measurements.

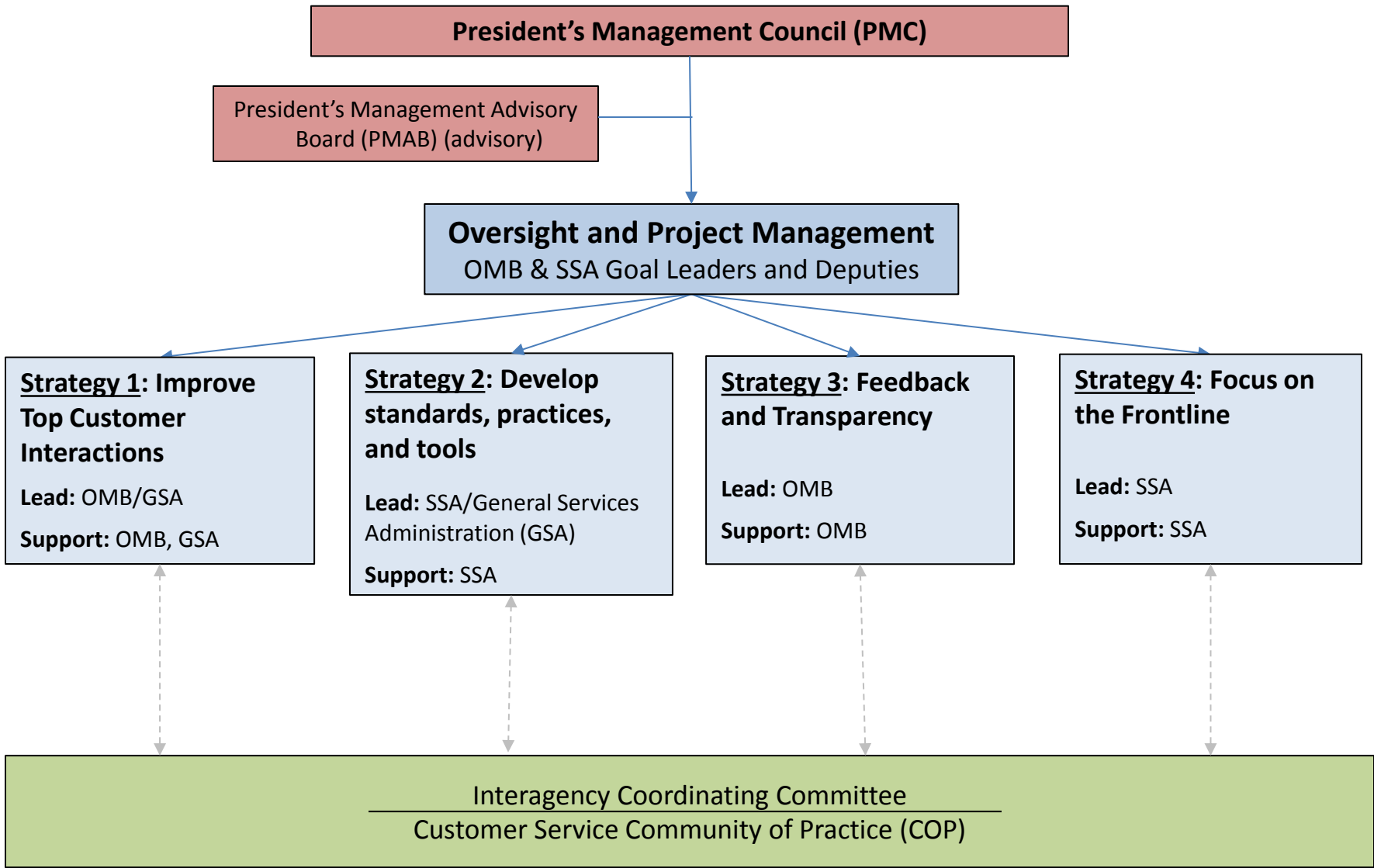
Progress Update

- On March 19th The Office of Management and Budget (OMB) issued guidance to agencies regarding implementing the Federal Customer Service Awards Program. Agencies are currently submitting award program overviews for OMB review. The first awards will be presented this fall. The goal of the program is to recognize individuals and teams who provide outstanding customer service directly to the American people and support identifying and sharing innovative practices across agencies.
- In February, the Social Security Administration (SSA) and OMB hosted a meeting in the Denver region to official kickoff the activities of the Denver regional Customer Service Community of Practice (RCoP). Beth Cobert, Deputy Director for Management, OMB, opened the session by speaking to the importance of customer service and Brain McDonald, Senior Vice President of Client Services & Support from Charles Schwab provided real world examples of how they provide innovative customer service through employee empowerment. The regional community organized around three work streams that will focus on best practices, customer feedback, and employees over the course of the next 12 months. The Denver pilot will test the value of the RCoP concept before similar efforts are launched at other locations.

Action Plan Summary

Sub-goal	Major Actions to achieve Impact	Key indicators [in development]
Strategy 1: Improve Top Customer Interactions	Track improvements in the timeliness and quality of top customer interactions and facilitate a reduction of barriers and accessing of expertise in order to make improvements where possible.	Citizen satisfaction across government, using standard cross-agency measurements
Strategy 2: Develop and implement standards, practices, and tools	<ul style="list-style-type: none"> • Establish a Customer Service Community of Practice (COP). • Identify a senior leader and team at each agency who will advocate for customer experience and coordinate efforts to improve customer service. • With the guidance of the COP, develop customer service standards and principles, as well as an assessment framework for agencies to use to determine opportunities for improvement. • Share best practices, including facilitating workshops and developing a “what works” collaboration tool for sharing ideas and jointly solving problems. • Develop tools to identify strengths and weakness in existing customer service and develop a simple, government-wide customer satisfaction process that can be applied across any interaction. 	Number and adoption of tools identified by the COP
Strategy 3: Feedback and Transparency	<ul style="list-style-type: none"> • Engage Congress and other stakeholders to identify areas where improvements are needed. • 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 all customer-facing agencies and 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. 	Indicators of data availability; results from newly established feedback mechanisms
Strategy 4: Focus on the Frontline	<ul style="list-style-type: none"> • Develop opportunities for agency executives to spend time in the field hearing directly from customers and emphasizing the importance of customer service to front-line staff. • Recognize excellent customer service by developing awards programs. • Promote a culture of customer service and develop a toolkit for improving the capability and capacity of the customer service workforce. 	Employee Viewpoint Survey (EVS) results

Goal Team and Governance Plan



Work Plan - Strategy 1: Improve Top Customer Interactions

Problem being targeted: Many government interactions impact a large numbers of citizens and any gap between existing service levels and expectations may create frustration with specific agencies and with the government in general. The list of specific transactions being targeted will be refined over time as data sources are developed and analyzed. Specific transactions initially identified include TSA security screening, veterans' pension and disability applications, student-loan repayment, Social Security and taxpayer assistance.

Theory of change: Agencies are already working hard to create improvements in these areas, but by regularly reviewing progress we can provide program managers with senior-level support and help identify best practices across government.

Milestone Summary			
Key Milestones	Milestone Due Date	Milestone status	Owner
Identify initial list of top customer interactions	Q4 FY14	Complete	OMB
Meet with each team to discuss successes, challenges and action plans	Q1 FY15	Under Review*	OMB
Identify opportunities to provide support to teams	Q1 FY15	Under Review*	OMB
Provide regular updates on progress	Ongoing	Under Review*	OMB

* OMB is currently reviewing the plan for improving top transactions to ensure alignment with the Smarter IT CAP Goal

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
Establish key COP roles and solicit COP coordinators	Q3 FY14	Complete	SSA/COP
Develop the scope and guiding principles of the COP	Q4 FY14	Complete	SSA/COP
COP workgroups will develop specific tools	Ongoing	On Track	SSA/COP
Launch a Regional Community of Practice (RCoP) – Denver, CO	Q2 FY15	Complete	SSA/COP
Make recommendations to CAP Goal leaders on actions that can be taken in this area to improve customer service	Ongoing	On Track	SSA/COP

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 outreach to Congress and other stakeholders and begin developing collection tool	Q4 FY14	Missed*	OMB
Develop approach to piloting broad-based customer feedback mechanism	Q4 FY14	Complete	OMB
Identify additions to top customer interactions list as appropriate	Q1 FY15	Under Review***	OMB
Pilot customer feedback approach	Q4 FY15**	In Process	OMB
Develop appropriate policy tool for full implementation (e.g., Executive Order, OMB guidance)	Q3 FY15	On Track	OMB

* This milestone was not completed due to a lack of resources to develop a collection tool.

** The Due Date has been updated for this milestone to reflect that while pilot activities have begun they will not be completed until there is sufficient time for data collection and analysis. Also, it may be determined at the end of the pilot period that additional pilots are needed to validate path forward.

*** OMB is currently reviewing the plan for improving top transactions to ensure alignment with the Smarter IT CAP Goal

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
Solicit individuals for subgroups comprised of COP members and agency leaders focused on customer service awards and executive engagements with front-line staff	Q4 FY14	Complete	SSA/COP
Develop award structure, criteria and nomination process	Q4 FY14	Complete	SSA/COP
Develop informal guidelines to expand opportunities for agency executives to engage with front-line staff	Q4 FY14	Complete	SSA/COP
Develop a public-facing website and other nomination channels	Q1 FY15	Complete	SSA/COP
Issue guidance to agencies on award process	Q1 FY15	Complete	OMB/COP
Agencies submit agency award process overviews to OMB for review	Q2 FY15	Complete	OMB/COP
Agencies submit award nominations to OMB for review	Q3FY15	On Track	OMB/COP
First award recipients announced	TBD	On Track	OMB/COP

Key indicators

Indicators in Development – CAP Goal Indicators:

- Improvements in citizen satisfaction across government using standard cross-agency measurements (beginning approx. Q4 2015)

Indicators in Development – Sub-Goal indicators

Strategy 2: Develop and implement standards, practices, and tools

- Number of tools identified by the Community of Practice (beginning Q4 2014)
- Reported adoption of tools identified by the Community of Practice by agencies and programs (beginning Q4 2014)

Strategy 3: Feedback and Transparency

- Indicators of data availability, such as the number of agencies and programs providing direct services to citizens with feedback mechanisms in place (beginning Q4 2014)
- Results from newly established feedback mechanisms as they are developed and implemented (beginning approx. Q4 2015)

Strategy 4: Focus on the Front-line

- EVS results (timeline to be determined)
- Agency executive visits to the front line talking and listening to customers (beginning approx. Q4 2015)

Contributing 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
- 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

Acronyms

- **CAP – Cross Agency Priority**
- **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**