

# Cross Agency Priority Goal

## Quarterly Progress Update

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### Customer Service

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FY2014 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 fifteen years, many Federal Government services fail to meet the expectations of citizens and business, 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

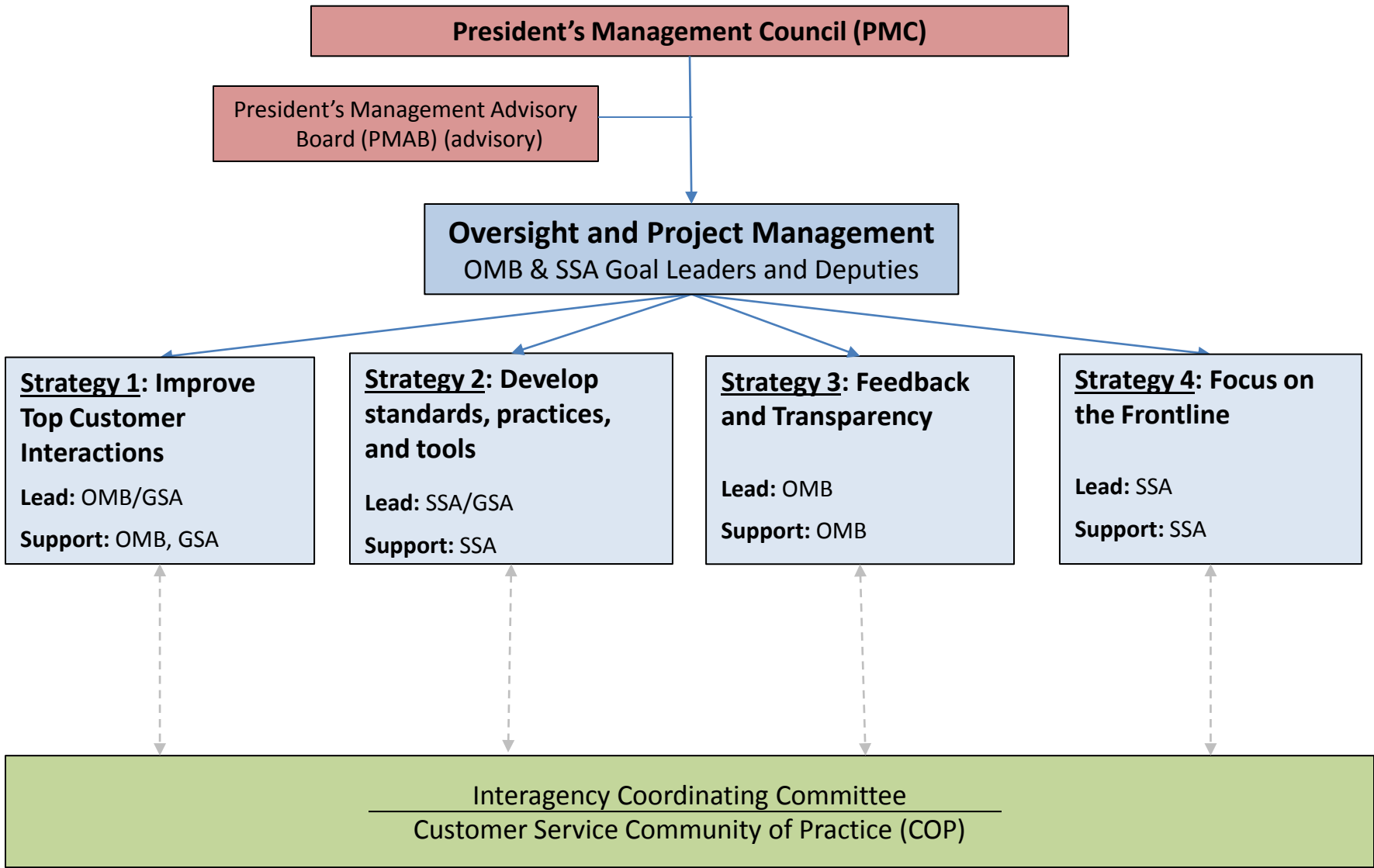
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- Held interagency working group sessions to determine lessons learned and actions needed to accelerate efforts begun under EO 13571, *Streamlining Service Delivery and Improving Customer Service*, and improve service delivery across Federal programs
- Conducted stakeholder outreach to identify lessons learned and best practices
- Engaged the President's Management Advisory Board to get feedback on steps which can be taken to improve Federal services. See [video](#) for more detail.
- Recruited the Customer Service CAP Goal Team
- Developed the Customer Service CAP Goal Action Plan
- Established the Community of Practice Coordinator role, and solicited individuals as coordinators and for subgroups

# Action Plan Summary

Sub-goal	Major Actions to achieve Impact	Key indicators [in development]
<b>Strategy 1: Improve Top Customer Interactions</b>	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
<b>Strategy 2: Develop and implement standards, practices, and tools</b>	<ul style="list-style-type: none"> <li>• Establish a Customer Service Community of Practice (COP)</li> <li>• Identify a senior leader and team at each agency who will advocate for customer experience and coordinate efforts improve customer service</li> <li>• 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</li> <li>• Share best practices, including facilitating workshops and developing a “what works” collaboration tool for sharing ideas and jointly solving problems</li> <li>• 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</li> </ul>	Number and adoption of tools identified by the Community of Practice
<b>Strategy 3: Feedback and Transparency</b>	<ul style="list-style-type: none"> <li>• Engage Congress and other stakeholders to identify areas where improvements are needed</li> <li>• Make customer service feedback a standard practice for customer-facing communications</li> <li>• Consider how to increase the use of voluntary customer satisfaction surveys to develop customer service improvements</li> <li>• 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</li> <li>• 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.</li> </ul>	Indicators of data availability Results from newly established feedback mechanisms
<b>Strategy 4: Focus on the Frontline</b>	<ul style="list-style-type: none"> <li>• 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</li> <li>• Recognize excellent customer service by developing awards programs</li> <li>• Promote a culture of customer service and develop a toolkit for improving the capability and capacity of the customer service workforce</li> </ul>	Employee Viewpoint Survey (EVSZ 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 an analyzed, but 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	Last Quarter	Owner
Identify initial list of top customer interactions	Q4 FY14	On Track	N/A	OMB
Meet with each team to discuss successes, challenges, and action plans	Q1 FY15	On Track	N/A	OMB
Identify opportunities to provide support to teams	Q1 FY15	On Track	N/A	OMB
Provide regular updates on progress	Ongoing	On Track	N/A	OMB

# 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	Last Quarter	Owner
Establish key COP roles and solicit COP coordinators	Q3 FY14	On Track	N/A	SSA/COP
Develop the scope and guiding principles of the COP	Q4 FY14	On Track	N/A	SSA/COP
COP workgroups will develop specific tools	Ongoing	On Track	N/A	SSA/COP
Make recommendations to CAP Goal leaders on actions that can be taken in this area to improve customer service	Ongoing	On Track	N/A	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	Last Quarter	Owner
Conduct outreach to Congress and other stakeholders and develop collection tool	Q4 FY14	On Track	N/A	OMB
Develop approach to piloting broad-based customer feedback mechanism	Q4 FY14	On Track	N/A	OMB
Identify additions to top customer interactions list as appropriate	Q1 FY15	On Track	N/A	OMB
Pilot customer feedback approach	Q1 FY15	On Track	N/A	OMB
Develop appropriate policy tool for full implementation (e.g., EO, OMB guidance)	Q3 FY15	On Track	N/A	OMB



# 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 frontline 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 community of practice to focus on workforce issues will provide agencies with tools to make improvements.

Milestone Summary				
Key Milestones	Milestone Due Date	Milestone status	Change from last month	Owner
Solicit individuals for subgroups comprised of COP members and agency leaders focused on customer service awards and executive engagements with front-line staff	Q3 FY14	On Track	N/A	SSA/COP
Develop award structure, criteria, and nomination process	Q4 FY14	On Track	N/A	SSA/COP
Develop informal guidelines to expand opportunities for agency executives to engage with front-line staff	Q4 FY14	On Track	N/A	SSA/COP
Develop public-facing website and other nomination channels	Q1 FY15	On Track	N/A	SSA/COP
Launch award marketing campaign to solicit nominations	Q1 FY15	On Track	N/A	SSA/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

- Employee Viewpoint Survey (EVS) results (timeline TBD)
- Agency executive visits to the front line talking and listening to customers (beginning approx. Q4 2015)