EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
Office of the Federal Chief Information Officer

GENERAL SERVICES ADMINISTRATION
Technology Modernization Fund Program Management Office

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## OVERVIEW OF THE TECHNOLOGY MODERNIZATION FUND (TMF): CUSTOMER EXPERIENCE ALLOCATION

The TMF Customer Experience Allocation is a targeted $100 million designation within the remaining American Rescue Plan (ARP) funding that focuses on streamlining and improving public-facing digital services to directly support the Biden-Harris Administration's technology vision and priorities to deliver a better customer experience (CX) to the public. This funding enables Federal agencies, and their High-Impact Service Providers (HISPs), to deliver on the commitments made in **Executive Order 14058,** Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government and the **President's Management Agenda, Priority 2,** Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience, to deliver better benefits, services, and programs to the public.

The TMF Board is committed to investing in projects that will deliver a secure, modern, digital-first government experience to the American people. With the TMF funding from ARP, the Board is focused on investing in projects that will lower the "time tax" for the American public when they interact with their government, as well as reduce administrative burden for the federal workforce. Projects that cut across agencies and systems, address immediate security gaps, and improve the public's ability to access and manage government services will be prioritized.

Technology underpins Federal agencies' ability to deliver services to the public. This requires Federal agency Chief Information Officers (CIOs) to partner with their agency leadership and HISP leadership, and their technology teams, to strategically use technology to support the delivery of an outstanding CX.

## FEDERAL CX VISION

When the American public interacts with their government, they should get a **simple, seamless, and secure customer experience** that's on par with top consumer experiences.

## TMF BACKGROUND

The Technology Modernization Fund is working to transform the way the government uses technology to deliver for the American public in an equitable, secure, and user-centric way. The TMF invests in technology projects across government, providing incremental funding, technical assistance, and oversight throughout execution to ensure the success of its investments.

**TMF CX ALLOCATION FRAMEWORK**

**Who should apply under the customer experience guidelines?**

Any Federal agency that provides public-facing information, benefits, services, and programs. This includes HISPs (of which there are currently 35), as well as agencies that support delivery of benefits, services, and programs to the public (e.g., CFPB online tools for consumer issues).

**What can they apply for?**

All projects must be grounded in **existing** customer research, data analysis, and/or customer-driven business needs, to solve identified pain points or delivery impediments. For projects that need early-phase generative research and design, agencies will need to include a research plan as part of their proposal.

Potential projects could include any of the project components below:

1. **Specific customer experience improvements.** Projects should improve the public's experience with one or more government process(es), using any of the following components:

| User-facing digital products and services ("Front Stage") | Business-facing digital products, services, and systems ("Back Stage") |
|---|---|
| <ul><li>Website content, eligibility tools, appointment schedulers, and facility locators.</li><li>Digital forms, signatures, document uploads, and payments.</li><li>Case status tracking and other service management tools.</li><li>Customer support, how-to guides, and knowledge bases.</li></ul> | <ul><li>Content management systems (CMS), to power content publishing.</li><li>Customer relationship management systems (CRM), to power notifications, case management, etc.</li><li>Platforms and technology stacks that host and power digital products and services.</li><li>Data, API, and microservices platforms and programs that power digital products and services.</li><li>Legacy data warehouses that need to be converted to a more modern structure to build and deliver data products.</li></ul> |

2. **Improving the customer support and field office experience.**

   a. Call center and customer support modernization.
      i. Call center cloud migration.
      ii. Call center case management, CRM, or other ticketing system for customer support issues.
      iii. Interactive voice response (IVR) system, with customer call back and queuing.
      iv. Self-service digital support tools, like AI-powered chatbots.
      v. Integration between CRM and other systems that provide critical information while handling a customer support issue.
      vi. Connection of CRM to phone/telephony systems.

   b. Technologies and systems that support in-person CX during a visit to a field office, like self-service check-in or payment terminals.

In addition to the TMF Criteria, there are four project areas for priority implementation:

1. **Design and delivery of cross-agency life experiences**, as sponsored by the President's Management Council.
2. **Improvement of one or two HISP services**, as designated for priority improvement through the annual OMB Circular A-11, Section 280 process.
3. **Design and delivery of self-service digital tools and services** that directly decrease customer call center volume.
4. **Technology projects that reduce public and administrative burden**, as outlined in **OMB M-22-10,** Improving Access to Public Benefits Programs Through the Paperwork Reduction Act, or technology projects that advance agencies' equity action plans, as outlined in **Executive Order 13985,** Advancing Racial Equity and Support for Underserved Communities Through the Federal Government.

**What outcomes should the projects produce?**

Project-Level Outcomes:

Projects should focus on the strategic use of technology to improve customer experience, which includes reducing burden on both the public and agencies, and making improvements to non-digital channels like customer call centers. We expect exceptional proposals that outline specific metrics and measurable goals they aim to achieve.

HISP Portfolio-Level Objectives:

Projects from HISPs should also meet the priority-level success metrics outlined in PMA Priority 2:

1. Increasing experience quality to be on par with the best consumer experiences, or other appropriate comparison.
   a. Target: Move from last into top 10 on Forrester industry ranking.
2. Reducing burden for government's customers.
   a. Measurement: Focus on designated HISP services (near term).
   b. Measurement: Focus on designated cross-agency life experiences (long term).
3. Improving trust in Government
   a. Target: Achieve 75 percent or higher post-transaction trust in HISPs.

**What repayment level is expected?**

All proposal requests must indicate expected Return on Investment (ROI), including any direct cost savings over at least a 5-year period, to the best of an agency's ability. If requesting repayment flexibility (i.e., less than 100% repayment), an agency must show either:

- Less than 100% direct cost savings over a 5-year period, and/or
- Justification for some or all of the direct cost savings to go toward reduced user fees, further CX enhancements, or additional deployment and/or growth of shared services. Agencies are expected to use this runway to budget for the sustained reimbursement of these shared services once TMF funds are fully exhausted.

For additional repayment guidance, see https://tmf.cio.gov/arp/.

**When are submissions due?**

Initial Project Proposals (IPPs) sent by **Monday, August 1, 2022** to ombtmf@omb.eop.gov and tmf@gsa.gov will receive expedited consideration.

IPPs will be reviewed on a rolling basis **through September 30, 2022**. The IPP and other templates can be found at https://tmf.cio.gov/documents/.

If you intend to submit a proposal, please submit your ideas for early feedback through the TMF CX Expression of Interest Survey. If you submit the form, the TMF Program Management Office may be able to support your team through the entire TMF application and review process.

**CONTACTS**

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