



## Improving Customer Experience (CX) with Federal Services

### Goal Leaders

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## Goal Statement

- Provide a modern, streamlined, and responsive customer experience across government, comparable to leading private-sector organizations.



## Challenge

- Citizens and businesses expect well-designed, efficient government services that are generally comparable in quality to that of leading private-sector organizations.
- Despite some important strides to improve customer experience, many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself.



## Opportunity

- Increase trust in the Federal Government by improving the experience citizens and businesses have with federal services across all delivery channels.
- Transform the customer experience by improving the usability and reliability of our government's most critical digital services.
- Create measurable improvements in customer satisfaction by using the principles and practices proven by leading private-sector organizations.



# Long-term Vision

## Outcomes by 2030:

- Customers rate satisfaction with Federal services comparable to private sector averages.
- Federal programs are able to identify the most important drivers of experience to the customer for particular types of services and transactions (e.g., service effectiveness, ease, efficiency, and equity/transparency).
- There is a significant increase in public trust in the Federal Government - agencies collect and track measures of trust through customer feedback, and can draw clear correlations between satisfaction and trust.

## Operations by 2030:

- The majority of direct services are available to citizens through self-service channels.
- For the majority of interactions, customers can easily track their status, can see accurate estimates of waiting and response times, and can provide feedback which is publicly reported on.
- Agencies have the skill and resources to develop deep customer understanding to inform service design and delivery.
- Quantitative and qualitative indicators of experience, service effectiveness, ease, efficiency and equity/transparency are collected from customers and operations throughout the design of each service to provide real-time customer voices to couple with customer research. This voice is readily available at the policy and decision-making table and informs continuous improvement of services.
- Agencies are able to connect data across services (e.g., if desired, updating your address in any one system will update across other Federal systems).
- Agencies strategically manage their services based on customer life experiences, coordinating the services they provide and the products that they deliver based on customer needs.
- The Federal government takes an enterprise view of managing high impact customer experiences and coordinates customer journeys across agencies and levels of government to be more seamless, frictionless, and personalized.





# Long-term Vision

## Critical Milestones:

- Agencies have an accountability structure for ensuring budget and operational processes are coordinated across silos to meet customer needs.
- A government-wide customer experience capability identifies priority customer experiences and ensures budget and operational processes are coordinated across silos to meet citizen needs.
- OMB and agencies are provided with the authority to transfer funding and statutory responsibilities from one agency to another, when doing so will help facilitate a better customer experience after Congressional notification.
- Customer-facing federal programs collect customer feedback consistent with OMB standards and publish that data through Performance.gov.
- Customer Experience measures are incorporated into SES performance plans, and is a core competency Federal employees are hired for, receive training in, and are evaluated on.



## Office of Management and Budget (OMB)

- Amira Boland, Lead, Federal Customer Experience (PPM)
- Mark Bussow, Performance Team Lead (PPM)
- Tony Garza, White House Leadership Development Fellow (PPM)
- Jay Teitelbaum, Chief of Finance and Operations (USDS)

## Department of Veterans Affairs (VA)

- Chris Corpuel, Presidential Innovation Fellow
- Barbara Morton, Deputy Chief Veterans Experience Officer
- Maura Newell, Presidential Innovation Fellow
- Scott Weiss, Presidential Innovation Fellow

## General Service Administration (GSA)

- Lauren Ancona, Data & Analytics Portfolio
- Boris Arratia, Senior Advisor, Office of Shared Solutions and Performance Improvement
- Philip Ashlock, Director, Data & Analytics Portfolio
- Angelo Frigo, Presidential Innovation Fellow
- Aaron Steinstra, Senior Design Strategist, Office of Customer Experience
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# Goal Structure

Provide a modern, streamlined, and responsive customer experience across government, comparable to leading private sector organizations



**STRATEGY 1:**

**Improve the Digital Experience  
(USDS)**

*Improve the usability and reliability of the government's most critical digital services*

**STRATEGY 2:**

**Increase Transparency to Drive  
Accountability  
(PPM + GSA)**

*Embed standardized customer metrics within high-impact programs to create government-wide performance dashboards*

**STRATEGY 3:**

**Apply Proven Practices to Raise  
the Standard of Service in  
Priority Areas (PPM)**

*Focus on customer experience improvement in high-impact programs, disseminate best practices government-wide using clear guidance*



**STRATEGY 4:**

**Empower Agencies to Manage Customer Experience at Enterprise Level (VA + GSA)**

*Develop capabilities, resources, and tools proven to enhance customer experience performance and share stories of success and lessons learned*



# FY20 Goal Actions

## **STRATEGY 1:**

### **Improve the Digital Experience (USDS)**

1. Keep up-to-date on USDS projects at <https://usds.gov>

## **STRATEGY 2:**

### **Increase Transparency to Drive Accountability (PPM + GSA)**

1. Create and operate on-ramp for CX feedback collections for agencies (Touchpoints)
2. Build [performance.gov/cx](https://performance.gov/cx) as central interface for CX performance
3. Enable agencies to share stories of learning, growth, and success with each other and the public

## **STRATEGY 3:**

### **Apply Proven Practices to Raise the Standard of Service in Priority Areas (PPM)**

1. Update and refine A-11 Section 280 and associated activities (HISP list, CX assessments, action plans, reporting)
2. Provide support and resources in developing customer understanding
3. Explore mechanisms for embedding CX into standard practice (SES performance plans, CFR, APGs, etc.)
4. Conduct govt-wide hiring action (PPM)

## **STRATEGY 4:**

### **Empower Agencies to Manage Customer Experience at Enterprise Level (VA + GSA)**

1. Leverage lessons learned and resources to improve the capacity of the Federal workforce to deliver and manage CX (VA)
2. Streamline centralized support for operational and technology CX-related capabilities (GSA)

## **Government-wide CX Actions (PPM)**

1. Research legislative and budgetary improvements that could enable more effective management of customer experiences (PPM)
2. Develop central CX governance structure and strategy (PPM)



# Summary of Progress in Q1 & Q2

## CX SME-QA Hiring Pilot

In January 2019, USDS and OPM partnered to test Subject Matter Expert Qualification Assessments (SME-QA), a hiring process where SMEs work with HR specialists to create qualification criteria based on the SMEs' determination of what is required to be successful in the job from day one. While they completed this process in two agency-specific hiring actions, there was an interest to pilot it for a government-wide hiring action. Multiple HISPs expressed difficulty in recruiting and hiring the right CX talent, and so the CAP goal team convened a panel of CX SMEs to run the process for this use case.

We developed a “CX Strategist” position description with associated competencies, skill levels, and interview questions. More than 10 offices in government are participating in hiring through this mechanism, with the CAP Goal team coordinating a cross-agency panel of SMEs to review candidates, interview them, and create a list of certified candidates for agencies to then select based on fit. 6 weeks from the release of the posting, we provided a certified list of candidates to agencies.

## Touchpoints Live

Touchpoints, a mechanism for agencies to collect customer feedback at no cost to HISPs (Terms of Service available) is currently being used by more than 5 agencies. Learn more: <https://touchpoints.digital.gov/>

## Amplify Program

In both FY19 and FY20, HISPs identified “Customer Understanding” as an area on their capacity assessments that they aimed to develop. To support them, the CAP Goal team dedicated team members from GSA and OPM to develop a program that will embed with participating HISPs to enable them to complete low-cost, light-weight, yet useful customer understanding activities.

## Updated A-11 Section 280 Supporting Documents

The team updated both the FY20 Capacity Assessment and Action Plan templates based on feedback on last year's process, refinement in line with leading practices, and provided them to HISPs for this year's activities. This includes an “A-11 Section 280” PRA Clearance template and supporting process in collaboration with OIRA.







## Strategy 1: Improve the Digital Experience

- **Vision(s) Actions Map to:** The majority of direct services are available to citizens through self-service portals. For the majority of interactions, customers can easily track their status, can see accurate estimates of waiting and response times, and can provide feedback which is publicly reported on. Agencies are able to connect data across services (ex. e.g., updating your address in any one system will update across all Federal systems).

USDS projects and actions can be followed at <https://usds.gov>, Twitter: @USDS, Instagram: @usdigitalservice



## Strategy 2: Increase Transparency to Drive Accountability

- **Vision(s) Actions Map to:** Leadership at the highest levels of government, program-level staff at agencies, and members of the public are constantly aware of the scale and scope of interactions happening with government services and have a “heat map” that can be filtered by service, channel, or location integrating feedback data from real-time surveys, social media, operational data and analytics, and other sources. Versions of this “dashboard” are visible to the public, agency leaders, front-line managers and even in the West Wing and this voice-of-the-customer is on hand at the decision-making table. The American public understands the ways in which their Federal government delivers to and is responsive to them; Federal employees are celebrated and success stories are shared.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Action 1</b>					
Develop capability of Touchpoints to automate generation of PRA documents	2Q FY20	Completed	Completed	GSA	
Develop capability of automated agency certification of data for reporting	4Q FY20	On track	New	GSA	
Develop capability of automated reporting for non-Touchpoints users	4Q FY20	On track	New	GSA	
Prototype simplified A-11 survey form delivery as individual modular components	2Q FY20	Completed	Completed	GSA	
<b>Action 2</b>					
Create centralized, government-wide data dashboard / website to post aggregate customer experience performance data publicly	1Q FY20	Completed	Completed	PPM, GSA	Central page created; unable to aggregate data for public use at this time
Develop interactive data comparison per HISP (e.g., by quarter, by channel )	2Q FY20	Completed	Completed	GSA	
Develop interactive data comparison across HISPs (e.g., by geography, like service)	4Q FY20	On track	No change	GSA	
Conduct analysis on the connection between employee engagement metrics and customer experience measures with Federal data	4Q FY20	On track	Updated to reflect project description	GSA	



## Strategy 2: Increase Transparency to Drive Accountability

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Action 3					
Regular Performance.gov blogs on CX success stories / lessons learned Support development of HISP video stories and shorter written/photo stories	4QFY20	On Track	New	GSA	



## Strategy 3: Apply Proven Practices to Raise the Standard of Service in Priority Areas

- **Vision(s) Actions Map to:** “The Mission” is understood by all to be delivering for the customer, embedded in the way in which we manage Federal budgets, strategic, and performance planning. The government possesses a canonical understanding of its customer, the service/product/value it provides to the public, and which problems are most important to solve.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Action 1</b>					
Convene private sector CX leaders, high impact program leaders and staff to facilitate best practice knowledge sharing	1Q FY20	Completed	Completed	PPM	
Update maturity model and include case studies for annual self-assessment	1Q FY20	Completed	Completed	PPM	
Conduct annual deep-dives with HISPs, gather feedback, reassess program requirements, and revise OMB Circular A-11 Section 280	3Q FY20	Completed	Completed	PPM	
Review and revise HISP list to include additional high impact programs/experiences	1Q FY21	On track	No change	PPM	
<b>Action 2</b>					
Select HISPs for Customer Understanding Program	2Q FY20	Completed	Completed	GSA with Lab at OPM	Program designed based on HISP capacity assessments
Kickoff and begin cohort program	2Q FY20	Completed	Completed	GSA with Lab at OPM	
Participants identify project assignments; begin project-based work	3Q FY20	On track	New	GSA with Lab at OPM	
Codify and share learnings of the program with HISPs and Federal communities	4Q FY20	On track	New	GSA with Lab at OPM	
Evaluate results of DOL/VA/DOD pilot to scale interagency solution / replicate process with additional cross-government customer journey	4Q FY20	On track	No change	PPM	





## Strategy 4: Empower Agencies to Manage Customer Experience at Enterprise Level

- **Vision(s) Actions Map to:** Agencies willingly and proactively continue to improve the way they work to be focused on the customer without a crisis catalyst. A central capacity builds the Human Capital of the Federal government to orient towards and deliver the customer experience the public deserves.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Action 1</b>					
Develop CX Institute (CXi) Curriculum (initial focus on Human Centered Design and Patient Experience)	2Q FY20	Completed	New	VA	Human Centered Design and Patient Experience curriculum developed and additional build is ongoing; adaptations in process to accommodate virtual curriculum in light of new COVID environment
Pilot CXi Curriculum (HCD, PX), to include collaboration opportunity with HISP(s) to audit and provide feedback	3Q and 4Q FY20	On track	New	VA	Beta testing and sharing of curriculum (such as HCD practices and Own the Moment CX training) with multiple agencies is ongoing; VA-specific curriculum can be adapted for use by sister agencies
Cross Agency senior leader tactical summit on supporting CX and CXi	3Q FY20	On track	New	VA	Adapting to accommodate virtual event with a focus on HCD practices as applied in a COVID environment
<b>Action 2</b>					
Develop CX buying guide / resources for HISPs	2Q FY20	Completed	Completed	GSA	First edition (public facing) now available on performance.gov/cx; future editions (internal to government only) forthcoming



# Government-wide CX Actions

- **Vision(s) Actions Map to:** A government-wide customer experience capability identifies priority customer experiences and ensures budget and operational processes are coordinated across silos to meet citizen needs

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Action 1</b>					
Develop further resources and tools to grow CX practices in HISPs, including journey mapping, low-cost actions	2Q FY20	Completed	Completed	PPM, GSA, VA	Customer Experience Amplify Program launched; PPM working on OIRA "CX Desk" stand-up
<b>Action 2</b>					
Establish ongoing governance model for government-wide customer experience initiatives	4Q FY20	On track	New	PPM	
Journey Map for a second customer segment	3Q FY19	On hold	On hold	PPM, Agencies	Team currently dedicated to coordinating pilot resulting from first cross-agency mapping effort.
Establish working group to explore the creation of a CX Quality Service Management Office (QSMO)	1Q FY20	On hold	On hold	VA, PPM, GSA	Team exploring other mechanisms of central governance



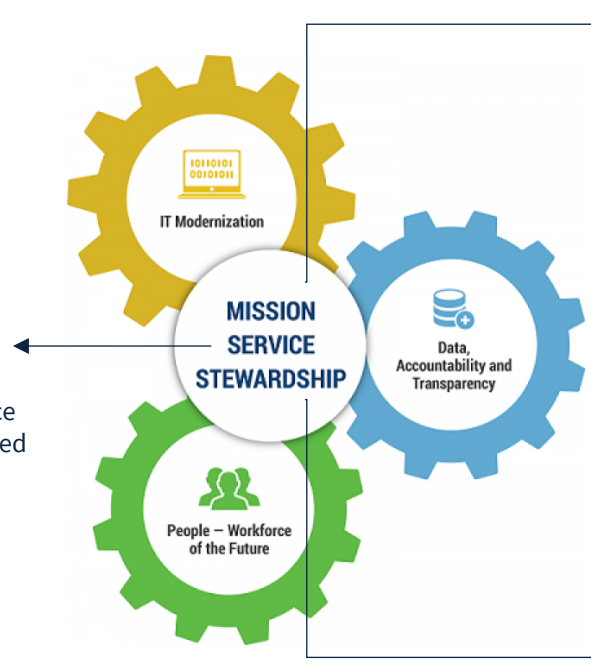
## After the first round of start-up activities are completed in FY2019, progress will initially be reported as:

- Percentage of HISPs that collect customer feedback data in alignment with government-wide metrics
- Percentage of HISPs that have a plan to improve customer service shared publicly
- Usage statistics of the publicly available customer feedback data
- Burden reduction from transition to digital forms

## Longer term performance indicators include:

### Service

- Positive change in HISP scores across government-wide metrics in Ease, Efficiency, Equity, and Employee categories
- Positive change in HISP CX maturity score
- Positive change in Federal Government CX scores by external organizations
- Improvement in HISP operational performance metrics (e.g., digital analytics such as decreased bounce rates, reduction in error rates of form submissions due to improved clarity of guidance/instructions)



### Mission

- Improvement in HISP mission performance metrics (ex. Increase in loan repayment rates, household income, employment outcomes, health outcomes)
- Positive change in HISP scores across government-wide metrics in Trust/Confidence, Satisfaction, and Quality categories

### Stewardship

- Cost avoidance from streamlined customer feedback collection mechanism
- Cost savings from streamlined customer feedback collection mechanism
- Cost avoidance from solutions implemented identified through journey mapping efforts
- Cost savings from solutions implemented identified through journey mapping efforts



## PRESIDENT'S MANAGEMENT AGENDA

# The following entities are identified as High Impact Service Providers (HISPs) and are subject to the customer experience section of the 2018 A-11 Guidance.

### Department of Agriculture

U.S. Forest Service\*  
Farm Service Agency  
Natural Resources Conservation Service

### Department of Commerce

U.S. Patent and Trademark Office (Trademarks)  
U.S. Patent and Trademark Office (Patents)

### Department of Education

Federal Student Aid

### Department of Health & Human Services

Centers for Medicare and Medicaid Services (Health Insurance Marketplace)  
Centers for Medicare & Medicaid Services (Medicare)

### Department of Homeland Security

Transportation Security Administration  
U.S. Customs and Border Protection  
Citizenship and Immigration Services  
Federal Emergency Management Agency

### Department of Housing and Urban Development

FHA Single Family Loans and Resources Center

### Department of Interior

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

### Department of Labor

Occupational Safety & Health Administration  
Office of Worker Compensation Programs

### Department of State

Bureau of Consular Affairs

### Department of Treasury

Internal Revenue Service

### Department of Veterans Affairs

Veterans Health Administration  
Veterans Benefits Administration

### Office of Personnel and Management

Federal Employment Services  
Retirement Services

### Social Security Administration

### Small Business Administration

Field Operations

### Interagency Initiative

Recreation.gov (U.S. Forest Service, National Park Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Bureau of Reclamation, U.S. Army Corps of Engineers, National Archives)

\*The Forest Service high impact service subject to submission of data and CX Action Plan is recreation.gov, so there will be one submission for both of these listed entities.

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