Improving Customer Experience with Federal Services

High Impact Service Provider Annual CX Action Plan

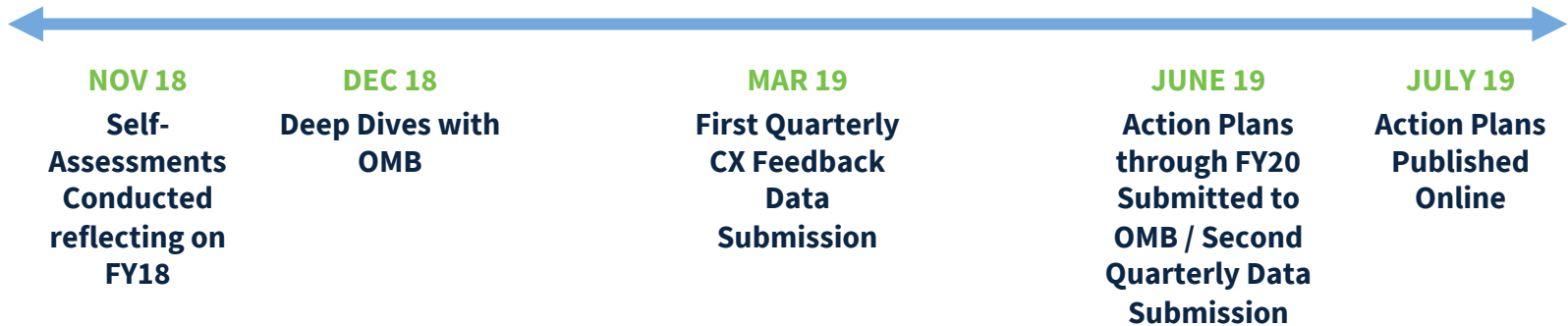## Medicare

June 2019

PRESIDENT'S MANAGEMENT AGENDA

FIRST YEAR Timeline for A-11 Section 280

FY19

NOV 18	DEC 18	MAR 19	JUNE 19	JULY 19
Self-Assessments Conducted reflecting on FY18	Deep Dives with OMB	First Quarterly CX Feedback Data Submission	Action Plans through FY20 Submitted to OMB / Second Quarterly Data Submission	Action Plans Published Online

ONGOING Timeline for A-11 Section 280

FY20

DEC 19	JAN 20	FEB 20	MAR 20	APRIL 20
Q1 CX Feedback Submission (Ongoing Quarterly)	Self-Assessments Conducted reflecting on FY19	Deep Dives with OMB	Action Plans through FY21 Submitted to OMB	FY21 Action Plans Published Online

PRESIDENT'S MANAGEMENT AGENDA

HISP Annual Maturity Self-Assessment Summary

In 200 words or less total, tell us about your efforts around each core CX function by responding to the following prompts that apply.

Measurement: 4 / 6

Please give a 2-3 sentence summary of your efforts:

We've been working to improve web metrics and customer service metrics and to ensure we are capturing the same level of metrics across channels and throughout the customer journey. During our last open enrollment period, we measured both product specific and overall customer service OKRs and presented them in consolidated dashboards to enable teams to monitor information across the journey.

What are you most proud of?

We are most proud of the level of engagement and input across the product teams in defining and measuring the OKRs and making sure they are aligned with the agency-wide customer service standards.

What nascent / ongoing activities do you hope to grow?

We are looking to continue to improve our dashboards so that we can truly have a single view into our customer service channels.

What's blocking you from initiating / making / fully implementing changes?

Time and resources are blockers. Work is underway to improve web and customer service metrics for all channels of the customer journey.

What else would you like to share?

Governance: 6 / 6

Please give a 2-3 sentence summary of your efforts:

We've established program-wide CX governance along with program-level leadership roles (i.e., CXO & CTO) and have teams with cross-agency expertise in UX, CX, research, content, mobile, performance, etc.

What are you most proud of?

We are most proud of how closely the teams are working and sharing best practices and tools from multidisciplinary perspectives.

What nascent / ongoing activities do you hope to grow?

Establish a consistent framework for elevating key decisions early for sign off and continue expanding cross-collaboration on best practices

What's blocking you from initiating / making / fully implementing changes?

At this time, we aren't experiencing any major blockers, though we'll continue to work on creating the space for teams to engage in CX activities across the program balanced with meeting critical deadlines with limited resources.

What else would you like to share?

Organization & Culture: 3 / 6

Please give a 2-3 sentence summary of your efforts:

We have established program-level leadership (i.e., CXO and CTO roles) to foster an organization that is focused on the customers and we have established organizational values that focus on a customer-first approach.

What are you most proud of?

Our continuously integrated collaboration on all parts of customer experience.

What nascent / ongoing activities do you hope to grow?

Continue to foster and grow a customer-first culture. While key stakeholders are engaged in customer experience trainings, we need to encourage and prioritize the trainings for all members of the organization. We're also continuing to improve job information to capture CX/UX requirements (PMAPs, PDs, job series).

What's blocking you from initiating / making / fully implementing changes?

Setting customer experience and ongoing training as a priority while overhauling the entire customer experience with limited resources is a challenge.

What else would you like to share?

Customer Research: 4 / 6

Please give a 2-3 sentence summary of your efforts:

We've implemented robust consumer research for every major product in development as well as overarching formative research at the program level.

What are you most proud of?

We are most proud of how much the product teams have embraced the value of research to their process.

What nascent / ongoing activities do you hope to grow?

More effectively combining findings from data collected via methodologies such as A/B testing, website analytics, satisfaction survey data, and direct consumer research to inform product improvements. Develop and disseminate recommendations and journey maps derived from broad ethnographic research conducted with Medicare audiences to supplement ongoing product-specific research.

What's blocking you from initiating / making / fully implementing changes?

Person-level, cross-channel data is not always available to allow for optimal integration with research to form more holistic analysis on behaviors, trends and opportunities. We are working to implement improvements on our roadmap.

What else would you like to share?

Service Design: 5 / 6

Please give a 2-3 sentence summary of your efforts:

We are looking closely at the overall Medicare customer service program to make sure that individual product development efforts are aligned with an overall customer service framework and broader program-level priorities.

What are you most proud of?

We are most proud that we developed a high-level program-level prioritization before we kicked-off a lot of product specific design and development work, and that we have been able to keep that prioritization as a "north star" for the team.

What nascent / ongoing activities do you hope to grow?

A better framework to identify the impacts of one product (and changes to that product) on other aspects of Medicare customer service.

What's blocking you from initiating / making / fully implementing changes?

A need for more resources that possess UX/CX expertise. This will ensure that all teams have adequate resources/expertise to focus on human-centered design.

What else would you like to share?

Areas of Focus

Reflecting upon our 2019 CX Maturity Self-Assessment, our HISP has decided to focus on raising our maturity in the following areas in FY19/FY20:

- **Measurement**
- **Governance**
- X **Organization & Culture**
- X **Customer Research**
- **Service Design**

FY 2019 / 2020 CX Improvement Actions

Describe a use case where a typical customer of your program faced challenge(s) during a service experience. This case should relate to one of your organization's Focus Areas for the remainder of FY19 and through FY20.

Typical HISP Customer Profile

Who is one of the primary customer served by your HISP? What goal(s) is this customer trying to accomplish by interacting with your service?

Medicare beneficiaries, mostly 65 and older. Looking for customer service with their health insurance or to complete a transaction, such as shopping for a health plan.

Customer Needs + Frustrations

What makes the difference for this customer when they're interacting with your service (ex. clear guidance upfront, knowledgeable employee to help them pull together an application, a fast processing time)? What common blockers might they face when interacting with your service?

The Medicare plan finder tool used to shop, compare, and enroll in health plans online, is difficult to use and not mobile optimized. Users often seek assistance through other channels rather than trust the online tool.

HISP Implementation Challenge(s)

What can make it difficult for your HISP to meet this need? Is it an internal IT system, process, or unclear guidance?

Addressing the issues with plan finder required a complete rewrite of the tool which is a multi-year effort. This work is well underway and we will be launching a new version shortly.

Stats

What data do you have that documents this experience/service? Could be something like "Less than 1/3 of our customers are connected to internet or smartphones," or "Employee engagement scores on FEVS dropped two points last year"

Satisfaction with the tool is low as measured by our online survey instruments

Action 1

Focus Area: Ethnographic Research (Customer Research)

Goal to be accomplished by September 30th, 2021: Conduct additional observational research with Medicare beneficiaries and caregivers to ensure continuous updates to our understanding of important customer characteristics.

Critical Activities and Milestones:
Summer 2019 – Finalize first Medicare Diary study

Winter 2019 – Define next steps for future waves of ethnographic research

Other Notes:

FY 2019 / 2020 CX Improvement Actions

Describe a use case where a typical customer of your program faced challenge(s) during a service experience. This case should relate to one of your organization's Focus Areas for the remainder of FY19 and through FY20.

Typical HISP Customer Profile

Who is one of the primary customer served by your HISP? What goal(s) is this customer trying to accomplish by interacting with your service?

Child of a Medicare beneficiary looking for nursing home care for a parent.

Customer Needs + Frustrations

What makes the difference for this customer when they're interacting with your service (ex. clear guidance upfront, knowledgeable employee to help them pull together an application, a fast processing time)? What common blockers might they face when interacting with your service?

The nursing home compare tool includes a great deal of data that is overwhelming. On Medicare.gov we also offer a long-term care hospital tool and it's hard for users to navigate the difference between these two tools.

HISP Implementation Challenge(s)

What can make it difficult for your HISP to meet this need? Is it an internal IT system, process, or unclear guidance?

Medicare has facility comparison tools online that currently support both beneficiary customer service and broader, professionally-focused public reporting requirements. However, we now have agreement with the policy component that we should decouple those functions and address each audience separately with tools that address their needs.

Stats

What data do you have that documents this experience/service? Could be something like "Less than 1/3 of our customers are connected to internet or smartphones," or "Employee engagement scores on FEVS dropped two points last year"

Satisfaction with the tools is low as measured by our online survey instruments

Action 2

Focus Area: Job Codes & Position Descriptions (Organization & Culture)

Goal to be accomplished by September 30th, 2021:
Continue to update or establish CX and UX position descriptions that work across the program and engage with other stakeholders to foster broader adoption of CX.

Critical Activities and Milestones:
Continue work on rewriting/developing position descriptions, including career ladders

Publish PDs (Fall 2019)

Other Notes: