



## Improving Customer Experience (CX) with Federal Services

### Goal Leaders

**James Byrne**, Deputy Secretary, Department of Veterans Affairs

**Matt Cutts**, Administrator, U.S. Digital Service

**Dustin Brown**, Deputy Assistant Director for Management, Office of Management and Budget

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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 service 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.



## Approach

Modeling after the private sector, focus will be placed on the foundational components of:

- Data: Capture and analyze the voices of citizens
- Tools: Build and deliver CX tools and products across the government
- Technology: Deliver easy and effective experiences, channel agnostic



## Office of Management and Budget (OMB)

- Mark Bussow, Office of Performance and Personnel Management (PPM)
- Amira Boland, PPM, Lead, Customer Experience
- Tony Garza, PPM, White House Leadership Development Fellow

## Department of Veterans Affairs (VA)

- Dr. Lynda Davis, Chief Veterans Experience Officer
- Barbara Morton, Deputy Chief Veterans Experience Officer
- Lee Becker, Chief of Staff, Veterans Experience Office
- Maura Newell, Presidential Innovation Fellow
- Scott Weiss, Presidential Innovation Fellow
- Chris Corpuel, Presidential Innovation Fellow
- Ryan Forentino, Presidential Innovation Fellow

## General Service Administration (GSA)

- Matthew Ford, Acting Chief Customer Officer
- Philip Ashlock, Director, Data & Analytics Portfolio
- Boris Arratia, Senior Advisor, Office of Shared Solutions and Performance Improvement
- Lauren Ancona, Data & Analytics Portfolio
- Ryan Wold, Data & Analytics Portfolio
- Maria Dayton, Presidential Innovation Fellow
- Angelo Frigo, Presidential Innovation Fellow

## United States Digital Service (USDS)

- Jay Teitelbaum, Chief of Finance and Operations





# 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*



**Supporting Strategy:**

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

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



# Summary of Progress in Q4

## Government-wide Customer Experience Guidance

OMB has updated Section 280 guidance on Managing Customer Experience and Improving Service for the 2019 edition of OMB Circular A-11. This document is available at <https://performance.gov/CX>.

- On September 19, 2019, CX Action Plans were made publicly available on HISP Profile pages at [performance.gov/CX](https://performance.gov/CX)

## Ensuring Source Data for Government-wide CX Performance Dashboard

In the A-11 guidance, a set of government-wide CX metrics was established in alignment with leading practices from both the private and public sectors in an effort to develop comparable, government-wide scores that will enable cross-agency benchmarking (when relevant) and general indication of an agency's customer's overall satisfaction.

- Touchpoints, a mechanism for agencies to collect customer feedback at no cost to HISPs (Terms of Service available) is now fully operational and operating under an OMB clearance:  
<https://feedback.usa.gov/touchpoints/>



## Strategy 1: Improve the Digital Experience

- **Problem Targeted:** Too often, outdated tools, systems and practices make interacting with the government cumbersome and frustrating. The digital experience must be agile and keep pace with private sector advances. User-centered design and iterative development practices are needed to prioritize user needs and learn what works as quickly as possible.
- **Theory of Change:** Innovative projects coordinated by USDS will expand the use of common platforms, services and tools in order to transform critical, public facing services. USDS will rethink how the Government buys digital services to leverage shared services and economies of scale. The top technical talent in the field will be brought into civil service in order to reach these objectives.

### USDS Quarterly Update:

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.

Following the accomplishments of the team that were included in the Q3 update, [OPM released a memo](#) to all agencies providing guidance and the team launched a [site](#) with resources on the process to support its use.



## Strategy 2: Increase Transparency to Drive Accountability

- **Problem Targeted:** Many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself. Insufficient data limits government's ability to identify major customer service challenges and problem areas and the public's ability to see the quality and timeliness of specific services.
- **Theory of Change:** Agencies will use data to target improvement efforts at both the government-wide and agency level and to provide diagnostic information for use at a program-level. Making data available publicly via dashboards will help citizens set expectations and hold government accountable for improvements.

| Key Milestones   | Milestone Due Date | Milestone Status | Change from last quarter | Owner              | Anticipated Barriers or other Issues Related to Milestone Completion            |
|--|--------------------|------------------|--------------------------|--------------------|---|
| Publish initial high impact service provider dashboards  | 3Q FY19            | Completed        | Completed                | PPM, Agencies, GSA |   |
| Create centralized, government-wide data dashboard / website to post aggregate customer experience performance data publicly   | 1Q FY20            | On track         | No change                | PPM, GSA           | Central page created; unable to aggregate HISP data for public use at this time |
| Develop interactive data comparison tools (e.g., by geography, like service)   | 2Q FY20            | On track         | No change                | GSA                |   |
| Develop capability of Touchpoints for automated agency certification of data for reporting, automated reporting for non-Touchpoints users  | 4Q FY20            | On track         | No change                | GSA                |   |
| Publish stories of CX data use by agencies, transparency and availability through social media, blogs, and other story telling   | 3Q FY20            | On track         | No change                | VA                 |   |
| Integrate employee engagement metrics such as Federal Employee Viewpoint Survey data, and additional operational data (such as Digital Analytics Program, processing times) on HISP dashboards | 4Q FY20            | On track         | No change                | GSA                |   |



## Strategy 3: Apply Proven Practices to Raise the Standard of Service of High Impact Service Providers

- **Problem Targeted:** Customer satisfaction with Federal services lags behind every other industry, as measured by both Forrester and the American Customer Satisfaction Index (ACSI), causing frustration for the public and higher costs for the Federal Government. CX is too often not a priority for leadership and staff at all levels. Entities of government have diverse understandings of “what good looks like,” and practices from leading private-sector organizations are not being consistently leveraged.
- **Theory of Change:** Create government-wide CX oversight and issue uniform guidance and maturity model to ensure consistent and sustained improvements in customer experience across government. Facilitate ownership and support cross-agency journey mapping to allow critical bottlenecks to be recognized and remedied across Federal Government.

| Key Milestones   | Milestone Due Date | Milestone Status | Change from last quarter | Owner              | Anticipated Barriers or other Issues Related to Milestone Completion |
|--|--------------------|------------------|--------------------------|--------------------|--|
| Assess plans to improve customer experience program maturity, refine planning process and guidance for following FY  | 3Q FY19            | Completed        | Completed                | PPM, Agencies      |  |
| Assess and develop initial plans to improve customer experience program maturity   | 3Q FY19            | Completed        | Completed                | PPM, Agencies      |  |
| Update maturity model and include case studies for annual self-assessment  | 1Q FY20            | On track         | No change                | PPM, GSA           |  |
| Convene private sector CX leaders, high impact program leaders and staff to facilitate best practice knowledge sharing   | 1Q FY20            | On track         | No change                | PPM, USDS, GSA, VA |  |
| Develop action plans to improve customer experience program maturity that include routine collection, analysis and application of customer feedback              | 2Q FY20            | On track         | No change                | PPM, Agencies      |  |
| Gather feedback, reassess program requirements, and revise OMB Circular A-11 Section 280   | 3Q FY20            | On track         | No change                | PPM                |  |
| Review and revise HISP list to include additional high impact programs   | 4Q FY20            | On track         | No change                | PPM                |  |
| Evaluate results of pilot(s) and determine project viability to scale interagency solution / replicate process with additional cross-government customer journey | 4Q FY20            | On track         | No change                | PPM, GSA, VA       |  |







# Supporting Strategy: Empower Agencies to Manage Customer Experience at Enterprise Level (1)

- **Problem Targeted:** Getting the right CX talent and services is hard. Program implementers don't necessarily have a deep understanding of their customer or their needs. No government-wide support capability exists.
- **Theory of Change:** Fostering a cultural change amongst agency leadership and staff, demonstrating the value of improved customer experience, creating government-wide customer experience oversight and support, and issuing uniform guidance will help ensure consistent and sustained improvements in customer experience across government. Performing cross-agency journey mapping will allow critical bottlenecks to be recognized and remedied across Federal Government.

| Key Milestones  | Milestone Due Date | Milestone Status | Change from last quarter | Owner              | Anticipated Barriers or other Issues Related to Milestone Completion  |
|---|--------------------|------------------|--------------------------|--------------------|---|
| Journey Map for second customer segment   | 3Q FY19            | On hold          | On hold                  | PPM, GSA, Agencies | Team is currently dedicated to coordinating pilots resulting from the first cross-agency journey mapping effort.  |
| Develop interim CX buying guide / resources for HISPs   | 2Q FY20            | Delayed          | Updated Due Date         | GSA                | GSA determined an RFI process would better inform this resource, and conducted this at the end of FY19. They are currently reviewing submissions and updating the guide to be released in early 2020. |
| Establish working group to explore the creation of a CX Quality Service Management Office (QSMO)  | 1Q FY20            | On track         | No change                | VA, PPM, GSA       |   |
| Develop further resources and tools to grow CX practices in HISPs, including journey mapping MOOC, low-cost actions                       | 2Q FY20            | On track         | No change                | GSA, VA            |   |
| Develop and disseminate trainings designed to enhance employee engagement and front-line customer service, similar to VA's Own the Moment | 3Q FY20            | On track         | No change                | VA                 |   |





## Supporting Strategy: Empower Agencies to Manage Customer Experience at Enterprise Level (2)

| Key Milestones   | Milestone Due Date | Milestone Status | Change from last quarter | Owner   | Anticipated Barriers or other Issues Related to Milestone Completion |
|--|--------------------|------------------|--------------------------|---------|--|
| Develop standardized position description, job codes, and hiring plans for CX positions  | 4Q FY20            | On track         | No change                | GSA, VA |  |
| Complete the Federal Integrated Business Framework (FIBF) to provide foundation for QSMO designation   | 4Q FY20            | On track         | No change                | GSA, VA |  |
| Establish a testbed for adopting private sector best practices for public service delivery, share lessons learned for building CX talent government-wide | 4Q FY20            | On track         | No change                | VA      |  |



# CAP Goal Progress Indicators

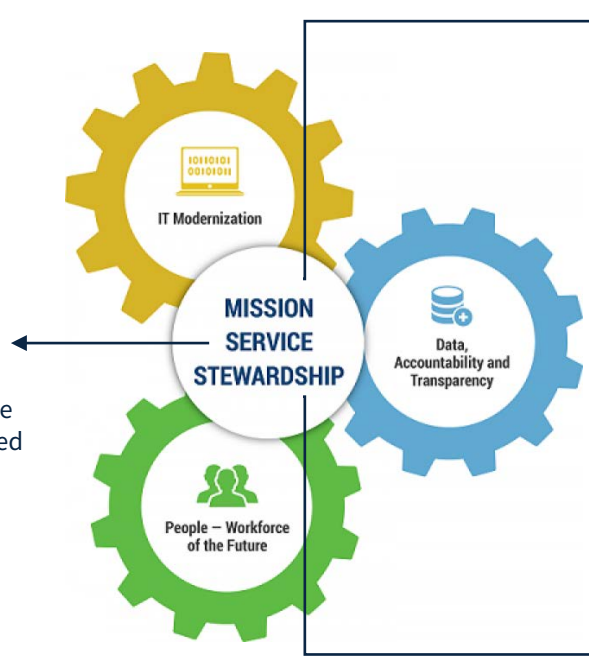
**After the first round of start-up activities are completed in FY2019, progress will initially be reported as:**

- 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

**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.

