Improving Customer Experience (CX) with Federal Services

Goal Leaders

James Byrne, Acting Deputy Secretary, Department of Veterans Affairs

Matt Cutts, Administrator, U.S. Digital Service

Mark Bussow, Performance Team Lead, Office of Management and Budget

June 2019

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), Deputy Goal Lead
- Amira Boland, PPM, Detailee from GSA
- Dr. Michelle Dorsey, PPM, White House Leadership Development Fellow

United States Digital Service (USDS)

- Fatima Noor, Product Delivery Manager

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
- Charles Worthington, Chief Technology Officer
- Maura Newell, Presidential Innovation Fellow

General Service Administration (GSA)

- Anahita Reilly, Chief Customer Officer
- Matthew Ford, Deputy 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
- Maria Dayton, Presidential Innovation Fellow

Goal Structure

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

STRATEGY 1:
Improve Digital Services (USDS)

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

STRATEGY 2:
Increase Transparency to Drive Accountability (PPM)

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 of High Impact Service Providers (PPM)

Develop resources, capabilities and tools proven to enhance performance of high impact programs

Supporting Strategy:
Manage Customer Experience at the Enterprise Level (PPM)

Focus on customer experience improvement in high priority areas, disseminating best practices across government using clear guidance, modern tools, and engagement of staff at all levels

Implementing First-of-its-Kind Federal Customer Experience Guidance

In an effort to institutionalize the fundamental building blocks of CX across Federal high-impact service providers (HISPs; listed on slide 18), OMB issued first-of-its-kind guidance in Circular A-11, Part 6, Section 280, "Managing Customer Experience and Improving Service Delivery"

- From December through February, deep dive meetings occurred with every HISP to evaluate their CX self-assessment and draft action plans, identify common pain points, capacity gaps and opportunities. This was followed by Action Plan Check-Ins with all the HISPs in May.

- Workshops targeted to building knowledge in the self-assessment topics are being developed

- Monthly calls have been instituted to build a CX community of practice and to support both HISPs and other interested entities implement the A-11 guidance

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.

- HISPs with customer experience surveys / feedback collections have cross-walked existing collections to government-wide metrics and identified areas for adjustments as needed

- HISPs with no existing collections have developed plans for instituting customer feedback mechanisms in order to submit data in accordance with A-11 timelines

- A team at GSA has developed a low-cost feedback tool for efficient adoption by HISPs (and others in government) needing a collection mechanism

- The submission deadline for Q1 FY19 HISP data was extended to March 29th due to the lapse in appropriations, with dashboard release expected this Summer

Identification of Customer Experience Challenges across Agencies

The CX CAP Goal Team has written a summary of their findings from the 25 HISP Self-Assessments and Deep Dive conversations that took place in Q1 and Q2. Please see Appendix A to this update.

Completed Government-wide Customer Experience Journey Map Pilot

Customers of the United States government pursue needs along journeys that don't perfectly align to agency boundaries. The CX CAP Goal team is piloting using "journey mapping" to document the perspective of individuals navigating Federal services irrespective of how the government is organized, which is necessary to identify some of the most critical bottlenecks and high-impact areas for improvement. A journey map of a Service member transitioning to civilian employment has been finalized, crossing DOL, DOD, VA, OPM, and SBA programs. Recommendations are now being developed for priority areas for improvement pilots, and a research and synthesis report is being produced to support replication for other customer groups.

Conclusion of the US Forms System Project

The US Forms System (USFS) project intended to create an open-source tool that simplifies the process of creating accessible web forms and reduces the amount of custom design and coding required to build forms. In mid-2018, the VA switched to using the USFS repository and became the library's first client. During the second half of 2018, the USFS team worked on making the library more general and less tied to the VA's software and design environment. In doing so, the team began connecting with prospective library adopters but found it difficult for other agencies to successfully adopt USFS. Building a general solution while actively addressing custom feature requests became increasingly complex. While the original solution may have worked for the VA, the assumption that the same implementations work for other agencies could not be validated. As such, the program has been suspended, but USFS remains an open-source library for others to build upon and learn from.

- **Problem Targeted**: The Federal Government maintains around 23,000 forms that are used to carry out its essential functions and provide critical services and benefits. In the case of paper-only forms, workers spend innumerable hours recreating and quality checking handwritten entries. Where digital forms exist, they are often simply fillable PDFs that still require manual processing because the data isn't collected in a format that can be automatically processed. The need to manually process both of these types of forms leads to more than 11.4 billion hours of paperwork annually, as well as a negative user experience.

- **Theory of Change**: Web-based forms created through user-centered design methods reduce the respondent burden while producing well-structured data to the agencies for ingestion. The U.S. Forms System creates a reusable open source code library for building complex web-based forms 8-10x faster than existing methods, using best practices in user experience and data collection and validation.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Paperless Government Project					
Develop initial version of reusable open source form creation library (US Forms System) for use government-wide by extracting code developed at VA by USDS.	3Q FY18	Completed	Completed	USDS	None. Code is available to the public and includes a starter app for getting started quickly.
Create and make available documentation, examples, and use cases to developers government-wide for planning, development, and pilots.	4Q FY18	Completed	Completed	USDS	None
Feature the US Forms System on part of Code.gov	4Q FY18	Completed	Completed	USDS	None
Conduct research into the usability of the US Forms System to understand agency-specific needs and pain-points, identify themes in their form development process, and surface recommendations to increase adoption.	1Q FY19	Completed	Completed	USDS	None
Identify agency candidates for proof-of-concept pilot using US Forms System, and secure agreement for participation, where possible.	2Q FY19	Completed	Completed	USDS	None
Evaluate results of pilot(s) and determine project viability to scale broadly as a government-wide open source library housed and maintained outside of USDS. Wrap up project and create documentation of lessons learned.	3Q FY19	Completed	Completed	USDS	As a result of pilot evaluation, project was cancelled. See previous slide for discussion.

- **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
Develop Customer Experience Dashboards					
Issue dashboard policy and/or guidance	3Q FY18	Completed	Completed	PPM	
Conduct meetings between OMB and agencies to collaborate on dashboard content	1Q FY19	Completed	Completed	PPM, Agencies	
Implement initial dashboards	3Q FY19	On track	No change	Agencies, GSA	Milestone due date adjusted from Q2 to Q3 as the HISP data submission deadline was extended due to the lapse in appropriations.

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
Develop and Enhance Customer Experience Metrics and Data Collection Tools					
Establish government-wide indicators	3Q FY18	Completed	Completed	PPM, VA	
Establish initial program-specific indicators and data collection strategies	1Q FY19	Completed	Completed	PPM, Agencies	
Create project plan to advance the use of real-time data collection models and tools, with a focus on burden reduction	1Q FY19	Completed	Completed	Agencies, GSA	
Refine indicators for FY20 measurement	4Q FY19	On track	No change	PPM, Agencies	
Ensure Public Openness and Accountability					
Create centralized, government-wide data dashboard/website to post customer experience performance data publicly	1Q FY20	On track	No change	PPM, GSA	

- **Problem Targeted:** Customer satisfaction with Federal services lags behind every other industry, as measured by the American Customer Satisfaction Index (ACSI), causing frustration for customers and higher costs for the Federal Government. Best practices from leading private-sector organizations are not being consistently leveraged to improve customer experience across Federal Government.

- **Theory of Change:** Developing resources, capabilities and tools proven to enhance performance will enable Agencies to leverage best practices to improve customer experience. Through Agency maturity assessments, gaps in knowledge will be identified and addressed.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Improve Customer Experience Performance and Programs					
Update customer experience program maturity self-assessment guidance	3Q FY18	Completed	Completed	PPM	
Assess and develop plans to improve customer experience program maturity	3Q FY19	On track	No change	PPM, Agencies	Action plans will be submitted by HISP's in June.
Develop plans to improve customer experience performance that include routine collection, analysis, and application of customer feedback	3Q FY19	Completed	Completed	Agencies	Agencies connected with Touchpoints survey tool.

- **Problem Targeted:** Government fails to maintain a consistent focus on achieving high-quality customer experience and 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
Foster Cultural Change					
Identify top customer experience challenges across agencies	3Q FY18	Completed	Completed	PPM	HISP Self Assessments and deep dives complete
Develop toolbox for agency leadership to support communications, training, and outreach with staff, including executive briefing materials demonstrating value of government customer experience improvement	3Q FY19	Completed	Completed	VA	Milestone due date adjusted from Q2 to Q3 due to the lapse in appropriations. Materials available on OMB MAX Customer Experience page.
Evaluate inclusion of customer experience measures in appropriate executive performance plans or agency performance goals	3Q FY19	Cancelled	Cancelled	PPM	Milestone replaced by dashboard scorecard to be released on Performance.gov.

Supporting Strategy: Manage Customer Experience at the Enterprise Level

| Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Develop and Issue Customer Experience Program Governance Guidance					
Develop draft customer experience framework to identify areas where additional guidance recommendations are needed	3Q FY18	Completed	Completed	PPM	
Issue customer experience program framework in an OMB guidance document	3Q FY18	Completed	Completed	PPM	
Charter a customer experience working group to gather best practices, assess minimum program requirements, and provide recommendations to OMB to include in next revision of OMB Circular A-11	2Q FY19	Completed	Completed	PPM	
Provide Government-wide Customer Experience Support					
Establish near-term customer experience support resources and make available to agency stakeholders	3Q FY18	Completed	Completed	PPM	
Evaluate the benefits of a government-wide customer experience support capacity for inclusion in future budget requests	1Q FY19	Completed	Completed	PPM	
Develop a plan for a central CX office that provides ownership and accountability of CX in line with successful private sector models	1Q FY19	Completed	Completed	PPM	
Develop Cross Agency Journey Maps					
Journey map of Service Member transitioning to civilian employment	1Q FY19	Completed	Completed	PPM, GSA, OPM, Agencies	
Documented and templatized a cross agency process for Journey Mapping that can be replicated for other customer groups	1Q FY19	Completed	Completed	PPM, GSA, Agencies	Resources will be shared in 2Q FY19
Journey Map for second customer segment	3Q FY19	On hold	On hold	PPM, GSA, Agencies	Further journey mapping was put on hold in order to focus resources on launching the pilot project.

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 (ex. digital analytics such as decreased bounce rates, reduction in error rates of form submissions due to improved clarity of guidance/instructions)
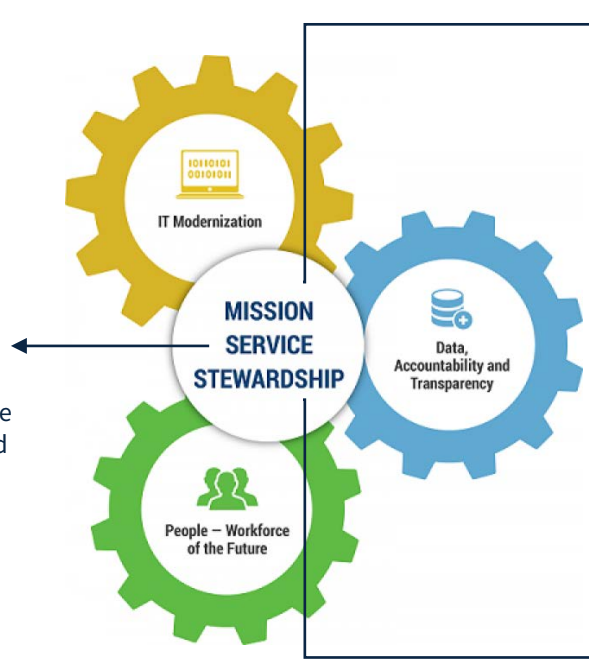
Mission
- Improvement in HISP mission performance metrics (ex. Increase in loan repayment rates, household income, employment outcomes, health outcomes)
- Positive change in HISP scores across government-wide metrics in Trust/Confidence, Satisfaction, and Quality categories

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 Authority

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

- *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.

- *5/23/19: Reflects that SSA is an HISP at the agency level

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)

Last updated on 5/23/19.