



## 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)
- Matt Eliseo, Performance Manager (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)

- Philip Ashlock, Director, Data & Analytics Portfolio
- Angelo Frigo, Presidential Innovation Fellow
- Aaron Steinstra, Senior Design Strategist, Office of Customer Experience
- Ryan Wold, Data & Analytics Portfolio



## 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 Q3

### CX SME-QA Hiring Pilot

The first government-wide pilot of the SME-QA hiring process concluded in July. Initially, more than a dozen agencies sought to fill 30 “CX Strategist” positions across government. The CAP goal team worked collectively to advertise and recruit for the effort, and more than 800 candidates applied to the single posting. Due to COVID-19, hiring priorities and abilities changed for several participating agencies, but more than 15 offers have been extended and additional agencies are continuing to interview and extend offers to candidates. All hiring managers were impressed with and excited about the talent ultimately accessible in the cohort – a rigorous review process conducted by more than 20 SME’s resulted in more than 40 individuals on certification lists at the GS 13, 14, and 15 levels. The team is now coordinating an onboarding program and aims to track the success of the role and talent within Federal teams. To view the positions originally included, and the role of the CX Strategist itself, learn more here: <https://smeqa.usds.gov/info/cx-govwide/>

### Annual Update to A-11 Section 280

The FY21 update to A-11 Section 280 directly responds to feedback collected from HISPs, as well as other Federal agencies, and builds off of FY20 maturation across government. It provides additional definitions of Federal “services;” includes a worksheet for Federal agencies to define customer needs / occasions, how their agency then maps “services” to enable customers to reach a product offering / comply with a policy, and identify supporting platforms, roles, and drivers of success; and identifies *trust* as the “north star” measure for Federal services.

### OIRA “CX Desk”

A “CX Collections Central” has been established, routing any information collections submitted under the A-11 Section 280 generic clearance to the Federal CX team, currently averaging a 1-day turnaround on reviews. Establishment of clearances are in progress at all 24 CFO Act agencies (with 8 complete), and statuses can be tracked here: <https://community.max.gov/x/oC00g>







## Summary of Progress in Q3

### 2020 Action Plans

HISPs completed their second annual CX Action Plans, building of their work implementing A-11 Section 280 for their first full year in FY19. Notably, this year, HISPs further focused their actions in the context of specific customer pain points across particular journeys. These are now available at <https://performance.gov/cx>.

### Building Customer Understanding Capacity

From April through August of this year, the CX CAP goal team worked with the Lab@OPM to create and deliver the Amplify Program to a group of 10 self-selected Federal teams. In the midst of constraints due to the COVID-19 crisis, the entirety of the program was redesigned to be a series of 6 self-paced learning modules available online, combined with workbook activities, weekly one-on-one coaching sessions, and monthly virtual forums to discuss and collaborate. All participants worked toward the goal of building their capacity to do customer / human centered design methods research by planning and completing it with the help of the Amplify team, and several teams were doing this for the first time. The program concluded with a presentation led by HISPs sharing what they learned about their customers' (in some cases internal, in other external) needs around a specific problem frame, and their organizations' capacities to serve them. For those inside government, the complete set of training modules and supporting materials can be accessed here: <https://community.max.gov/x/cD5jfw>

### Cross-Agency Journey Mapping Phase I Completion

On August 8<sup>th</sup>, the Department of Labor announced that it has chosen Eightfold.ai to pilot its website application to better match transitioning military service members' skills with employers' needs, as part of a pilot program administered by the Department's Veterans' Employment and Training Service (VETS) with support from the U.S. Departments of Defense and Veterans Affairs. This multi-stage, user-involved challenge competition was designed to address a pain point identified through the customer research conducted by our team in 2018, in particular, the confusion of multiple Federal and private sector job searching tools. Learn more here: <https://www.dol.gov/newsroom/releases/vets/vets20200710>





## Summary of Progress in Q3

### **Cross-Agency Journey Mapping Phase II Kickoff**

Further continuing the approach of basing our understanding of journeys from a customer, rather than organizational, perspective, the CX CAP goal team is ambitiously conducting two additional maps: an individual surviving a national disaster and an individual born with a disability. Keep up to date on the work here:

<https://www.performance.gov/2020cxmaps/>

### **Sustaining the CX and Service Delivery Communities**

The central OMB CX team is currently working to finalize a governance structure charter for ongoing cross-government service delivery and experience improvement initiatives (like the human-centered view of Federal services irrespective of agency lines) as well as maintain HISP and broader communities engaged in the space to date. This entity will include representation from HISPs as well as Federal Chief Experience Officers (or similar roles).

### **Managing Customer Experience and Improving Federal Service Delivery Strategy Project**

Building off improvements in particular throughout the last decade and under the 2018 President's Management Agenda, the team is engaging Federal customers, external experts and stakeholders across government to develop a set of bolder and more transformational recommendations to be incorporated in the next Presidential term as part of the 2021 President's Management Agenda. This will include concrete actions to address more deeply rooted structural and cultural barriers to the ways in which the Federal government approaches service definition, design, delivery, and incorporates a customer-focused approach.





## 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	No change	GSA	
Develop capability of automated agency certification of data for reporting	4Q FY20	On track	No change	GSA	
Develop capability of automated reporting for non-Touchpoints users	4Q FY20	On track	No change	GSA	
Prototype simplified A-11 survey form delivery as individual modular components	2Q FY20	Completed	No change	GSA	
<b>Action 2</b>					
Create centralized, government-wide data dashboard / website to post aggregate customer experience performance data publicly	1Q FY20	Completed	No change	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	No change	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	No change	GSA	TSA case study completed; VHA and GSA studies in-progress





## 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	No change	GSA / VA	



## 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	No change	PPM	
Update maturity model and include case studies for annual self-assessment	1Q FY20	Completed	No change	PPM	Updated A-11 Section 280 supporting materials available at <a href="https://www.performance.gov/CAP/cx/">https://www.performance.gov/CAP/cx/</a>
Conduct annual deep-dives with HISPs, gather feedback, reassess program requirements, and revise OMB Circular A-11 Section 280	3Q FY20	Completed	No change	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	No change	GSA with Lab at OPM	Program designed based on HISP capacity assessments
Kickoff and begin cohort program	2Q FY20	Completed	No change	GSA with Lab at OPM	
Participants identify project assignments; begin project-based work	3Q FY20	Completed	Completed	GSA with Lab at OPM	
Codify and share learnings of the program with HISPs and Federal communities	4Q FY20	On track	No change	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	Completed	Completed	PPM	DOL announced winner (see update slide)





## 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	No change	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	No change	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	Completed	No change	VA	In collaboration with Government CIO, VEO designed and conducted a two-day virtual "FedLab HCD 2020" that included a design sprint and taught methods and tactics employed by VHA as part of its customer focused transformation. More here: <a href="https://governmentciomedia.com/fedlab-human-centered-design">https://governmentciomedia.com/fedlab-human-centered-design</a>
<b>Action 2</b>					
Develop CX buying guide / resources for HISPs	2Q FY20	Completed	No change	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	No change	PPM, GSA, VA	Customer Experience Amplify Program completed; stand-up of OIRA "CX Desk" completed
<b>Action 2</b>					
Establish ongoing governance model for government-wide customer experience initiatives	4Q FY20	On track	No change	PPM	Kicked off Federal CX strategy project
Journey Map for a second customer segment	FY21 Q1	On track	Now in-progress, new due date change from FY19 Q3 to FY21 Q1	PPM, Agencies	See <a href="https://performance.gov/2020cxmaps">https://performance.gov/2020cxmaps</a>
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





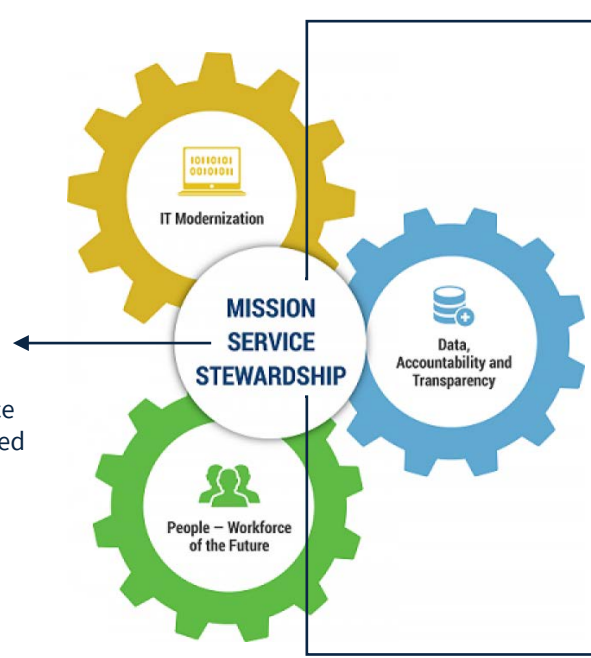
## After the first round of start-up activities are completed in FY2019, progress will initially be reported as:

- 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 A-11 Section 280 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

### 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.

Last updated August 2020

