



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
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General Service Administration (GSA)

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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 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 Q4

Managing Customer Experience and Improving Federal Service Delivery Strategy Project

July – October 2020, we spoke to more than 50 subject matter experts, delivery partners, Congressional staffers, advocacy organizations, former government officials, and current government employees. The team also surveyed Federal program leaders and managers, scanned a decade of Executive Actions and reports on Federal customer service and experience, and researched leading CX practices in federal, state and local agencies, international governments, and the private sector. For the next Administration and 2021 PMA, we have outlined a set of decisions and incremental, bold, and transformational actions that can be taken to address more deeply rooted structural and cultural barriers to the Federal government conducting more sophisticated and effective service definition, design, delivery, and customer-focused approaches.

Cross-Agency Journey Mapping Project

Further continuing the approach of basing our understanding of journeys from a customer, rather than organizational, perspective, we have concluded the development of two more service journeys: that of an individual surviving a natural disaster and an individual with an developmental disability navigating the transition to adulthood. The team interviewed nearly 100 individuals and brought together more than a dozen agencies to complete the project: <https://www.performance.gov/2020cxmaps/> Next, we plan to identify a specific moment in each journey for an integrated team to tackle.

OIRA “CX Desk”

All High Impact Service Providers either have an A-11 Section 280 generic clearance in place or have posted a public notice in the Federal Register and are on their way to getting one. The “CX Collections Central” at OIRA has reviewed more than 50 information collections requests, and currently averaging a 3-day turnaround on reviews. For those in government, find your clearance here: <https://community.max.gov/x/oC00g>

Federal CX Cookbook

As part of its leadership of the CX CAP goal, the Veterans Experience Office pulled together a “CX Cookbook” for practitioners that includes specific actions they took, and other HISPs have taken, to build, scale, and mature their CX programs. <https://www.performance.gov/cx/va-customer-experience-cookbook.pdf>





Summary of Progress in Q4

Connecting Employee and Customer Experience

High Impact Service Providers (HISPs) are now two years into implementing OMB Circular A-11 Section 280, first-of-its kind guidance on managing customer experience and improving Federal service delivery. HISPs are now reaching more sophisticated levels of using their data – the team worked with two agencies, the Transportation Security Administration (TSA) and Veterans Health Administration (VHA), to integrate data sets (customer feedback, annual employee viewpoint survey engagement indices, and administrative operational data) to glean insights (through data visualization and correlational analysis) about how they can better manage their service centers, exploring the connection between the Employee Experience and Customer Experience.

SME-QA Hiring Pilot

More than 18 individuals have now been hired at multiple agencies in the “CX Strategist” position created by a panel of more than 20 Subject Matter Experts. The team is now creating a cohort program and providing support to ensure these new hires are immediately connected with supportive resources and mentors. Learn more about the hiring pilot here: <https://www.performance.gov/CX-hiring-pilot/>





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 |
|--|--------------------|------------------|--------------------------|----------|--|
| Action 1 | | | | | |
| 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 | Completed | Completed | GSA | Touchpoint users can opt-in to auto reporting |
| Develop capability of automated reporting for non-Touchpoints users | 4Q FY20 | On hold | On hold | GSA | De-prioritized for now for team to spend time on social listening pilot; Agencies currently uploading excel documents to OMB max |
| Prototype simplified A-11 survey form delivery as individual modular components | 2Q FY20 | Completed | No change | GSA | |
| Action 2 | | | | | |
| 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 | Completed | Completed | 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 2 (continued) | | | | | |
| Conduct analysis on the connection between employee engagement metrics and customer experience measures with Federal data | 4Q FY20 | Completed | Completed | GSA / VA / TSA / OMB | See performance.gov/cx resources section |
| Action 3 | | | | | |
| Regular Performance.gov blogs on CX success stories / lessons learned Support development of HISP video stories and shorter written/photo stories | 4QFY20 | Completed | Completed | GSA / VA | Cookbook and Action Plan collections of HISP successes, Blogposts drafted and shared on performance.gov (see /CX resources section) |



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 |
|--|--------------------|------------------|--------------------------|---------------------|--|
| Action 1 | | | | | |
| 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 https://www.performance.gov/CAP/cx/ |
| 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 | |
| Action 2 | | | | | |
| 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 | No change | GSA with Lab at OPM | |
| Codify and share learnings of the program with HISPs and Federal communities | 4Q FY20 | Completed | Completed | GSA with Lab at OPM | See https://community.max.gov/x/cD5jfw |
| Evaluate results of DOL/VA/DOD pilot to scale interagency solution / replicate process with additional cross-government customer journey | 4Q FY20 | Completed | No change | 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 |
|---|--------------------|------------------|--------------------------|-------|---|
| Action 1 | | | | | |
| 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 | Completed | Completed | VA | Beta testing and sharing of curriculum (such as HCD practices and Own the Moment CX training) with multiple agencies is ongoing – delivered HCD training to 10 sister agencies, including HHS, DoE, SBA, PTO, DHS and others, and OTM CX training to 2 sister agencies, including HUD and DoD as well as agency representatives participating in the White House Leadership Development Program; VA-specific curriculum may 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: https://governmentciomedia.com/fedlab-human-centered-design |
| Action 2 | | | | | |
| 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 |
|--|--------------------|------------------|--------------------------|---------------|---|
| Action 1 | | | | | |
| 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 |
| Action 2 | | | | | |
| Establish ongoing governance model for government-wide customer experience initiatives | 4Q FY20 | Completed | Completed | PPM | Recommended set of options to be provided to incoming Administration for execution in alignment with 2021 PMA |
| Journey Map for a second customer segment | FY21 Q1 | Completed | Completed | PPM, Agencies | See https://performance.gov/2020cxmaps |
| 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 |



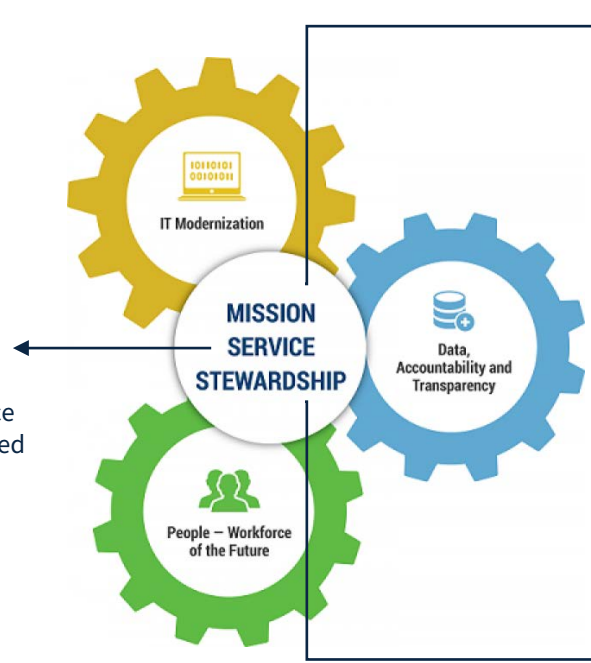
After the first round of start-up activities are completed in FY2019, progress will initially be reported as:

- 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.

