

CX CAP Goal Supporting Materials: Metrics

Dear High Impact Service Provider:

Below is guidance on how to get started measuring Customer Experience (CX) in a way that will help us to build the standard of service across the Federal government and improve your own services and mission achievement.

We look forward to working with you on this, and are available to connect to discuss your agency’s high-impact services, journeys, and touch points as you determine where you’ll start.

Sincerely,

Nathan Sanfilippo
Office of Management and Budget
nathan.t.sanfilippo@omb.eop.gov

Amira Boland
General Services Administration
amira.boland@gsa.gov

Getting Started

- 1
- Review the Excel template that includes the information that you’ll regularly report.
- 2
- Identify your highest-impact customer journeys. If you need help thinking about which of your customer journeys are high-impact, consider some of the parameters included in the template (volume, annual program spend, customer-identified priorities, APGs, other agency priorities, etc.).
- 3
- Within these journeys, identify touch points/transactions at which to collect feedback (e.g., online after submission of a form; in a follow-up email; on an iPad at a service center; or over the phone after a call center interaction).
- 4
- Create your agency's transactional CX survey to include the mandatory general and as many component questions as you are able, minimally editing only as absolutely necessary, to meet your context.
- 5
- Complete the Excel template with the distribution of respondent scores for each touchpoint and each question asked (e.g., 1: 10%; 2: 30%; 3: 10%; 4: 40%; 5: 10%).
- 6
- If possible, survey customers on an annual basis to replicate these questions at the relationship level (rather than tied to a specific transaction). Use the same questions below but modify slightly as needed to capture a series of interactions over the span of a year (e.g., “My interactions with [Agency] have increased my confidence with the agency.”).

General CX Questions (Mandatory, 2 Questions)

		strongly disagree	disagree	neutral	agree	strongly agree
Satisfaction	I am satisfied with the service I received from [Program/Service].	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trust (or)	This interaction increased my confidence in [Program/Service].	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Confidence	I trust [Agency/Program] to fulfill our country’s commitment to [population].	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Service Component Questions (Minimal Revisions, 6 Questions)

		strongly disagree	disagree	neutral	agree	strongly agree
Service	Confidence: This interaction increased my confidence in [Agency].	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Quality: My need was addressed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process	Ease: It was easy to complete what I needed to do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Efficiency: It took a reasonable amount of time to do what I needed to do.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Transparency: I was treated fairly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People	Employees: Employees I interacted with were helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

CX CAP Goal Supporting Materials: HISP Maturity Self-Assessment

Below is a CX self-assessment to capture your entity's maturity (at the listed provider level, e.g., Passport Services, Farm Service Agency) in managing its customer experience. This assessment should facilitate conversations across organizational silos and programs and inform your CX action plan.

- CX Level 1
- CX Level 2
- CX Level 3

		Yes	No
Measurement	We have defined Customer Experience metrics in line with the government-wide reporting requirements.	<input type="radio"/>	<input type="radio"/>
	We have identified quantitative, objective customer-experience related metrics that we report on with our feedback metrics.	<input type="radio"/>	<input type="radio"/>
	We are aligned with agency-wide customer service level standards including call centers and touch points in different mission areas.	<input type="radio"/>	<input type="radio"/>
	We have a “Voice of the Customer” strategy for collecting CX feedback and measures across our entity's entire purview.	<input type="radio"/>	<input type="radio"/>
	We have a central view of how our entity is doing on CX at Secretary, Regional, Program, Front-Line, or other appropriate levels.	<input type="radio"/>	<input type="radio"/>
	We publicly release our CX performance data—the results of our surveys, touch point survey levels, and quantitative metrics.	<input type="radio"/>	<input type="radio"/>
Governance	We have sub-entity or program leadership dedicated to a specific customer segment CX strategy.	<input type="radio"/>	<input type="radio"/>
	We have an Executive that is responsible and dedicated to the entity’s CX strategy.	<input type="radio"/>	<input type="radio"/>
	We have a CX strategy that is either aligned with or specifically a component of our overall agency strategy.	<input type="radio"/>	<input type="radio"/>
	Significant policy decisions and large investments require CX activities and documentation as part of the review process.	<input type="radio"/>	<input type="radio"/>
	We support our CX employees to spend time on sharing best practices and tools governmentwide and participate in CX activities.	<input type="radio"/>	<input type="radio"/>
	We have identified where our customer journeys overlap with other agencies and have created mechanisms to work together.	<input type="radio"/>	<input type="radio"/>
Organization & Culture	All employees receive a training in which they are oriented to who the entity's customers are and our CX strategy.	<input type="radio"/>	<input type="radio"/>
	We have a library of CX trainings that are annually updated and a method for collecting and sharing CX stories.	<input type="radio"/>	<input type="radio"/>
	We have job codes and positions that are specific to CX skill sets and roles.	<input type="radio"/>	<input type="radio"/>
	We evaluate employee performance against role-specific CX metrics.	<input type="radio"/>	<input type="radio"/>
	We have awards and recognition specifically for exemplary CX behavior.	<input type="radio"/>	<input type="radio"/>
	We have a team(s) of people that are able to support programs with CX activities.	<input type="radio"/>	<input type="radio"/>
Customer Research	We use ethnographic research techniques such as interviews and observational studies to better understand customer behavior.	<input type="radio"/>	<input type="radio"/>
	We have a central, entity-wide catalog of our customers and detailed personas that is annually reviewed.	<input type="radio"/>	<input type="radio"/>
	We have a central, entity-wide catalog of our customer journeys and prioritized bottlenecks that is annually reviewed.	<input type="radio"/>	<input type="radio"/>
	We complete customer segmentation/analysis activities at least annually.	<input type="radio"/>	<input type="radio"/>
	We have a regular mechanism for collecting employee feedback and places in which they believe our programs could be improved.	<input type="radio"/>	<input type="radio"/>
	We share the results of customer segmentation/analysis activities with agency leadership, employees, and the public.	<input type="radio"/>	<input type="radio"/>
Service Design	We have mechanisms for involving stakeholders in co-creation of programs and improvements.	<input type="radio"/>	<input type="radio"/>
	We are moving our IT organization towards agile, iterative design processes.	<input type="radio"/>	<input type="radio"/>
	We have adopted CX tools or other resources from other government programs or developed our own for others to leverage.	<input type="radio"/>	<input type="radio"/>
	Existing IT and digital investments are tested on an ongoing basis using human-centered design processes.	<input type="radio"/>	<input type="radio"/>
	New IT and digital investments are tested using human-centered design processes.	<input type="radio"/>	<input type="radio"/>
	All programs and entities that interact with the public have human-centered design capacity.	<input type="radio"/>	<input type="radio"/>

CX CAP Goal Supporting Materials: HISP Maturity Self-Assessment Notes

Use the space below to capture any specific notes or additional details for the self-assessment.

-  CX Level 1
-  CX Level 2
-  CX Level 3

Measurement

Governance

Organization & Culture

Customer Research

Service Design

CX CAP Goal Supporting Materials: HISP CX Action Plan Template

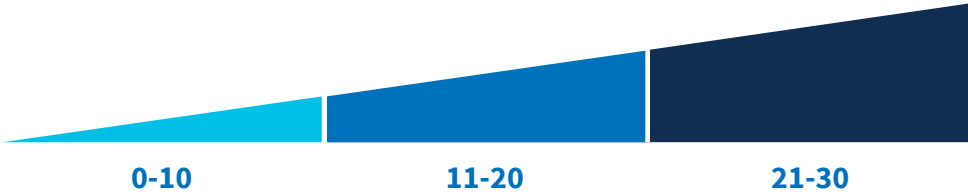
This Action Plan template is meant to provide a guide of what to include—you may find it helpful to create a separate document.

Maturity Score

Tabulate your score on the previous self-assessment. Award your agency 1 point for every “yes” response.

Measurement	<div></div> / 6
Governance	<div></div> / 6
Organization & Culture	<div></div> / 6
Customer Research	<div></div> / 6
Service Design	<div></div> / 6

We scored / 30.



Areas of Focus

In the next fiscal year, we are working to build our capacity and activities in _____ and _____ .
(Select at least two of the five categories above.)

<div>Area:</div> <div>Goal by end of FY19:</div> <div>Actions to be taken in FY19:</div> <div>Milestones:</div> <div>Person Responsible + Contact:</div> <div>Other Notes:</div>	<div>Area:</div> <div>Goal by end of FY19:</div> <div>Actions to be taken in FY19:</div> <div>Milestones:</div> <div>Person Responsible + Contact:</div> <div>Other Notes:</div>	<div>Area:</div> <div>Goal by end of FY19:</div> <div>Actions to be taken in FY19:</div> <div>Milestones:</div> <div>Person Responsible + Contact:</div> <div>Other Notes:</div>
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