

# play #1

# CREATE THE ENVIRONMENT

## for good customer service



The reason an organization gives good or bad customer service comes down to one thing: what's happening inside. It's more than just hiring the right people. It's more than customer service training. But at the same time, it's simple: It's setting an example of customer service behavior at the top.

This section will help you learn and understand the culture of customer service, the resources you may need for effective customer service and how you can get buy-in from leaders to set the right workplace culture. It will also give you instructions on creating a team.

# What is Good Customer Service?

Before you can work to improve customer service, it's important to have a handle on what the term actually means, why it's important and what it looks like in reality.

"Improving the experience that federal customers have is not an end in itself. It is a means to a greater end," said Rick Parrish, a Senior Analyst at Forrester Research who specializes in government customer service. "And that greater end is primarily mission success. Just as companies in the private sector improved their customer experiences so that they can have more loyal customers, federal agencies all have missions that they have to accomplish, and improving the experience that their customers have with them, helps them accomplish those missions."

So what does customer service in the public sector mean? In short, it's all about knowledge and having the answers citizens need. Agencies that can deliver the right knowledge to the right customer at the right time via the right channel will achieve consistent customer satisfaction. This means that any effective customer experience strategy must focus on enabling the fast and accurate delivery of knowledge where and when it is needed.

## GET SUPPORT FROM LEADERS

Again and again the experts we spoke with said great customer service cannot happen unless employees at all levels of the organization support it, especially executive leaders.

"No real customer-centered transformation can succeed without active sponsorship from the senior level," Parrish said. "You know, in a hierarchical organization, you can get some stuff done, but without leadership, it's just going be bits and pieces. It's not going be anything really sort of enterprise-level."

To provide an optimal customer experience, employees organization-wide must understand the motivation and the strategy of good government customer service. Working to gain support from relevant leaders early in the customer service strategy process will help spread the knowledge of the company's customers and target your customers more effectively.

But it's one thing to say you'll have leaders' support on customer service efforts — it's another to actually get it. To that end, try these strategies:

**USE DATA.** "If you have access to any kind of data, that's always great," said Janice Quintana, Director of CharMeck 311 in Charlotte, N.C. "Even when you're out in the community and you're hearing data or you have a small call center and there's data, that's always a great way to show leaders something empirical that they can see, other than just a feeling."

Look for data that proves customer service has helped other agencies or that it will run things more efficiently in your organization and present that to officials.

Additionally, most agencies have way more customer data than they realize, Parrish advised. "Even a motley collection of one-off surveys, website and social media analytics, call center logs, and customer e-mails can be mined to uncover pain points. Don't worry about painting a photo-realistic picture of your customers. Just aim for a few broad brush strokes that can guide basic customer experience improvement."

**REVEAL CUSTOMERS' UNFILTERED VOICE.** If you don't have the data to impress decision-makers' left brains with intricate multivariate regression analyses, wow their right brains with dramatic quotes and resolutions of major

customer problems. All the numbers in the world aren't as powerful as listening to a call center recording of a crying mother or reading an e-mail from an irate retiree.

**MAKE THE BUSINESS CASE.** Eighty-six percent of consumers have quit doing business with a company because of bad customer experience. If that doesn't change leaders' minds, we're not sure what will.

## HIRE THE RIGHT PEOPLE

Although it may not be in every job description, customer service is, at some level, everybody's job. To that end, the folks you hire or work with will affect your agency's overall customer service experience.

So how can you make sure you hire the right people? Attitude, empathy, a proactive nature and good communication skills are all quite important qualities, but how can you screen for those?

As Desk.com notes, "In the end, you're looking for a good blend of operational and personal skills." Below is a simple checklist the company, part of Salesforce, recommends having on hand for interviews that will help ensure you work with the right people to support your customer service initiatives. Bonus: Anybody who has most of the qualities in this chart is likely to be an excellent, hardworking employee overall, not just in customer service terms.

EMPATHY	FUNCTIONAL EXCELLENCE	THE 'WOW' FACTOR
<input type="checkbox"/> picks up emotional distress signals	<input type="checkbox"/> able to escalate the issue with style and diplomacy	<input type="checkbox"/> enthusiastic about a customer-facing role
<input type="checkbox"/> puts him/herself in the customer's shoes	<input type="checkbox"/> collaborates with team members when challenges arise	<input type="checkbox"/> good team fit
<input type="checkbox"/> able to quantify the pain the customer feels	<input type="checkbox"/> known issue: can identify what's wrong and fix it	<input type="checkbox"/> exhibits qualities that align with core values
<input type="checkbox"/> always treats the customer with respect	<input type="checkbox"/> unknown issue: has an inquisitive approach to researching unknown issues to resolution	<input type="checkbox"/> that extra something (what makes this candidate stand out in the crowd)

# Coach Your Team to Customer Service Greatness

It's one thing to understand your customer. It's another to shift customer-facing employees' attitudes and actions to create an organizational culture in which excellence is the norm. That's why the next step is getting your team members in shape. They will require coaching and consistent, real-time feedback to learn and sustain customer service greatness. Different people will require different approaches to ongoing improvement. Here are several steps you can take to achieve a sustainable change in customer service orientation:

# 1

## CAST A VISION (AND MAKE IT VISUAL).

How concretely can you portray the perfect customer experience? Can you paint a vivid portrait of the ideal outcomes you'd like to consistently achieve? Perhaps you can graphically illustrate target customers. Post a graphical representation of them in locations where relevant customer-facing employees will see them regularly. Encourage supervisors and frontline staff to discuss them in weekly meetings.

# 2

## OFFER REAL-TIME FEEDBACK.

Whether it's a communications team member interacting with a citizen on Facebook or a front-line security agent diffusing a tense situation, personnel benefit most when you provide input on their performance in close proximity to the service event. Sit with contact center personnel to hear their phone call exchanges or monitor their web-based chats. Remark on what went well and offer constructive, specific feedback on aspects that have an opportunity for growth. Moreover, give employees the chance to critique themselves. Ask what they think went well, where they could improve and what a realistic timetable for making adjustments is. Don't wait for monthly or annual performance reviews. When you see something, say something.

# 3

## ACT MORE LIKE A COACH THAN A MANAGER.

Most members of a customer service team want to perform well. They want to "win" for the organization. Managers tend to watch from afar as the players execute on the field or court. Coaches are right there on the sidelines, standing with their teams and making decisions in the moment. Coaches might even run the drills with the team. Are you willing to pick up the phone or step to the desk to handle a customer concern? The people on your team will be watching, giving you an opportunity to practice what you preach, test assumptions and model behavior. A particularly courageous coach will even ask for feedback in those moments, demonstrating that everyone has areas for improvement.



# Remember: Keep it simple

*Make it standard operating procedure that whenever you make a decision at any level, you ask yourself: 'How is this going to affect the customer?'*

- RICK PARRISH  
SENIOR ANALYST, FORRESTER RESEARCH



4

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## MAKE TRAINING PRACTICAL.

Activities ought to tie directly back to the organization's mission and activities. Set up role-playing around real scenarios and trouble spots. For instance, analyze an actual interaction between an agent and a customer. Review the conversation once and then repeat the exercise with a specific persona in mind.

## ENSURE THAT TEAM MEMBERS ARE FULLY EQUIPPED.

Anyone who is in touch with a customer should have quick access to answers. Although it's preferable and builds trust when agents respond right away, it's also OK for them to say, "Give me one minute and I'll find out for you." Customers will be more patient if agents if agents keep asking clarifying questions or providing commentary on what they're doing rather than allowing silence to dominate the wait. They could say things such as, "I'm looking up your account information. I see that you had a transaction on July 15. Is that the date in question?". That means agents must be able to access an easily searchable Customer Relationship Management system with client account data or a content repository with accurate, up-to-date information. Some literature has used the term Contextual Workspace, or a "Content Cockpit," to describe this kind of information-at-your-fingertips environment.

## TELL CUSTOMER SERVICE SUCCESS STORIES.

The best way to institutionalize customer service improvement is to regularly recount positive customer interactions. Every time you gather customer-facing team members, ask for testimonials. If you record or monitor interactions, play those recordings for the group. Read letters or e-mails, or share input from social media. Post positive tweets or words of gratitude from satisfied customers, and point out the people on your team who delivered those superb experiences. Celebrate group goal achievements and highlight top performers.

## Resources

### GOVLOOP ACADEMY COURSE: THE CUSTOMER SERVICE PLAYBOOK FOR GOVERNMENT

After viewing these 11 online lessons, you will better understand your customer experience and adapt your approach to meet their needs more effectively.

### A NEW WAVE OF FEDERAL CUSTOMER SERVICE

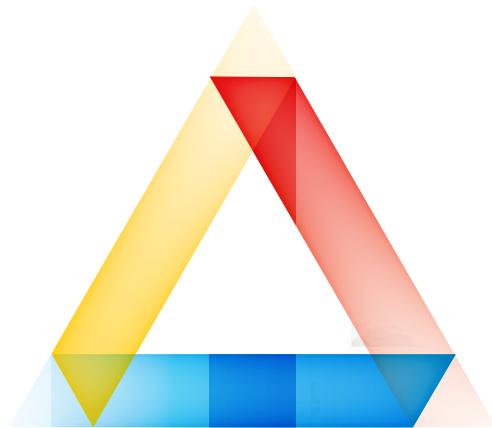
Greg Pellegrino, Customer Strategy Expert at Deloitte Consulting, gives concrete tips and advice for agencies looking to improve their customer experience.

### BUILDING A CUSTOMER SERVICE DREAM TEAM

To address the challenges of a disengaged workforce, bake a long-term, customer-centric company culture into everything you do, this blog post states.

### DIGITAL SERVICES: CHANGE CULTURE, NOT JUST TECHNOLOGY

You might assume the biggest barrier to effective government digital services is the acquisition and deployment of complex technology. In reality, technology is the easy part. The true barrier to digital innovation is culture. Explore this infographic to learn how to move past these challenges.

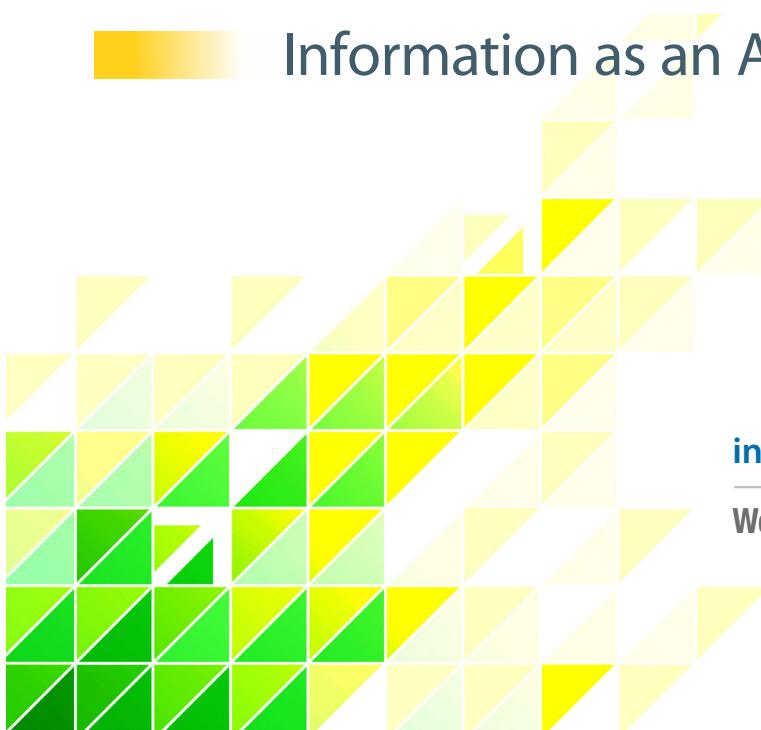


## Transforming Data Into Customer Value

 Customer-Facing Analytics

 Differentiated User Experience

 Information as an App



[informationbuilders.com](http://informationbuilders.com)

Get Social

WebFOCUS

iWay Software

Omni



# Create Flexible, Familiar, and In the Flow Customer Service

AN INTERVIEW WITH MELISSA TREIER, VICE PRESIDENT OF PRODUCT SALES AT INFORMATION BUILDERS

**W**e all have an idea of what the citizen user wants. After all, we are citizen users. But once you've imagined a new customer service that meets users' needs, how can you be sure it really will stand the test of the real world?

According to Melissa Treier, Vice President of Product Sales for Information Builders, a business intelligence, integration and data integrity software provider, that's the true test of a citizen application. "Will it drive adoption and connection with your audience? At the end of the day, if you don't have adoption and if you don't have connection to what you're putting out there, then the effort is all for naught," she said in a recent interview.

To achieve customer service goals in real environments, Treier said agencies should develop applications that fit the "three Fs." From the development to deployment, applications should be:

► **FLEXIBLE.** "Many organizations look at sharing information outside their firewall or to a larger community and they become overwhelmed. They think the only option is just to provide a static environment or experience," said Treier. "But that's going to [negatively] impact your adoption and the value associated with that application."

Instead, applications should be responsive to the needs of individual users. That requires adaptive, multi-platform technology. "What that means from an IT perspective is that you don't have to create multiple versions of the single application in order for it to be deployed on multiple devices," Treier explained.

► **FAMILIAR.** Citizens must also be to relate your service to other interactions in their day to day. "It can't be very distant from what [citizens are] used to in their daily lives, because then they'll have a harder time connecting with it," said Treier. Again, technology is a key consideration because you'll want to reach people on devices and platforms that they already use.

► **IN THE FLOW.** Make sure your service can integrate into the daily routines of your users, both on and offline. "Ask yourself, 'How do citizens typically like to receive and interact with information?'" Treier said. "Should you make it available to them via an online experience, or should you add a push technology that would allow them to pick it up on their phone?" Incorporate user habits into your design.

To engrain these three tenets into your customer service project, Treier said organizations must take an iterative development approach. "One of the most common mistakes we run into at organizations is just overcomplicating the first scenario – trying to create the 'end all, be all' with that first rollout," she said.

But that design technique often fails. "It complicates the project," Treier continued. "It requires a lot more buy-in upfront. It also just slows down the time to that first deliverable." What's more, that final deliverable may not actually meet citizen needs if it hasn't been tested through prototypes.

"We're more of the opinion that you should just get something out there. It doesn't have to be the 360-degree, full product but it has to

be something that provides some value. Start small and build on that success," Treier said.

Additionally, Treier recommended making sure that the user and business needs of a project are fully integrated throughout that iterative development process. "Don't let the technology drive the ultimate business value," she said. "A key part of success is to always have the customer service team and IT working together to improve the process, to improve the trust around the organization, and get something stood up. A downfall is when we see IT take a lead with no connection to the user, and ultimately deploy something that's not adopted."

This IT-customer service team partnership can also create applications that are more appealing to the end user. "Most of the applications that are deployed to citizens need to combine data from more than one siloed data structure," explained Treier. "And the data can be inconsistent in those silos. An organization must have a way to ensure the information they share is accurate, complete and consistent."

A collaborative, iterative approach to customer service design can help organizations create flexible, familiar, and in the flow applications that engage users.

Information Builders can help achieve those goals. "Providing the technology platform and environment that really does enable an iterative approach – a fast time to delivery – and an application that citizens will actually use is our main goal," concluded Treier.

# play #2

# GET TO KNOW

## your customer



Once you've set up a customer service environment, it's time to focus on the most important component: your customers. Knowing whom your agency serves, their demographics, and what they like and dislike is critical to building strong customer service at any government agency.

This section will first help you apply human-centered design to help you get started on better understanding your customer base. We have included an Agriculture Department case study to show firsthand how government agencies can incorporate customer feedback to improve service delivery and overall performance. We then take you through the steps of identifying your customers and understanding their backgrounds before sharing time-tested methods to help you get to know your customers better.

# Applying Human-Centered Design

Ultimately, customer service is a problem focused on people and their experiences. Therefore, it makes sense that the solutions we apply should be created with customers at the center of every step and decision. This person-focused process of problem solving is commonly called human-centered design (HCD).

"Human-centered design is used best when it's focused on and applied to a really challenging problem involving a lot of people, which the government is ripe for," said Stephanie Wade, Director of OPM's Innovation Lab.

There are three steps to any HCD approach, though different design-minded organizations

use different terms to describe the process. For instance, consulting firm [IDEO](#) labels the three stages as hear, create and deliver, while the [LUMA Institute](#) calls them looking, understanding and making.

Despite these diverse lexicons, all of these HCD approaches share one thing in common: The goals of each phase are centered on bringing end users' needs into focus, executing a strategy for fulfilling those needs and evaluating the success of their solutions throughout the process. There is no doubt that humans are at the center of those design approaches, from beginning to end.

In this playbook, we'll use the terms from [+Acumen's Design Kit](#): inspiration, ideation and implementation. During each phase, your team will focus on different objectives and execute various tasks to meet those goals. Below, we break out these three stages.

These phases are modular and non-linear. Chances are the order of these phases will vary for every project in which you apply them. They each provide and react to new information that will inform your next steps. As a result, you'll find yourself looping back and forth between the phases, likely visiting each multiple times before releasing your grand solution.

## INSPIRATION

*Objective: Determine what your customers need.*

### ACTION ITEMS:

- ▷ Observe, meet and interview your customers.
- ▷ Review what you already know about your customers and service.
- ▷ Define any barriers or constraints to your project.

## IDEATION

*Objective: Develop potential solutions to meet your customers' needs.*

### ACTION ITEMS:

- ▷ Analyze the information received during inspiration to create succinct insights.
- ▷ Host creative brainstorming sessions with a multidisciplinary team, asking "how might we" questions to get conversations going.
- ▷ Solicit further input from customers.
- ▷ Generate ideas for solutions.

## IMPLEMENTATION

*Objective: Test your solution in the real world.*

### ACTION ITEMS:

- ▷ Create prototypes of your idea.
- ▷ Solicit feedback on your solution.
- ▷ Incorporate new information into your project design.

## CASE STUDY: Applying HCD to USDA's Food and Nutrition Service

OPM's Innovation Lab partnered with USDA's Food and Nutrition Service (FNS) to improve children's access to healthy meals at school through the National School Lunch Program. This program provides healthy, low-cost or free meals to more than 30 million children each school day.

FNS officials approached the Innovation Lab because a large amount of incorrect payments were being made for discounted meals. Many school districts weren't receiving the appropriate compensation for the meals they distributed, resulting in balance errors at the district and federal levels.

Wade said that many people initially assumed the problem was a technological one — that a software program wasn't processing payment information correctly or that a register wasn't

syncing with the system. However, the lab's multidepartment team deployed an HCD approach to discover the real, nontechnical root of the problem.

The team entered the field — in this case, the school cafeterias that were offering and collecting payment for discounted meals — to see how the application process worked, who was using the system and where errors were occurring.

"We found that there were real challenges in the application process and that parents were struggling to apply correctly, and that was leading to a lot of errors in the system overall," said Wade.

Next, the lab brought school leaders and parents into the design research phase to give input on the length of the program application, the complexity of the instructions and the mechanics of the application process.

With those insights, the team quickly prototyped, tested and implemented a solution that addressed the root causes of high error rates and application challenges. The team designed a new application form that met user needs, communicated more clearly how to apply and reduced the time it takes to apply for meal discounts.

In May 2015, USDA made the new application available to more than 14,000 school districts, which manage more than 100,000 schools. Because of this project, FNS officials anticipate reducing improper payments by 10 percent, or \$600 million, by the 2019-20 school year. This project will decrease application errors and protect taxpayer dollars to ensure the National School Lunch Program remains available to the millions of children who rely on it.

# Understanding Your Customers

As we said in our [previous customer service guide](#), one of the reasons organizations don't take more time to consider their customers first is they assume that their customer base is too diverse. Many organizations, particularly government agencies, assume they don't have the ability to narrow down the pool of customer types. As a result, they miss out on opportunities to better connect with their constituents or customers. New approaches to represent these interests may seem far too complicated and costly.

Fortunately, there are many simple and effective methods to get to know your customers. First, it's important to understand your customers through the following characteristics:

- ▷ **DEMOGRAPHICS:** age, gender, income and other identifying factors.
- ▷ **PSYCHOGRAPHICS:** personality type and preferences.
- ▷ **BEHAVIOR:** similar likes and dislikes, community involvement, and hobbies.

To understand these characteristics, you need to know where your customers are located, their decision-making process and how they interact with your agency. The following questions help you do that:

- ▷ Where do customers live and where do they most frequently access information or services with you?
- ▷ Do they spend their time online or at in-person events?
- ▷ How do they connect with your organization?
- ▷ Where do they begin their research?
- ▷ What is the primary problem that leads them to you?
- ▷ What do users seem to like about their current experiences with the service?
- ▷ What are the benefits or incentives to finding a solution with you? Do they have any other choices?

Forrester's Parrish said the first critical step is gaining customers' perspective. "Gather real information about your customers, both quantitative and qualitative. Understand who your customers are and how they want you to fit into their lives, and understand their perspectives," he said.

Once you've gauged some of this information, you then need to ask your customers:

- ▷ Why did you originally interact with our organization?
- ▷ Why do you continue to interact with us?
- ▷ What do we do that others don't and how can we do that better?

## Time-Tested Methods to Meet Your Customer

Getting to know your customers can be quite the challenge for government, which represents so many diverse interests. What are some concrete ways to get to know your customer? There are many methods, including online interaction, face-to-face meetings and a lot of research. Check out the following strategies:

### EVENTS:

Nothing gets you [face time with your customers](#) better than hosting events. Events help you sell your messages and services to customers because rapport is developed almost immediately. When events garner large attendances, they help your agency gain popularity in a more intimate and personal setting.

Attendees may be more eager to interact with your agency and look into services you offer. Additionally, they may be more willing to provide testimonials. Taking advantage of the high energy levels at events such as happy hours and summits, you can attain excellent written, audio and/or video testimonials from attendees to use on your websites or other promotional materials.

### SURVEYS:

The first and most important step to implementing surveys is to be sure that OPM approves them. The office has [excellent guidelines](#) for Customer Satisfaction Surveys, which you can customize to assess any type of service provided in the public sector and to measure several quality dimensions that predict customer satisfaction including courtesy, knowledge, timeliness, reliability and quality.

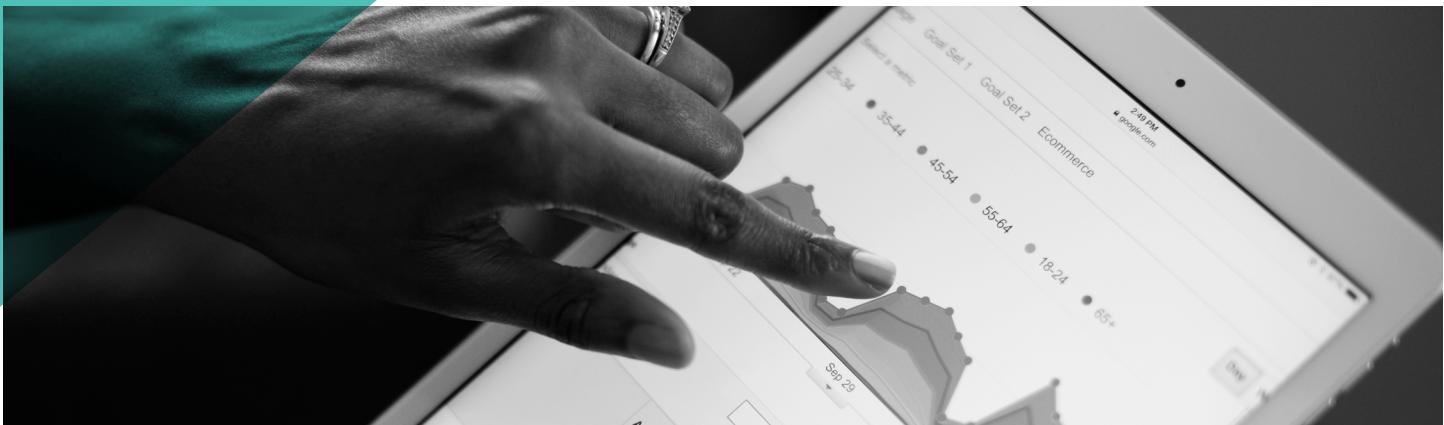
### IN-PERSON FOCUS GROUPS:

[Customer focus groups](#) combine the best of both the survey and events worlds. Focus groups are a simple but effective way to establish productive dialogues with your customers; most people appreciate being asked for their opinions.

Select your participants carefully according to the objectives you have set. Think of the personalities you're assembling and what dynamics these would bring to the focus group. Regular focus groups entail face-to-face meetings with a sampling of users that help you learn more about who they are, what they need

from you and what more they can learn about your organization.

In running a successful focus group, it's important to establish clear, measurable objectives and know what you want to get out of the event. Perhaps you want to test a new services strategy and end up with strong endorsements from at least 80 percent of the participants. Also, be sure to create a win-win for you and your customers. For example, ask, "Why would customers want to invest valuable time and resources meeting with us, and what tangible benefits will they receive?"



## Meeting Your Customer on a Budget

It may be easy for private-sector organizations to adopt these methods, but the government may not necessarily have the budget or resources. Good events can be costly, especially in addition to conducting surveys and focus groups. Worried your agency doesn't have the resources to implement these methods? Worry no more! There are many cost-efficient hacks to getting to know your customers. Try these:

### GOOGLE ANALYTICS:

[Google Analytics](#) is an easy, free tool that tracks performances across your government websites in addition to customer/constituent engagement with your agency. This tool allows you to re-engage your most valuable customers based on their onsite interactions with Google Analytics. It also allows your agency to collect and manage customer data with a single accurate view that can be customized and shared across departments. With these features come comprehensive reporting and analytics tools, which can be filtered to reflect your agency's needs. For example, you can

view which new content on your agency's site is popular and how much traffic is being driven to your site.

### HALL TESTS:

[Hall tests](#), or hallway tests, are part of a useful quantitative methodology that helps test customers' reactions to concepts in controlled and neutral environments. It is usually best to use a venue in a central and easily accessible location. One of the key benefits of hall tests is the ability to present respondents with stimuli, such as food or drink or products and services from the agency. They can then respond to those in person, allowing much more opportunity to engage and explain to the agency the positive and negative aspects they experience in detail.

### ONEVIEW:

As a social bookmarking service, [OneView](#) allows your organization to save and organize links, centralize saved links, and access the link collection of one or all agency workers. Moreover, the collected information can be shared

with other users. [HP OneView](#) helps simplify day-to-day infrastructure management. Take the Colorado [Governor's Office of IT](#) for example. Using OneView, it displays its commitment to customer service and tracks its customer service ratings in a clear, comprehensive manner — all on one page.

Getting to know your customers takes work, said William Chumley, CCO at Colorado OIT. "It takes working and meeting with the customer, building a strong relationship, and digging into their business models to understand their goals," he said. "The next step is to ensure every level in your organization connects with your customers and understands what's done at every level of the organization in terms of customer strategy."

Knowing and liking your customers are critical to having them getting to know and like you. It's not always free and easy, but it's worthwhile. Once your agency has a solid strategy in understanding your customers, the next step is building customer personas.

## Resources

### THE HUMAN-CENTERED DESIGN APPROACH

This free, interactive online course from GovLoop Academy describes the five phases of HCD and explains how to apply design thinking to each step of a project.

### COLORADO'S OIT FY16 PLAYBOOK: STRATEGIC PLANNING ROADMAP

The OIT Playbook offers a strategic roadmap incorporating a culture of customer service into the workplace. This work offers key insights for how a government agency can set itself up for success in improving customer relations and services.

### THREE WAYS TO BE YOUR CUSTOMER'S BFF

Amanda Nelson, Director of Marketing at information management firm RingLead, provides three broad, yet helpful, strategies to better understand your customers. The blog post includes many helpful links to gathering good data on customers plus methods to personalize interactions with your customers.

# play #3 build your **CUSTOMER PERSONAS**



Once you've taken the time to identify, meet and get to know your customers, it's time to build your customer personas. If you're still reeling from the first step, fear not. We've provided a comprehensive and simple framework to get you started on this next one.

This section will cover the details of personas: what they are, why we need them and best practices for building them. In addition, we've provided three sample personas that are broad enough to apply to any agency, plus a worksheet to help you practice creating customer personas.



## BEST PRACTICES FOR BUILDING PERSONAS

It's important that you use your data and research efficiently. Be sure to apply these best practices for building the personas most helpful to your agency:

▷ **CONDENSE THE USER RESEARCH:**

Based on the data from getting to know your customers, look for themes and characteristics that are relevant and universal to your agency's systems and users.

▷ **BRAINSTORM:** Once you've condensed the research, organize similarities into persona groups that represent your target users. Name or classify each group.

▷ **REFINE:** Combine and prioritize personas that seem to be roughly identified or outliers. Separate them into primary, secondary and even complementary categories. The standard number of personas for an organization usually ranges from three to five.

▷ **MAKE THEM REALISTIC:** Develop the appropriate descriptions of each persona, background, motivations and expectations. In this case, you will not want to use a lot of personal information.

▷ **SHARE WITH A WIDER CIRCLE:** Don't wait until personas are finalized before sharing them with stakeholders. Get frontline customer service employees involved early in the process of persona creation. Informing stakeholders of your agency's progress will keep them interested and ensure a more accurate persona.

▷ **GAIN SUPPORT:** It's also important that officials in multiple departments within your organization understand the personas. Relevant leaders should have support early on to better socialize the personas and spread knowledge of the company's customers throughout the organization. This also helps your agency better focus on the people you strive to serve.

## What are personas?

First, what are customer personas and why are they so important to an organization? The purpose of personas is to create reliable and realistic representations of your key audience segments for reference. These representations should be based on qualitative and some quantitative research from the getting-to-know-your-customers stage. The best and most effective personas:

- ▷ Represent a major user group for your agency.
- ▷ Express and focus on the major needs and expectations of the most important user groups.
- ▷ Give a clear picture of the users' expectations and how they're likely to interact with your organization (i.e., use your website).
- ▷ Aid in uncovering universal features and functionality.
- ▷ Describe real people with backgrounds, values and goals.

"The customer persona is a profile of a fictitious but real-seeming person who represents a certain type of customer," Forrest-Parrish said.

[Usability.gov](#) provides some great examples for how government can use customer personas to its advantage.

### WHY DO WE NEED THEM?

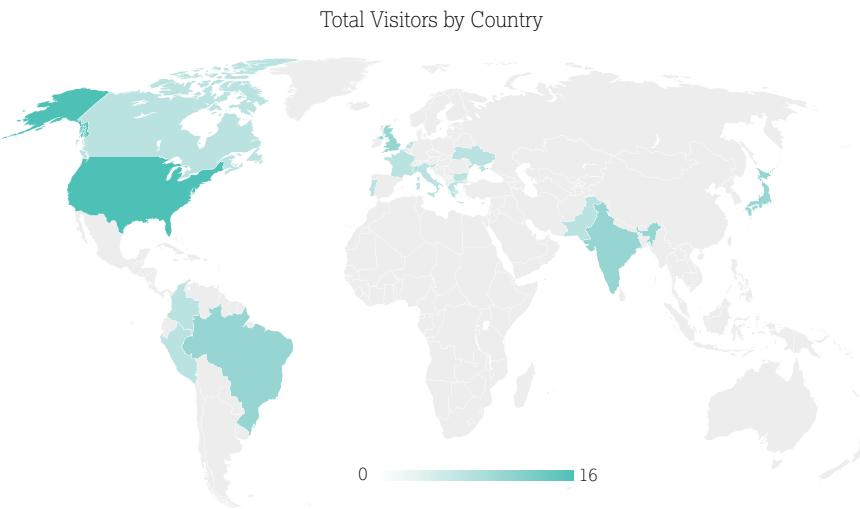
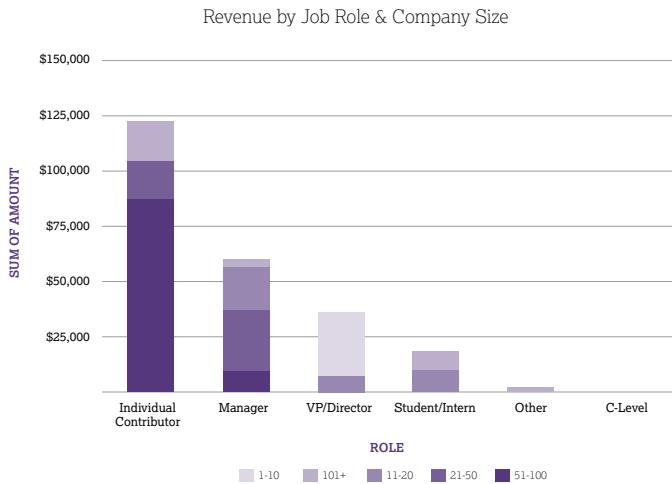
Personas help officials focus decisions about customer service strategies by adding a level of real-world consideration to the conversation. They also offer a quick and inexpensive way to test and prioritize those features throughout the development process. Additionally, they can help your agency:

- ▷ Understand customers' needs, behaviors and concerns based on different groups and demographics.
- ▷ Improve stakeholder and leader evaluation of new customer-interaction ideas.
- ▷ Aid information architects to develop more informed interface behaviors and labels.
- ▷ Create an improved look and feel to your website.
- ▷ Decide which approaches to take based on user behaviors.
- ▷ Ensure site content is written to appropriate audiences.

"Customer personas really help you understand and empathize with your customers," Forrest-Parrish said. "It helps you get inside their heads."

# Visualizing Your Customer Base

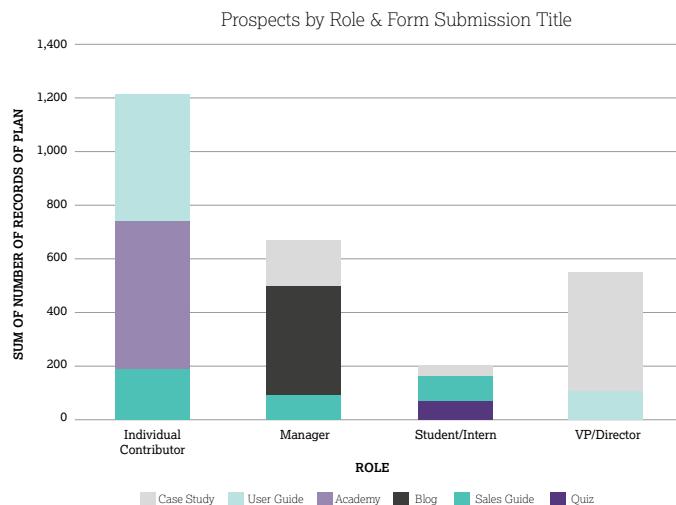
Here are some [frameworks](#) for grouping and characterizing your customers.



## 1. COMPANY INFORMATION:

You can get a lot of information about the users and various agencies you serve by analyzing the information you collect through forms on your agency's website. For example, you can gather the number of people at a company, an individual's role or level, and the industry the person works in.

Plot this information visually to see which roles are most prominent among your customers. You can filter by company size to get a better idea of the specifics. This will help you prioritize how you serve and cater to certain customer personas.

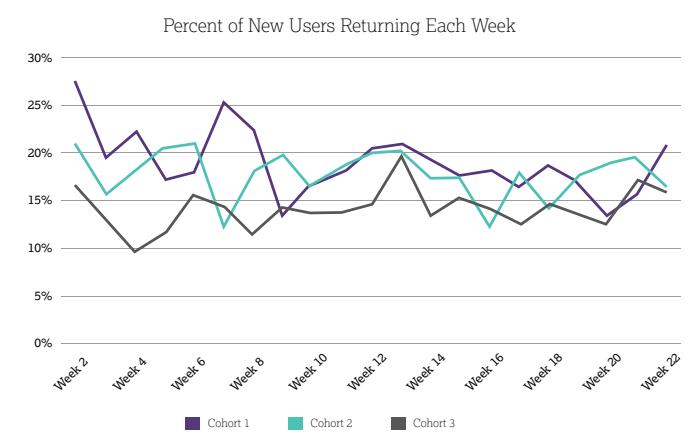


## 3. CONTENT CONSUMPTION:

This is where your agency needs to use information such as form submission page titles and job roles to see who is interacting with which type of content. This helps build customer personas and determine how to better market and reach out to customers with more specific, relevant content.

## 2. DEMOGRAPHIC DATA:

Once you start identifying your customers and know them through individual demographic data, you should begin to assemble the data visually. Visualizing customers based on location or other demographic data builds the foundation for other research, including languages they speak or whether they live in urban, suburban or rural areas. This can also help with timing of campaigns and communications with certain customers in different time zones.



## 4. COHORT BEHAVIOR:

Cohort analysis is a helpful tool to study user behavior, and when creating personas, it allows you to group users who performed a certain action within a specific period of time. Find answers to questions such as "Do customers who sign up in January tend to engage more with your agency than customers who signed up in March?" Segment populations by customer creation date and transaction date to visualize how these cohorts behave over time.

# 3 Common Personas

To get you started on building your agency's customer personas, GovLoop created [three common personas](#) that are broad and applicable to any organization:



SELF-SERVER



PEOPLE PERSON



CROWD SOURCER

First, let's take a look at the Self-Server. These individuals are easy to identify, as they get impatient quickly. Rather than waiting in line or on hold on the phone, they'd prefer to complete a transaction completely on their own.

They would prefer to use your website or a mobile app than have materials sent to their home. This persona tends to be tech-savvy or represents customers who believe they can figure out the system without help. They will take the extra time to figure out an issue on their own before contacting your agency.

Then, there's the opposite: the People Person. This persona represents people who don't like machines. They hate automated voice messaging systems and dislike websites that make it difficult to find contact information.

People in this persona appreciate talking to a person from the agency and are willing to wait in line as long as they know they will be able to engage with someone who can help them. In an automated-service world, they appreciate a personal touch from organizations.

The Crowd Sourcer likes to go with the pack. When people represented in this persona have a problem, they search the web search to find a community where they can ask questions and get technical assistance. Rather than talking to an organization directly, they prefer to learn about services or information from their peers.

These are the people who place great care in product and agency reviews by peers on sites such as Amazon or Yelp. If the crowd is positive, they will be more willing to give the agency a chance. Because they like to share their expertise in reviews, too, they often participate as volunteer advocates.

## Resources

### HOW TO CREATE DETAILED BUYER PERSONAS FOR YOUR BUSINESS

This marketing website provides detailed explanations of customer personas and how organizations can use them. In addition to step-by-step instructions on how to create personas, it provides a free customer persona template that you can use for your agency.

### THE COMPLETE GUIDE TO DEVELOPING AND USING BUYER PERSONAS

This resource from Single Grain provides a simple, comprehensive explanation of what a customer persona is and how to create your own for your agency. The guide includes visuals of sample personas and tips on how to gather data to build customer personas.

# Revolutionizing Customer Service with Microsoft

AN INTERVIEW WITH BILL PATTERSON, GENERAL MANAGER AT MICROSOFT

**D**espite government investing more time, resources, and knowledge into their customer service initiatives, constituents still don't seem to be fully satisfied. According to leading consumer surveys, satisfaction with government services is at an eight-year low and the federal government ranks near the bottom.

There is hope for government, however. In a recent interview, Bill Patterson, General Manager of Microsoft, said there are myriad ways to improve customer service in government – especially if you first build a solid technology foundation.

Through its customer service knowledge-management solutions, Microsoft helps organizations provide easy, organized access to knowledge for real-time customer service and response, deliver consistent answers and information across teams and departments, and reduce handle times and repetitive questions.

## CHALLENGES IN GOVERNMENT AGENCIES

When it comes to budget and resources, there simply never seems to be enough in the public sector. Government agencies are often hesitant to invest in newer customer service technologies to the fullest extent because they anticipate huge costs and difficulties meeting the diverse demands of constituents.

The difficulty in investing more resources into customer service initiatives can be attributed to an even larger challenge for government: culture. "Public sector entities tend to think of customer service as an added initiative to invest in," Patterson said. "It really needs to be thought of as the fabric of what government does."

Additionally, government agencies may be reluctant to invest in newer technologies that improve customer experience when leaders are comfortable with the way things have always been done.

"Agencies may say, 'We've always invested in technology this way over the last 30 years of

our existence,'" Patterson said. "The rate of change as consumers, however, is accelerating. Meanwhile, the rate of change inside the organization is still on the same pace as when technology first entered the arena."

Government must think differently in order to keep up with current technology and the demands of customers.

## SIMPLE STEPS TO BETTER CUSTOMER SERVICE

Though budget and resources are always scarce, Patterson noted that government customer service can greatly improve by taking the following simple steps with customer service technologies:

**STEP 1. LISTEN.** Consumer feedback should drive customer technology strategies. Therefore, the first and most cost-effective measure that government agencies can take is to listen. Social media and other forms of engagement are great ways to hear what your customers are saying. "Change happens first by listening, and then acting," Patterson said. "Most organizations still struggle to listen to their customers on social media, where posts and feedback can become an epidemic quickly."

**STEP 2. ASSEMBLE KNOWLEDGE-BASED PLATFORMS.** Government agencies should focus on harnessing knowledge and unifying it into one place or platform to deliver consistent, easily accessible information.

"Embedded in that customer service solution is an enterprise knowledge management application," Patterson said. "The goal of that knowledge application is to fundamentally change the way in which questions and answers are both standardized and shared across an organization at large."

This consistent knowledge foundation can really help kick-start investment into more sophisticated customer service technologies. With Microsoft customer service solutions, agencies can better manage, track and respond to interactions with customers. For example, with a one-stop platform, agencies like

the DMV could centralize their service data and interactions to more efficiently help those who need to update their licenses. Agencies can also improve how they address issues, provide proactive information, create benchmarks, and excel in the future.

## STEP 3. TURN KNOWLEDGE INTO ENGAGEMENT SOLUTIONS.

Once you've listened to your customers and collected knowledge in platform-based tools, it's time to turn tactics into solutions. This is where it's important to choose how you define your organization's business process while making it more customer-centric. "Most organizations think of staffing customer service and look at how many phones are needed," Patterson said. "But today, only about 45-55% of customers prefer using the phone as a way of attaining service. If half of your customers don't want to be on the phone with you, why would you design your whole business process that way?"

The Social Security Administration, for example, deploys self-service technology so customers can easily look up the answers to their questions. "When you search online how to get a new Social Security card, you are actually searching a Microsoft knowledge base solution where the Social Security Administration has proactively provided the answer to frequently-asked questions," Patterson said. "For government, this means eliminating the need for thousands, perhaps millions of individuals to call or email this government agency, which saves time and money and ultimately increases customer satisfaction."

The ultimate goal is for government agencies to address constituents' issues in the swiftest and most efficient manner, reducing effort while increasing satisfaction. And technology is helping government get there.

# play #4 pick where to **IMPROVE THE EXPERIENCE**



Once you understand the type of person who will interact with you and their most common points of contact, the next step is to optimize their overall experience. Now is when you walk that proverbial “mile in their shoes” to better understand how you can enhance the customer experience.

This section will help you understand how you can apply the personas you’ve created to the crucial spots where customers interact with your organization and how any pain points can be, if not erased, at least improved. This process includes creating journey maps — maps that detail how customers are interacting with you.

# Create & Use a Journey Map

Once you have a clear set of personas in mind, an important next step is to map your customer journey. The most effective mapping exercises explore specific scenarios and strive to understand your customer needs not only when they initiate contact, but at the moment when their need arises — before they even arrive at your door or website. The more detailed customer journey you can paint, the more accurately and proactively your organization will respond to customer needs.

"A journey map is basically a big visualization of a customer's emotional experience as they interact with you, and they are often informed by interviews," said Phaedra Chrouzos, GSA's CCO. "So, for example, for the Federal Acquisition Service, we did 150 interviews in about two and a half months where we talked to contracting officers across government about their experience with GSA. And then we bucketed those experiences along what their journey was like. So first they think about what they need to buy, then they learn about how to buy it, then they buy it, then they have the experience with the vendor, and so on and so forth. And we literally map out the experience on the positive. Then you literally can see a visualization of the highs and low and the lows and highs of an emotional journey. From there, you can pick the low-hanging fruit to help improve a customer's experience with you."



*You can pick the low-hanging fruit to help improve a customer's experience with you.*

- PHAEDRA CHROUZOS  
CHIEF CUSTOMER OFFICER, GSA



There are five phases in a journey-mapping exercise:

## CREATE AN INITIAL MAP.

In this phase, participants are challenged to map a journey from the customers' perspective. The most effective mapping activity will identify a specific customer, such as the personas used as examples in Play #3. If an organization has already given some thought to the points of contact, as explained in Step 2, that data should also be included in the development of journey-mapping scenarios. Finally, the mapping process should take into account an organization's entire customer service "ecosystem" — the internal people, processes and technology that play a part in delivering customer service. Note how various people in your organization play a key role as you walk through customer experience scenarios. Encourage those diverse stakeholders to participate in this exercise. Break into small, cross-functional groups if you have a large gathering of stakeholders.

## EVALUATE AND PRIORITIZE.

As you seek to understand the customer's experience, don't just stop at the mechanical problems, such as materials that aren't in the right place or forms that need to be updated. Try to comprehend their attitudes and emotions. If they're angry or frustrated, write it down. If they're confused, record that experience. If they're impressed with something, jot down what they may be thinking at that moment. Then, evaluate each of these attitudes to identify the high and low parts of their emotional journey. These feelings are helpful indicators as to what their true needs may be and can be used to identify the most important moments that matter.

## ADD DETAIL.

As you walk in the shoes of your customers, look for core issues to fix and opportunities to improve. Be critical of yourself. Be honest. Sometimes we get so used to our own services and information that we develop blind spots. This phase includes several steps of adding more detail to uncover customers' true functional and emotional needs, in addition to detailing the roles and processes of the people and things involved in the journey. The more you can step outside your perspective and take on the vantage point of your customer, the more valuable this exercise can be for your organization. Moreover, the challenges with their experience will become obvious. Name them.

## EVALUATE AND FRAME THE ISSUE OR OPPORTUNITY.

Once you have a good understanding of customers' needs, you then evaluate how well you're meeting them. This includes evaluating whether the people and systems involved are performing properly. This now gives you a clear, strong understanding of the issue or opportunity, along with what is important to the customer, so that you can begin brainstorming new solutions.

## DESIGN NEW EXPERIENCES.

Lastly, the journey-mapping process allows agencies to brainstorm new innovations to redesign the customer experience. The importance of this phase is that it reminds organizations that journey mapping is an iterative process. There are always ways to reset or re-imagine the cycle, apply new tactics and continually improve service or information delivery.

1

2

3

4

5

## Go in Person

For all the data, analytics, mobile apps and slick online experiences you can offer a customer, sometimes nothing beats an in-person meeting. "Nothing is more effective than getting out in the community and attending community events," said Quintana, head of Charlotte's 311 efforts. "We have a community action team here in 311, and the city of Charlotte has a neighborhood and business services team."

Additionally, various departments have their own speaker's bureaus or community outreach teams, which 311 will partner with to attend events at schools, homeowners' associations and festivals, or for retiree and religious groups. The community action team has also partnered with the police department for two National Night Out events and with the Boy Scouts.

Blair Corcoran de Castillo is a GovLoop Featured Blogger on detail to OPM. She recently wrote about how empathetic thinking, face time and in-person user groups have improved the agency's customer experience. We excerpt her [blog post](#) on the next page.



*Nothing is more effective than getting out in the community and attending community events.*

- JANICE QUINTANA  
DIRECTOR OF CHARMECK 311





COMMUNICATIONS, DIGITAL GOVERNMENT

# ARE YOU CHOOSING EMPATHY?



*Blair Corcoran de Castillo*

## GOVLOOP FEATURED BLOGGER

I believe that empathy is a choice that people working in government need to choose more often.

Empathy is often described as the emotion through which you share another's feelings and experiences. It is a deep, sensitive connection that makes us sense what another goes through. It is more than just a cognitive understanding of what someone else feels; it is the ability to feel what it is like to be in another person's shoes. If government employees wanted to encourage themselves to employ empathy, there are a number of different techniques that can be used to elicit it, including [empathy interviewing](#) and periods of observation, as well as strategies for nurturing the growth of empathy.

This shift to empathy would necessitate leaving our perceptions of how citizens live at our desks and going out into communities to gain a richer understanding of their experiences. It would require choosing openness on many

levels: being open to new experiences, being open to emotions, and being open to challenging our own opinions. In return, choosing empathy could result in outcomes, like:

- ▷ Creating realistic programs. (Empathy creates an awareness of what might be practical from a program participant's perspective.)
- ▷ Knowing who your constituents are. (We all may think we know who our constituents are, but empathy enables you to know who they truly are — seeing them face-to-face — and how they live.)
- ▷ Staying in touch with the dynamics on the local level. (Empathy can help you understand what the environment feels like at the local level.)
- ▷ Designing programs and policies that meet citizens' needs. (Empathy provides valuable insights into what a person needs or desires.)

Many offices in the government already encourage empathy or use empathy to guide their work. For example, the Innovation Lab at the Office of Personnel Management (Lab) utilizes empathy throughout its approach to projects. The Lab recently completed a project in partnership with the Department of Agriculture's Food and Nutrition Service (FNS) in which empathy was a key component of the ultimate design of the solution. (see pg. 11)

Choosing empathy is one reason the Lab and FNS developed a new application. By empathizing with parents, they gained awareness of the aspects of the form that were most challenging and why. The different iterations of the application developed were also grounded in empathy, and this approach ultimately resulted in a version that was shorter, less complicated and resonated with parents.

## Resources

### JOURNEY MAPPING THE CUSTOMER EXPERIENCE: A USA.GOV CASE STUDY

In this excellent case study, USA.gov details how it used journey maps to better understand customers' journeys across channels.

### ALL YOU NEED TO KNOW ABOUT CUSTOMER JOURNEY MAPPING

This detailed blog post sets the context for the importance of journey maps and gives you the steps for creating one

# Exceeding Expectations: Making the Leap from Good to Great Customer Service

AN INTERVIEW WITH TIM YOUNG, PRINCIPAL AT DELOITTE DIGITAL

**C**ustomer service in government is not exactly stellar right now. Today, citizens expect seamless experiences similar to what they demand of the private sector – but this is an experience that is difficult for the public sector, given how the government is organized and what regulations and silos exist.

In order to better understand the obstacles and opportunities the federal government is presented with to achieve better customer service, GovLoop sat down with Tim Young, Principal at Deloitte Digital. “Numerous wake-up calls have shown that the lack of attention to customer service and deferred investment in technology has caused the federal government to fall further behind the private sector,” Young said.

The American Customer Satisfaction Index found that satisfaction with the federal government is at all all-time low. Young suggested that with many legislative and bureaucratic obstacles, such as budget cuts and sequestration, the federal government is already at a disadvantage when compared to private sector expectations. A major refocus on customer service will help the federal government raise their bar of expectations and capabilities.

“IT is a key enabler to improving customer success,” Young explained. “When you look at the federal government and the legacy infrastructure that exists, it’s clear that it doesn’t help create an enriching customer experience because it’s based on outdated technology due to long processes. It requires time for updates, proposing a budget, getting it approved through the congressional lifecycle, and then even more time to receive funding and putting it into contract. The legacy IT environment is a contributor to substandard customer service.”

But it’s not just outdated technology. Young noted that in order for a department to go from good to great customer service, they need to focus on the people aspect. “When you look at the people, process, technology equation, the government needs to take an ‘all of the above’ approach,” he said.

“First, employee satisfaction and customer service are closely linked together. The happier your employees are about treatment towards customers, the better job they’re going to do serving customers.”

The second point, Young explained, is that customer experience with the federal government includes many different transactions across agencies, and they should be customized for the unique experience that reflect the agency. Customers are experiencing different emotions and expectations at each agency, and should not be serviced with a rubber stamp experience. “Demographics of customers really matter, but also having greater predictability to the behaviors of your customers and users are important,” Young advised.

Young also said that government needs to start looking to better customer persona research to inform their engagement and service strategies.

“Personas and, what we call, ethnographic research is a key part in understanding customer demographics and improving service,” he said. “Government needs to move away from structured analysis of customers to actual observation, focusing less on process and more on why people do the things that they do, and how to better design and produce better outcomes preferably at a lower cost.”

Ethnographic research includes observing contextual, behavioral, and emotional reactions. “The way in which we live, work, and play is constantly evolving, and our emotional responses, values, expectations, considerations, and constraints need to be factored in through continual ethnographic research,” Young said. The insights that this kind of research can provide are the context of customer expectations for that government service.

Understanding the relationship between government and the people it serves is key to developing a modern customer engagement and satisfaction strategy.

It’s the government’s absolute imperative and responsibility to provide great customer service to its constituents. “The government was created by the people for the people,” Young said. “So if you’re collecting money from people and providing them services, but you’re not focusing on the quality of service then that is irresponsible government. Instead of looking at the federal budget as an entitlement, for the government to spend at its discretion, it should be looked as an investment in the federal government with a focus on what is the return of that investment to the constituent.”

Gathering feedback through formal and informal mechanisms such as online surveys and focus groups will provide the important insight that your agency needs to develop an appropriate customer service strategy. These metrics will gauge customer activities and happiness with the service they are receiving and, when implemented into the overall strategy, will change the way government incents behaviors that make the most sense for constituents and employees of your agency.

# play #5

# IMPLEMENT

## your idea

Now that you have determined how you're going to improve the customer experience, it's time to put your ideas into action. Create a prototype solution, release it to the public and then start improving your project with real-world testing and feedback.

This section will help get your idea off the ground by explaining what a minimum viable product is, and how to use it to improve your end product. It also explains the perils of a project handoff, with tips to avoid mistakes. Finally, we highlight TechFAR — a necessary guide for anyone looking to adopt Agile processes to acquisition.



## Testing Your MVP

Once you and your team have formed an idea that you're excited about, it will be really tempting to jump in and start developing that solution to the finest detail, without taking the time to verify that the solution is actually as desirable, feasible and viable as you think it is. Designing solutions without seeing how potential users might respond is risky, inefficient and potentially wasteful.

Instead, your initial goal is to create a minimum viable product, or MVP. Why?

It's impossible to know for sure if your idea will fulfill your users' needs until you see it in action. Your customer service idea may be great in theory, but it may not hold up in the real world. If you've already invested all your resources into a project and it ultimately fails in practice, you won't have anything left to dedicate to improvement. And even if your prototype doesn't fall flat, it won't be the best that it can be without user feedback.

For this reason, ongoing communication with your customers is crucial. For programs run through OPM's Innovation Lab, Director Wade explained, "we make sure that throughout the process, we bring [users] in for co-creation so that citizens are part of the design process. And we're not just asking them what their needs are; we're bringing them into the problem-solving."

To solicit this feedback, give your users a prototype to react to. This prototype should be very simple during initial testing phases. "Lo-fidelity" prototypes typically focus on testing broad concepts by including the minimum amount of detail needed. Examples of the most basic lo-fidelity prototypes are quickly sketching out ideas on whiteboards or scrap paper. Such prototypes can often help answer the question, "Does this solution actually make sense?"

Moving up the spectrum, a series of increasingly higher-fidelity prototypes can be used to test more specific details of your design. Storyboards and user flows can help users see how they fit into a new design.

Then, deploy paper or "functional" prototypes for so-called "Wizard of Oz" testing. In this style of testing, users are presented with your physical prototypes and asked to interact with them in the same way they would use the system in the real world. So, if your prototype is a paper sketch of a smartphone app, users should press their fingers on the paper to make their selections.

Then, working as the wizard behind the curtain, you adjust the prototype as needed, shuffling in new interface sketches, or modifying it to set up the user's next interaction. This type of testing can provide a huge amount of information about users' first impressions of your design without requiring much investment in time and resources to build the prototype.

As you incorporate user feedback, keep in mind that this is not a one-time or linear process. Once you've improved your MVP, you'll want to release it again in multiple forms for additional testing and feedback.

# Mastering the Handoff

If you work within a dedicated customer service department, the most difficult part of your project will likely be project handoff. Oftentimes, project managers find that many of the program's nuances and details are lost when they are implemented by staff members who weren't involved in the ideation stage. In other cases, a project will meet unexpected hurdles once it encounters real-world conditions. Yet, many frontline workers lack the resources, knowledge or mechanisms to effectively revamp the project in light of new barriers.

To avoid these common pitfalls, deploy these three principles:



## 1. RELAY THE EMOTION OF YOUR PROJECT.

It's important to provide the details and mechanisms that comprise your customer service improvement project. After all, implementers need to know how the improved service is supposed to work. However, it's equally important to describe the emotion of the project, because that less tangible sense of mission and purpose will help implementers make real-time decisions when changes are necessary. To relay the emotion of an initiative, have project creators answer the following questions during the handoff to implementers:

- ▷ What inspired you to initiate this project?
- ▷ How did your team and your customers feel before you created this customer service solution?
- ▷ How do you want customers to feel when they interact with your service?

## 2. KEEP COMMUNICATION CHANNELS OPEN.

Although you will likely require a formal handoff meeting to relay important logistical and emotional information to implementers, that handoff isn't the end of a project creator's tenure. Instead, use that time to solidify communication channels that implementers can access when they need further information or advice from creators.

## 3. PLACE A PROJECT CHAMPION ON THE GROUND.

For better or worse, customer service is only one priority among many agency goals. Therefore, you'll need someone to champion the customer cause. You might entrust an entire team or department with the responsibility of deploying your new customer service, but you will need a single person to lead the charge. This person may not bear ultimate responsibility for project outcomes, but she will be tasked with keeping up the project's momentum, even as other department priorities compete for attention and resources.

# Contracting for Evolving Customer Service

In traditional procurement processes, an agency need is defined upfront, with specific labor and technology requirements laid out in detail before a project starts. For federal agencies looking to generate innovative customer service solutions, this waterfall acquisition method is not conducive to success because it doesn't allow for a project to evolve with new customer feedback.

To remedy that, OPM has created a document that applies the Federal Acquisitions Regulation (FAR) to iterative or "Agile" project development. Called [TechFAR](#), this guide was specifically created to help agencies execute the 13 "plays" in the [Digital Services Playbook](#). However, its directions and suggestions for applying FAR to Agile projects can easily be used for non-digital initiatives as well.

For instance, TechFAR describes how acquisition professionals can create a product vision — a high-level definition of the scope of a project — to meet FAR 15.203 without outlining the specific details of acquired technologies. The resource also provides a template and samples of successful product visions.

To ensure your customer service projects can iteratively incorporate new feedback, technologies and considerations, your agency must deploy Agile contracting methods. Use TechFAR to understand what those methods look like and how to use them in your efforts to improve the citizen experience.



*[TechFAR] is designed to support effective risk management and break down common myths that inhibit the modernization of Government's approaches to digital service development.*

- THE TECHFAR HANDBOOK



## Resources

### AGILE CONTRACTING

This on-demand webinar offers lessons learned from federal agencies that have implemented Agile methodologies to their technology acquisition processes.

### THE TECHFAR HANDBOOK FOR PROCURING DIGITAL SERVICES USING AGILE PROCESSES

This online resource matches FAR requirements to digital service procurement needs and provides instructions for how to adopt Agile acquisition processes.

# play #6

# GENERATE

# real results

The customer service journey is never over. Rather than thinking of your proposed solution as an end goal, think of it as an experiment. Once you've deployed your solution, you'll want to solicit feedback, measure your results, celebrate successes and improve your design where there is opportunity.

This section will explain how to select the best metrics for your unique customer service project. It will also explain why both customer and employee feedback is critical to maximizing the value of your project, and what to do when your project starts creating real customer service wins.

# Choosing Metrics of Success

It's a common misconception that Agile projects, especially those centered on eliciting human emotions and behaviors, can't produce measurable results. In fact, creating and monitoring metrics of success are crucial to project implementation. Without those measurements, you can't determine the return on your investment or even if your customer service project worked at all.

So what do customer service metrics look like? Inevitably, each customer service project will require unique metrics to measure success. "There's no one measure that says, 'This is really innovative,'" Wade said. Instead, metrics must represent the distinctive qualities of each project and its desired outcomes.

Nevertheless, there are common considerations that should guide your metric selection. They are:

## FOCUS ON THE CUSTOMER.

Many agencies make the mistake of grading customer service projects on organization-centric outcomes. "The trick is to choose metrics that represent the customer's perspective," said Parrish of Forrester Research. "One of the classic examples here is call centers that measure success of average handling time. You hear someone say they got a customer off the phone in 30 seconds. Boy, that was a big win for the customer experience, right? Wrong. You may have rushed them off the phone, and you probably didn't answer the question. That's not a win for the customer experience."

Instead, call center managers should consider if the caller had a good experience with the service representative and was able to successfully complete the transaction. Customer service metrics for success must always focus on the user experience.

## ALIGN CUSTOMER GOALS WITH ORGANIZATIONAL OUTCOMES.

Nevertheless, organizational priorities must play a role in your customer service project. There are two primary reasons this alignment is crucial.

First, it's necessary to understand how internal processes impact external customer outcomes. "You have to be able to match voice-of-the-customer data with internal operational data so you can see how the two relate," said Parrish.

Second, positively correlating customer service with organizational goals helps engender support from agency leaders. A win for the customer should be framed as a win for an agency. Appropriately aligned customer and organizational metrics help tell that story.

## KEEP METRICS FLEXIBLE.

Because customer service projects should constantly incorporate user feedback and lessons learned, it's likely that your initial project idea will end up looking and operating differently once deployed. As a result, the way you gauge project success should also be open to revision.

"In the beginning, we draft ideas of measures of success, but we still don't really know [if they're correct]," Wade explained. "Because we don't enter a problem with a solution already in mind, we actually start with questions. Since we don't presuppose what our solution is, we revisit our drafted measures at the end of a project and ask ourselves, 'OK, what are we actually doing? How are those measures relevant or not relevant?' We revise them, and then work with teams to monitor the measures over time."

Other organizations can follow suit by creating upfront metrics of success to guide a project, but they must allow them to change as project details evolve. This will likely require careful communication to leaders about how and why you may change project details.

## DON'T FORGET THE UNSEEN METRICS.

Oftentimes, customer service projects are created to eliminate problems. In those instances, you may need metrics that consider what processes are no longer being used or which problems users are no longer reporting.

"Customer service is often perceived as invisible," said Colorado CCO Chumley. "One of our agency leaders told us she wanted to be a happy hostage, which means she just never wanted to have to call us."

For Chumley's office, that meant one way to measure success was whether state employees used its services because that indicated they were happy with the project.

## PRIORITIZE EMOTIONS AND BEHAVIORS.

As we've mentioned, the premise of HCD is that an effectively designed service will positively affect people's emotions and behaviors. Government customer service projects are no exception, and metrics for success should examine to what degree these positive outcomes are achieved.

Rather than choosing metrics that measure satisfaction in the short term, focus on how customers feel when they interact with your service. Then, ask if they want to have that same experience again. The answers to these questions are far more likely to correlate to the long-term success of your project than a simple satisfaction score.

## MIX THE QUALITATIVE AND QUANTITATIVE.

To track the emotional and behavioral impacts of your project, you'll likely need qualitative metrics to tell your customer service story. These are questions such as, "How do customers feel when they use our services?" At the same time, quantitative metrics (think: number of repeat site visits or increase in service enrollment) are an easy way to quickly measure and show the impact of your service.

Ultimately, you'll want your customer service project evaluation to include both types of metrics to create the full picture of your success and learn where exactly you can improve.

## Solicit Constant Feedback



To measure your success and determine how your project should be altered to better meet goals, continually solicit feedback from your end users.

An easy way to constantly monitor user experience is to survey users at the end of their government interaction. For example, the General Services Administration created a four-question evaluation that asks citizens to rank the quality of their interaction and their likelihood to repeat the service and recommend it to a friend. The survey can be deployed on any federal government website.

However, Chumley warned that you can over-survey your audience. "We were finding that people were saying, 'Okay, we're tired of answering your surveys,'" he said, and participation dropped off.

Nevertheless, his department still wanted to capture valuable feedback.

To continue the customer service conversation, Chumley's department reduced survey frequency to twice a year, but asked more detailed questions during those evaluations. Additionally, OIT started real dialogues with customers. "Rather than doing surveys all the time, every couple of weeks we just have a conversation and ask, 'How are we doing?' And we ask if they would choose our service over a private-sector service. Then, since they can't really go to the private sector, we ask them, 'How can we make it better?'" Chumley said.

These one-on-one conversations are more time-consuming than automated user surveys, but they are an effective way of soliciting valuable, descriptive feedback.

For your agency or department, the mechanism for getting this information may necessarily be different — particularly if your resources or staff time are constrained. However, remember to think beyond the survey and consider ways to constantly hear from your citizens after your project launches.

# Don't Forget Your Employees

As frontline implementers of your customer service solutions, you can't forget to consider the experiences of your own employees. Your project may have a positive impact on customer experiences, but it cannot do so at the cost of your employee engagement.

For instance, your new user-facing process might take significantly longer to execute and extend workdays. If that's the case, you might trade customer experience problems for internal, morale issues. In a worst-case scenario, that diminished morale could affect the efficacy of your customer experience project as employees become less likely to support and execute your vision.

To avoid this tradeoff between employee and citizen engagement, make sure you're soliciting feedback from your own staff, not just external users. Let both considerations guide your project evolution.

# Celebrate Success

Finally, when your project gets off the ground and starts making a real difference in users' experience, make sure you record and advertise your successes. While this may seem obvious — you want to give credit where credit is due, right? — it's also a critical step to project implementation. Celebrating the impact of your customer service project is crucial to:

- ▷ **MAINTAINING MORALE:** Customer service is often an unpaid part of a public servant's job. To keep your employees engaged and dedicated to good user experiences, show them the real impact they're making on the lives of citizens.
- ▷ **ENGENDERING SUPPORT.** Leaders' support is necessary to secure the time and resources to create great customer services. Help build and maintain buy-in by showcasing how customer service wins are leading to better mission fulfillment for your agency.
- ▷ **LEARNING WHAT WORKS.** Highlighting how you're meeting and exceeding citizen expectations not only celebrates your work, it also educates others about how customer service is achieved.



*Rather than doing surveys all the time, every couple of weeks we just have a conversation and ask, 'How are we doing?' And we ask if they would choose our service over a private-sector service. Then, since they can't really go to the private sector, we ask them, 'How can we make it better?'*

- WILLIAM CHUMLEY

CHIEF CUSTOMER OFFICER, COLORADO OFFICE OF INFORMATION TECHNOLOGY



## Resources

### DIGITAL METRICS GUIDANCE AND BEST PRACTICES

Created as part of DigitalGov's Digital Analytics Program, this resource also provides a great sampling of metrics and processes for determining the success of your agency's digital presence at the local, state or federal level.

### HOW TO CREATE A CUSTOMER EXPERIENCE INDEX

This tutorial from Deputy Associate Administrator Martha Doris of GSA offers sample questions for measuring the success of citizen interactions.

### USING CUSTOMER FEEDBACK TO IMPROVE HEALTHCARE.GOV

This article and accompanying on-demand webinar explain how the Department of Health and Human Services used qualitative and quantitative metrics to ultimately improve HealthCare.gov, and how other agencies can apply lessons learned.

# CONCLUSION

This Customer Service Playbook had one aim: to equip you to establish a customer-centric approach to citizen interactions. We have shared several tools that you may adopt to create and assess your customer-facing activities. Building on best practices from our experts and research, we have shared steps that will hopefully help you think more thoroughly about your plan to wow customers, the places where they encounter your organization, and the people who are responsible for delivering excellent services and information.

Customer service in government has a long way to go, but inspiring strides are already being made everywhere you look. From excellent 311 centers in Philadelphia and Charlotte to the hiring of CCOs across the federal government from improved social media interactions with citizens to the creation of better digital services and platforms, there's so much going on. And we can't wait to see what you do next.

