Improving Customer Experience (CX) with Federal Services

Goal Leaders

James Byrne, Acting Deputy Secretary, Department of Veterans Affairs

Matt Cutts, Administrator, U.S. Digital Service

Mark Bussow, Acting Deputy Assistant Director for Management, Office of Management and Budget

December 2018
Overview

**Goal Statement**
- Provide a modern, streamlined, and responsive customer experience across government, comparable to leading private-sector organizations.

**Challenge**
- Citizens and businesses expect well-designed, efficient government services that are generally comparable in quality to that of leading private-sector organizations.
- Despite some important strides to improve customer experience, many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself.

**Opportunity**
- Increase trust in the Federal Government by improving the experience citizens and businesses have with federal services across all service channels.
- Transform the customer experience by improving the usability and reliability of our government’s most critical digital services.
- Create measurable improvements in customer satisfaction by using the principles and practices proven by leading private-sector organizations.
Leadership

Office of Management and Budget (OMB)
- Mark Bussow, Office of Performance and Personnel Management (PPM), Deputy Goal Lead
- Amira Boland, PPM, Detaillee from GSA
- Dr. Michelle Dorsey, PPM, White House Leadership Development Fellow

United States Digital Service (USDS)
- Fatima Noor, Product Delivery Manager

Department of Veterans Affairs (VA)
- Dr. Lynda Davis, Chief Veterans Experience Officer
- Barbara Morton, Deputy Chief Veterans Experience Officer
- Lee Becker, Chief of Staff, Veterans Experience Office
- Charles Worthington, Chief Technology Officer

General Service Administration (GSA)
- Anahita Reilly, Chief Customer Officer
- Matthew Ford, Deputy Chief Customer Officer
- Philip Ashlock, Director, Data & Analytics Portfolio
Modeling after the private sector, focus will be placed on the foundational components of:

- Data: Capture and analyze the voices of citizens
- Tools: Build and deliver customer experience tools and products across the government
- Technology: Deliver easy and effective experiences, whether in person, via phone, or online
Goal Structure

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

**STRATEGY 1:**
Improve Digital Services (USDS)

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

**STRATEGY 2:**
Increase Transparency to Drive Accountability (PPM)

*Embed standardized customer metrics within high-impact programs to create government-wide performance dashboards*

**STRATEGY 3:**
Apply Proven Practices to Raise the Standard of Service of High Impact Service Providers (PPM)

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

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

*Focus on customer experience improvement in high priority areas, disseminating best practices across government using clear guidance, modern tools, and engagement of staff at all levels*
Development of the “Gears of Government” Awards Program

In previous CX CAP Goal updates, strategy 3 focused on rewarding individuals and initiatives that demonstrated outstanding customer experience. Recognizing the value of rewarding outstanding work across the President’s Management Agenda’s key tenants of “Mission, Service, and Stewardship,” this initiative grew to become the broader “Gears of Government” Award to celebrate individuals and teams across the Federal workforce whose dedication supports exceptional delivery of key outcomes for the American people. Customer Experience is a specific category for Gears of Government Awards, continuing to emphasize the importance of improving the service of government for its customers.

This awards program will no longer be tracked as an initiative related only to the CX CAP Goal. More information is available about this ongoing effort at https://www.performance.gov/gearawards/

Strategies 2 and 3 in this document have been updated to reflect this change in structure of the Gears of Government Award and this CAP Goal’s current areas of focus.
Began to Implement First-of-its-Kind Federal Customer Experience Guidance

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

- In November, HISPs completed their self assessment to rate their program maturity and identify initial areas of development to inform their required action plan
- In December, deep dive meetings occurred with every HISP to evaluate their CX self-assessment and draft action plans, identifies common pain points, capacity gaps and opportunities
- Monthly calls have been instituted to build a CX community of practice and to support both HISPs and other interested entities implement the A-11 guidance

Ensuring Source Data for Government-wide CX Performance Dashboard

In the A-11 guidance, a set of government-wide CX metrics was established in alignment with leading practices from both the private and public sectors in an effort to develop comparable, government-wide scores that will enable cross-agency benchmarking (when relevant) and general indication of an agency’s customer’s overall satisfaction.

- HISPs with customer experience surveys / feedback collections have cross-walked existing collections to government-wide metrics and identified areas for adjustments as needed
- HISPs with no existing collections have developed plans for instituting customer feedback mechanisms in order to submit data in accordance with A-11 timelines
- A team at GSA has developed a low-cost feedback tool for efficient adoption by HISPs (and others in government) needing a collection mechanism
**Summary of Progress in the Last Quarter**

**Proposed a new “Customer Experience Improvement Capability”**

In June, OMB issued “Delivering Government Solutions in the 21st Century: Reform Plan and Reorganization Recommendations,” which included a proposal to create a new government-wide CX capability – a proven structure in the private sector to facilitate a sustainable, embedded orientation towards customers across complex organizations.

- Developed plan for office that provides ownership and accountability of customer experience in line with successful private sector models
- Outlined functions for office to play based on HISP needs identified and prioritized in December deep dives

**Completed Government-wide Customer Experience Journey Map Pilot**

Customers of the United States government pursue needs along journeys that don’t perfectly align to agency boundaries. Documenting the perspective of individuals navigating Federal services irrespective of how the government is organized is necessary to identifying some of the most critical bottlenecks and high-impact areas for improvement.

- Completed journey map of a Service member/Veteran seeking employment crossing DOL, DOD, VA, OPM, and SBA programs; conducted primary research and interviews with more than 50 individuals, currently refining recommendations of priority areas for improvement initiatives
- Documented and templated cross-agency process including stakeholder engagement across agencies, OMB, private sector organizations, and customers themselves to replicate for other customer groups
- Have begun to coordinate interagency involvement for a second customer segment
Strategy 1: Improve Digital Services

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

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

### Key Milestones

<table>
<thead>
<tr>
<th>Key Milestones</th>
<th>Milestone Due Date</th>
<th>Milestone Status</th>
<th>Change from last quarter</th>
<th>Owner</th>
<th>Anticipated Barriers or other Issues Related to Milestone Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop initial version of reusable open source form creation library (US Forms System) for use government-wide by extracting code developed at VA by USDS.</td>
<td>3Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>USDS</td>
<td>None. Code is available to the public and includes a starter app for getting started quickly.</td>
</tr>
<tr>
<td>Create and make available documentation, examples, and use cases to developers government-wide for planning, development, and pilots.</td>
<td>4Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>USDS</td>
<td>None</td>
</tr>
<tr>
<td>Feature the US Forms System on part of Code.gov</td>
<td>4Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>USDS</td>
<td>None</td>
</tr>
<tr>
<td>Conduct research into the usability of the US Forms System to understand agency-specific needs and pain-points, identify themes in their form development process, and surface recommendations to increase adoption.</td>
<td>1Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>USDS</td>
<td>None</td>
</tr>
<tr>
<td>Identify agency candidates for proof-of-concept pilot using US Forms System, and secure agreement for participation, where possible.</td>
<td>2Q FY19</td>
<td>On track</td>
<td>Not started</td>
<td>USDS</td>
<td></td>
</tr>
<tr>
<td>Evaluate results of pilot(s) and determine project viability to scale broadly as a government-wide open source library housed and maintained outside of USDS.</td>
<td>3Q FY19</td>
<td>On track</td>
<td>Not started</td>
<td>USDS</td>
<td></td>
</tr>
</tbody>
</table>
### Problem Targeted:
Many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself. Insufficient data limits government’s ability to identify major customer service challenges and problem areas and the public’s ability to see the quality and timeliness of specific services.

### Theory of Change:
Agencies will use data to target improvement efforts at both the government-wide and agency level and to provide diagnostic information for use at a program-level. Making data available publicly via dashboards will help citizens set expectations and hold government accountable for improvements.

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</tr>
</thead>
<tbody>
<tr>
<td>Develop Customer Experience Dashboards (<em>see example on next slide</em>)</td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Issue dashboard policy and/or guidance</td>
<td>3Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Conduct meetings between OMB and agencies to collaborate on dashboard content</td>
<td>1Q FY19</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM, Agencies</td>
<td></td>
</tr>
<tr>
<td>Implement initial dashboards</td>
<td>2Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>Agencies, GSA</td>
<td>Not all HISPs will have data available in 2Q FY19 as they have just begun / are in the process of starting data collections, however this still puts them on track to comply with guidance timelines.</td>
</tr>
</tbody>
</table>
Strategy 2: Increase Transparency to Drive Accountability

Government-wide Customer Experience Metrics

Sample CX Survey

1. I am satisfied with the service I received from [Program/Service].
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree

2. This interaction increased my confidence in [Program/Service].
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree

   Or: I trust [Agency/Program] to fulfill our country’s commitment to [population].
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree

3. My need was addressed.
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree

4. It was easy to complete what I needed to do.
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree

5. It took a reasonable amount of time to do what I needed to do.
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree

6. I was treated fairly.
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree

7. Employees I interacted with were helpful.
   - strongly disagree
   - disagree
   - neutral
   - agree
   - strongly agree
### Strategy 2: Increase Transparency to Drive Accountability

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</tr>
</thead>
<tbody>
<tr>
<td><strong>Develop and Enhance Customer Experience Metrics and Data Collection Tools</strong></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Establish government-wide indicators</td>
<td>3Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM, VA</td>
<td></td>
</tr>
<tr>
<td>Establish initial program-specific indicators and data collection strategies</td>
<td>1Q FY19</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM, Agencies</td>
<td></td>
</tr>
<tr>
<td>Create project plan to advance the use of real-time data collection models and tools, with a focus on burden reduction</td>
<td>1Q FY19</td>
<td>Completed</td>
<td>Completed</td>
<td>Agencies, GSA</td>
<td></td>
</tr>
<tr>
<td>Refine indicators for FY20 measurement</td>
<td>4Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>PPM, Agencies</td>
<td></td>
</tr>
<tr>
<td><strong>Ensure Public Openness and Accountability</strong></td>
<td></td>
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<tr>
<td>Create centralized, government-wide data dashboard/website to post customer experience performance data publicly</td>
<td>1Q FY20</td>
<td>On track</td>
<td>No change</td>
<td>PPM, GSA</td>
<td></td>
</tr>
</tbody>
</table>
Strategy 3: Apply Proven Practices to Raise the Standard of Service of High Impact Service Providers

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

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

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Update customer experience program maturity self-assessment guidance</td>
<td>3Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Assess and develop plans to improve customer experience program maturity</td>
<td>3Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>PPM, Agencies</td>
<td></td>
</tr>
<tr>
<td>Develop plans to improve customer experience performance that include routine collection, analysis, and application of customer feedback</td>
<td>3Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>Agencies</td>
<td></td>
</tr>
</tbody>
</table>
Supporting Strategy: Manage Customer Experience at the Enterprise Level

- **Problem Targeted:** Government fails to maintain a consistent focus on achieving high-quality customer experience and no government-wide support capability exists.

- **Theory of Change:** Fostering a cultural change amongst agency leadership and staff, demonstrating the value of improved customer experience, creating government-wide customer experience oversight and support, and issuing uniform guidance will help ensure consistent and sustained improvements in customer experience across government. Performing cross-agency journey mapping will allow critical bottlenecks to be recognized and remedied across Federal Government.

<table>
<thead>
<tr>
<th>Key Milestones</th>
<th>Milestone Due Date</th>
<th>Milestone Status</th>
<th>Change from last quarter</th>
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<th>Anticipated Barriers or other Issues Related to Milestone Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify top customer experience challenges across agencies</td>
<td>3Q FY18</td>
<td>Missed</td>
<td>In Progress</td>
<td>PPM</td>
<td>To fit with A-11 Timeline, HISP Self Assessments and deep dive to discuss high priority areas, occurred in Nov/Dec, team is now compiling results of these conversations into the top customer experience challenges government-wide</td>
</tr>
<tr>
<td>Develop toolbox for agency leadership to support communications, training, and outreach with staff, including executive briefing materials demonstrating value of government customer experience improvement</td>
<td>2Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>VA</td>
<td></td>
</tr>
<tr>
<td>Evaluate inclusion of customer experience measures in appropriate executive performance plans or agency performance goals</td>
<td>3Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>PPM</td>
<td></td>
</tr>
</tbody>
</table>
## Supporting Strategy: Manage Customer Experience at the Enterprise Level

### Key Milestones

<table>
<thead>
<tr>
<th>Milestone Description</th>
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<th>Change from last quarter</th>
<th>Owner</th>
<th>Anticipated Barriers or other Issues Related to Milestone Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and Issue Customer Experience Program Governance Guidance</td>
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</tr>
<tr>
<td>Develop draft customer experience framework to identify areas where additional guidance recommendations are needed</td>
<td>3Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Issue customer experience program framework in an OMB guidance document</td>
<td>3Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Charter a customer experience working group to gather best practices, assess minimum program requirements, and provide recommendations to OMB to include in next revision of OMB Circular A-11</td>
<td>2Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Provide Government-wide Customer Experience Support</td>
<td></td>
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</tr>
<tr>
<td>Establish near-term customer experience support resources and make available to agency stakeholders</td>
<td>3Q FY18</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Evaluate the benefits of a government-wide customer experience support capacity for inclusion in future budget requests</td>
<td>1Q FY19</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Develop a plan for a central CX office that provides ownership and accountability of CX in line with successful private sector models</td>
<td>1Q FY19</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM</td>
<td></td>
</tr>
<tr>
<td>Develop Cross Agency Journey Maps</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Journey map of Service Member/Veteran seeking employment</td>
<td>1Q FY19</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM, GSA, OPM, Agencies</td>
<td></td>
</tr>
<tr>
<td>Documented and templatized a cross agency process for Journey Mapping that can be replicated for other customer groups</td>
<td>1Q FY19</td>
<td>Completed</td>
<td>Completed</td>
<td>PPM, GSA, Agencies</td>
<td></td>
</tr>
<tr>
<td>Journey Map for second customer segment</td>
<td>3Q FY19</td>
<td>On track</td>
<td>No change</td>
<td>PPM, GSA, Agencies</td>
<td></td>
</tr>
</tbody>
</table>
Working Draft: Veterans Employment Journey
This journey map is continuing to be refined and validated. A final version will be shared on performance.gov/cx in early 2019.
After the first round of start-up activities are completed in FY2019, progress will initially be reported as:

- Percentage of HISPs that collect customer feedback data in alignment with government-wide metrics
- Percentage of HISPs that have a plan to improve customer service shared publicly
- Usage statistics of the publicly available customer feedback data
- Burden reduction from transition to digital forms

**Longer term performance indicators include:**

**Mission**
- Improvement in HISP mission performance metrics (ex. increase in loan repayment rates, household income, employment outcomes, health outcomes)
- Positive change in HISP scores across government-wide metrics in Trust/Confidence, Satisfaction, and Quality categories

**Service**
- Positive change in HISP scores across government-wide metrics in Ease, Efficiency, Equity, and Employee categories
- Positive change in HISP CX maturity score
- Positive change in Federal Government CX scores by external organizations
- Improvement in HISP operational performance metrics (ex. digital analytics such as decreased bounce rates, reduction in error rates of form submissions due to improved clarity of guidance/instructions)

**Stewardship**
- Cost avoidance from streamlined customer feedback collection mechanism
- Cost savings from streamlined customer feedback collection mechanism
- Cost avoidance from solutions implemented identified through journey mapping efforts
- Cost savings from solutions implemented identified through journey mapping efforts
The following entities are identified as High Impact Service Providers (HISPs) and are subject to the customer experience section of the 2018 A-11 Guidance.

**Department of Agriculture**
- U.S. Forest Service*
- Farm Service Agency
- Natural Resources Conservation Service

**Department of Commerce**
- U.S. Patent and Trademark Office (Trademarks)
- U.S. Patent and Trademark Office (Patents)

**Department of Education**
- Federal Student Aid

**Department of Health & Human Services**
- Centers for Medicare and Medicaid Services (Health Insurance Marketplace)
- Centers for Medicare & Medicaid Services (Medicare)

**Department of Homeland Security**
- Transportation Security Administration
- U.S. Customs and Border Protection
- Citizenship and Immigration Services
- Federal Emergency Management Authority

**Department of Housing and Urban Development**
- FHA Single Family Loans and Resources Center

**Department of Interior**
- Trust Beneficiary Call Center, Office of the Special Trustee for American Indians
- U.S. Fish and Wildlife Service

**Department of Labor**
- Occupational Safety & Health Administration
- Office of Worker Compensation Programs

**Department of State**
- Bureau of Consular Affairs

**Department of Treasury**
- Internal Revenue Service

**Department of Veterans Affairs**
- Veterans Health Administration
- Veterans Benefits Administration

**Office of Personnel and Management**
- Federal Employment Services
- Retirement Services

**Social Security Administration**
- Field Operations

**Small Business Administration**
- Field Operations

**Interagency Initiative**

*The Forest Service high impact service subject to submission of data and CX Action Plan is recreation.gov, so there will be one submission for both of these listed entities.

Last updated on 11/21/18. 1) SSA HISPs combined due to reorganization; 2) Forest Service and recreation.gov submitting as one HISP 3) Trademarks and Patents submitting as two distinct HISPs