



Improving Customer Experience (CX) with Federal Services

Goal Leaders

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Goal Statement

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



Challenge

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



Opportunity

- Increase trust in the Federal Government by improving the experience citizens and businesses have with federal services across all 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.





Office of Management and Budget (OMB)

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- Anahita Reilly, Chief Customer Officer
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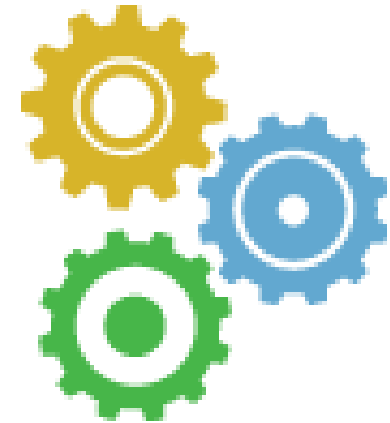




Approach

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





Note: Modification of Strategies

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





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	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Paperless Government Project					
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.	3Q FY18	Completed	Completed	USDS	None. Code is available to the public and includes a starter app for getting started quickly.
Create and make available documentation, examples, and use cases to developers government-wide for planning, development, and pilots.	4Q FY18	Completed	Completed	USDS	None
Feature the US Forms System on part of Code.gov	4Q FY18	Completed	Completed	USDS	None
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.	1Q FY19	On track	No change	USDS	
Identify agency candidates for proof-of-concept pilot using US Forms System, and secure agreement for participation, where possible.	2Q FY19	On track	Not started	USDS	
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.	3Q FY19	On track	Not started	USDS	





Strategy 2: Increase Transparency to Drive Accountability

- 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.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Develop Customer Experience Dashboards (*see example on next slide)					
Issue dashboard policy and/or guidance	3Q FY18	Completed	Completed	PPM	
Conduct meetings between OMB and agencies to collaborate on dashboard content	1Q FY19	Completed	Completed	PPM, Agencies	
Implement initial dashboards	2Q FY19	On track	No change	Agencies, GSA	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.





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

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Develop and Enhance Customer Experience Metrics and Data Collection Tools					
Establish government-wide indicators	3Q FY18	Completed	Completed	PPM, VA	
Establish initial program-specific indicators and data collection strategies	1Q FY19	Completed	Completed	PPM, Agencies	
Create project plan to advance the use of real-time data collection models and tools, with a focus on burden reduction	1Q FY19	Completed	Completed	Agencies, GSA	
Refine indicators for FY20 measurement	4Q FY19	On track	No change	PPM, Agencies	
Ensure Public Openness and Accountability					
Create centralized, government-wide data dashboard/website to post customer experience performance data publicly	1Q FY20	On track	No change	PPM, GSA	





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.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Improve Customer Experience Performance and Programs					
Update customer experience program maturity self-assessment guidance	3Q FY18	Completed	Completed	PPM	
Assess and develop plans to improve customer experience program maturity	3Q FY19	On track	No change	PPM, Agencies	
Develop plans to improve customer experience performance that include routine collection, analysis, and application of customer feedback	3Q FY19	On track	No change	Agencies	





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.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Foster Cultural Change					
Identify top customer experience challenges across agencies	3Q FY18	Missed	In Progress	PPM	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
Develop toolbox for agency leadership to support communications, training, and outreach with staff, including executive briefing materials demonstrating value of government customer experience improvement	2Q FY19	On track	No change	VA	
Evaluate inclusion of customer experience measures in appropriate executive performance plans or agency performance goals	3Q FY19	On track	No change	PPM	





Supporting Strategy: Manage Customer Experience at the Enterprise Level

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
Develop and Issue Customer Experience Program Governance Guidance					
Develop draft customer experience framework to identify areas where additional guidance recommendations are needed	3Q FY18	Completed	Completed	PPM	
Issue customer experience program framework in an OMB guidance document	3Q FY18	Completed	Completed	PPM	
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	2Q FY19	On track	No change	PPM	
Provide Government-wide Customer Experience Support					
Establish near-term customer experience support resources and make available to agency stakeholders	3Q FY18	Completed	Completed	PPM	
Evaluate the benefits of a government-wide customer experience support capacity for inclusion in future budget requests	1Q FY19	Completed	Completed	PPM	
Develop a plan for a central CX office that provides ownership and accountability of CX in line with successful private sector models	1Q FY19	Completed	Completed	PPM	
Develop Cross Agency Journey Maps					
Journey map of Service Member/Veteran seeking employment	1Q FY19	Completed	Completed	PPM, GSA, OPM, Agencies	
Documented and templated a cross agency process for Journey Mapping that can be replicated for other customer groups	1Q FY19	Completed	Completed	PPM, GSA, Agencies	
Journey Map for second customer segment	3Q FY19	On track	No change	PPM, GSA, Agencies	





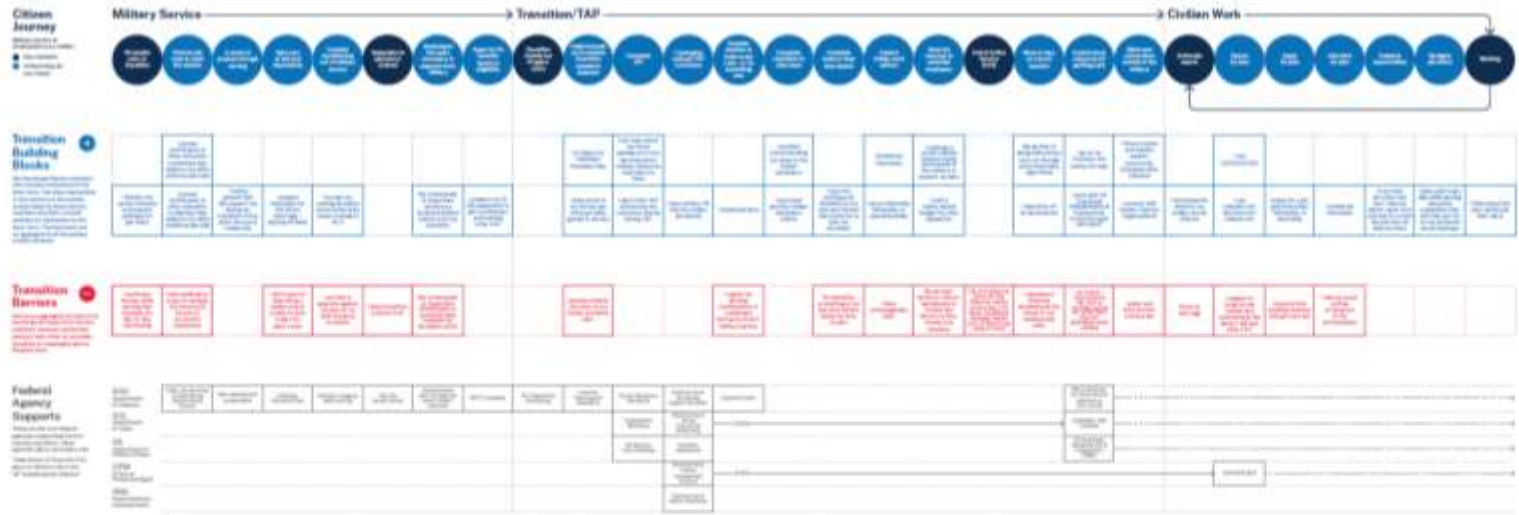
Supporting Strategy: Manage Customer Experience at the Enterprise Level

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.

Employment Journey Map: Service Members & Veterans U.S. Government Customer Experience CAP Goal

Implemented in the year within the broad domain of Service Member & Veteran Services. The design process resulted in a set of 100+ customer experience goals that represent a range of needs, objectives, and outcomes. These goals are organized into a hierarchy and are aligned with the agency's mission and vision. The agency's customer experience goals are a subset of the broader customer experience goals that are defined in the President's Management Agenda (PMA). The agency's PMA goals are organized into a hierarchy and are aligned with the agency's mission and vision. The agency's customer experience goals are a subset of the broader customer experience goals that are defined in the President's Management Agenda (PMA).



Research Themes

- Theme 1:** Service members are seeking to be able to transition from military to civilian life more easily and with less stress.
- Theme 2:** Many transitioning program participants are seeking to be able to find civilian jobs more easily.
- Theme 3:** Service members who have been injured during their military service are seeking to be able to find civilian jobs more easily.
- Theme 4:** Service members who have been injured during their military service are seeking to be able to find civilian jobs more easily.
- Theme 5:** A transition to civilian life has an impact on the mental health of service members and their families.
- Theme 6:** Many transitioning program participants are seeking to be able to find civilian jobs more easily.

Transition Data

Transition Date	Transition Date
2017-01-01	2017-01-01
2017-02-01	2017-02-01
2017-03-01	2017-03-01
2017-04-01	2017-04-01
2017-05-01	2017-05-01
2017-06-01	2017-06-01
2017-07-01	2017-07-01
2017-08-01	2017-08-01
2017-09-01	2017-09-01
2017-10-01	2017-10-01
2017-11-01	2017-11-01
2017-12-01	2017-12-01

Demographic Data (Demographics)

Demographic Data	Demographic Data
2017-01-01	2017-01-01
2017-02-01	2017-02-01
2017-03-01	2017-03-01
2017-04-01	2017-04-01
2017-05-01	2017-05-01
2017-06-01	2017-06-01
2017-07-01	2017-07-01
2017-08-01	2017-08-01
2017-09-01	2017-09-01
2017-10-01	2017-10-01
2017-11-01	2017-11-01
2017-12-01	2017-12-01

How Might We Frame

- How might we make the transition process easier for service members?
- How might we make the transition process easier for service members who have been injured during their military service?
- How might we make the transition process easier for service members who have been injured during their military service?
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- How might we make the transition process easier for service members who have been injured during their military service?





CAP Goal Progress Indicators

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

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

Longer term performance indicators include:

Service

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



Mission

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

Stewardship

- Cost avoidance from streamlined customer feedback collection mechanism
- Cost savings from streamlined customer feedback collection mechanism
- Cost avoidance from solutions implemented identified through journey mapping efforts
- Cost savings from solutions implemented identified through journey mapping efforts





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
Recreation.gov (U.S. Forest Service, National Park Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Bureau of Reclamation, U.S. Army Corps of Engineers, National Archives)

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

* 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.

