Exploring EX + CX

Improving Federal Customer Experience and Service Delivery

ACT IAC Annual CX Summit

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For the first time, SBA is conducting a customer experience survey through its 68 district offices, the point of delivery for most SBA programs and services.

Monitoring search terms and call-center questions, recreation.gov discovered that the term “walk-up” was confusing to users on their site; changing that language to “first-come, first-serve” resulted in a 78% reduction in user searches and user comments.

NextGen FSA consolidated multiple websites into a single, digital front door: StudentAid.gov. With this new site, students, parents, and borrowers will be able to access all the information and tools they currently use through an improved interface.

The Bureau of Trust Funds Administration (BTFA) is in the midst of its first-ever customer journey mapping effort to visualize the "current state" of the beneficiaries' journey as they interact with BTFA at all touchpoints and through multiple channels.

The Bureau of Consular Affairs has empowered certain front-line employees (even below the GS-13 level) with delegated authority to make decisions on opening a passport agency during the weekend or after hours for U.S. citizens who need to quickly reach family members abroad in extreme scenarios.

The General Services Administration launched Touchpoints, a low-cost, simple, and secure survey tool that enables agencies to easily spin up feedback surveys, with GSA managing a central PRA clearance averaging 2 days to cleared.

Over 90% of outpatient customers of the Veterans Health Administration trust the VA to fulfill the country's commitment to Veterans.

2018 – 2020 activity summary

**agency enablers**

Created “CX Strategist” position description for GS-13/14/15 levels w/ associated competencies, task descriptions, and interview questions / guides

Conducted government-wide SME-QA CX hiring pilot to hire more than 20 CX Strategists at more than 10 agencies

Created “CX Buying Guide” in alignment with CX maturity roadmap on types of services and how to navigate procurement

Worked with OIRA to create new umbrella clearance package, as well as entirely new “CX Desk” workflow

**developed trainings for agencies** on customer journey mapping, each element of the CX maturity model in collaboration with MITRE, website analytics, and service definition workshop

**Facilitated a C-suite / Assistant Secretary CX roundtable** with the Office of American Innovation

Developed no-cost, PRA-covered survey tool: Touchpoints

**central capacity demonstration**

Published first-ever guidance on CX (OMB Circular A-11 Section 280)

Conducted deep-dives with all 25 High Impact Service Providers to assess maturity and identity priorities for development

Developed cross-agency journey map for Service Member transitioning to civilian employment

Supported the design of a $1M challenge with DOL, DOD, and VA based on journey map findings

Completed analysis of government-wide CX feedback data

**Publically released CX Action Plans for all HISPs**

Built individual HISP pages to share CX data on performance.gov

Supported budget examiners in the FY20 and FY21 budgeting process to allocate dollars to promising CX investments in alignment with CX Action Plans

**Ongoing coaching** with HISPs on their CX programs
Recent 2020 activities

last three months / initiatives to be completed by 12/30

Completed and packaged Amplify Customer Understanding Program for agency teams across government – it’s all online!

Led cross-agency teams to complete two more journey maps:

- Individual with a disability customer journey map (CMS, DOL, ED, SSA, HUD)
- Individual surviving natural disaster customer journey map (FEMA, SBA, HUD, HHS)

Conducted CX Strategist SME-QA Hiring Effort

Release of VA’s “CX Cookbook” plays and success stories

Completion of CX Data Case Studies on EX <> CX: TSA, VHA

- Identifying recommendations to address more structural, transformational actions to improve customer experience and Federal services to inform the next term and 2021 PMA

OMB Circular A-11 Section 280 institutionalizes CX practices and measurement

Conduct an **annual self-assessment** against CX maturity model

Collect **customer feedback across government-wide metrics** and report quarterly, through public-facing dashboards

Develop **action plans** in line with annual agency strategy and budget efforts to improve customer experience maturity and measures
How can we layer Federal priorities + activities?

(Some of) Agency To-Do List

- Customer Experience
- Workforce of the Future
- Leveraging data as a strategic asset
- Foundations for Evidence-based policymaking Act and deliverables
- Federal performance framework and deliverables
Agency Case Study

Transportation Security Administration
Case Study: TSA

DHS Strategic Objective
6.2 Develop and Maintain a High Performing Workforce
6.2.3 Improve personnel training, professional development, and education opportunities
6.2.6 Improve leadership communication with the workforce

2019 CX Capacity Assessment + Action Plan
One of the lowest-scoring areas was “Organization & Culture” – and noted critical role of the front-line employees
Actions taken:
- Conducted customer feedback from sample of airports nationwide
- Focused on improving Transportation Security Officer (TSO) communication and training for additional screening

2020 CX Capacity Assessment + Action Plan
- How can we connect CX to priorities our leaders are engaged on?
- How can we better make use of our administrative data (employee feedback, operational data, customer feedback) to mission objectives (trust in TSA, security incidences)?
Case Study: TSA

What We’re Trying to Connect and Learn

Customers require clear communication from Transportation Security Officers (TSOs) regarding security checkpoint procedures. Many passengers are not seasoned travelers and thus unsure of what to expect at the screening checkpoint. Additionally, screening procedures change regularly and vary from airport to airport. Given this, clear communication from TSOs is critical to ensure a positive customer experience.

The TSOs are trying to get passengers through the screening process as quickly as possible while maintaining the highest level of security. Importantly focused on security, constantly ensuring they themselves understand updated policies or guidance, and facing the same stressors as travelers (parking, construction, etc.), TSOs must also deliver on customer experience objectives.

21% of passengers surveyed stated that additional screening was not explained

Question

Do airports that have a more engaged workforce also have less customer complaints?

Data Sets

Federal Employee Viewpoint Survey (FEVS) data: filtered for TSO job series, by airport, and the Employee Engagement Index (EEI) which is comprised of 15 items grouped into 3 sub factors: Leaders lead – focuses on opinions on senior leaders, Supervisor – statements on direct supervisors, Intrinsic Work Experience – feelings about employee’s work/workplace

TSA Contact Center complaint data: total count of calls labeled “complaints” for 2018, 2019

Airport Category data: TSA and the FAA classify US airports based on various factors such as throughput of passengers, number of takeoffs and landings, extent of passenger screening, and other security considerations
How Do I Read the Following Maps?

- Each circle represents an airport location
- Color of circle indicates number of complaints (darker red = more / top quartile of complaints)
- Size of circle indicates categorization size of airport
- Shading of circles indicates EEI score (more shading = more engagement, empty circle / bottom quartile of engagement)
View 1: Employee Engagement + Passenger Throughput

TSA's Federal Employee View Survey Scores across U.S. Airports

FEVS Metrics
- 2019 FEVS Overall
- Intrinsic Work Experience
- Leaders Lead

FEVS Metrics Score Quartiles
- 1 - Highest FEVs Score
- 2
- 3
- 4 - Lowest FEVs Score

For optimal viewing experience please make sure you are viewing in full screen.
View 2: EEI Layered with Complaint Data

*Customer satisfaction is represented by the number of complaints received.
View 3: EEI Layered with Complaint Data (Filtered Specific Airports)
View 4: Similar Realities \(=\neq\) Similar EX and CX
Case Study: VHA

Agency Strategic Objective

Promote a culture where every Veteran receives an exceptional experience which is easy, effective, and emotionally resonate to build trust. – VHA Patient Experience Mission

2019 CX capacity assessment + action plan

One of VHA's focus areas based on the 2019 CX Capacity Assessment was “Organization & Culture” - VA employees play an important part of providing great customer experiences. Our Veterans interact with VHA in a myriad of ways: calling a VHA call center, going to a VHA community-based outpatient clinic for a primary care appointment, visiting a VHA business office, getting admitted to one of VHA inpatient services, and all of these interactions are with VHA employees who had not received the same customer experience training. Furthermore, an effective customer experience training would also help improve employee experience.

Actions taken –

• Deployed a CX standardized training across VHA (‘Own the Moment’ (OTM)). OTM teaches how to create great customer experiences by defining customer experience and shares three overarching principles based on VA's CX Principles (Ease, Effectiveness, Emotion): Guide the Journey (Ease); Understand and Respond to Needs (Effectiveness); and Connect and Care (Emotion). Own the Moment also introduces “the VA Way” to deliver great customer experiences. The VA Way is comprised of three elements: VA's Core Values (ICARE: Integrity, Commitment, Advocacy, Respect, Excellence), VA Behaviors (WECARE: Welcome, Explain, Connect, Actively Listen, Respond, Express Gratitude), and service recovery.

• VHA has trained **100,708 full-time employees** in OTM, which is 27.43% of all VHA employees (367,088) as of 10.2.2020
Case Study: VHA

Agency Strategic Objective

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2020 CX capacity assessment + action plan

2020 CX capacity assessment and 2020 CX Action Plan focused VHA’s attention more on improving services directly and less on building internal capabilities. Another area of focus from 2019 was Customer Research. Leveraging human-centered design, VHA developed a journey map and tools to improve the Inpatient Experience in VHA Medical Centers/Hospitals. For 2020, VHA began deploying three inpatient experience tools to improve the discharge experience of our patients:

- Discharge Checklist
- Journey to Discharge Booklet
- Caregiver Support Guide

The full deployment of these tools will continue through FY21 due to COVID-19.
Case Study: VHA

VHA Outpatient Services: Employee Engagement and Customer Satisfaction* Visualization

- Data from 136 facilities across the US
- **Customer satisfaction**: 87.5% of patients agree or strongly agree with the statement “I trust my facility for my healthcare needs.”
- **Employee engagement (FEVS/AES scores)**: 58-81% (Federal Government average = 68%)

*Customer satisfaction is represented by the percentage of people that agree or strongly agree with the statement “I trust my facility for my healthcare needs.”
Case Study: VHA

VHA Outpatient Services: Employee Engagement and Customer Satisfaction* Observations

• VHA outpatient customer satisfaction shows a positive relationship with employee engagement
• Visualizations show range of performance and areas to explore further
• There are pockets within the same state or geographic area that have wide ranges of scores
• Dallas VAMC has brought in the voice of the employee to gain their insights and include in decision making

Between 2018 and 2019, Dallas increased customer satisfaction from 80% to 87%
Case Study: VA

VA Employee Journey Map

Objective: Provide easy, effective and emotionally resonant experiences for employees across their workforce life-cycle as members of the VA team. Leverage proven CX data, tools, technology and engagement capabilities that will support the culture of employee customer service so they Choose VA.

Identify the moments that matter to improve the employee experience (EX), which in turn will improve the customer experience (CX). By researching moments that matter (e.g., applying, hiring, onboarding), the team has identified bright spots and pain points encountered throughout an employee’s journey with VA.

Delivered the following product in 2020:
• VA's first-ever EX journey map (from ‘Considering and getting in’ to ‘Moving on’) to identify key moments that matter to VA employees
Case Study: VA

VA Employee Journey Map

- 11,000 data points were captured from employee experience interviews
- 5 phases in which an employee's goals and expectations are distinctly different
  - Considering & Getting in
  - Starting Up
  - Performing, Growing, and Adapting
  - Changing Roles
  - Moving On
- Within the 5 phases, there are 23 employment stages a VA employee may encounter
- Within the 23 stages, 30 identifiable Moments that Matter are highlighted
Putting it all together

How can we learn from more efforts like these?
connect
Performance.gov/cx
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