Fall 2020

Improving Federal Customer Experience and Service Delivery

Overview
A growing consensus across government recognizes the importance of experience

Whether seeking a loan, Social Security benefits, Veterans’ benefits, or other services provided by the Federal Government, Americans expect Government services to be efficient, intuitive, and responsive to their needs, just like services from leading private-sector organizations.

Yet on the 2019 American Customer Satisfaction Index, the Federal Government remains the lowest-ranked sector, lagging over seven points below average.

In Forrester’s 2020 index (at right), the Federal government raised to its highest average yet, though still ranked last behind utilities, airlines, and insurance companies. Several HISPs made strong gains.
Recent policy and legislation changes have made customer experience a focal point.
Improving experiences improves trust in government
## Improving customer experience is worth the investment, driving critical outcomes for government agencies around the world

**Increase trust**  
**Achieve stated missions**  
**Meet or exceed financial goals**  
**Reduce risk**  
**Deepen employee engagement**

**Across the globe ...**

<table>
<thead>
<tr>
<th>Satisfied customers are</th>
<th>Satisfied customers are</th>
<th>Dissatisfied customers are</th>
<th>Dissatisfied customers are</th>
<th>Long-term org success is</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>9X</strong></td>
<td><strong>9X</strong></td>
<td><strong>2X</strong></td>
<td><strong>2X</strong></td>
<td><strong>50%</strong></td>
</tr>
<tr>
<td>more likely to trust government</td>
<td>more likely to agree agencies achieve their mission</td>
<td>more likely to reach out for help 3+ times</td>
<td>more likely to publicly express dissatisfaction</td>
<td>driven by its health, and is mutually reinforced by CX</td>
</tr>
</tbody>
</table>

SOURCE: McKinsey 2018 Public Sector Journey Benchmark Survey; Global results from Canada, U.S., Mexico, U.K., France and Germany
We’re working towards a vision of a 21st century service delivery organization

**Understand customer needs first.**
Invite the public, agency staff, and other stakeholders to participate in journey mapping efforts to better understand the moment an individual or business interacts with government to accomplish a task and enable actual user needs to drive problem solving and co-creation, leading to better solution design.

**Streamline the navigation of government.**
Build on customer needs identified to create optimal experiences by taking a holistic view of the environment, actors, materials, and channels in an interaction.

**Build digitally, iterate, and adapt continuously.**
When it comes time to build, acquire, and implement, we must accept that perfection will never be achieved at the start. Agile development can create mechanisms to continually collect data on performance and real-time feedback from customers and employees. Forms can be accessed, completed, and submitted online and on a mobile device.

**Create accountability and transparency.**
Adopt a whole of government view of managing customer experiences and coordinate journeys across agencies and levels of government, providing accountability structures for experiences that cross organizational silos. Services create transparency and communicate with customers at each step of a process, customer-facing federal programs collect customer feedback consistent with OMB standards and publish that data through Performance.gov.
We’re starting with 25 of the nation’s highest impact service providers (HISPs)

**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 Treasury**  
Internal Revenue Service

**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**

**Department of Interior**  
Bureau of Trust Funds Administration  
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 Veterans Affairs**  
Veterans Health Administration  
Veterans Benefits Administration

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

**Social Security Administration**

**Small Business Administration**  
Field Operations

**Interagency Initiative**  
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
We established government-wide CX measures

Trust
Ex: This interaction increased my trust in [Program/Service name]
I trust [Agency/Program/Service name] to fulfill our country’s commitment to [relevant population].

Satisfaction
Ex: Please rate your experience [5 star option].
I am satisfied with the service I received from [program/service name].

<table>
<thead>
<tr>
<th>Trust and Experience Drivers</th>
<th>Driver Sub-Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability + Consistency</td>
<td>Effectiveness / Value</td>
</tr>
<tr>
<td></td>
<td>My need was addressed / My issue was resolved. / I found what I needed. / My question was answered.</td>
</tr>
<tr>
<td></td>
<td>Ease / Simplicity</td>
</tr>
<tr>
<td></td>
<td>It was easy to complete what I needed to do. / It was easy to find what I needed.</td>
</tr>
<tr>
<td></td>
<td>Efficiency / Speed</td>
</tr>
<tr>
<td></td>
<td>It took a reasonable amount of time to do what I needed to do. / I found what I needed on the site quickly.</td>
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<tr>
<td>Transparency</td>
<td>Equity / Transparency</td>
</tr>
<tr>
<td></td>
<td>I was treated fairly / I understand what was being asked of me throughout the process.</td>
</tr>
<tr>
<td>Humanity</td>
<td>Employee Interaction / Warmth / Helpfulness / Competence</td>
</tr>
<tr>
<td></td>
<td>Employees I interacted with were helpful. / The Call Center Representative was committed to solving my problem.</td>
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</tbody>
</table>
We’re working with HISP(s) to map how they manage their “services”

**Occasion**  
*(the why)* A customer* situation and goal. Can be written as a story describing their intent or a life event. Include information on the scale of the demand or impact of the problem and characteristics of the person.  
* = ‘customers’ are individuals or companies seeking to be served by your agency

**High-Impact Service**  
*(verb)* the process a customer goes through - and the sum of the help provided by an agency and it’s partners throughout - to obtain or make use of the offering.

*The service is made up of...*

**Offering or Objective**  
*(noun)* Product, good, or value received / task completed, e.g., passport, flu shot, loan, tax payment, progress through a border checkpoint

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**Channels**  
*(places)* Where to access or interact with the service, e.g., communication letters, websites, contact centers

**Roles + Operations**  
*(people)* Tasks to perform and who does do them, e.g., concierge, county office employee, auditor, chat bot

**Tools + Technologies**  
*(things)* Foundational building blocks for delivering services, e.g., systems, tools, physical capital
## What’s a Federal “service”?

<table>
<thead>
<tr>
<th>Occasion</th>
<th>Offering</th>
<th>Service</th>
<th>Service Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 15th</td>
<td>Tax Payment</td>
<td>Online filing</td>
<td>Compliance: Completing required actions such as filing taxes, submitting</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>information for or engaging with an auditor, environmental reporting, or</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>completing a survey mandated by law</td>
</tr>
<tr>
<td>I’m traveling internationally</td>
<td>Passport</td>
<td>Passport Application</td>
<td>Administrative: Requesting or renewing items that do not require an</td>
</tr>
<tr>
<td></td>
<td></td>
<td>/ Renewal</td>
<td>extensive eligibility determination or multi-stage review processes such</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>as getting a license, passport, or social security card.</td>
</tr>
<tr>
<td>I’m taking over my grandparents’ farm</td>
<td>Access to</td>
<td>Microloan Program</td>
<td>Benefits: Applying for or progressing through more complex government</td>
</tr>
<tr>
<td></td>
<td>Financing</td>
<td></td>
<td>processes to determine eligibility and degree of benefit such as</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>immigration, Medicare, Veterans’ Health services, or a small business loan.</td>
</tr>
<tr>
<td>I want to take my kids on a vacation</td>
<td>Parks Pass</td>
<td>Vacation Planner</td>
<td>Recreation: Utilizing a public space such as national parks, historical</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(recreation.gov)</td>
<td>sites, or visiting museums</td>
</tr>
<tr>
<td>I had a child</td>
<td>Vaccine</td>
<td>CDC Vaccine Schedule</td>
<td>Informational: Providing authoritative knowledge-based resources to the</td>
</tr>
<tr>
<td></td>
<td>Recommendations</td>
<td>App</td>
<td>public such as designing labels, releasing warnings, requiring disclosures,</td>
</tr>
<tr>
<td>I’m planning my company’s growth strategy</td>
<td>American</td>
<td>Census Data Release</td>
<td>or providing health recommendations.</td>
</tr>
<tr>
<td></td>
<td>Housing Survey</td>
<td></td>
<td>Data and Research: Conducting or funding research, maintaining and</td>
</tr>
<tr>
<td></td>
<td>Data</td>
<td></td>
<td>preserving artifacts, collecting, analyzing, reporting, and sharing data.</td>
</tr>
<tr>
<td>I have unexplained fees on my credit card</td>
<td>Legal recourse</td>
<td>Financial product</td>
<td>Regulatory: Providing clear guidance to support commerce, transportation,</td>
</tr>
<tr>
<td>statement</td>
<td></td>
<td>complaint</td>
<td>employment rules, workplace safety, public safety (e.g., ensuring clean</td>
</tr>
<tr>
<td></td>
<td></td>
<td>reporting</td>
<td>water, safe medicines); enabling reporting of grievances (e.g., consumer</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>protection)</td>
</tr>
</tbody>
</table>
HISPs at diverse points in CX maturity have taken actions to improve experiences

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 Office of the Special Trustee of the American Indians 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 OST 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.
Across high impact services, we identified a number of commonalities

**themes**
Customers experience life events, not Federal agencies
Moments of stress often require complex decisions
People frequently navigate Federal services on behalf of someone else
Sometimes the confusing part isn’t the website

**barriers**
CX is too often not a priority for staff at all levels, requires cross-silo coordination, and program ownership
Program implementers don’t have a deep understanding of their customer or their needs
Frustrated employees won’t provide an exceptional experience for customers
Getting and asking for the right CX talent and services is hard

The 2020 Federal Service Delivery and Customer Experience Strategy Report further refines these initial findings and prioritizes barriers for Federal leaders to tackle.
Cross-Agency Journey Maps
CAP Goal 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

CX Strategist SME-QA Hiring Effort lessons learned, now being used by Data Science hiring effort
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
Ongoing coaching with HISPs on their CX programs

CX Data Case Studies on EX<<>>CX: TSA, VHA
“CX Cookbook” plays and success stories

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, 21, and 22 budgeting processes to allocate dollars to promising CX investments in alignment with CX Action Plans
Amplify Customer Understanding Program for agency teams across government – all self-serve modules online

Individual with a disability customer journey map (CMS, DOL, ED, SSA, HUD)
Individual surviving natural disaster customer journey map (FEMA, SBA, HUD, HHS)
2020 Federal Customer Experience Strategy project (in progress)
connect
Performance.gov/cx
cx@omb.eop.gov