



AGENDA 2021 - DELIVERING OUTCOMES, BUILDING TRUST
**IMPROVING CUSTOMER EXPERIENCE AND
TRANSFORMING SERVICE DELIVERY**

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American Council for Technology–Industry Advisory Council (ACT–IAC)

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IMPROVING CUSTOMER EXPERIENCE AND TRANSFORMING SERVICE DELIVERY

The government must strengthen its ability to deliver outcomes for the public. Regardless of one's opinion about government's role in our lives, if it doesn't live up to expectations – if it doesn't “work” for the public – trust in our institutions will continue to decline. As recent challenges have shown, how the government serves the public, protects the systems and information we rely on, responds and adapts to new opportunities and crises makes a great difference in how people feel about their government. As policymakers and government program leaders chart the course for the future, it's important to recognize that these are not mutually exclusive goals, they are highly interdependent. The government the public deserves is one that delivers accessible services and meets personalized needs; provides for efficient resilient infrastructure which protects information and systems and institutions from adverse events; and is agile and adaptable to meet emerging needs.

People rely on the government to deliver vital services and information that impact the quality of their lives and economic well-being. Increasingly, they expect to be able to interact with the government as conveniently and easily as they do with their favorite commercial brands and service providers. Delivering a customer experience that meets or exceeds expectations is essential to building trust in the government and is equally vital to delivering critical outcomes. If people's experience with government consistently meets or exceeds their expectations, their trust in government will grow.

Recognizing the importance of delivering customer-centric services, a solid foundation

of customer experience policies, practices and capabilities have evolved over several previous Administrations. We now must harness the momentum that's been sparked to accelerate, scale and mature customer experiences across government. To do this requires breaking down silos that fragment customer journeys and constrain orchestration of integrated, omni-channel service delivery. Additionally, building modern, flexible back-end infrastructure that can adapt to meet growing and evolving needs must be a priority.

Lasting change also requires visible, accountable executive leadership, and engaged, trusted champions who can build and sustain customer-centric culture across and throughout agencies. While most agencies—and particularly those with high impact, public facing services—are currently working to improve customer experience, many lack a shared vision and roadmap that set consistent direction and guide priorities.

COVID – 19 exposed the urgency for government to shift to digital services, accelerating use of self-service tools and other technologies that enable people to easily engage with government remotely.

- Policy changes were enacted quickly, enabling agencies such as USDA, SSA and IRS to accept digital signatures and to use secure email to submit documents needed to obtain vital federal benefits and services.
- VA increased use of telehealth from 10,000 to 120,00 visits per week from February to May of this year. This monumental shift was in part possible because Congress had passed legislation allowing Veterans Health Administration clinicians to deliver telehealth services to veterans across state lines.
- As federal agencies shuttered offices and contact centers, employees shifted to full time telework, with little disruptions to service delivery.

These changes forced agencies to adapt quickly, revealing the urgent need to speed and scale infrastructure modernization and make permanent digital and self-service capabilities that enable people to more effectively and easily interact with government from where they are and whenever it is convenient for them. Having had positive experience receiving more government services virtually, people are not going to want to return to inconvenient, time-consuming in person services.

CHALLENGES AND OPPORTUNITIES

To convert vision into lasting change, executive branch management agencies and agency leaders should focus on three key areas: Understanding customers; Transforming service delivery; and Measuring impact and increasing accountability.

UNDERSTANDING CUSTOMER NEEDS

Building on progress made over the last several Administrations, the 2018 President's Management Agenda makes improving customer experience a priority by making it one of this Administration's top management priorities: a cross-agency performance goal. Capacity assessments, action planning, and performance reporting are important elements of the initiative. Yet, as agencies improve how they serve customers, it is clear many don't fully understand who their customers are, the problems or objectives these customers are attempting to address by interacting with public services, or how they expect to navigate and interact with them. Deeper understanding of the needs, challenges and overall realities customers face when interacting with government services will uncover gaps in services or capabilities and should inform the prioritization of what services to build or enhance, and how to design services to be clear and useful for customers.

Agencies should consider user research a core component that informs the design and delivery of programs and services. Upfront investment in research and understanding can save agencies costly downstream consequences—from products with low adoption to services that require costly support through call centers, training or redesigns. Understanding customers and their journeys across multiple federal (and state and local) entities is foundational to focusing on the right areas of an agency's portfolio. Recognizing that journeys may cross multiple services allows

smarter investment and reduction of duplicative (and potentially burdensome) functionality.

Learning what users need and how well the government is meeting these needs is not a one-time or annual effort. Feedback must be captured continually, in real time at the point of service, and it must be actionable—teams must be structured for flexibility and responsiveness. If data is collected only sporadically, it can't be used to understand how to quickly pivot and meet emerging needs, or what investments are required to address shortcomings in service delivery.

Unfortunately, many agencies and programs lack a comprehensive understanding of their customers or, perhaps more frustrating, customer data is isolated or fragmented across the agency. Even if they had such data, agencies often lack the expertise necessary to act on it to improve the customer experience and advance mission outcomes.

In 2021, the government has an opportunity to expand on the valuable work done in the current and past administrations to improve the experience citizens have when interacting with their government. The urgency is highlighted by the government's response to the needs of Americans' grappling with and recovering from the pandemic.

Among the important benefits of a strong commitment to improving customer experience:

- Renewing focus on strengthening customer experience can undergird any effort to strengthen or restore trust in government.
- Though demand has been high and on the rise for some time, increasing reliance on digital services and self-service options presents an opportunity to transform and improve government services such as benefits, recreation, and informational assistance.
- By reflecting on citizens and businesses as customers and what matters most to them, agencies can direct investment to those

areas that can have the greatest impact, reimagining government services based on people's needs and expectations.

- Evidence-based service delivery improvement efforts require a blend of qualitative data (e.g., leading human centered design practices like interviews, observations and focus groups) and quantitative data (e.g., real time, transactional feedback using specialized CX tools and operational systems). Such data should yield actionable insights into what people want and expect (attitudes), and how they actually interact with agency services (their behavior).
- A customer-centric culture has been shown to drive significant improvements in employee experience and engagement.
- Enhancing customer experience often yields increases in operational efficiency and/or lowers cost to serve by implying complex processes, deflecting contact center calls to lower cost channels, consolidating duplicative data requirements and other similar management improvements.

TRANSFORMING SERVICE DELIVERY

In order to provide a consistent experience across government, government services must be more easily accessible, understandable, and integrated. While more than half of all traffic to public-facing government websites is from those using mobile devices, many government sites are still not optimized for them. Despite existing legislative and policy mandates, many websites are still not fully accessible to people with disabilities or they contain content that's not easily readable by search engines. When unable to solve problems online, the public is forced to phone, email, or visit someone directly, driving increased costs to the taxpayer as well as creating inefficiencies such as increased wait times. But not all populations have equal access to technology and bandwidth—government must serve all, especially the underserved and other at-risk populations that may not have easy access

to technology or bandwidth. Government has more to do to ensure everyone benefits from a more modern, digital customer experience.

Transforming government services to meet the ever-changing needs of the public will require

- Designating (and funding) an organization responsible for defining, diagnosing, and managing end-to-end delivery of services that cross multiple agencies and currently do not have collective accountability mechanisms or coordination.
- Increasing understanding of customer needs, the "products" the public is seeking to access, the services that enable their access, the platforms, tools, and roles that enable them, and the drivers that matter most at critical moments.
- Designating an executive in each agency or department with accountability and resources responsible for customer issues, who aligns the vision for service delivery across the agency and ensures that all customer data is aggregated to fully understand the customers' current experience.
- Setting a strategy with a clear vision, standards for service delivery, and a framework for agency implementation.
- Conducting risk-based assessment of policies that inhibit the ability to conduct end-to-end digital services (e.g., requirements for in-person interviews and submission of documentation to verify eligibility for certain benefits, inability to submit medical records electronically when applying for benefits) that takes into account and mitigates privacy, security and equity concerns.
- Minimizing data sharing restrictions that often limit the extent to which agencies can collaborate to streamline services and eliminate redundant data submissions.
- Breaking down the silos and sharing customer feedback within and between agencies, using

insights to drive needed improvements across programs and agencies.

- Modernization efforts that create flexible, cloud-based, back end systems that can support digital services at scale.
- Enabling reliable, accurate and secure authentication.

MEASURING IMPACT AND STRENGTHENING ACCOUNTABILITY

To address the need to measure and improve customer experience, OMB defined a set of key customer experience measures based on leading commercial practices. These metrics provide a solid framework for tracking improvement. Given the range of maturity of CX across agencies though, use of the recommended measures and methods is mixed, and must be expanded. The Department of Veterans Affairs is an exemplar, having fully implemented OMB's measurement requirements and publicly reporting customer experience results. The Department showed an increase of Veterans trust from 55% in 2016 to 80% in 2020. Few other agencies can report such distinct results or progress.

The adoption of customer experience measurement will continue to require the highest level of leadership support and priority. To achieve the promise of modern customer experience improvement techniques, customer experience measurement should be a requirement for all designated high-impact service providers, as well as those providing high-impact internal services and others that could benefit. Real-time insights will enable agencies to make measurable improvements in customer experience for the people they serve and the outcomes they are seeking to accomplish.

Steps government could take to strengthen measurement and accountability for improving customer experience include:

- Developing consistent measures and service level standards based on the moments that matter most.
- Establishing customer experience baselines for high impact and other major public facing and internal services.
- Connecting customer experience metrics to individual senior executive performance plans, beginning with executives who oversee and manage programs that provide direct services to the public.
- Aligning customer experience metrics to inform agencies' performance, enterprise risk management, and budget decision-making as part of a balanced set of metrics, including operational, financial, and employee related ones.
- Considering legislation that mandates customer measurement and exempting any customer experience feedback and measurement devices from burdensome Paperwork Reduction Act requirements.
- Providing additional budget and other resources to high-impact service providers to strengthen and institutionalize their Customer Experience capabilities.

RECOMENDATIONS

ACT-IAC's Agenda 2021 capstone document, "Delivering Outcomes, Building Trust," prioritizes a focus on outcomes in all aspects of management and at all levels of government. Improving people's experience when interacting, engaging and transacting with the government will strengthen trust in government and improve outcomes for the public. The following recommendations would accelerate the shift to citizen-centric digital services.

1. Expand and deepen a focus on CX across government.

The scope of CX implementation and budget guidance should involve a coordinated effort to rethink the current definition of High Impact Service Providers (HISPs), conducting a more deliberate approach to designating and defining public-facing government services that must undertake specific service design and customer experience efforts. CX implementation and budget guidance should apply to end-to-end federal services—defined as the sum of the help provided by an agency and its partners throughout the process a customer goes through to obtain, receive, or make use of a public offering (or comply with a policy or regulation), rather than following traditional agency or even specific programmatic silos. Since providing services to the public often extends across individual programs and agencies, all public-facing agencies should be required to measure, report on and improve the overall experience in an integrated manner, and those designated as high impact can help to prioritize activities.

2. Measure and report progress improving customer experience.

Expand customer experience measurement requirements to all Federal agencies:

- A. Ensure consistent measures and service level standards, both transactional and relational.
- B. Obtain and analyze real-time customer feedback at the point of interaction; define process and governance to convert insights to measurable service improvements.
- C. Require agencies to establish a baseline and report annually to OMB on the metrics for public-facing services, including:
 1. OMB Circular A-11 feedback metrics as well as other key measures that matter to their customers.

2. Service levels (e.g., number of days to process a benefit application with consistent criteria about when the clock starts and stops).
 3. Impact of customer experience transformation efforts.
- D. Share meaningful CX feedback with the public.
 - E. Add CX to the FITARA Scorecard.
 - F. Include CX and service design/delivery targets in Agency Priority Goals for all CFO Act agencies.

3. Strengthen the governance and capacity to drive customer experience improvements government-wide.

- A. Ensure the individual or entity responsible for managing and implementing CX government-wide has sufficient authority and resources to effectively drive change, enable agency accountability for measureable outcomes and participate in relevant policy deliberations and decision-making.
- B. Designate a senior executive directly accountable for CX in all CFO Act agencies.
- C. Use the President's Management Council as a forum for sharing leading CX practices and holding agencies accountable for improving customer experience.
- D. Expand customer experience competency across government and include in SES performance plans and relevant position descriptions.

4. Increase investment in improved customer experience initiatives and accelerate shift to digital access and self-service. Support/enable CX initiatives and measurement across program and agency boundaries by providing adequate budget and other resources

- A. Make permanent policy flexibilities that have been granted during the pandemic, including acceptance of digital documents and signatures and allowing video vs. in person interviews.

- B. Invest sufficiently in modernized, cloud-based, back-end infrastructure to accelerate and scale digital services.
- C. Provide agencies easy access (e.g., contract vehicles) to specialized, proven CX talent and expertise, including human centered design.

5. Drive innovation.

Building on cross-agency journey mapping work and service definition efforts, pilot top three cross-agency services through a new initiative called “Government Without Boundaries” to identify common pain points and design solutions that improve the end-to-end customer experience and increase operational efficiency across government. Ensure adequate funding is available to participating agencies to pilot identified solutions.

Recommended Resources

- [ACT-IAC CX Playbook](#)
- [OMB Guidelines, Section 280 of A-11](#)
- [Federal CX Maturity Assessment](#)
- [Federal Service Definition Worksheet](#)
- [Federal Customer Experience Challenges](#)
- [21st Century Integrated Digital Experiences Act \(IDEA\)](#)
- [GSA CX Services Evaluation and Buying Guide](#)
- [Digitalgov.gov Customer Experience Toolkit](#)

Improving Customer Experience and Transforming Service Delivery

There are many more specific actions that can be taken. These are addressed in our series:

Agenda 2021 Delivering Outcomes – Building Trust A Guide for the Future of Government Agenda

ACT-IAC stands ready to help advance these ideas into action.

Please contact us at

<https://www.actiac.org/contact-us>
or 703-208-4800.

