Synopsis:

People deserve government services that are easy to find, use, and understand, on par with services delivered by the private sector. Improving the citizens’ experience with government requires technology, people, process improvements, and culture change. Customer experience is the overall perception that customers have of an agency, organization, or service.

This playbook is intended to help government leaders improve service to citizens, with guidance on how to establish a customer experience office or program, which can transform services across an entire agency. Whether customers are veterans, college students, taxpayers, immigrants, seniors, employees, or other federal agencies, the framework and recommendations provided in this playbook can be applied to improve any government service.
American Council for Technology-Industry Advisory Council (ACT-IAC)
The American Council for Technology (ACT) is a nonprofit educational organization established to create a more effective and innovative government. ACT-IAC provides a unique, objective, and trusted forum where government and industry executives are working together to improve public services and agency operations through the use of technology. ACT-IAC contributes to better communications between government and industry, collaborative and innovative problem solving, and a more professional and qualified workforce.

The information, conclusions, and recommendations contained in this publication were produced by volunteers from government and industry who share the ACT-IAC vision of a more effective and innovative government. ACT-IAC volunteers represent a wide diversity of organizations (public and private) and functions. These volunteers use the ACT-IAC collaborative process, refined over thirty years of experience, to produce outcomes that are consensus based.

The findings and recommendations contained in this report are based on consensus and do not represent the views of any particular individual or organization.

To maintain the objectivity and integrity of its collaborative process, ACT-IAC does not accept government funding.

ACT-IAC welcomes the participation of all public and private organizations committed to improving the delivery of public services through the effective and efficient use of IT. For additional information, visit the ACT-IAC website at www.actiac.org.

Customer Experience Community of Interest
ACT-IAC's Customer Experience community of interest (COI) strives to drive the government and industry to be customer-centric, placing the customer at the center of their priorities, investments and decisions. This includes all aspects of supporting the citizen journey, from understanding customer expectations through training and educating leaders to understand the importance of being customer-centric. As we leverage all aspects of ACT-IAC's robust programs, we focus on culture, training and professional development, innovation, agency support, and tools & practices to break down barriers to improving the overall customer experience.

Disclaimer
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Customer Experience (CX) Playbook: A Guide to Transform Service Delivery

I. Introduction

People deserve government services that are easy to find, use, and understand, on par with services delivered by the private sector. Yet government service delivery continues to fall far short of citizen expectations. This is reflected in the Forrester “The US Federal Customer Experience Index” [1] and McKinsey & Company’s survey of 15,000 people who used the top 30 government programs and the American Customer Satisfaction Index (ACSI). [2] Government continues to be the lowest rated in all customer experience surveys. Organizations such as Amazon, Apple, and Disney continue to set the bar for government and elevate the citizens’ expectations.

On January 30, 2018, ACSI released its latest results of citizens’ satisfaction with US federal government services. The ACSI Federal Government Report 2017 is based on interviews with 2,881 users, chosen at random, and contacted via email in November and December 2017. Respondents were asked to evaluate their recent experiences with federal government services. The research is conducted by CFI Group which licenses the ACSI methodology. Citizen satisfaction with US federal government services improved for the second year, increasing 2.5% to 69.7 on a scale from 0 to 100. This follows an increase in 2016 which is the biggest one year improvement in 20 years of ACSI measurement. This year was an 11-year high. [3]

Improving the citizens’ experience with government cannot be done with technology alone; it also requires people, process improvements, and culture change. Improving the public’s perception of government service is complex and will require that customer experience (CX) become a priority and focus within federal agencies. To change this focus will require a better understanding of the discipline of CX, a move toward a more customer-centric culture, workforce and skills, clear governance of the end-to-end customer experience, measures that change employee behavior, greater understanding of customer expectations, and systems to integrate customer feedback into systems, to drive improvement.

This playbook intends to help government leaders improve service to citizens, with guidance on how to establish a customer experience office or program, which can transform services across the entire agency. Whether customers are veterans, college students, taxpayers, immigrants, seniors, employees, or other federal agencies, the framework and recommendations provided in this playbook can be applied to improve any government service.

As citizens journey through life and interact with government during pivotal life events, there are substantial issues and challenges that inhibit government from delivering the seamless, high quality, secure and private services that the public expects. It is not easy. Some of these challenges include:
1. Lack of understanding within agencies of the importance of CX to the public, the government, and the country.
2. Limited understanding of the CX discipline, including, human centered design, personas, journey mapping, and use of data to assess improvements.
3. Tendency of agency managers to confuse CX with traditional “customer service.”
4. Organizational silos across delivery channels and functional departments that hinder collaboration and deliver service in pieces, rather than as a well-orchestrated single system.
5. Staffing that hasn’t been professionalized over time and/or have unionized workforces that restrict large scale changes.
6. Performance management systems that do not incentivize customer-centric behavior.
7. Outdated legacy systems and IT infrastructure that hinders seamless service delivery.

While these challenges are difficult to overcome, if addressed, the positive impact that the government can have on the day-to-day lives of citizens is immeasurable.

II. Key Concepts

A. The Customer Experience Ecosystem
The customer experience ecosystem involves relationships with customers, employees, partners (e.g., vendors, contractors, consultants), and other government agencies that collaborate together to implement a CX framework, as described within this playbook. Policies, processes, and technologies are interconnected within the CX ecosystem and impact customer experience every day. When beginning an effort to improve your agency’s CX it is important to ensure you have a clear understanding of who is in your CX ecosystem before you begin your CX efforts within your agency.

B. The Role of Customer Service and User Experience in Improving the Customer Experience
While user experience (UX) and customer service have received a lot of attention in government over the past few years, both contribute to the overall experience that customers have with government. UX refers to the customers’ interaction with a product, website, app, or other government touchpoint. UX can be measured by the time it takes to complete a transaction, abandonment or bounce rate, time on page, or time on site among others. Essentially, if a product or technology is difficult to use or navigate or is not intuitive, it results in a poor user experience, which impacts the overall CX. UX is driven by user centered design – putting the user at the center of all decisions, always starting with user research and understanding to inform prioritization, system flow, screen level designs and interactions. The User Interface (UI) refers to the elements and behaviors of the screen – form fields, buttons, layout, visual design and branding, and feedback messages. Usability testing can be used to evaluate design decisions at all levels – whether the product or service meets users’ needs, as well as where to click on a screen to accomplish a task. UX concepts are important tactics when assessing the overall CX and determining where improvements in the interface or product are needed.
Customer service refers to service received on a specific channel or touchpoint. Customer satisfaction is tied to the interaction within that touchpoint (e.g., phone, website, email, chat, or in-person service). Customer service is a critical component to understanding the overall customer experience, and to understanding specific areas of improvement that can be made within the overall customer journey. Good customer service creates satisfied customers and a good customer experience creates loyal customers.

C. Definition of Customer Experience (CX)
Customer experience (CX) is a newer concept for government. Customer experience is the overall perception that your customers have of your agency, organization, or service. CX encompasses the entire (or end-to-end) journey a customer has with your agency. Good CX delivers a continuity of experience between channels or touchpoints. This begins when a customer has a need or problem and ends after the problem is fully addressed and complete. By focusing on the entire journey, you are able to capture disconnects and/or inconsistencies that occur between touchpoints. These are pain points that impact the overall perception and emotions that customers feel when interacting with your agency. For example, if a customer experience is positive on a single touchpoint (e.g., telephone call), but the overall journey across multiple touchpoints (e.g., website and web chat) is negative, the overall customer experience is negative. This could be due to lack of consistent information, incomplete instructions, repetitive processes, excessive steps, or inability for a customer to use self-service to make their interactions/transactions easier.

D. Benefits of Good Customer Experience
There are many benefits of providing a good experience to the public when engaging, interacting, or accessing government services.

1. **Increased mission success** - an outstanding customer (or citizen) experience is analogous to successfully accomplishing the mission of the agency.

2. **Increased efficiency** by increasing the return on investment (ROI) and reducing cost through reducing repeat contacts, enabling first contact resolution (FCR). These improve efficiency and reduce the need for additional contacts (calls, visits, or other contacts). Additionally, consolidation and integration tend to reduce duplication across an organization.

3. **Enhanced employee engagement** - when employees are valued by their managers, rewarded for excellent performance, and valued for their contributions and service, they are more engaged, happier, and more productive in the workplace.

4. **Improved trust in government** - when agencies provide easy services that meet the public’s needs, this improves trust they have in government. Trust also improves citizens’ participation in important government activities (e.g., participation in the census) and the
overall outlook that citizens have about our country.

5. **Compliance with government “asks” or requirements** - when agencies make it easy for citizens to complete tasks or fulfill requirements (e.g., complete taxes, complete census forms, sign up for health care coverage), compliance increases.

**E. Human-Centered Design**

Human-centered design (HCD) is a set of tools and methods that help to put user needs at the center of a CX problem from field research to concept development through testing and implementation. An essential part of HCD is the use of rapid prototyping to learn about and refine what users want through co-creating, building, testing, and pivoting. HCD and agile go hand-in-hand to encourage learning quickly whether the user’s needs are being met and making changes before potentially millions of dollars are wasted building the wrong product or service.

HCD uses a problem-solving methodology known as design thinking. Design thinking has been used for decades in the industrial design profession to design both products and services. It has three phases: **inspiration, ideation, and implementation**. Using design thinking methods will capture the most relevant feedback of an experience that will be adopted and desired by the user. The three core phases are further broken down into five steps that serves as a framework to develop ideas centered around the end-user or the customer: **Empathize, Define, Ideate, Prototype, and Test**.

Using this framework allows you to understand the customers through a feedback loop incorporated into your programs and service development efforts by helping to clearly define the problem that you are trying to solve, providing the basis to brainstorm ideas for how to solve the problem, and then developing concepts that can be prototyped to quickly test your solution.

**III. Purpose**

This playbook provides a customer experience framework, tools, and techniques to improve the experience your customers have when using your Department or Agency’s products and services. As previously mentioned, this framework applies to any program or initiative that involves customers. While this playbook is written from an enterprise-wide perspective for external services provided to the public, it can also be applied to improve internal services including acquisition, finance, technology, and human resources. These services provided within an agency are also critical components of the CX ecosystem.

If you are new in your leadership role, or if customer experience has not been a topic that has gotten attention, this framework provides you with insights to jump start the conversations and
actions within your organization.

This playbook is intended for senior leaders in all federal agencies. The plays can be applied to a variety of programs and services offered by an agency. It is the hope that agency leadership will use this playbook to transform the services they provide to their external customers and drive agency leadership who provide internal services to do the same.

IV. Assessing Readiness and Getting Started

CX improvement is an iterative and continuous process. Understanding and choosing the right starting point for improving CX is a critical step in building consensus, gaining momentum for CX transformation, and making impact.

The following fundamental questions can be used to assess your agency’s readiness:

- Do senior leaders within your agency understand the importance of CX?
- Is CX and customer service a priority within your agency?
- Do you know who your customers are?
- Is there a common understanding of the experience your customers are currently having with your agency’s products and services?
- Do you have a strong business case for improving the customer experience?
- Is there an organization within your agency that is responsible for monitoring the services provided to your customers?
- Do individual performance plans align CX as a priority at various levels in the agency?
- Do organizations/departments/branches have quantifiable customer service goals?
- How are customer service and customer experience measured currently?
- Do you have a culture of customer service?

Suggestions:

- Implement a structured, enterprise-wide, leadership-sponsored approach for the best results.
- Start with small proofs of concept or minimally viable products (MVPs) to build momentum for change and to demonstrate improvement.
- Analyze performance and customer satisfaction data to determine the baseline of your service or experience and then establish metrics for improvement.
V. Customer Experience (CX) Framework and Plays

A. Framework

This framework is a continuous life-cycle of plays that can be executed from the beginning or at any point in the process, depending on the maturity level within your organization. The plays do not have to be executed in a linear fashion. They may be done in parallel or at any point in the process. If you already understand the state of CX in your agency and are actively measuring and setting CX goals for continuous service improvement, skip to the play that provides information that is the most valuable to you.

Source: Dorris Consulting International, 2018

B. CX Plays

The following plays are included in the playbook to help your agency:
1. Understand the current state of customer satisfaction and experience in your agency
2. Understand your agency’s culture and appetite for change
3. Build a customer-centric culture
4. Create a customer strategy
5. Design the experience of the future
6. Identify the support and resources (e.g., staff, technology, funding) needed
7. Develop a business case to justify resources
8. Continually measure and monitor

Play 1: Understand the Current State of Customer Satisfaction and Experience in the Agency

As you begin the process of improving customer experience, a complete understanding of your customers’ current experiences will set the path for your plan. Use the following checklist to assess your current environment.

Checklist: Understand the Current State

- Who are your customers?
- What are the highest valued services provided by your agency?
- What data are available to understand the customers’ current experience and interactions?
- What data are available to assess the cost and satisfaction with internal services provided within the agency?
- What is the baseline experience? How do you currently measure customer experience?
- What matters most to your customers?
- Can you describe your customer’s journeys when interacting across touchpoints in your agency?
- What is the vision or desired experience your agency wants to deliver?
- Is CX one of the agency’s top three priorities?
- Are there CX champions in departments/organizations within your agency?
- Are the CX champions experienced in CX?
- Are there senior leaders who are CX advocates and who understand the importance of CX?
- Is the CIO on board with the need to improve the customer experience to both the internal and external customers?
- Is there a single organization that is responsible and understands the experience customers are having across the entire agency?

The explanation for each of these questions are provided below. This is an important step in the CX journey since it will determine the “as is” and identify the health and maturity of the agency to make the necessary commitment to improve.

Who are your customers?
It is important to understand who your customers are, which sounds like a simple question. However, when you provide services to the public, it could mean your customers are college students or seniors or veterans or active travelers. Seniors, for example, who access services
from the Social Security Administration have different needs and expectations. An active senior has different needs than a homebound senior. Within the US Department of Veterans Affairs, veterans of World War II have much different needs than Iraq or Afghanistan veterans based on their changing demographics and behaviors. Services for millennials who are applying for student loans require a different technology strategy than providing information to seniors who may not use technology at all.

**What are the highest valued services provided by the agency?**
To prioritize limited resources, it is important for you to focus on the highest value services. The importance may be determined by the impact the service has on the customer, the urgency of the service when needed, impact on the citizens’ life, consumer or business value, and/or political sensitivity or risk and stakeholder complexity.

The method used to determine high value will be different for every agency since each agency has different customers and stakeholders. If, for example, you have a service that is receiving Congressional or Government Accountability Office (GAO) attention, it may be wise to include it as a high value service. In addition, GAO releases a report each year that identifies the riskiest services or areas across government. [4] Those areas are also important to consider.

Consider the following areas:
- Services where a significant proportion of the agency’s budget is spent
- Services used by many citizens
- Services with low customer satisfaction scores
- Services receiving media attention for lack of performance
- Services with high non-compliance

**What data are available in the agency to better understand the customers’ experience and interactions?**
There are many sources of data available to assess the customer’s interactions and feedback. Analyze the following:
- Web analytics (e.g., click throughs, abandonment, time on page, search terms),
- Contact center operational data (e.g., volumes, abandon rates, reason for contact, occupancy, service levels)
- Contact center quality results
- Voice of customer data (including social media and customer feedback)
- Customer satisfaction data
- Any previous customer research data
- Employee insights about behavior and feedback
- Unstructured customer feedback from social media and web chats
- Live service call interactions, as well as call recordings
- Screen captures that provide insights for how customers navigate your website
Leverage the following data, if available:
- GSA Google Analytics (Analytics.USA.gov) for website traffic and performance data
- Internal agency performance data that has been collected and reported to the Office of Management and Budget
- Data available through your Performance Improvement Office

For large Departments with many Bureaus or Agencies that serve the same customers, bringing all the customer data together can be very informative. Agencies tend to work in silos, which restricts the agency from fully understanding the customers’ end-to-end experience. Bringing together the customer data enables the agency to “tell the story” for specific customer segments. An analysis of the customer data should result in a better understanding of where improvements can be prioritized and acted upon.

Ask the following questions to understand how your customers are using your various delivery channels:
- How many customers are accessing your services by each touchpoint/channel?
- What is the customer satisfaction by touchpoint/channel?
- What are the most popular reasons for contact by touchpoint/channel?
- What content is accessed most frequently through self-service “Frequently Asked Questions” (FAQs)?
- What are the customer demographics by touchpoint/channel?
- What percent of customers access your mobile website and/or apps?

What data are available to assess the cost and satisfaction with internal services provided within the Agency?
Internal services provided within your agency have relevance in the overall customer experience provided.

You should understand and assess the following internal services at a minimum:
- Human resource processes
- Information technology
- Procurement

If you are a Chief Information Officer, Chief Human Capital Officer, or Chief Acquisition Officer and trying to improve the services your organization provides internally, understanding your cost to serve and the customers’ experience and satisfaction will be necessary to baseline your services also.

As the government implements Technology Business Management (TBM), it will provide the costs necessary to make data driven decisions around smart IT investments. TBM provides a standard way to categorize IT costs, technologies, resources, applications, and services.
Develop a baseline understanding of the current experience

By aggregating customer-related data together across your department or agency you can create an initial baseline understanding of the customer’s experience. To complete the baseline and truly understand the full breadth and depth of the current experience, you will need to conduct interviews and/or observe customer behaviors (e.g., ethnographic research) as well. To ensure an accurate baseline, a year is sometimes necessary. The objective is to reveal the story both data and interviews are telling you and identify any gaps and pain points in the experience.

It may require you to collect data from various points within the agency unless there is a central organization that captures all customer data.

Understand what matters to your customers

Once you know who your customers are within the highest valued services, it is important to understand what matters to your customers. What matters to patients and their families when obtaining medical advice may be different than what matters to the public when accessing national parks or trying to determine eligibility for benefits. Consider the following:

1. Quality of the product (e.g., passport or green card)
2. Timeliness of the service
3. Empathy of the agents or in-person service provider
4. Consistency of the information across channels
5. Customer support such as ease of use, transparency, knowledge, courtesy, and speed

Case Study: Find out what matters and measure it: US Department of Education, Federal Student Aid

In 2010, the Department of Education’s Federal Student Aid program wanted to learn “what matters” to the neediest students. Instead of using long surveys, complex statistical models, or specialized skills, the FSA program started where its audience was: social media. By creating a presence on Facebook and Twitter, FSA connected with students in the way most natural to them. Basic Google text analytics helped to identify the application and repayment journeys as important - and in need of simplification. This relatively straightforward analysis showed FSA what truly mattered for accomplishing its mission, without requiring a large investment. [5]

Case Study: US Department of Veterans Affairs

The VA developed a central measurement system that provides insights to all teams undertaking CX efforts. An objective, centralized CX organization (which does not itself deliver any services to customers) maintains the system, and external support ensures it is statistically relevant and methodically sound. As a result, VA has a robust CX measurement system that serves the entire organization and, ultimately, the people who matter most to VA. [5]
Understand the entire experience, from start to finish

Once the most important journeys are determined, to improve the overall CX, you need to understand the perception that the customer has at the end or completion of a transaction (e.g., when the service is delivered, when the answer is delivered, when the information is accessed, etc.). This transaction may have used many channels: website, virtual agent, email, or phone conversation with a customer service rep (CSR). When assessing the overall experience your citizens/customers are having with your program, service or agency, it is possible to have a good experience in one channel but, in the end, have a bad perception of the overall experience based on a different aspect of the total journey.

The following will help guide through the discovery process:

- Are users starting in one channel and ending in another?
- How are they coming to you – mail, walk-in, phone, web?
- Use HCD tools such as ethnographic research, personas, journey maps, process maps, or other tools to understand the current experience of the most important journeys/tasks/interactions.
- Understand that the entire experience may include other agencies. Reach out to collaborate and try to improve the entire process.

What is the vision of the experience the agency wants to deliver?

Most agencies have an experience that they aspire to deliver and values that are tied to their brand. These values could be providing a fair and equitable process when evaluating a request for a service or benefit; ability to protect the privacy and security of your personal information; transparency in data and process; ability for the public to know where their transaction is in the process; timeliness; etc.

- What does your agency stand for now and in the future? Transparency? Efficiency? Trustworthiness?
- Is the senior leadership committed to these customer values?
- Does the culture reflect these customer-centric values?
- Are these values communicated throughout the agency?

Case Study: US Department of State, Bureau of Consular Affairs

At the Bureau of Consular Affairs, a shared purpose is reflected in the rallying cry, “No missed trips!” This creates a shared purpose within the Department of State of ensuring people have the required paperwork to make the trips and helping people to arrive safely and expeditiously to their destination. It focuses the organization on what matters to its customers and empowers employees to take action aligned with the end goal, not just with their assignment or task in the moment. [6]

Is CX one of the top three priorities of the Agency?
Before going any further, you need to determine if the agency’s leadership is onboard with CX as a major priority. Depending on your role within the agency, if the Secretary or Administrator is not committed to improving CX, be prepared for either an uphill battle or to initiate a grassroots movement of those who are as committed as you are. Questions to ask include:

- Are there champions of CX who understand the discipline and benefits?
- Do you have any agency leadership who are advocates for CX?
- Do you have a single department/office that understands the customer’s entire experience and is responsible and accountable for the customers’ experience?

**Play 2: What is the Agency’s Culture and Appetite for Change?**

With a clear understanding of the agency’s current environment, it is important to understand whether the leadership within the agency has an appetite for incremental change and improvement of services. Federal leaders face challenges that complicate their ability to deliver an outstanding customer experience. They have broad mission mandates, uncertain budget environments, limited workers skilled in digital services, technology and the disciplines of agile development, and customer experience. The situation is further complicated by scrutiny from Congress, media, and various oversight bodies, and limited procurement options.

The role you have within your agency and your authority to change the culture will impact the strategy you pursue. Regardless, identify what you can change and begin improving what you can. If the Secretary or Administrator of the department or agency is on board with improving service delivery as a priority, work within the agency’s structure to align the leadership on customer values, priorities and commitments. If he/she is not on board with improving government services, create initiatives within your program and use every opportunity to communicate the results and impact to customers.

**Checklist: Determining the Agency’s Appetite for Change**

- Is CX one of the top three priorities of the agency?
- Does your leadership embrace the concept of CX?
- Does your leadership understand CX?
- Do your leaders understand the importance of CX?
- Do your leaders understand the benefits and risks of taking on CX?
- Does your leadership understand that both internal and external CX are important?
- Do you have a customer-centric culture?

**Play 3: Build a Customer-Centric Culture Across the Organization**

Having a customer-centric culture is the core of being able to drive the changes or transformations needed to improve customer experience. Most federal agencies have a specific
culture which has been influenced by the age of the department or agency, the leadership’s values over time, the stability and consistency of the leadership over time, and the vision and mission of the department or agency. Many agencies have a risk averse culture and no urgency or desire to make the necessary changes to improve the customer experience. Improvements can occur in small pockets, but full-scale transformation does not happen without making it a priority from the administration and aligned through the agency leadership. The following are needed to enable a customer-centric culture.

**CX is an agency priority with executive leadership.**

1. Make service and customer/citizen experience one of the top three priorities of the agency.
2. Revisit the mission statement to align it to the needs of the public and drive goals and initiatives throughout the agency.
3. Create a unifying vision that all employees can rally around.
4. Create an organization that ensures that the leadership across the Department is aligned on the customer values; collects customer data and assesses the experience the public is having when accessing their services; manage the voice of the customer and voice of the employee program.
5. Ensure that every person in the organization has an element in their performance plan that addresses customer/citizen service. While this can be tricky, continue to review the results to eliminate gaming or chasing numbers.

**Employee engagement is an important focus for all executives.**

1. Focus on employee empowerment and engagement, which begins with recruiting talent, continues in the hiring process, onboarding, continuous training and professional development, and performance management.
2. Hire people with the customer service attitude. For example, Southwest Airlines says their mission is to provide good service. They just happen to fly airplanes. They hire for attitude and train for skills.
3. Reward and recognize employees for providing excellent customer service and experiences.
4. Provide employees with an avenue to provide input into how to improve CX.

**The performance management and budget process should use CX as a key factor in decision making.**

1. Create program targets and goals that are reasonable and attainable to drive improvements to customer or citizen service and/or experience.
2. Determine the actions to achieve the program targets.
3. Ensure that performance plans include incentives that are aligned with the customer outcomes and experience for everyone in the organization.
4. Measure and monitor the target key performance indicators (KPI’s) on a quarterly basis (at a minimum) in conjunction with budget and resource decisions.
5. Establish targets for internal customer experience as well.

**Like-minded CX evangelists can be leveraged to shift the culture.**

1. Identify those within the agency that believe in CX, including leadership and people in the field or regions.
2. Bring the CX evangelists together to create a plan for improvements.

**Checklist: Creating a Customer-Centric Culture**

- Leadership commitment to customers
- Stated priority in agency goals
- Everyone in organization understands customer values
- Desired customer experience is stated and measured
- Democratize data to provide access to employees
- Employees have a voice, are rewarded, etc.

**Case Study: Environmental Protection Agency**

In 2016, the Environmental Protection Agency’s (EPA) Office of Environmental Information/Chief Information Office (OEI) established an internal-facing Information Technology/Information Management (IT/IM) Customer Experience (CX) program. After a successful year of practicing CX on “family”, OEI decided to expand CX beyond IT/IM. As a first step, OEI started an agency-wide, “multi-disciplinary” CX Community of Practice (CoP). The goals for the CoP are:

- To evangelize and expand CX beyond IT/IM.
- Provide participants with the skills and knowledge to take CX principles, tools and techniques back to their organizations to improve their customer’s experience.
- To promote a culture of good customer experience across EPA.
- To share and/or develop best practices in creating and implementing inward and external-facing customer experience programs.
- To collaborate on shared CX challenges and develop innovative and extensible solutions.
- To develop an Agency-wide cadre of customer experience champions. [7]

**Play 4: Create a Customer Strategy that Identifies the Service Gaps and How They Will Be Filled to Meet the Customer’s Expectation**

A customer strategy is a blueprint that articulates the customer experience vision and the roadmap for how to achieve that vision. The CX strategy needs buy-in from the organization’s highest levels across the agency and should articulate the priorities and a roadmap to achieve the customer vision and experience. The agency’s key executives should be empowered to implement the strategy and be held accountable for results. The CX strategy should build a customer-centric culture and embed customer-first thinking into the organization’s DNA. If your
agency has a Chief Customer Experience Officer (CCXO) or a Chief Customer Officer (CCO), the CCXO/CCO is a key leader in defining the CX strategy, along with other agency officials. See Play 5 for suggestions on implementing a CCXO/CCO in your agency.

The data review should help to identify the service gaps. The data could include the customer satisfaction data, performance data and analytics.

Checklist: CX Strategy
- Define the authorities of the Chief Citizen Experience Office (CCXO) and the CX governance.
- Define the agency’s customer-centric principles and core values.
- Articulate a clear understanding of your customers and their current experiences.
- Develop components, goals, timelines, outcomes, and measurements of your CX strategy.
- Describe a process and procedures that will be used to engage employees continuously.
- Develop a roadmap for achieving the experience you want to provide to customers.
- Describe (and develop if one does not exist) a Voice of the Customer Program.

Play 5: Design a Single Organization That Focuses on the Customer (if needed)

Some federal agencies have established a central office and role for customer experience within their agencies. For example, the US Department of Veterans Affairs established a Veteran Experience Officer, the General Services Administration has a Chief Customer Officer, and the US Census Bureau has a Chief Customer Experience Officer. Regardless of the titles, CCXOs/CCOs align with agency officials on the customer values and unite the department or agency to deliver one experience to their customers. They are the architects of customer-driven growth, improvements, and customer retention within your agency. They are change agents and advocates for the customers.

The CCXO/CCO role is defined differently in private sector companies, depending on the focus and their internal management structure. Examples include: Senior Vice President of Member (or Customer) Experience, Vice President of Customer Experience and Trust, Chief Donor Officer, or Chief Patient Experience Officer.

Specifically, a CCXO/CCO is responsible for:
1. Driving change while uniting the organization and working with program and staff offices.
2. Overseeing the voice of the customer (VoC) program, including customer surveys, capturing the survey data, and driving actions to address pain points.
3. Overseeing the creation of the customer strategy.
4. Overseeing the performance management system to determine success.
5. Communicating the customer values and successes to the organization.
6. Holding the business line leaders accountable for improving customers’ experiences. [8]

Play 6: Design the Experience of the Future

Design thinking can be defined as a human-centered approach to innovation that draws from the designer’s toolkit to integrate the needs of people, the possibilities of technology and the requirements for business success. Design thinking includes customers in the design process from the beginning through the development, testing and deployment of a product. This ensures that you get feedback throughout the process. This also minimizes spending too much on development going in the wrong direction. Designing services should be from the outside in – not the inside out. Technological advancements need to be included as you identify possible solutions to the problem.

Service design processes such as journey mapping the future state can help visualize the experience. When designing the future experience, think about the organization’s brand and values that you want to design into the process. For example, is it more important that the experience is based on trust, responsiveness, transparency, etc.? As you design the experience keep in mind how you will measure it.

As you work through the design phase, consider creating a minimally viable product (MVP) that can be used to test your hypothesis along the way. Pilots and prototypes are also useful methods of building services and experimenting along the way. Testing can be done with those who are early adopters, as well those who you would not think would use your service.

Be sure to design the security and accessibility into the system or service from the beginning. Retrofitting those capabilities always costs more to do after the fact.

For information on how to build a service using agile and iterative practices, see Play #4 of the Digital Services Playbook at https://playbook.cio.gov/#play4. The Digital Services Playbook [9] lays out the following plays which can be extremely insightful as you design and develop a new service:

Play 1: Understand what people need
Play 2: Address the whole experience, from start to finish
Play 3: Make it simple and intuitive
Play 4: Build the service using agile and iterative practices
Play 5: Structure budgets and contracts for delivery
Play 6: Assign one leader and hold them accountable
Play 7: Bring in experienced teams
Play 8: Choose a modern technology stack
Play 9: Deploy in a flexible hosting environment
Play 10: Automate testing and deployments
Play 11: Manage security and privacy through reusable processes
Play 12: Use data to drive decisions
Play 13: Default to open

Another helpful collection of tools available to assist you in bringing human-centered design principles into designing future experiences are the 18f Method Cards, available at https://methods.18f.gov/. [10]

Play 7: Develop the Business Case for Improving CX

In these times of tight budgets, it is important to document the benefits, risks, and costs of all new initiatives. Some CX initiatives may require some upfront investment, with the potential to save valuable resources in the long-term. There are many low-cost improvements that can be made with less investment. Some examples of low to no-cost improvements could be improvements to the interactive voice response (IVR) with improvements to content based on a review of data (including contact center call data) making changes to reset customer/citizen expectations.

Customer experience efforts could require investments in analysis, training, process improvements, and technology. While it can be perceived as further burden on an already heavy mission and as a costly endeavor in tight budget times, building the business case for executives can identify cost savings or freeing resources for mission activities. For example, consolidating websites or contact centers can have upfront costs but integrate the customer experience and reduce the cost of managing individual contracts and services.

Checklist: Develop a Business Case
- Determine the baseline costs and benefits of the agency's service.
- Determine how CX improvements are expected to impact the system
- Estimate the cost of the investment.
- Determine when the investment will be paid for by the savings.

Play 8: Measure Customer Experiences

It is critical that customer experiences be measured. Metrics tell the full story of customers' experiences. The data derived from the results will drive customer experience initiatives, inform your customer experience strategy, continually improve your customer understanding, and inform you on how well the experiences you design (Play 6) are resonating with customers. Measurement also informs decisions and prioritization.
Customer experience metrics should be specifically tied to your agency goals, and incorporated into strategic plan objectives. They should be relevant, sensitive to changes in performance, and practical in use.

There are several ways to determine which customer experience metrics are appropriate for your program and matter most to your customer. They can be described through descriptive, perception, and outcome metrics. Another way is to determine internal and external metrics that tell a holistic story of how your agency performs to its customer-oriented goals.

Examples of internal or operational metrics:
- Website analytics: number of visitors, mobile/desktop access percentages, time spent on page
- Digital transaction analytics: task completion, cost/transaction, digital uptake (proportion of tasks completed online), session duration, bounce rates, page views, search queries, click through rates.
- Contact center metrics: contact volumes, interactive voice response (IVR) data, first contact resolution, available time, abandon rates, service levels, quality scores, response times, interaction types.

Examples of external, customer-provided metrics:
- Overall satisfaction: Net Promoter Score, customer effort, customer index score
- Ratings of service across touchpoints: experience surveys by touchpoint
- Customer ratings: timeliness of service, ease of use, expectations versus actual experiences, likelihood to return or recommend

For further information on a proposed measurement framework and other examples of customer-oriented metrics, see the ACT-IAC Customer Experience Metrics White Paper at https://www.actiac.org/customer-experience-metrics-white-paper.

The following checklist of example metrics are broken down by categories and provide examples you may think about in developing CX metrics for your program.

**Checklist: Performance Measures**

**Awareness**
- What percentage of the customers asked are aware of the service?
- Does the percentage of people who are aware of your service increase change over time?

**Efficiency**
- How many days does it take to process an application?
- How long does it take to complete the form, survey, or census?
How long does it take to schedule an appointment for an in person service?

What percentage of decisions are appealed?

How many days does it take to process an appeal?

Do your customers perceive your service as a good value for money?

Effectiveness

What percentage of your customers return?

Did the citizen receive consistent answers across different channels?

Value

Was it worth the time and money to apply for a service (e.g., federal student loan?)

Ease of Use

How easy was it to complete the form?

Did you have to pay a third party to complete the paperwork needed to acquire the service?

Adoption

What percentage of the possible customers use your service? For example, if you are providing a shared service to other agencies, what is the possible number of customers?

How many use your service?

Customer Satisfaction

How satisfied was the customer with the service provided?

Suggestions:

● Build in time for ad hoc evaluations; quickly recognize when something is not working

● The process for monitoring progress will be established within the agency at all levels and possibly with the Office of Management and Budget

● Celebrate successes and incremental improvements.

● Recognize that in times of rapid change, there are always new expectations which require changes to target performance metrics.

● Routinely benchmark your program with other government programs to evaluate different approaches, results, and gain new insights and ideas.

● Benchmark with private sector companies and leverage their expertise and knowledge.

VI. Legislation Related to CX and Digital Services

The following is a listing of legislation and Office of Management and Budget (OMB) memoranda related to CX:
January 10, 2018 - P.L. 115-114, Connected Government Act, requires federal agencies to make any new or redesigned websites 180 days after enactment of the bill that are publicly available to be mobile friendly. As described in the law, the term ‘mobile friendly’ means, with respect to a website, that the website is configured in such a way that the website may be navigated, viewed, and accessed on a smartphone, tablet computer, or similar mobile device.” Not later than 18 months after enactment of the Act, the General Services Administration (GSA) and the Office of Management and Budget (OMB) will report progress in implementing the Act.

January 4, 2011—GPRA Modernization Act of 2010 (GPRAMA)

June 2011—OMB M-11-26 – Fast-Track Process for Collecting Service Delivery Feedback Under the Paperwork Reduction Act

June 2011—OMB Memo M-11-24 – Implementing Executive Order 13571 on Streamlining Service Delivery and Improving Customer Service

April 2011—Executive Order 13571 – Streamlining Service Delivery and Improving Customer Service

January 2011—GPRA Modernization Act of 2010 (GPRAMA)

April 2010—Social Media, Web-Based Interactive Technologies, and the Paperwork Reduction Act

April 7, 2010—Social Media, Web-Based Interactive Technologies, and the Paperwork Reduction Act
Clarifies that the Paperwork Reduction Act of 1995 (the PRA) does not apply to many uses of social media and similar technologies, clearing the way for agencies to use social media and web-based interactive technologies to serve and engage with the public online.


December 8, 2009—Open Government Directive
Laid the groundwork for a transparent, participatory and collaborative government by: Publishing Government Information Online; Improving the Quality of Government Information; Creating and Institutionalizing a Culture of Open Government; Creating an Enabling Policy Framework for Open Government.
Open Government Plan:
● **Transparency**: describe steps the agency will take to conduct its work more openly and publish its information online
• **Participation**: promote opportunities for the public to participate throughout the decision-making process.
• **Collaboration**: further cooperation with other Federal and non-Federal governmental agencies, the public, and nonprofit and private entities in fulfilling the agency’s core mission activities

There are several pieces of proposed legislation, to include:

• **Government Customer Service Accountability and Improvement Act of 2018**. The Government Customer Service Accountability and Improvement Act was introduced by Rep. Barry Loudermilk (R-GA), on March 22, 2018 and would establish customer service standards in government. To read the full bill, click here.
• **Integrated Digital Experience Act (IDEA)** was introduced by Rep. Ro Khanna (D-CA) on May 10, 2018, and by Senator Rob Portman (R-OH) on June 12, 2018. For a summary of the IDEA, click here.

**VII. References**

3. GAO Report to Congressional Committees, High Risk Series, Progress on Many High-Risk Areas, While Substantial Efforts Needed on Others, February 2017
4. Improving the customer experience to achieve government-agency goals, McKinsey & Company, Tony D’Emidio, David Malfara, and Kevin Nehr, February 2017
6. Environmental Protection Agency Input, January 2017
7. Chief Customer Officer 2.0 - How to Build Your Customer-Driven Growth Engine, Jeanne
Bliss, June 2015


VIII. Additional Resources


- Digital Government Strategy – Building a 21st Century Platform to Better Serve the American People

- June 15, 2011—OMB M-11-26 – Fast-Track Process for Collecting Service Delivery Feedback Under the Paperwork Reduction Act Established the Fast-Track PRA review, reducing the time required for agencies to get clearance to conduct customer surveys from several months to several weeks.

- June 2011—OMB Memo M-11-24 – Implementing Executive Order 13571 on Streamlining Service Delivery and Improving Customer Service Requires that agencies develop customer service standards that are “understandable to the public, easily accessible at the point of service and on the Internet, and measurable (where
appropriate); where possible, standards should include targets for speed, quality/accuracy, and satisfaction.

- **Improve Customer Service Delivery**
  - Publish Customer Service Plans
  - OMB Establish a Customer Service Task Force

- **Advance Customer Service through Innovative Technology**
  - Each agency establish one “signature initiative” that uses technology to improve the customer experience

- **Solicit Timely Customer Feedback**
  - Office of Information and Regulatory Affairs (OIRA) create a Paperwork Reduction Act “Fast Track” review process and Provide Guidance on Customer Feedback Options

- **Improve Online Services**
  - Freeze Establishment of New Federal Executive Branch Domains
  - Update .Gov Domain Policy and Guidelines
  - Eliminate Duplicative and Outdated Websites

- **April 27, 2011—Executive Order 13571 – Streamlining Service Delivery and Improving Customer Service** - Requires agencies to develop, in consultation with the Office of Management and Budget (OMB), a Customer Service Plan to address how the agency will streamline service delivery and improve customer experience.

Requirements include:

- Establishing one major initiative (signature initiative) that will use technology to improve the customer experience;
- Establishing mechanisms to solicit customer feedback on Government services and using such feedback regularly to make service improvements;
- Setting clear customer service standards and expectations, including, where appropriate, performance goals for customer service required by the GPRA (Government Performance and Results) Modernization Act of 2010 (Public Law 111-352);
- Improving the customer experience by adopting proven customer service best practices and coordinating across service channels (such as online, phone, in-person, and mail services);
- Streamlining agency processes to reduce costs and accelerate delivery, while reducing the need for customer calls and inquiries; and
- Identifying ways to use innovative technologies to accomplish the customer service activities above, thereby lowering costs, decreasing service delivery times, and improving the customer experience.
- Requires agencies to post customer service metrics and best practices online.

- **GSA supported OMB on the CAP goal on customer experience and created a CX toolkit as**
part of that effort. It contains links to CX resources in the areas of Strategy, Governance, Culture, Customer Understanding, Design, Measurement and Digital Services. The toolkit includes links to background information on the history of CX and customer service in the federal government, federal guidelines, and examples of agency plans and strategies. https://digital.gov/resources/customer-experience-toolkit/


- Jeanne Bliss, author of Chief Customer Officer 2.0 has many resources, one of which is a blog and podcast as well as a book as previously mentioned.
IX. Authors and Affiliations

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