Harnessing Life Events to Connect Citizens and Services: An Innovator’s Guide

ACT-IAC Institute for Innovation

Date Released: December, 2015

SYNOPSIS
Increasingly, governments—federal, state, local and tribal—are focused on designing citizen-centered services that deliver value to customers and meet or exceed expectations. In support of these efforts, ACT-IAC’s Institute for Innovation sponsored this project to help agencies become more citizen-centric by leveraging a life event framework to transform customer service, advance service delivery and exceed customer expectations. In this Innovation Paper, we report our findings and recommend how to:

- Improve customer service through collaboration and sharing;
- Improve information-sharing to streamline and monitor service; and
- Deliver meaningful and measurable value to the public.
American Council for Technology-Industry Advisory Council (ACT-IAC)

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ACT-IAC Institute for Innovation

This paper was prepared by the ACT-IAC Institute for Innovation. The Institute is chartered to promote innovation in the delivery of government services and operations. It develops and delivers high-quality strategic advice that reflects cross-industry recommendations based on the consensus of experts from ACT-IAC’s member companies and government advisors and liaisons.

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Further Information

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Executive Summary

A Revolution in Customer Service

Across diverse sectors of the economy, a customer service revolution is underway. New thinking about what it takes to succeed in hypercompetitive markets have combined with innovations in technology, management science and entrepreneurial culture. Fundamentally new customer-centric methods are emerging that reframe how, when, where and by what means products and services are delivered to customers. Perhaps also as extraordinary is how quickly customers have changed their perceptions about what constitutes acceptable customer service.

Leaders in government have not ignored this revolution. To the contrary, government leaders have begun reframing public service, and adopting approaches that place the customer at the center of every interaction. By doing so, agencies can better understand the needs of their customers and translate those needs into targeted, effective service-delivery improvements.

Moreover, governments are working to simplify common customer interactions such as paying taxes, obtaining a birth certificate, getting a business license or applying for government benefits. Improvements include such things as streamlining data collection, or eliminating confusing or unnecessary steps or processes.

Governments are also leveraging advances in data analytics, broadband communications and digital technologies to learn more about what customers want and need. These technologies facilitate real-time interactions that bridge both digital and physical services, to better meet customer needs and exceed expectations.

However, the biggest impact on customer experience may come from agencies forming communities of service, bundling services from multiple agencies to meet a customer’s needs in a single transaction, instead of forcing customers to transact services one agency at a time.

Customer-Facing Change Takes Time and Disciplined Commitment

Managing the customer-facing change in government will take time and disciplined commitment. We believe that transforming government customer service will, by necessity, span changes of organizational leadership and administrations.

Our research shows that the commitment to transform customer service in government is real and enduring. So are higher expectations by customers. New laws, Executive Orders,
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Management Agendas and other initiatives attest to action and urgency around customer service to individuals and businesses as both constituents and customers.

This Innovation Paper -- *Harnessing Life Events to Connect Citizens and Services: An Innovator’s Guide* -- is published by the ACT-IAC Institute for Innovation. Our research and recommendations focus explicitly on innovative, customer-centric and value-driven approaches to public service prompted by customer *Life Events*. Key concepts include:

- Build trust in government services by making services more citizen-centric;
- Achieve savings by eliminating duplicative and overlapping services;
- Deliver a more holistic set of services to address the “whole” customer;
- Create a more agile and adaptive service platform to address exigent needs; and
- Create 21st century virtual service platforms offering better value and quality of service to enrich our future.

These findings and recommendations align the most promising innovations in customer service with the aims and objectives of public service. It also builds on the principles established in the 2013 ACT-IAC *Smart Lean Government Practical Guide*. 
Introduction

“*The public deserves competent, efficient, and responsive service from the Federal Government.*”

The Challenge

Government agencies are under intensifying pressure to improve the delivery of public services, and the customer experiences that define them. Whether it’s paying taxes, obtaining an export license or passport, or applying for government benefits, the public expects government services to be well-designed, efficient, and comparable to the services they receive from leading private sector organizations.

Customer Expectations Are Changing — Fast

The rapid pace of change in customers’ expectations is not surprising when one considers how private sector companies such as Google, Amazon, and Uber have revolutionized perceptions of value and ease of service and redefined the standard for customer experience. Competition is undeniably accelerating all this, as is the proliferation of digital technologies, advanced analytical tools, mobile communications, innovation, and an insatiable penchant for market agility. Across various economic sectors, market-leading companies have learned that just giving customers what they say they want is no longer enough. Market leaders study their customers, analyze their behaviors and adjust their market operations and offerings specifically to suit them. These leading firms also make it easier for customers to interact with them at any time, from anywhere, and over any channel —online, over the phone and in person. The best among them provide customers with more choices and greater value at competitive prices. Public sector customers and government officials are taking notice.

Turning Challenges Into Opportunities: A President’s Call to Action

In 2011, President Obama issued Executive Order 13571 “Streamlining Service Delivery and Improving Customer Service” in which the White House directed government-wide improvements to government service delivery, customer service and customer experience.

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Moreover, in the President’s FY-2015 Budget, the White House updated the President’s Management Agenda\(^2\) to include a new Cross-Agency Priority Goal to “Deliver a World-class Customer Service Experience for Citizens and Businesses.” The customer service goal has three core objectives:

1. **Streamline transactions** – Identify transactions with a high impact on a significant number of citizens and streamline processes, better meet customer needs, and use performance measures to improve services.

2. **Develop standards for high impact services** – Understand customer expectations and service needs, and continually evaluate and improve their effectiveness in meeting those needs.

3. **Utilize technology to improve the customer experience** – Make it faster and easier for individuals and businesses to complete transactions with government online.

Notably, this goal directs agencies to keep pace with and even exceed customer expectations. It also addresses the need to improve services to individuals as well as private and governmental entities to which agencies directly provide significant services.

**When Government Service Is About You**

Increasingly, governments—federal, state, local and tribal—are focused on designing and delivering citizen-centered services that add value and meet or exceed customer expectations. In support of these efforts, ACT-IAC’s Institute for Innovation sponsored this project to help agencies to become more citizen-centric by leveraging a *life event* framework to transform customer service, advance service delivery and exceed customer expectations. In this Innovation Paper, we report our findings and recommend how to:

- Improve customer service through collaboration and sharing;
- Improve information sharing to streamline and monitor service; and
- Deliver meaningful and measurable value to the public.

A Focus on Life Events is a Focus on the Customer

Each of us encounters life events. These notable waypoints shape our experiences, drive behaviors and influence the standard and quality of our lives. To each of these life events, the private and public sectors deliver key and essential services – although in very different ways.

Customer-Centric Service Design Puts the Customer First

Underpinning the customer revolution is outside-in or customer-centric service design. This approach ensures the interests of the customer take precedence. Customer requirements and preferences are considered integral to service design and delivery, and are prioritized across the entire service organization. At the heart of outside-in thinking is a commitment to manage the customer experience and ensure customer concerns are considered in every decision, including what services to offer and the makeup of those services. Outside-in cares most about successful customer outcomes.

Program-Centric Service Design Puts Agency Processes First

Governments have used life events as prompts for public services for years. Today, the Federal Emergency Management Agency (FEMA) coordinates disaster planning, response and recovery with a broad community of service that includes federal, state and local governments as well as non-profits and private citizens. FEMA serves as a tested example how an agency can organize and scale to respond rapidly to a variety of emergency life events. Yet to obtain many government services, customers must still navigate a daunting bureaucracy, following outdated processes that are often time-consuming, mistake prone and tedious.

Our research found the root problem is largely attributable to archaic, segmented and program-centric service designs.
Inside-out or program-centric service design is widespread across government today, and relies on the core competencies of the agency to create vision, drive change, develop services and stimulate innovation. The “we are unique” mindset is prevalent in these organizations. Leaders often resist the notion that they can benefit from the outside experts, other government agencies or private sector firms due to the agencies “uniqueness” as well as a fear that change or external dependencies will trigger failures in service.
Look Outside In: Understand the Customer Perspective

Orienting services around the customer relies upon a firm understanding of customers. What services or information do they need? When do they need it? How quickly do they need it? What information must the customer provide to get the service? Does your agency or another part of government already have that information? Where else can the customer get related information and services?

![Figure 1: Life Events Generate Public Needs](image)

Today, the burden is on customers to figure out what services are available, and how to access them. For example, when someone loses their independence and can no longer care for themselves, a family member must navigate complex systems, rules, and applications on their behalf. Trying to discover the benefits a person is eligible for, such as Medicare, Medicaid, or disability benefits, across healthcare, social service and financial systems, is difficult even when the family is not emotionally strained. The challenge is further complicated by the myriad of service providers: hospitals, rehabilitation centers, nursing homes, home health care nurses, private physicians, financial institutions, and others. Were these organizations to integrate services around a life event by sharing information, connecting services, and proactively supporting the family at the first interaction, the burden would be dramatically reduced.

The federal government stands to gain public trust by understanding the customer perspective. By offering easier access to simplified and efficient services that address customer needs, government demonstrates a commitment to customer-centric service. This builds confidence that government is there to serve and support.

Developing a Culture of Service

Many companies have found that when they support and empower their employees, customer satisfaction increases. VA has adopted this approach with its MyVA transformation initiative, which is aimed at providing a seamless, unified Veteran Experience across the entire organization and throughout the country. VA recognizes that to improve the Veteran's experience, it also needs to improve the employee experience, and it has targeted both areas as high priorities.
Finally, common life events give agencies opportunities to collaborate and share, which leads to operational efficiency.

The following recommendations are intended to help executives, managers, and implementers understand how to institutionalize a citizen-centric focus based on life events.

**Develop a Customer-Centric View**

Organizations that excel at customer service develop a culture in which every employee seeks to delight the customer. Simply put: they put the customer first. The bureaucratic and policy barriers that exist in government can make it seem impossible to put the customer first, but organizations can overcome these challenges by taking proven steps to refocus workers on delighting the customer:

- Establish executive commitment to, and lasting support for, customer service;
- Develop strategies and plans to foster customer-centered culture change;
- Identify your customers, their needs, and the life events that create those needs;
- Hire workers that want to help customers, overcome service barriers, and innovate;
- Provide resources to innovate and improve customer experience.

Understanding customers and their needs is the foundation for any effort to improve customer experiences. Once customers are defined, agencies must document customer needs and their journeys to better understand their current experiences, and define the ideal experience want. Personas and customer journey maps are excellent tools to increase customer understanding.

**Figure 2: Personas and Journey Maps**

Personas describe people based upon shared attributes, attitudes, behaviors, and needs. Journey Maps document the customers’ experiences as they navigate the service environment.
Seek Out the Voice of the Customer – Information is Vital

A common mistake organizations make is to presume that they understand their customers, without doing research to confirm that understanding. To develop a true understanding, you must seek out and capture the “voice of the customer.” This process generates a list of customer wants and needs that can be used to develop products or services that satisfy customers.

Develop your understanding through:

- **Research.** Qualitative research seeks to understand what customers think and why. Quantitative research is gleaned through voice of customer programs, usability studies and other user research. Examples include focus groups, customer forums, surveys, and observational studies.

- **Social Media.** Social media channels such as Facebook, Twitter, and online community forums provide a valuable source of insight into customer experiences, attitudes, and beliefs.

- **Operations Data.** Many agencies track, analyze and report data from web metrics (e.g., page views, top tasks, popular search queries) as well as contact center metrics (e.g., common questions, customer sentiment, call recordings, web chat and e-mail transcripts). These data provide insight into which services are accessed, when they are used, who uses them, and the quality of the service provided.

- **Analysis Tools.** Human language technologies enable agencies to glean additional insights regarding sentiment, geographic location, and other characteristics of their target audience, to better understand comments, inform strategies for improving communication and outreach, and address customer concerns.

A multidimensional perspective of what customers value, need and expect can help agencies build better customer touchpoints that simplify transactions and add value to the customer.

Design Positive Customer Experiences

Customers, government, and the public at large can all benefit when services are delivered from a life events perspective. Life events serve as a nexus for a community of service providers to support related needs. For instance, a disaster event might trigger needs related to housing, health, and security. Organizations that collaborate around the disaster can link people to a wide range services, information, and other resources. Customer experience professionals should focus on the following areas to design meaningful solutions.
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- **Reduce customer burden.** With a life events approach, customers gain access to a range of services at their first touchpoint; no longer will they need to figure out what services they’re eligible for, or where to get help.

- **Use the right channel.** Offer services and information via well-known and accessible channels. Choice of channels used should be informed by customer research.

- **Provide value at the first interaction.** Develop tools, resources, and processes that enable government to solve the problem at the first touchpoint.

- **Be proactive.** For example, flood victims may not realize they’re eligible for aid, because they’re busy trying to repair the flood damage and find temporary housing. If agencies proactively reach out to flood victims (as they often do), people can understand all the benefits to which they’re entitled, and recover from the disaster more quickly and with less of a financial burden.

Public-facing agencies exist to help people. Better experiences drive better outcomes for customers, and demonstrate that agencies are effectively executing their mission. Positive customer interactions can also increase employee morale. Most people who work in these citizen-serving government agencies are proud of the agency mission and want to help people. When these employees are able to help customers, they feel better about their work, which in turn cultivates a culture that continuously strives to deliver superior customer experiences.

**Consider the Customer’s Journey**

Life events can drive a variety of customer needs that span programs, agencies, and levels of government. Consider how to recognize and support the full customer journey.

- Engage in communities of service to deliver more public value.
- Map the customer journey and set expectations within a community of service.
- Identify opportunities to streamline service support.
- Leverage the voice of the customer and operational data to identify and prioritize integration efforts.

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Using Data to Improve Service.

Feedback USA ([http://feedback.usa.gov/](http://feedback.usa.gov/)) is a pilot program designed to improve customer citizens’ experience where they interact most with the federal government. Customers applying at Department of State passport agencies and centers and Social Security Administration card centers will now have their opinions heard as they provide quick feedback through a single tap of a kiosk button, and they’ll be able to provide additional feedback through the agency’s website. Agency partners will see this anonymous feedback in real time, so they can act quickly to resolve any issues and improve their service to citizens.
Several agencies are cultivating partnerships to make it easier for customers to apply for benefits or obtain services. For example, VA partners with several agencies, including:

- **Department of Defense.** VA and DOD actively share information about veterans in order to improve service and facilitate the transition from active duty to civilian life.

- **Department of Labor.** VA partners with the Department of Labor to help veterans with job transition activities such as writing resumes, preparing for interviews, etc.

- **Department of Housing and Urban Development.** VA works with HUD on VA-backed mortgages and makes it easier for veterans to qualify for housing assistance benefits.

- **Department of Agriculture.** VA and Agriculture are looking at ways to adapt farm equipment to meet disabled veterans’ needs.

- **Office of Personnel Management.** VBA has simplified the process for a veteran to demonstrate s/he is disabled and qualifies for federal hiring preferences, and they’re working towards incorporating an automatic check of a veteran applicant’s disability into the OPM hiring process so the veteran no longer needs to complete and submit a special form.

- **Social Security Administration.** VBA is collaborating with SSA on a system to identify veterans that are determined to be disabled by VA, so they will then automatically qualify for certain social security disability benefits. (Note that agencies may be governed by different laws, or have different legal definitions of what it means to be disabled.)

- **Business USA.** Business USA worked with the VA to optimize the veteran’s experience, so when someone registers as a veteran-owned business, s/he is seamlessly transitioned to Business USA’s website to register their business. Metrics on usage and bounce rates indicate active usage of this service.
## Table 1: Actions to Better Understand Your Customers

<table>
<thead>
<tr>
<th>Objective</th>
<th>Executives</th>
<th>Managers</th>
<th>Staff</th>
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<tbody>
<tr>
<td><strong>Develop a customer-centric view</strong></td>
<td>▪ Develop strategies and plans to foster customer-centered culture change;</td>
<td>▪ Support and reward employees who take a customer-centric view and include it as a factor in an employee’s annual performance evaluation</td>
<td>▪ Exhibit customer-centric behaviors</td>
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<td>▪ Provide resources to innovate and improve customer experience.</td>
<td>▪ Support employees who attempt to overcome barriers to taking a life events perspective</td>
<td>▪ Look for opportunities to overcome barriers to taking a life events perspective</td>
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<td></td>
<td></td>
<td>▪ Hire workers that want to help customers, overcome service barriers, and innovate</td>
<td>▪ Look for opportunities to continually improve customer experience</td>
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<td></td>
<td></td>
<td>▪ Exhibit customer-centric behaviors</td>
<td>▪ Stay current on voice of the customer data</td>
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<td><strong>Design positive customer experiences</strong></td>
<td>▪ Charter a working group (cross organization within agency, or cross agency) and develop a shared vision and plan for integrating life events focus into your agency’s service offerings</td>
<td>▪ Actively participate in working group and support shared vision and plan</td>
<td>▪ Actively implement and support plan for a positive customer experience and a life-events focus</td>
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<td></td>
<td>▪ Provide support for implementing ideas to realize the vision</td>
<td>▪ Communicate vision and plan with all staff</td>
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<tr>
<td></td>
<td></td>
<td>▪ Demonstrate commitment to share vision and plan</td>
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<tr>
<td><strong>Consider the customer journey</strong></td>
<td>▪ Use the same working group to identify customers across programs and their needs</td>
<td>▪ Engage in communities of service across agencies</td>
<td>▪ Engage in communities of service across agencies</td>
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<td>▪ Provide the resources to collect ongoing input and feedback from customers to capture their evolving needs.</td>
<td>▪ Actively participate in working group to identify customers’ needs across programs (map the customer journey)</td>
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<td>▪ Leverage the voice of the customer and operational data to identify and prioritize integration efforts</td>
<td>▪ Identify opportunities to streamline service support.</td>
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<td></td>
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<td>▪ Help collect customer feedback</td>
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Look Inside Out: Use Life Events to Become Customer-Centric

Understand What the Public Needs From You

Understanding customers and their needs is the foundation for any effort to improve customer experiences. From this foundation, organizations can design services and supporting functions based on Life Event needs. When considering how to improve customer service; managers, analysts, and advisors must consider processes that support a single transaction as well as an expanded series of transactions across programs and organizations. In doing so, organizations can design processes that are focused upon delivering added value while reducing burden to the customer. Only by leveraging design-driven methods described within the Outside-in section, can organizations truly design customer-centered processes.

Determine What Life Events Create Those Needs

Life events can align customer needs with targeted offerings. Consider how each of us encounters life events; these notable markers shape our experiences, drive distinct behaviors and influence the standard and quality of our lives. For example, anticipating the birth of a child, expectant parents may consider buying a new home, a more family-friendly automobile or investment products for college savings. Market leaders such as Apple (technology), USAA (insurance) and Amazon (retail) will anticipate the evolving needs of a family as they experience life events, and trigger an integrated package of products or services designed to meet specific customer needs. These companies continuously study customers scientifically. They consider all customer interactions as opportunities to collect, analyze, and act on. Government has worked to develop similar capabilities. Opportunities surrounding big data projects include customer analytics, real-time service management, and event-based information sharing. These capabilities will serve agencies that wish to understand and be more responsive to customers, particularly within an integrated multiagency service environment.
Connect Your Capabilities within a Community of Service

As the federal government has advanced the digital services agenda, some agencies now offer citizen-centric services online. These digital services are the building blocks for information sharing strategies and a life event orientation. Many organizations leverage these building blocks (e.g., the Social Security Administration’s “my SSA” portal, or the Veterans Affairs e-benefits self-service portal) to provide customers a single location for services. USA.gov has built considerable momentum as a destination for citizens to interact with the government around life events, but a key tenet of a life event approach is the relationships across a life-events ecosystem, including, private sector, non-profit organizations, and citizens. To further enhance a life events focus, there must be Communities of Service that collaborate across a life event ecosystem to drive interconnections based on varying triggers.

As governments and other organizations provide better information and better access, they must ensure planning and resources to provide the required levels of access and information to deliver streamlined services and increase customer satisfaction and quality of life. An organization must assess its service delivery capabilities, technology and human capital resources, and policy awareness to understand its readiness to participate in sharing across a life events ecosystem. Depending on the maturity level of the organization, some agile, iterative process steps, grounded within a Community of Service, must be used to incrementally implement the Life Events focus.

To the extent that an organization adopts a life event orientation, this transforms not only how data is shared but how to align strategies to policies, organization to governance, and architectures to information and infrastructure. Many organizations are leveraging the building blocks of the Life Event Orientation to deliver improved customer experience, e.g., Public sector agencies with customer experience programs have started to drive a life event orientation.
The State of Utah embarked on a path to enable information sharing across an ecosystem of state, local, industry, and citizen services and capability. A contributing factor was the organizing of the Winter Olympic games in Salt Lake City, where the ability to collaborate and communicate with agencies, tourists, first responders, businesses, etc. was a top priority. This led the State to consider an innovative strategy on how to deliver services in an effective, capable, and transparent manner. Their citizen-centric transformation (life event orientation) included:

- **Enterprise Perspective** - A strategic plan with an approach to support the delivery of services via a citizen/Life Events lens.
- **Executive Sponsorship** - The state Governor and his senior leadership team provided the executive and financial support to execute on the plan.
- **Product Management Approach** - Designating Product Managers versus Project Managers, that would focus on citizen services as products.
- **Measure progress transparently and consistently** – Regular measurement to keep the visibility and focus on executing and completing the plans. Deep embodiment of lessons learned, and process improvements.

Utah’s approach incorporated six steps to assess and pave the way for a citizen-centered service orientation, depicted in Figure 4.

**Figure 4: Infuse Life Events Into Planning Processes**

- **Service Delivery Assessment** – All agencies should define and socialize the current service delivery approach, to identify how to improve the overall service delivery model. Agencies should assess their service delivery teams on awareness of their impact on customer life events, and focus on life events to improve their service offerings.

- **Technology Capability Assessment** – Due to the rapidly changing technology landscape, agencies must ensure they’re using technologies appropriate to support service delivery and to store, disseminate and protect agency data in an efficient and responsible manner.
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- **Policy Awareness Assessment** – Agencies should review the policies, inter-agency agreements or MOUs impacting their services, to clarify the scope of their responsibilities to other governmental entities.

- **Human Capital Assessment** – Assess current skillsets and identify areas that may need additional resources, including a champion or sponsor to support their current and expected services. Develop a training and awareness plan; include recommendations to update job and role descriptions, as well as directives and team charter documentation, as needed. Pay attention to those areas where a change from their current model to a life events approach would entail a change in the number or skillset of their resources.

- **Life Events Roadmap Development** – Define the agency’s future state and approach to delivering service. Develop an action plan to guide the agency’s new service approach; create transition plans and milestones.

- **Next Steps Prioritization** – Iteratively prioritize the next steps, factoring in the agency’s overall plan, budget and resource capabilities.

Utah’s approach enabled them to critically assess their internal processes and align work to be more responsive to public needs. Moreover, the process helped them to critically evaluate how State services integrate with other providers to deliver deeper value to the public.

**Exploit Opportunities to Deliver Shared Value**

Agencies are beginning to share information behind the scenes to facilitate life-event related services. For example, the **Department of Education** can automatically verify the income of a student or family applying for federal student aid through an arrangement with the **IRS**. This prevents the student from having to manually enter tax information on their application, simplifying the process, ensuring accuracy and reducing improper payments.

The **Social Security Administration (SSA)** has teamed with the **Centers for Medicare and Medicaid (CMS)** to make it easy for seniors to apply for both Social Security retirement benefits and Medicare on-line. In addition, the SSA website provides tools, calculators and on-line application forms. SSA is working to allow people to download their Social Security Statements so they can share the statements with financial planners and mortgage brokers.

**SSA** has data sharing agreements in place with a multitude of federal, state, and local agencies, as well as some banks and lenders, to facilitate service and ensure proper payments. For example, SSA partners with all **50 states** to issue social security numbers before babies leave the hospital. Referred to as Enumeration at Birth, this has helped SSA
and other agencies verify eligibility for certain services. SSA also has agreements with 2300 prisons to ensure that prisoners are not receiving benefits. Social security identification information is used by banks and mortgage companies to verify that the paperwork someone submits matches their social security records. SSA shares information about people who have died with federal agencies that provide benefits so that the benefits can be stopped or adjusted as appropriate.

Challenges

There are challenges to effectively delivering services in a life event context. Some of the most significant challenges include:

- **Ownership/Accountability** - Determining which agency owns and has ultimate responsibility for the product. The concept of product ownership used in private industry may be important to flesh out here.

- **Inconsistent Definitions** - A standard taxonomy and common definitions must be developed so that information is shared consistently (e.g., VA and SSA have different definitions/rules regarding disability benefits; HUD, USDA, IRS and SSA all have a different legal definition of “household.”). Today, government working groups are actively developing tools that can be used to link communities of service within a life events framework:
  - Standard content models;
  - Information Exchange Standards – through the National Information Exchange Model; and
  - Government-Wide Pattern Library - participants across government are developing this library, to: a) provide designers and developers with tools to deliver high quality government websites, and b) bring consistency to, and improve customer experience of, federal government websites.

- **Trust** – The public must trust the government to keep their information secure. Individuals within agencies must learn to trust each other before they are willing to share information, data, services and systems. Relationships are key to building strong partnerships.

- **Funding** – Government must invest in the infrastructure needed to build these communities of service. If done correctly, initial investments should produce a positive return on investment in the long run.

- **Privacy** – In general, some people have concerns about providing their private, personally identifiable information (PII) to the government. Others may not want data provided for one purpose to be shared with other agencies for a different purpose. These
privacy concerns need to be understood and customers need the ability to choose if and how their information is shared.

- **Identity Management** – Enhanced methods for authentication with government systems are needed to reduce fraud, improve ease of use and allow customization to improve the user experience. Identity helps workers quickly identify available services, determine eligibility, and initiate applications on behalf of the customer.

- **Legislation** - Outdated legislation and regulations such as the Paperwork Reduction Act hamper agencies’ ability to easily gather customer feedback to identify and fix problems.

- **Technology** - Back end and legacy systems must be modernized to improve interoperability and strengthen security.

- **Communication** - Service personnel need to know that there is organizational commitment to solving issues as soon as possible. Leaders need to communicate this commitment within their organizations and provide the resources to empower their people. Workers also need to have information from partner organizations tied to the customer journey. They need to know what related services are available to an applicant, who provides them (federal, state, tribal, local, non-profit, etc.), and how to remove the burden from the applicant by initiating a request for the related service.

- **Data** - Data standards are essential for multi-organization information exchange and coordination of service. Standards also establish data requirements for metrics and measures needed to monitor and improve service delivery. Emerging big data capabilities within organizations will serve as essential tools to collect, harmonize, and analyze agency performance, customer satisfaction and program impact.
### Table 2: Actions to Change How You Serve Customers

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<td>Understand the public needs you satisfy</td>
<td>▪ Establish strategic priority for Life Events in support of the customer experience framework.</td>
<td>▪ Advocate an enterprise perspective by establishing a plan with an approach to support the delivery of citizen services via a Life Events lens.</td>
<td>▪ Document customer journey maps to define shared service opportunities</td>
</tr>
<tr>
<td>▪ Advocate an enterprise perspective by establishing a plan with an approach to support the delivery of citizen services via a Life Events lens.</td>
<td>▪ Assess challenges and constraints – legal, policy, security, technology</td>
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<tr>
<td>Identify the life events that create customer needs</td>
<td>▪ Sponsor customer centric initiatives with Life Events orientation to drive change</td>
<td>▪ Identify transactions for high impact services to citizens</td>
<td>▪ Establish catalog of life events services</td>
</tr>
<tr>
<td>▪ Facilitate resource allocation to support life events orientation</td>
<td>▪ Enable roadmap to define the action plan to prioritize program and process change</td>
<td>▪ Develop standards for services and continually evaluate to improve effectiveness</td>
<td></td>
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<tr>
<td>▪ Designate Product Managers that would focus on life events services as products</td>
<td>▪ Adopt a “product” management focus</td>
<td>▪ Associate programs and services to life events</td>
<td></td>
</tr>
<tr>
<td>Connect your capabilities within a community of service</td>
<td>▪ Establish shared life events priorities across government ecosystem</td>
<td>▪ Create teams to design/establish service integration</td>
<td>▪ Develop rules of engagement</td>
</tr>
<tr>
<td>▪ Sponsor/drive change efforts</td>
<td>▪ Identify use cases for Life Event pilots</td>
<td>▪ Align to governance structures and architectures</td>
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<tr>
<td>▪ Ensure technology, processes and data are ready for shared service delivery</td>
<td>▪ Map data to be shared to support life events focus and document data sharing agreements</td>
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<tr>
<td>▪ Identify workforce education needs</td>
<td>▪ Update processes, leveraging integration to enable a unified approach</td>
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<tr>
<td>▪ Develop rules of engagement</td>
<td>▪ Create virtual service platforms to drive value and quality of service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ Understand how / when to find and communicate related services</td>
<td>▪ Align to governance structures and architectures</td>
<td></td>
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Manage to Results with Meaningful Data

This paper has described how organizations can deliver citizen-centric services by harnessing life events. To ensure that this approach is effective, agencies must measure performance from an agency and an inter-organizational perspective (inside-out) as well as from the public’s point of view (outside-in).

Measures should capture:

- **Reach** – What are customers able to discover and how do they benefit from the service?
- **Activation** – When and how are life event-oriented services consumed within and across organizations?
- **Impact** – In what ways are customers’ circumstances or understanding changed?
- **Satisfaction** – To what degree was the customer satisfied by the service?

Because the life event journey transcends agencies, it requires a new approach, both to ensure consistency in measurement across organizations, and to assess if organizations are designing their systems to realize the full value of a life event framework.

Identify Customer Success Metrics and Performance Indicators

This evolution starts with an understanding of performance indicators and how they’re established. Key performance indicators (KPIs) should stem from agency and Federal goals but must also address the customer’s service expectations. Too often, agencies derive inside-out metrics that presume understanding of what a customer values, without validating those metrics with customers. It is not uncommon for organizations to misunderstand the values of their customers; and consequently design their service focusing on lesser values outcomes. For instance, an agency may optimize a web site for speed of service, when the user actually desires more of a rich interaction. To remedy this, agencies must leverage the voice of the customer to capture customer expectations and criteria for service success.

Metrics should allow organizations to quantify and qualify the value of customer interactions (impact) and when and where the service is initiated/accessed (activation). For instance, agencies must determine whether a service that appears to have a positive impact actually satisfies the customer. Understanding whether the objective of a site is to complete a partial transaction or provide a referral to a site where the customer can complete a full transaction would lead to dramatically different performance measures. Initiatives such as the “Federal Feedback Button” introduce means for customers to rate both service impact and service experience. Activation metrics pinpoint how customers access a service: directly from the provider or through an intermediary. SSA measures customer satisfaction with its eServices
channels using real time surveys administered by ForeSee. These surveys gather information from users concerning navigation, performance, and their ability to accomplish their task. The surveys also include “open ended” questions in which SSA asks users, for example, what could be improved, or if they were able to complete their task on the Internet would they choose that or would they use another service channel. The agency regularly reviews the results of its surveys to target changes that will have the most significant impact on customer satisfaction. They also review current and past surveys to identify issues affecting multiple applications. This allows them to streamline their efforts and coordinate a solution for all applications.

Developing and understanding user journey touchpoints and explicit goals for each step in this process is vital to balance service efficiency and customer satisfaction. A life events framework provides the opportunity to design interaction pathways that deliver best-in-class customer experience delivery, such as one-touch resolution. In addition, this perspective measures whether or not tasks are being achieved, and identifies areas for process improvement.

Use Operational Data to Improve Service Management

A life events framework facilitates the development and adoption of task-specific measures that span resources from multiple agencies. As each life event affects the intended audience differently, tailored pathways for delivering and measuring user experience can be included in the service design. Operational metrics enable managers to learn how and when customers consume services. In addition, they can discover where a customer’s first touch occurs, to align resources and training accordingly. Using operational data presents managers an opportunity to perform task and audience-specific analyses that provide actionable insights to improve customer experience and highlight moments-of-truth that may have gone undetected in system-level analytics.

Agencies should work together to address configuration differences and understand how their measurement tools report data to paint a consistent picture across the user journey. Trend analysis of descriptive metrics can also provide a level of consistency. For example, an analysis of page views can help you gauge how your tool is being adopted. Volume may change from tool to tool, but a trend analysis will accommodate this variance by looking at relative change over time.
Cross agency measurement was given a boost when, on August 17th, Steve VanRoekel, U.S. Chief Information Officer, established the Digital Analytics Program (DAP) where data government-wide was rolled out to all participating DAP agency users. DAP users have access not only to their specific agency’s profile/view, but all of the participating agencies’ views, as well as the government-wide main roll-up profile. The memo announcing the Program explained that “opening the DAP government-wide data will let participating agencies see other agency’s public-facing website analytics, gain valuable knowledge about shared customers, benchmark against similar agencies, and, most importantly, engage in collaboration and exchange lessons learned.” The Program (https://www.digitalgov.gov/services/dap/) has a goal to allow every agency to use its data to inform changes/modifications to their own agency’s websites, creating better and more engaging digital experiences for the public, by using analytics data from other agencies’ websites. The DAP actively encourage Web managers from multiple agencies to communicate about content, design, strategy, and anything else the data can uncover.

**Openly Communicate Performance**

By creating a shared understanding, a life events framework proactively addresses internal governance issues and clarifies who’s responsible for implementing change by assigning ownership and dependencies on a task-level basis. It also facilitates progressive measurement with benchmarks and timeframes to inform needed enhancements, their prioritization, and coordination of release schedules across agencies. These independent and shared responsibilities present opportunities to apply interagency or agency-specific improvements.

A well-designed measurement program can identify areas for increased efficiency, potential cost reduction, and customer-centered performance standards. Insights gained through analytics further our understanding of how and why users seek information and complete tasks. These insights can help us identify areas that may function better as a self-service resource, or understand when the audience is ready to move to self-service, and develop concrete targets to measure success. To achieve this requires performance transparency and coordination across agencies, which will demonstrate government’s serious commitment to improve customer service.

Our research and interviews indicate that organizations need to focus upon developing metrics that incorporate the customer perspective and consider inter-organizational performance. Many agencies measure counts of applications and costs to process them bureau by bureau or agency by agency; however, there is limited experience merging transactional data with satisfaction and program impact – particularly the impact of addressing a life event. Interagency performance metrics are generally established within
interagency agreements. Consistent definition and application of customer service metrics across all collaborating agencies is not yet in place but can be a powerful tool to advance White House Cross Agency Priority Goals and foster customer-centric design.

Measures, such as the samples listed in the table below, should align with user and organizational goals. Depending on where you engage users in their information-seeking journeys, different measures should be used to determine value and success. For example, BusinessUSA.gov uses bounce and drop rates to gauge how successful they are in handing visitors off to a Veteran’s Affairs site and connecting these visitors to the resources they seek. In addition, the specific objective of the site has to be considered when establishing meaningful measures. In the case of the BusinessUSA.gov site, the objective is to provide connections to other sites that enable the users’ to complete their activities online, not provide the primarily functionality itself. A measure that asked if the individual was able to complete their work on the BusinessUSA.gov would not be appropriate. Rather, a measure gauging satisfaction with the hand-off would better reflect the objective of the site.

<table>
<thead>
<tr>
<th>Sample Measures</th>
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<tbody>
<tr>
<td><strong>Descriptive</strong></td>
</tr>
<tr>
<td><strong>Reach</strong></td>
</tr>
<tr>
<td>How many found the resource?</td>
</tr>
<tr>
<td>- Page views</td>
</tr>
<tr>
<td>- Visits</td>
</tr>
<tr>
<td>- Unique visitors</td>
</tr>
<tr>
<td>- Call volume</td>
</tr>
<tr>
<td>- System availability</td>
</tr>
<tr>
<td><strong>Impact</strong></td>
</tr>
<tr>
<td>How was the resource used?</td>
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<tr>
<td>- Load times</td>
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<tr>
<td>- Search terms</td>
</tr>
<tr>
<td>- Time on page</td>
</tr>
<tr>
<td>- Page views per visit</td>
</tr>
<tr>
<td>- Repeat visitors</td>
</tr>
<tr>
<td>- Bounce rates</td>
</tr>
<tr>
<td>- Adoption rates</td>
</tr>
<tr>
<td>- Drop rates and points</td>
</tr>
<tr>
<td><strong>Subjective</strong></td>
</tr>
<tr>
<td><strong>Effect / Activation</strong></td>
</tr>
<tr>
<td>Were user goals met? How well?</td>
</tr>
<tr>
<td>- Path analysis for goal achievement</td>
</tr>
<tr>
<td>- Completion rates &amp; interaction data</td>
</tr>
<tr>
<td>- First touch resolution</td>
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<tr>
<td>- Sustained use</td>
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<tr>
<td>- Refer a friend</td>
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<tr>
<td>- Satisfaction surveys</td>
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<tr>
<td>Measurement Goal</td>
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<td>------------------</td>
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</tbody>
</table>
| **Identify Customer Success Metrics and Performance Indicators** | ▪ Ask customers what service experiences, impacts and outcomes they expect: what contributes to satisfaction  
▪ Identify program and process metrics that must be achieved per policy or law  
▪ Assess how existing metrics address customer-centered performance. Identify gaps.  
▪ Identify cost and compliance performance requirements  
▪ Identify ways to incorporate findings into CQI cycles  
▪ Ensure metrics cover all critical performance dimensions | ▪ Map user pathways and connectedness of data and resources  
▪ Identify community behaviors that drive customer satisfaction  
▪ Identify information sharing and service integration opportunities and associated service level requirements  
▪ Identify metrics gaps, and prioritize analysis needs and use cases  
▪ Share performance data upstream and downstream | ▪ Establish performance monitoring standards and a common vocabulary  
▪ Define community metrics or index that characterize customer-oriented performance  
▪ Establish performance standards for communities and individual organizations  
▪ Collaborate with advocates to focus on success |
| **Use Operational Data to Improve Service Management** | ▪ Establish electronic logs and monitors to measure digital quality of service  
▪ Prompt customers to provide transaction-level feedback  
▪ Use surveys and other media to capture customer feedback  
▪ Establish routine performance reviews and use data to target and implement performance improvements  
▪ Align resource performance goals to staff annual goals  
▪ Ensure that staff rewards and recognition support customer success goals | ▪ Conduct feasibility / alternative solution analysis to address integration issues  
▪ Measure information exchanges associated with customer journeys (i.e., cross-agency responses to life events)  
▪ Monitor and measure service level conformance  
▪ Establish routine performance reviews to identify areas for improvement | ▪ Collect government-wide performance data  
▪ Leverage Chief Performance Officer Council to address performance deficiencies  
▪ Provide a collaborative space to incubate and test both alternative approaches to and improvements of existing integrated service delivery practices |
| **Openly Communicate Performance** | ▪ Develop communications plans that include sharing of customer experience data internally and publicly  
▪ Communicate performance online and through routine performance reporting channels  
▪ Celebrate successes as achieved  
▪ Provide a forum to learn from fail points | ▪ Establish communications to highlight the efficacy of collaborative, shared responses to life events  
▪ Educate customers about what they can expect from integrated services  
▪ Report progress of remediation activities | ▪ Communicate advances in shared services and collaboration through Performance.gov  
▪ Conduct reviews that explore the degree to which agencies advance citizen-centered collaboration  
▪ Establish and use a repository for lessons learned across agencies |
Taking the Next Step

Delivering services to citizens is at the heart of what governments do. Yet -- doing it well -- is what government customers expect. Can we deliver in the digital age?

For many agencies today, truly good service must often transcend archaic designs, bureaucratic boundaries and limited channels of delivery. In making the change, service providers must become customer advocates and focus beyond longstanding agency measures of efficiency and insular measures of effectiveness. We have found that some leading service providers in government already have.

Life Events are often the common denominator that triggers a range of related services from one company to another and increasingly in government, one agency to another. Notions of “whole person” care,” “tell me once,” “customer for life,” and “predictive and proactive services,” now common in many industries, are slowly finding their way to government. Enabled by new technology, analytical methods, tools and innovative management practices, government leaders are transforming the quality of customer service and the intimacy of customer experience in new and different ways. Are we moving fast enough? We still hear the all too common refrain from customers: “So why can’t government service be more like commercial services?”

Our research and the main proposition of this innovation paper suggests that we can. We have found that cross-agency collaboration, customer-centric design and measurable improvements to the customer’s “journey” and experience frame a nourishing environment for change. Constantly refining, simplifying, and humanizing these service models can profoundly transform government customer services and customer experiences without risky or lavish investment. Still, cultural, bureaucratic and policy obstacles get in the way.

Can we get to truly customer-centric service fulfillment? We believe so. Already, ecosystems of state, tribal, federal and commercial service providers exchange information to enable better and more efficient service.

Can we get to seamless service? Interagency and intra-government service hand-offs are less prevalent, but do exist and seem to be growing. These Communities of Service – focus squarely on the customer rather than any one agency involved in service fulfillment.

The Life Events approach and the methods that we describe are proven to markedly improve service and render a more favorable experience to the government customer. Moreover, for many agencies, Life Events initiatives can greatly leverage cost to benefit and accelerate time to benefit.
Harnessing Life Events to Connect Citizens and Services: An Innovator’s Guide

Are you ready to focus on the customer? Take on a Life Events project at your agency or across agencies. Start with our Action Guide – add imagination, passion and inspiration. Leaders innovate and find a way.
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