



## Improving Customer Experience with Federal Services

### Goal Leaders

**Thomas Bowman**, Deputy Secretary, Department of Veterans Affairs

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## Goal Statement

- Provide a modern, streamlined, and responsive customer experience across government, comparable to leading private-sector organizations.



## Challenge

- Citizens and businesses expect well-designed, efficient government services that are generally comparable in quality to that of leading private-sector organizations.
- Despite some important strides to improve customer experience, many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself.



## Opportunity

- Increase trust in the Federal Government by improving the experience citizens and businesses have with federal services across all service channels.
- Transform the customer experience by improving the usability and reliability of our government's most critical digital services.
- Create measurable improvements in customer satisfaction by using the principles and practices proven by leading private-sector organizations.



## Core Team:

### Office of Management and Budget (OMB)

- Mark Bussow, Office of Performance and Personnel Management (PPM)
- Nathan Sanfilippo, PPM
- Elaine Ho, U.S. Digital Service (USDS)
- Bryan Swann, USDS

### Department of Veterans Affairs (VA)

- Dr. Lynda Davis, Chief Veterans Experience Officer
- Barbara Morton, Deputy Chief Veterans Experience Officer
- Charles Worthington, Chief Technology Officer

## Partner Agencies:

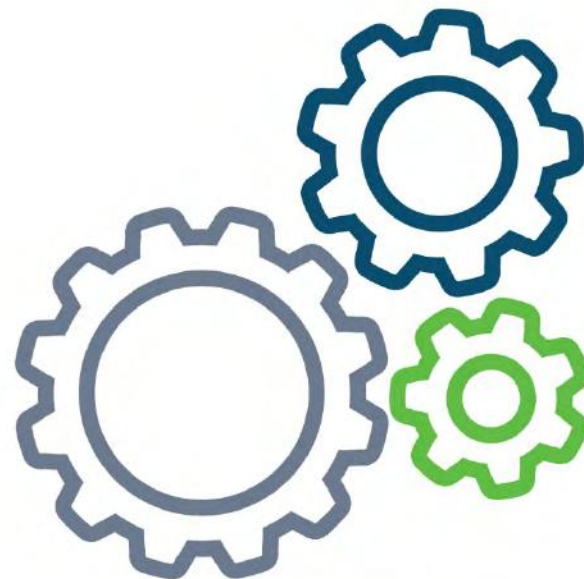
- Department of Agriculture
- Department of Commerce
- Department of Education
- Department of Health and Human Services
- Department of Homeland Security
- Department of Housing and Urban Development
- Department of the Interior
- Department of Labor
- Department of State
- Department of the Treasury
- General Services Administration
- Office of Personnel Management
- Small Business Administration
- Social Security Administration





**Modeling after the private sector, focus will be placed on the foundational components of:**

- **Data**: Capture and analyze the voices of citizens
- **Tools**: Build and deliver customer experience tools and products across the government
- **Technology**: Deliver easy and effective experiences, whether in person, via phone, or online





## Goal Structure

Provide a modern, streamlined, and responsive customer experience across government, comparable to leading private sector organizations



**STRATEGY 1:**  
**Improve Digital Services  
(USDS)**

*Improve the usability and reliability of the government's most critical digital services*

**STRATEGY 2:**  
**Modernize Customer  
Experience for the 21<sup>st</sup>  
Century (PPM)**

*Bring federal customer experience to 21<sup>st</sup> century standards by enabling self-service and leveraging customer data/feedback for high-impact programs*

**STRATEGY 3:**  
**Celebrate Success (PPM)**

*Reward individuals and initiatives that demonstrate outstanding customer experience*



**Supporting Strategy:**  
**Keep a Customer Focus (PPM)**

*Create a support and accountability network to ensure sustainable customer experience improvement across government using clear guidance, modern tools, and engagement of staff at all levels*





The U.S. Digital Service is a group of **experts** that uses design and technology to **deliver better services to the American people.**

Digital services should be a primary avenue for the American public to interact with the Federal Government. The U.S. Digital Service (USDS) seeks to transform critical, public-facing federal digital services by applying modern technology best practices.

### USDS chooses projects based on:

- The **greatest impact** for the greatest number of people
- Likelihood of **success**
- Ability to **scale** across government

### In support of the CAP goal, USDS will:

1. **Deliver targeted improvements** on a portfolio of agency-specific projects (see next slide) and provide regular updates.
2. **Introduce the Paperless Government Project** as a new, cross-agency project with specific milestones tracked by this CAP goal.



## Strategy 1: Improve Digital Services - Selected Ongoing Projects

Project	Status Update
<p><b>Vets.gov</b> – A single, usable website for vets that consolidates all veteran services into one place and works on any device.</p>	<p>Ongoing releases of new functionality: Discharge tools – December 2017</p>
<p><b>Veterans Affairs (VA) Disability Claim Appeals</b> – A new system that empowers VA employees with modern technology to increase timely, accurate appeals decisions and improve the Veteran experience.</p>	<p>Ongoing updates and improvements</p>
<p><b>Immigration Benefits Processing</b> – Rebuilds Department of Homeland Security's 'ELIS' system and transforms how U.S. Citizenship and Immigration Service processes more than 6 million benefit applications each year to improve efficiency, reduce cost, increase security, and eliminate backlogs.</p>	<p>Naturalization Online application launched in December 2017</p>
<p><b>Small Business Administration 8(a) Business Development Program</b> – A new platform that streamlines certification processes, eliminates paper applications, decommissions legacy systems, and improves the user experience for small business applicants.</p>	<p>Online applications launched in November 2017. Online recertification launched in February 2018</p>
<p><b>Centers for Medicare and Medicaid Services Quality Payment Program</b> - A new system (the Quality Payment Program) that changes the way Medicare pays doctors and other clinicians so they are rewarded for quality of care over quantity of care.</p>	<p>Launched in January 2018</p>
<p><b>Login.gov</b> - A single, common identity platform that makes accessing government services easier, faster, and more secure for Americans.</p>	<p>1.5 million users in 4 months. USAJobs.gov launch imminent</p>
<p><b>Military Family Moves</b> - Improves the stability and security of the Defense Personal Property System (DPS), the platform through which all service members and their families coordinate the shipment of their household goods when they are transferred between bases.</p>	<p>Launched Move.mil with ongoing updates and improvements</p>





## Strategy 1: Improve Digital Services - Paperless Government

- Problem Targeted:** The Federal Government's more than 23,000 different forms lead to more than 11.4 billion hours of paperwork annually, and many provide a poor user experience. While some are solely paper-based, even digital forms can be redundant, unnecessarily complex, and fail to work across all devices and browsers.
- Theory of Change:** The Paperless Forms Tool lets an agency prototype online forms eight times faster than current processes. As a result, citizens can receive critical services faster and have a superior user experience while agencies can operate more efficiently by reducing costs and redirecting time to higher impact work.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Paperless Government Project</b>					
<ul style="list-style-type: none"> <li>Develop form conversion tool: extract tool developed by the USDS at the VA and repurpose it for government-wide use</li> </ul>	2Q FY18			USDS	
<ul style="list-style-type: none"> <li>Identify agency candidates for proof-of-concept pilot using forms conversion tool</li> </ul>	2Q FY18			USDS	
<ul style="list-style-type: none"> <li>Evaluate proof-of-concept pilot and determine project viability to scale broadly as a government-wide shared service</li> </ul>	3Q FY18			USDS	







## Strategy 2: Modernize Customer Experience for the 21st Century

- **Problem Targeted:** Many federal government services fail to meet the expectations of the public, creating unnecessary hassle and cost for citizens, businesses, and the government itself. Insufficient data limits government's ability to identify major customer service challenges and problem areas and the public's ability to see the quality and timeliness of specific services.
- **Theory of Change:** Agencies will use data to target improvement efforts at both the government-wide and agency level and to provide diagnostic information for use at a program-level. Making data available publicly will help citizens set expectations and hold government accountable for improvements.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Develop Customer Experience Dashboards (*see example on next slide)</b>					
▪ Issue dashboard policy and/or guidance	3Q FY18			PPM	Proposal on next slide currently being discussed with agencies. May change as a result of feedback.
▪ Conduct meetings between OMB and agencies to collaborate on dashboard content	4Q FY18			PPM, Agencies	
▪ Implement initial dashboards	1Q FY19			Agencies	



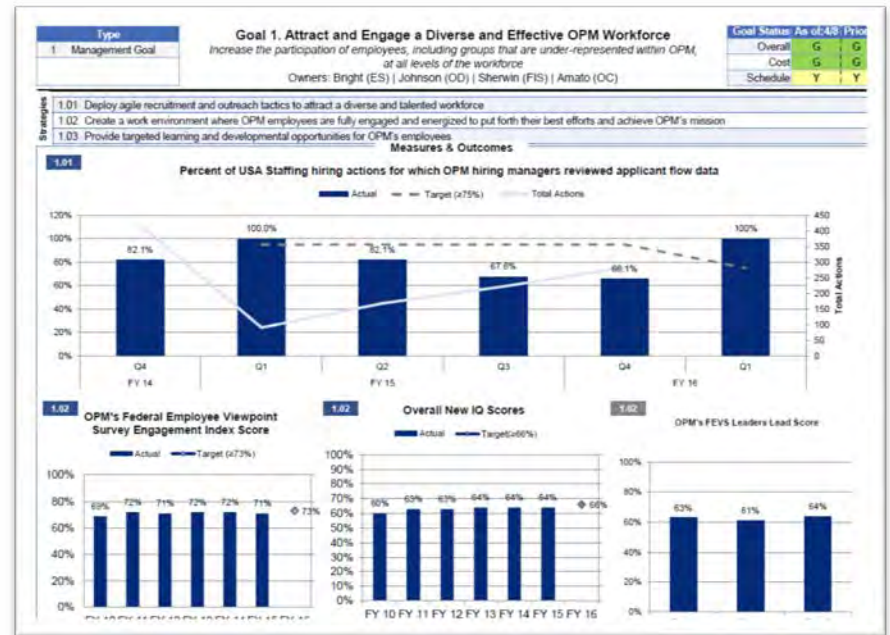


## Current Proposal Under Development: Customer Experience Dashboards

- High-impact programs<sup>1</sup> will develop dashboards that present key metrics being tracked as part of this CAP goal, such as:
- Overall customer satisfaction/trust of program
  - Including sub-indicators assessing program quality using the customer experience drivers of ease, effectiveness, and emotion
- Customer experience program maturity

Dashboards will also track program-specific information based on the level of customer experience program maturity and mission goals, for example:

- Transaction success rate
- Staff professionalism
- Transaction timeliness
- Other mission-specific outcomes



\*Sample dashboard for illustrative purposes only

<sup>1</sup> See slide 16 for list of programs





# Strategy 2: Modernize Customer Experience for the 21<sup>st</sup> Century

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Develop and Enhance Customer Experience Metrics and Data Collection Tools</b>					
<ul style="list-style-type: none"> <li>Establish government-wide indicators</li> </ul>	3Q FY18			PPM, VA	Proposed government-wide indicators currently being discussed with agencies. May change as a result of feedback.
<ul style="list-style-type: none"> <li>Establish initial program-specific indicators and data collection strategies</li> </ul>	4Q FY18			PPM, Agencies	
<ul style="list-style-type: none"> <li>Create project plan to advance the use of real-time data collection models and tools, with a focus on burden reduction</li> </ul>	3Q FY18			OFCIO, GSA	
<ul style="list-style-type: none"> <li>Refine indicators for FY20 measurement</li> </ul>	4Q FY19			PPM, Agencies	
<b>Improve Customer Experience Performance and Programs</b>					
<ul style="list-style-type: none"> <li>Update customer experience program maturity self-assessments</li> </ul>	3Q FY18			VA, Agencies	
<ul style="list-style-type: none"> <li>Develop plans to improve customer experience program maturity</li> </ul>	1Q FY19			Agencies	
<ul style="list-style-type: none"> <li>Develop plans to improve customer experience performance that include routine collection, analysis, and application of customer feedback</li> </ul>	1Q FY19			Agencies	
<b>Ensure Public Openness and Accountability</b>					
<ul style="list-style-type: none"> <li>Create centralized, government-wide data dashboard/website to post customer experience performance data publicly</li> </ul>	1Q FY20			PPM, USDS	





## Strategy 3: Celebrate Success

- Problem Targeted:** Too often agency leadership and front-line staff do not view providing excellent customer experience as a priority. In some cases, staff that work directly with citizens feel undervalued.
- Theory of Change:** Providing greater recognition of high-quality customer service at senior leader and cross-government levels will incentivize and reward customer experience improvement across programs.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Conduct Annual Federal Customer Service Awards</b>					
▪ Announce and issue guidance on customer service awards	2Q FY18			PPM	
▪ Receive nominations from agencies	4Q FY18			Agencies	
▪ Review nominations and determine finalists	4Q FY18			PPM	
▪ Conduct awards ceremony to celebrate winners	1Q FY19			PPM	
<b>Recognize Agency Improvements</b>					
▪ Assess agency-level customer experience improvement efforts to recognize and award during the Federal Customer Service Awards	4Q FY18			PPM	





## Supporting Strategy: Keep a Customer Focus

- **Problem Targeted:** Government fails to maintain a consistent focus on achieving high-quality customer experience and no government-wide support capability exists.
- **Theory of Change:** Fostering a cultural change amongst agency leadership and staff, demonstrating the value of improved customer experience, creating government-wide customer experience oversight and support, and issuing uniform guidance will help ensure consistent and sustained improvements in customer experience across government.

Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Foster Cultural Change</b>					
<ul style="list-style-type: none"> <li>▪ Identify top customer experience challenges amongst high-impact programs</li> </ul>	3Q FY18			PPM	
<ul style="list-style-type: none"> <li>▪ Develop executive briefing materials demonstrating value of government customer experience improvement</li> </ul>	3Q FY18			PPM, VA	
<ul style="list-style-type: none"> <li>▪ Develop toolbox for agency leadership to support communications, training, and outreach with staff</li> </ul>	2Q FY19			PPM, VA	
<ul style="list-style-type: none"> <li>▪ Evaluate inclusion of customer experience measures in appropriate executive performance plans or agency performance goals</li> </ul>	3Q FY19			PPM	





Key Milestones	Milestone Due Date	Milestone Status	Change from last quarter	Owner	Anticipated Barriers or other Issues Related to Milestone Completion
<b>Develop and Issue Customer Experience Program Governance Guidance</b>					
<ul style="list-style-type: none"> <li>Develop draft customer experience framework to identify areas where additional guidance recommendations are needed</li> </ul>	3Q FY18			PPM	
<ul style="list-style-type: none"> <li>Charter a customer experience working group to gather best practices, assess minimum program requirements, and provide recommendations to OMB</li> </ul>	4Q FY18			PPM/VA	
<ul style="list-style-type: none"> <li>Issue customer experience program framework in an OMB guidance document</li> </ul>	TBD			PPM	May be issued as standalone guidance or integrated into an existing Circular.
<b>Provide Government-wide Customer Experience Support</b>					
<ul style="list-style-type: none"> <li>Establish near-term customer experience support resources and make available to agency stakeholders</li> </ul>	3Q FY18			PPM	
<ul style="list-style-type: none"> <li>Evaluate the benefits of a government-wide customer experience support organization for inclusion in future budget requests</li> </ul>	1Q FY19			PPM	





## Indicators will be developed to monitor progress towards customer experience and digital services program maturity

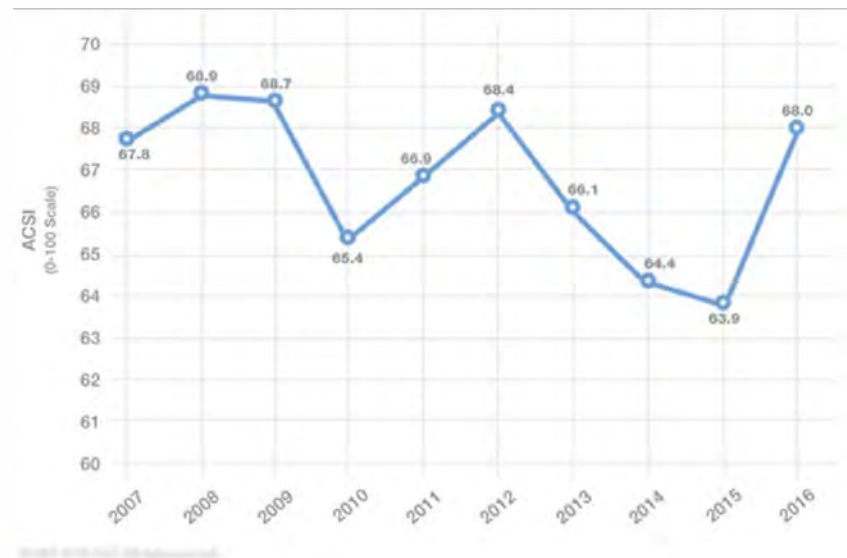
- Use of self-assessment data as reported via program-level dashboards, such as:
  - Percentage of major customer service programs that collect customer feedback data
  - Percentage of major customer service programs that have a plan to improve customer service
  - Percentage of major customer service programs that promote customer experience improvements throughout their organizations

## External indicators will monitor overall government-wide customer experience

- Such as the Forrester Federal Customer Experience Index and the American Customer Satisfaction Index (ACSI)



2016 American Customer Satisfaction Index (ACSI) Scores







## **Department of Agriculture**

- U.S. Forest Service
- Farm Service Agency
- Natural Resources Conservation Service

## **Department of Commerce**

- Patent Approvals, U.S. Patent and Trademark Office
- Trademark Registration, U.S. Patent and Trademark Office

## **Department of Education**

- Student Financial Aid, Federal Student Aid

## **Department of Health & Human Services**

- Health Insurance Marketplace, Centers for Medicare & Medicaid Services
- Medicare, Centers for Medicare & Medicaid Services

## **Department of Homeland Security**

- Airport Security Screening, Transportation Security Administration
- Immigration and Customs Inspections, U.S. Customs and Border Protection
- Citizenship and Immigration Services
- Emergency and Disaster Relief, Federal Emergency Management Authority

## **Department of Housing and Urban Development (HUD)**

- FHA Single Family Loans and Resource Center

## **Department of Interior**

- Trust Beneficiary Call Center, Office of the Special Trustee for American Indians
- Visitor Services, U.S. Fish and Wildlife Service

## **Department of Labor**

- Occupational Safety & Health Administration
- Office of Worker Compensation Programs

## **Department of State**

- Passport Issuance & Processing, Passport Services Office, Bureau of Consular Affairs

## **Department of Treasury**

- Online services, Internal Revenue Service

## **Department of Veterans Affairs**

- Veterans Health Care Benefits, Veterans Health Administration
- Veterans Pension Benefits & Veterans Disability Benefits through the Veterans Benefits Administration and the Veterans' Experience Office

## **General Services Administration**

- Office of Citizen Services and Innovative Technology

## **Office of Personnel and Management**

- Federal Employment Services, USAJobs
- Retirement Services

## **Social Security Administration**

- Social Security Card Issuance/Processing, Office of Operations
- Social Security Retirement Benefits, Office of Operations
- Social Security Disability Benefits, Office of Disability and Adjudication Services

## **Small Business Administration**

- Field Operations, Small Business Administration

## **Interagency Initiatives**

- **Federal Recreation Council** (U.S. Forest Service, National Park Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Bureau of Reclamation, U.S. Army Corps of Engineers, National Oceanic and Atmospheric Administration)
- **Recreation.gov** (U.S. Forest Service, National Park Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Bureau of Reclamation, U.S. Army Corps of Engineers, National Archives)

