



## Improving Customer Experience with Federal Services

### Goal Leaders

**James Byrne**, Acting Deputy Secretary, Department of Veterans Affairs

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**FY18 Q3 Quarterly Update – September 2018**



## 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), Deputy Goal Lead
- Nathan Sanfilippo, PPM, White House Leadership Development Fellow
- Bryan Swann, U.S. Digital Service (USDS), White House Leadership Development Fellow

### Department of Veterans Affairs (VA)

- Dr. Lynda Davis, Chief Veterans Experience Officer
- Barbara Morton, Deputy Chief Veterans Experience Officer
- Lee Becker, Chief of Staff, Veterans Experience Office
- Charles Worthington, Chief Technology Officer

### General Services Administration (GSA)

- Amira Boland, Deputy Director, Office of Evaluation Sciences
- Anahita Reilly, Chief Customer Officer
- Matthew Ford, Deputy Chief Customer Officer
- Simchah Suveyke-Bogin, Director, CX Center of Excellence
- Philip Ashlock, Director, Data & Analytics Portfolio

## Partner Agencies:

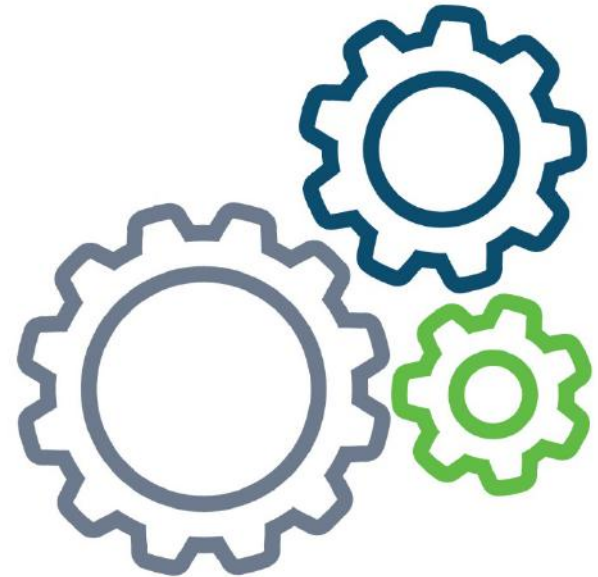
- |   |   |                                   |
|---|---|-----------------------------------|
| ▪ Department of Agriculture               | ▪ Department of Homeland Security             | ▪ Department of the Treasury      |
| ▪ Department of Commerce                  | ▪ Department of the Interior  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





### **First-of-its-kind Federal Customer Experience Guidance Issued**

- In an effort to institutionalize the fundamental building blocks of CX across Federal high-impact service providers (HISPs; listed on slide 19), OMB issued first-of-its-kind guidance in [Circular A-11, Part 6, Section 280, “Managing Customer Experience and Improving Service Delivery”](#)
- Implementing the guidance will establish a more consistent, comprehensive, robust, and deliberate approach to Federal CX
- Since its issuance on June 30<sup>th</sup>, OMB has met with every HISP to communicate expectations as agencies being to implement the guidance

### **“Customer Experience Improvement Capability” Proposal**

- In June, OMB issued “[Delivering Government Solutions in the 21st Century: Reform Plan and Reorganization Recommendations](#),” which included a proposal to create a new government-wide CX capability
- While the CX CAP Goal focuses on driving agency-specific improvements, the proposal expands that concept to start to address citizen CX with the Federal Government as a whole
- It proposes creation of a government-wide capability to partner with Federal agencies to identify key customer groups and map their journeys from across agencies and programs to and improve government CX





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 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 - Paperless Government

- Problem Targeted:** The Federal Government maintains around 23,000 forms that are used to carry out its essential functions and provide critical services and benefits. In the case of paper-only forms, workers spend innumerable hours recreating and quality checking handwritten entries. Where digital forms exist, they are often simply fillable PDFs that still require manual processing because the data isn't collected in a format that can be automatically processed. The need to manually process both of these types of forms leads to more than 11.4 billion hours of paperwork annually, as well as a negative user experience.
- Theory of Change:** Web-based forms created through user-centered design methods reduce the respondent burden while producing well-structured data to the agencies for ingestion. The U.S. Forms System creates a reusable open source code library for building complex web-based forms 8-10x faster than existing methods, using best practices in user experience and data collection and validation.

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 initial version of reusable open source form creation library (US Forms System) for use government-wide by extracting code developed at VA by USDS.</li> </ul>	3Q FY18	Completed	Completed	USDS	
<ul style="list-style-type: none"> <li>Create and make available documentation, examples, and use cases to developers government-wide for planning, development, and pilots.</li> </ul>	4Q FY18	On track	No change	USDS	
<ul style="list-style-type: none"> <li>Identify agency candidates for proof-of-concept pilot using US Forms System, and secure agreement for participation.</li> </ul>	3Q FY18	At risk	At risk	USDS	3 agencies are piloting the US Forms System, but 4Q FY18 schedules are unclear.
<ul style="list-style-type: none"> <li>Evaluate results of pilot(s) and determine project viability to scale broadly as a government-wide open source library housed and maintained outside of USDS.</li> </ul>	4Q FY18	On track	No change	USDS	
<ul style="list-style-type: none"> <li>Feature the US Forms System on part of Code.gov</li> </ul>	4Q FY18	On track	No change	USDS	Without a pilot/example to show, will be a less useful featured entry.







## 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	Completed	Completed	PPM	
▪ Conduct meetings between OMB and agencies to collaborate on dashboard content	1Q FY19 <sup>1</sup>	On track	No change	PPM, Agencies	
▪ Implement initial dashboards	2Q FY19 <sup>1</sup>	On track	No change	Agencies	

<sup>1</sup> Due date updated to align with due dates published in the new CX guidance





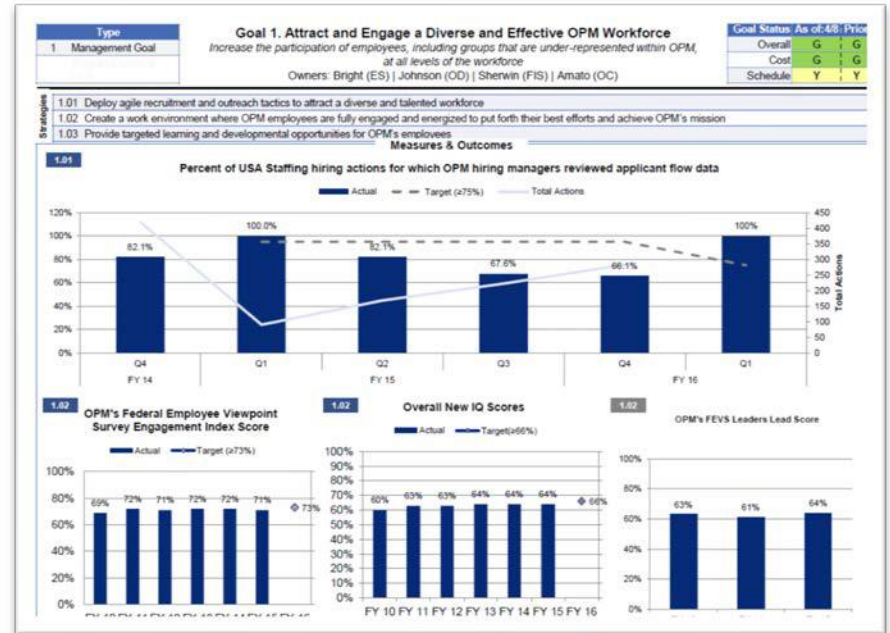
# Strategy 2: Modernize Customer Experience for the 21<sup>st</sup> Century

## Current Proposal Under Development: Customer Experience Dashboards

- High-impact programs<sup>1</sup> will create dashboards that present key government-wide metrics being developed as part of this CAP goal and outlined in a forthcoming revision of OMB Circular A-11, such as:
  - Overall customer satisfaction and confidence/trust with program
    - Including sub-indicators assessing program quality using the customer experience drivers of ease, effectiveness, efficiency, equity, and employee interaction
  - 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>					
▪ Establish government-wide indicators	3Q FY18	Completed	Completed	PPM, VA	
▪ Establish initial program-specific indicators and data collection strategies	1Q FY19 <sup>1</sup>	On track	No change	PPM, Agencies	
▪ Create project plan to advance the use of real-time data collection models and tools, with a focus on burden reduction	1Q FY19	On track	No change	OFCIO, GSA	
▪ Refine indicators for FY20 measurement	4Q FY19	On track	No change	PPM, Agencies	
<b>Improve Customer Experience Performance and Programs</b>					
▪ Update customer experience program maturity self-assessment guidance	3Q FY18	Completed	Completed	PPM	
▪ Assess and develop plans to improve customer experience program maturity	3Q FY19 <sup>1</sup>	On track	No change	Agencies	
▪ Develop plans to improve customer experience performance that include routine collection, analysis, and application of customer feedback	3Q FY19 <sup>1</sup>	On track	No change	Agencies	
<b>Ensure Public Openness and Accountability</b>					
▪ Create centralized, government-wide data dashboard/website to post customer experience performance data publicly	1Q FY20	On track	No change	PPM, USDS	

<sup>1</sup>Due date updated to align with due dates published in the new CX guidance





## 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 Gears of Government Awards to Recognize Outstanding Customer Service</b>					
▪ Announce and issue guidance on customer service awards	2Q FY18	Completed	Completed	PPM	
▪ Continuously provide awards to recognize outstanding staff	4Q FY18	Completed	Completed	Agencies	New program launched that includes continuous recognition
▪ Review nominations and determine finalists	2Q FY19 <sup>1</sup>	On track	No change	PPM	
▪ Conduct awards ceremony to celebrate winners	3Q FY19 <sup>1</sup>	On track	No change	PPM	
<b>Recognize Agency Improvements</b>					
▪ Assess agency-level customer experience improvement efforts to recognize and award during the Gears of Government Awards	2Q FY19 <sup>1</sup>	On track	No change	PPM	

<sup>1</sup> Due date updated to align with Gears of Government Awards process





## 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	Missed	No change	PPM	Meetings in progress to identify challenges. To be completed by 4Q FY19.
<ul style="list-style-type: none"> <li>▪ Develop toolbox for agency leadership to support communications, training, and outreach with staff, including executive briefing materials demonstrating value of government customer experience improvement<sup>1</sup></li> </ul>	2Q FY19	On track	No change	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	On track	No change	PPM	

<sup>1</sup> Consolidated milestones





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	Completed	Completed	PPM	
<ul style="list-style-type: none"> <li>Issue customer experience program framework in an OMB guidance document</li> </ul>	3Q FY18	Completed	Completed	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 to include in next revision of OMB Circular A-11</li> </ul>	2Q FY19 <sup>1</sup>	On track	No change	PPM	
<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	Completed	Completed	PPM	
<ul style="list-style-type: none"> <li>Evaluate the benefits of a government-wide customer experience support capacity for inclusion in future budget requests</li> </ul>	1Q FY19	On track	No change	PPM	

<sup>1</sup> Due date updated based on initial publication of OMB Circular A-11, Section 280 in June 2018





### **Indicators are being developed to monitor progress towards improving Federal CX program maturity**

- After initial CX program maturity assessment in FY 2019, government-wide data will be reported 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





# Key Indicators – Forrester CX Index



## Federal Government



RANK	FEDERAL AGENCY	2018 SCORE	2017 SCORE
1	National Park Service (NPS)	77 –	75
2	United States Postal Service (USPS)	70 –	69
3	Tricare	65 –	67
4	Department of Veterans Affairs (VA)	63 ▲	59
5	Medicare	61 –	62
6	Bureau of Consular Affairs	60 –	59
7	US Citizenship and Immigration Services (USCIS)	60 –	61
8	Medicaid	60 –	58
9	Social Security Administration (SSA)	58 –	60
10	Small Business Administration (SBA)	58 ▼	62
11	Transportation Security Administration (TSA)	56 –	56
12	Internal Revenue Service (IRS)	54 –	56
13	Department of Education (ED)	54 –	54
14	Healthcare.gov	49 ▲	45
15	USAJobs.gov	44 –	45

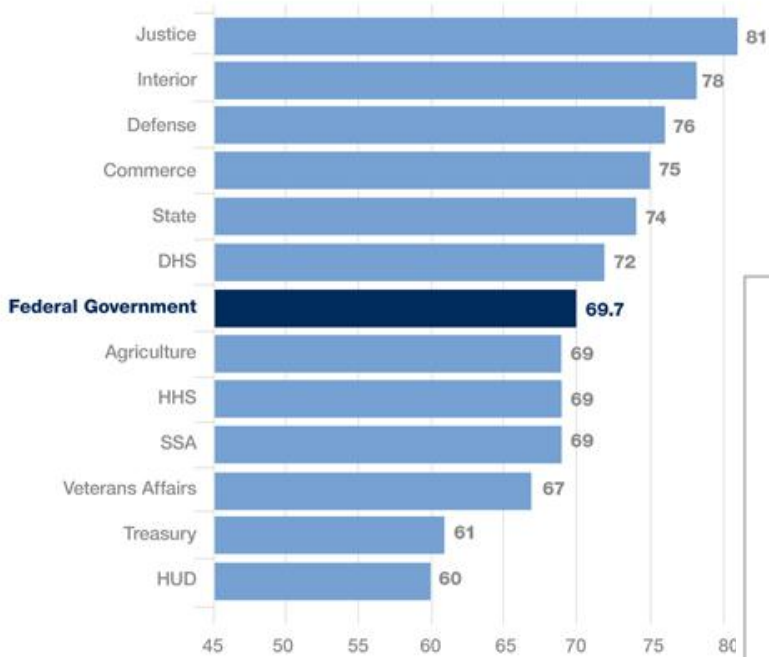
▲ Statistically significant increase    – No statistically significant change    ▼ Statistically significant decrease





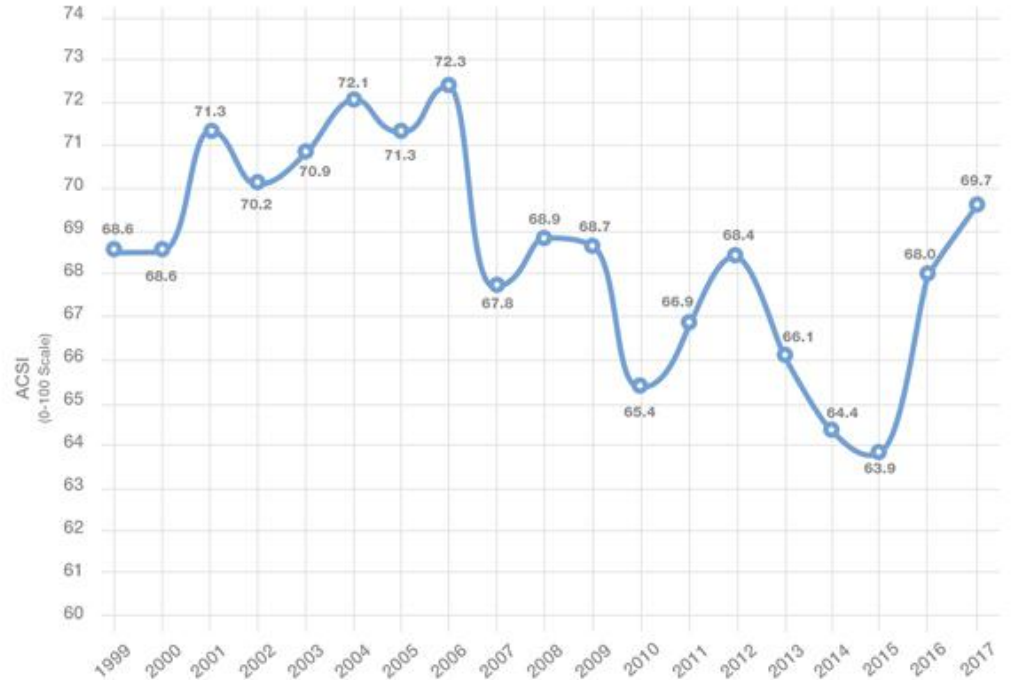


### ACSI: Federal Departments 2017



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### Citizen Satisfaction With Federal Government Services



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## 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

## 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

- **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)

