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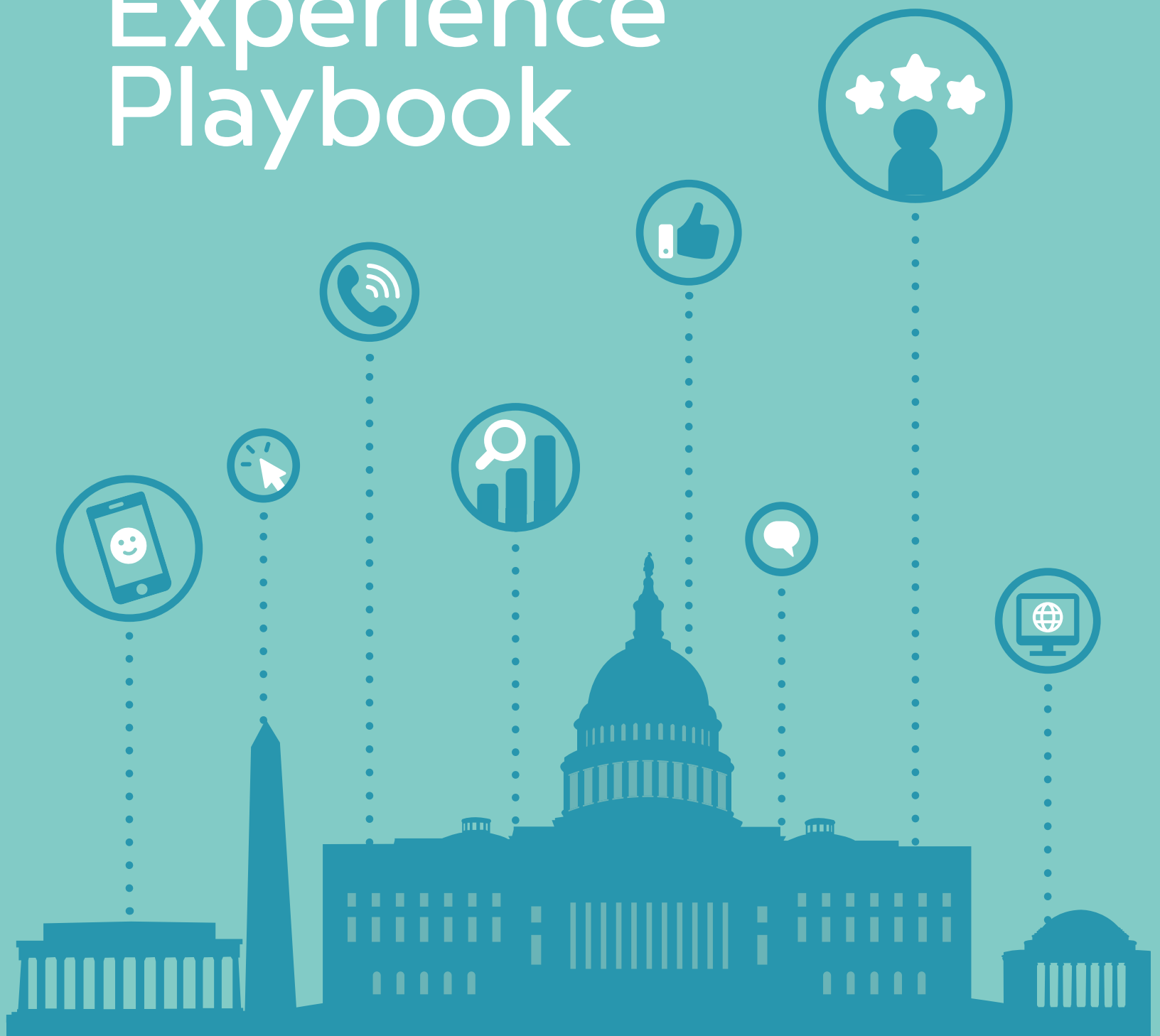
Government's Customer Experience Playbook



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Carahsoft and GovLoop have partnered to provide resources around the latest federal, state and local CX and citizen engagement initiatives and legislation. The goal is to guide government leaders and stakeholders interested in learning more about improving the citizen experience.

Executive Summary

Long lines, red tape, confusing websites and wasted afternoons. These descriptions have all been used to define interactions with government agencies.

Although true, they don't tell the whole story. There are pockets of innovation where the experiences that government provides meet or exceed what private companies offer – some of which we highlight in this guide.

That's quite a feat for government agencies, considering that customer experience (CX) has long been tied to the delivery of goods and services in the private sector. Successful business owners understand the value of keeping customers – and employees – happy by consistently providing quality experiences.

For this guide, we define CX as the sum of all interactions over time that people and businesses have with an agency. Think beyond that contact center call or the portal on the website to renew licenses. CX is bigger than a website, strategy or individual's title. Every employee plays a role, and it must be a central part of their job function and your agency's overall mission. When that happens, internal and external engagement improve, processes are streamlined, and time and resource savings become a reality.

But where should agencies start in their journey to better CX?

In this guide, we offer practical tips to improve CX from government experts who are leading the charge at small, medium and large agencies. We also explore how legislation such as the 21st Century Integrated Digital Experience Act (IDEA), the President's Management Agenda (PMA), state and local customer-focused legislation, and technology advancements are driving better CX across government.

You'll learn:

- What's new in the CX landscape across federal, state and local governments.
- The core functions of a successful CX program and how agencies are applying them.
- How to assess the maturity of CX efforts at your agency and more.

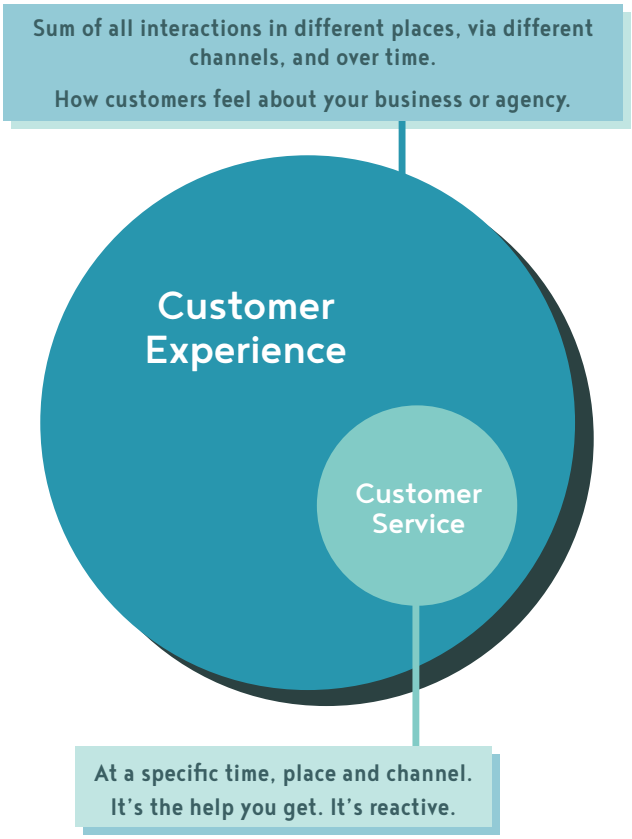
Before we dive in, let's start by defining CX and reviewing what's new in government.

Defining CX in Government

One of government's unique aspects is that employees wear dual hats. On one hand, they are service providers – charged with assisting the public in various ways, whether that's filing for student aid or requesting trash collection services.

But employees are also customers. For example, they rely on internal IT departments to ensure that they have the necessary resources to do their jobs. Whether you are on the giving or receiving end of those services, a key aspect of these interactions that government employees must take ownership of is the overall experience.

The General Services Administration's newly launched Customer Experience Center of Excellence (CoE) explains what CX, or customer experience, entails and how it differs from customer service. The Customer Experience CoE is one of five GSA-housed IT Modernization Centers of Excellence focused on accelerating modernization efforts through close collaboration between the government and private sector. To better assess the maturity of CX efforts at your agency, check out the CX Self Assessment at the end of this guide.



Source: coe.gsa.gov

> "A CX strategy should not be yet another independent initiative developed in a silo. A CX strategy should be customer-focused and baked into how government conducts strategic planning and have meaningful mission achievement measures."
>
> Senior Administration Official, Office of Management and Budget

> "Customer Experience (CX) is defined as the sum of all experiences a customer has with your organization. Since government is often a sole-source service provider (e.g., there's only one place to pay taxes, or get a driver's license), CX is even more important in the public sector than in other organizations."
>
> DigitalGov

What's New in Federal Government CX?

Federal agencies have been measuring customer satisfaction since at least 1993, when President Bill Clinton issued an executive order focused on that and setting customer service standards. However, "benchmarking results across agencies has not been possible because each agency has used its own instrument," according to the Office of Personnel Management. Here's what's different now:

CX in the President's Management Agenda:

As part of the PMA and associated Cross-Agency Priority goals, federal agencies are zeroing in on improving CX with federal services. The overarching objective is to "provide a modern, streamlined, and responsive customer experience across government, comparable to leading private-sector organizations," and the administration has laid out a roadmap with milestones and status updates at Performance.gov. The team leading the governmentwide CX efforts is also evaluating "inclusion of customer experience measures in appropriate executive performance plans or agency performance goals."

Measuring CX:

Agencies are tasked with identifying their highest-impact customer journeys – using customer volume, annual program cost and/or knowledge of customer priority as weighting factors – and selecting touchpoints or transactions within those journeys to collect feedback. The Trump administration is also focused on creating publicly available CX performance dashboards that show how government agencies are performing in key areas, such as overall customer satisfaction, quality and employee helpfulness.

Uptick in mobile users:

The rise of mobile users and how to best serve them should be a priority for agencies, if it isn't already. Citing the U.S. Digital Analytics Program, Jacob Parcell, Acting Director of GSA's Innovation Portfolio, said that 2019 is the first year that more than 50 percent of sessions on government websites were mobile users. Government websites on average now handle more than 20 million users daily, he added, with about 48 percent of traffic on federal websites coming from mobile devices.

Legislation elevates digital experience:

In terms of legislation, lawmakers have made a strong tie between the role technology plays in CX through the passage of 21st Century IDEA. President Trump signed it into law December 2018, and it set requirements for federal website modernization and digitization of government forms and encourages acceleration of electronic signatures. GovLoop sat down with the author of the legislation, which we feature more extensively in the next section.

Sample CX Survey

1. **I am satisfied with the service I received from [Program/Service].**

   strongly disagree | disagree | neutral | agree | strongly agree

2. **This interaction increased my confidence in [Program/Service].**

   strongly disagree | disagree | neutral | agree | strongly agree

   OR: I trust [Agency/Program] to fulfill our country's commitment to [population].

   strongly disagree | disagree | neutral | agree | strongly agree

3. **My need was addressed.**

   strongly disagree | disagree | neutral | agree | strongly agree

4. **It was easy to complete what I needed to do.**

   strongly disagree | disagree | neutral | agree | strongly agree

5. **It took a reasonable amount of time to do what I needed to do.**

   strongly disagree | disagree | neutral | agree | strongly agree

6. **I was treated fairly.**

   strongly disagree | disagree | neutral | agree | strongly agree

7. **Employees I interacted with were helpful.**

   strongly disagree | disagree | neutral | agree | strongly agree

Source: performance.gov

OMB's CX guidance & updates:

In addition to the PMA, federal agencies are implementing first-of-its-kind CX guidance from the Office of Management and Budget (OMB). The goal is to "institutionalize the fundamental building blocks of CX across federal high-impact service providers," such as the Internal Revenue Service, Centers for Medicare and Medicaid Services, and Citizenship and Immigration Services.

These high-impact service providers operate the government's most critical digital services on which millions of people depend. The expectation is that they will serve as examples for other agencies. (We will discuss the new OMB guidance in further detail in the "Core Function of a Successful CX Program" portion of the guide.)

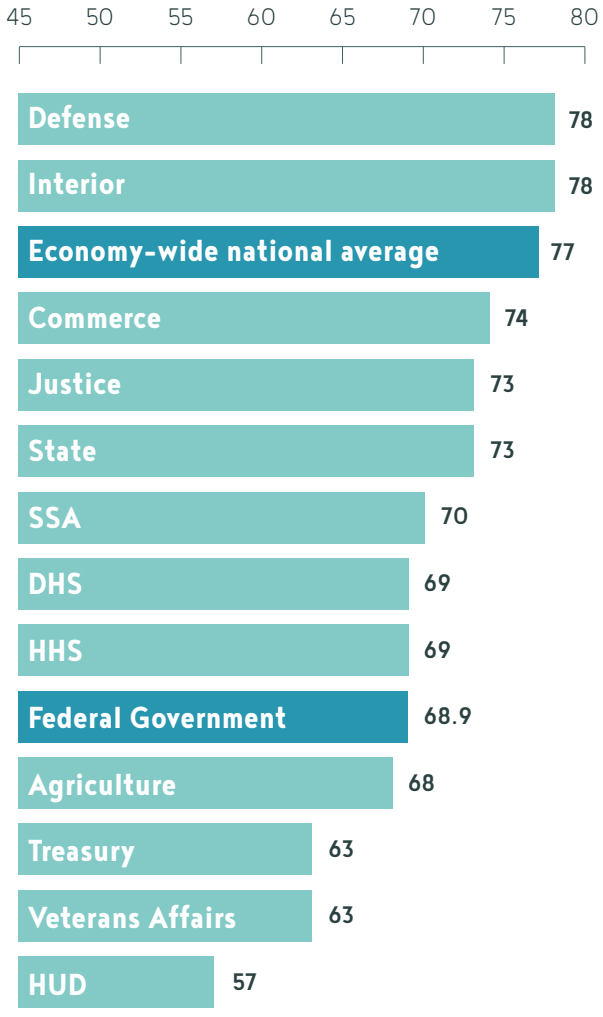
OMB's CX guidance attempts to categorize the types of government services and agencies, such as the Transportation Security Administration and the Occupational Safety and Health Administration, which are not typically viewed as CX organizations but rather more compliance-based.

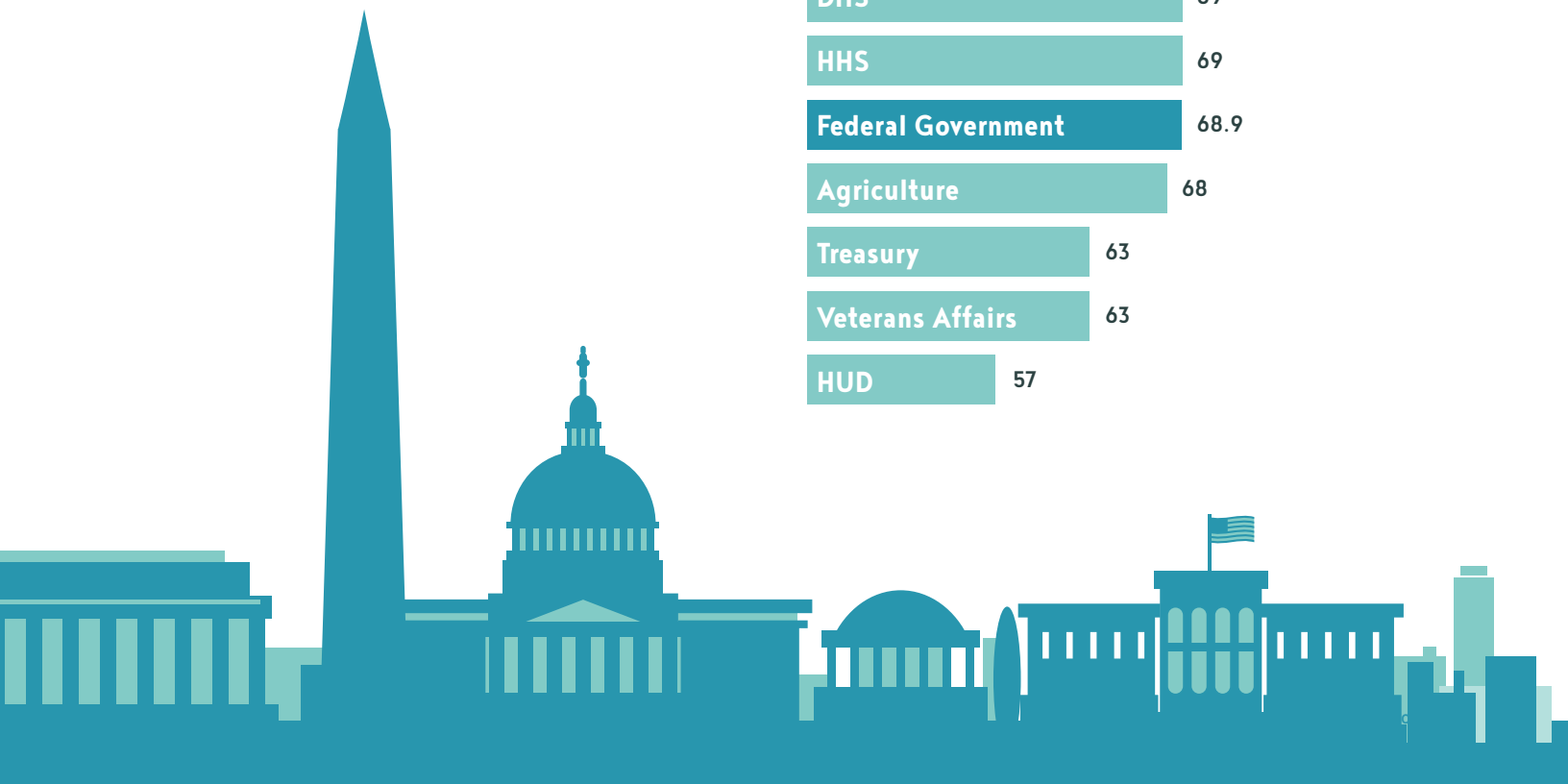
The governmentwide team focused on elevating CX, which includes representation from OMB, is also working with agencies to standardize clearance or approval templates to conduct CX-related activities, which are subject to Paperwork Reduction Act requirements. The 1980s law was designed to reduce the total amount of paperwork burden the federal government imposes on private businesses and citizens through activities such as qualitative customer research, gathering customer feedback data, and conducting service and digital product testing. The standards are expected to ease the burden on conducting those activities.

American Customer Satisfaction Index (ACSI) Federal Government Report 2018:

The American Customer Satisfaction Index (ACSI) federal government model includes four key drivers of citizen satisfaction: the quality of information, customer service, timeliness and ease of government processes, and usefulness of government websites. ACSI results are reported on a scale of 0 to 100. Satisfaction with federal services fell 1.1 percent in 2018 to 68.9 but remains at its second highest level since 2008. The survey was conducted before the 35-day government shutdown, so any impact from that will show up in the 2019 survey. Read the full report here.

ASCI: Federal Departments 2018





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Industry Spotlight

Why Customers' Needs Should Drive Modernization Strategies

An interview with John D. Conley, Regional Vice President for Public Sector, State and Local at Salesforce

Transforming the way governments serve the public is about more than choosing the right technologies. This level of change requires agencies to rethink how they engage their customers – from citizens and external partners to the frontline employees assisting the public.

They first have to understand their customers – what they need and how they'd like to interact with government services. These insights are what drive modernization and help agencies find the right tools to effectively cater to the unique needs of their customers.

In a recent interview with GovLoop, John D. Conley, Regional Vice President for Public Sector, State and Local at Salesforce, explained that establishing the right modernization pathways to improving digital services – whether it's a mobile app or 311 phone system, for example –leads to the greatest mission impact. Many agencies today are benefiting from the customer-relationship management solution that Salesforce provides, but they're also using this powerful platform to break down silos and unite teams to deliver personalized engagement.

"Having better customer engagement means that you're assisting people on their timeframe in a location that is convenient to them, including mobile," Conley said. "So, whether that's a self-service channel or social media assistance, having that engagement directly corresponds to an agency's program or mission impact."

"Having better customer engagement means that you're assisting people on their timeframe in a location that is convenient to them, including mobile."

Better engagement can also increase compliance in certain instances. For example, a growing number of governments are using chatbots to provide round-the-clock assistance to customers. These automated bots can help them initiate any necessary paperwork for the services they need or answer questions about a process and what they're required to do.

But one of the biggest hurdles that prevents agencies from fully embracing better CX through improved technology delivery is a legacy mindset.

"For the last 20 years, it was expected that customers went to a brick and mortar facility because they had to get their picture taken, or an agency needed a wet ink signature," Conley said. "But technology has now evolved to the point where all of those requirements can be handled via the computer, but that legacy mindset of in-person transactions still exists."

As technology evolves, government should be an incubator for innovation. For example, through partnerships with Salesforce, government entities have built out their 311, or call center, capabilities to empower citizens to connect with the government about various issues. Salesforce is also joining forces with cities to modernize their social safety net programs in a way that puts the citizens' needs first. That means considering the customer journey and their pain points, as well as the fact that mobile options are no longer a nice-to-have but an expectation.

When it comes to CX, agencies must pick the right platform that gives them the flexibility to unify teams across the organization and collectively improve customer experience, Conley said, and that's what's driving government collaboration with Salesforce.

"All agencies have customers, and the goal should be to provide the best possible service and engage them early and often throughout the process," Conley said.

TAKEAWAY

Customers are the lifeblood of government organizations, and to better serve the public, agencies must understand their pain points and how technology can drive better services and engagement.

What's New in State & Local Government CX?

Although there is not a uniform movement across state and local governments to improve CX, various efforts are underway. Laws such as 21st Century IDEA do not apply to state and local governments, but that hasn't stopped them from forging their own paths.

For example, several states – Illinois, New Jersey, Oregon and Utah – have made strides to improve the digital experience for residents. New York City and Washington, D.C., are among the local governments making strides in CX. We've highlighted some of the legislation and initiatives below:

Illinois

HB0816 would amend the Department of Innovation and Technology Act and require each state agency to submit a plan to improve the provision of digital services, including modernizing websites and enhancing the use of data analytics, by July 1, 2020.

New Jersey

The **21st Century Integrated Digital Experience Act** is aimed at modernizing state government websites and would require agencies to develop an IT modernization improvement plan to improve digital services. The bill calls for intuitive and adaptive electronic forms, electronic signatures, mobile-enabled websites, and digital processes and workflows.

New York City

BetaNYC's Digital Roadmap was formed to "share NYC's past success in digital and tech initiatives and simultaneously 'spur' the development of the city's tech scene" by focusing on internet access, open data, engagement, open government and industry. As of fall 2017, 14 of the ideas in the original roadmap were drafted into legislation, nine were made law, and an additional nine became public-private partnerships.

Oregon

SB 240 would direct state agencies to use electronic records and electronic signatures by July 1, 2020.

Utah

launched a statewide **Customer Experience program** in July 2018. It's expected to save the state money by promoting more in-house research and consolidating CX programs on a single platform.

Washington D.C.

Grade.DC.gov strives to improve customer experience at participating D.C. government agencies by collecting feedback through a website and through comments posted on social networking sites like Twitter to form a grade for each agency. The goal is access to customer opinions to help government agencies improve CX.

GovLoop also spoke with state and local leaders around the country to learn about CX priorities. Here's what they said:

"We'll be moving off of some of our legacy mainframes – moving them into the cloud – in the next few years. We'll be seeing some artificial intelligence systems, including chatbots and phone bots, being used to improve customer service, and more of these state-of-the-art emerging technologies being used, including blockchain, and more diffusion of mobile apps. And so, there's no lack of opportunity – while we keep it all safe, of course."

Theresa Szczurek, CIO, Colorado

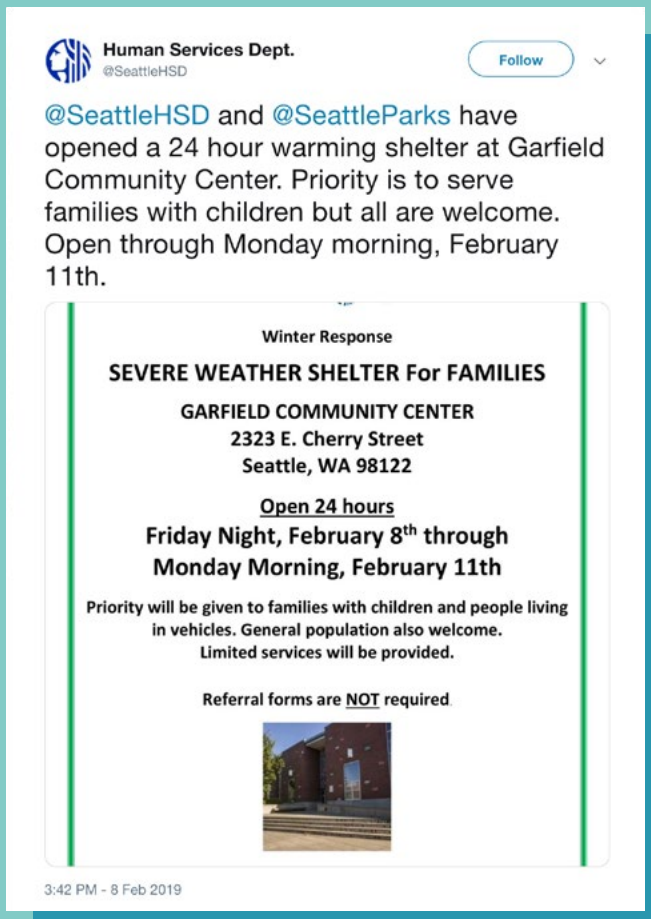
"If [residents] have to come in to City Hall, that's not being efficient and effective for the customer. And so, you're now able to download and fill out forms online, pay for things online, which has been very, very helpful. Really, technology push has been a big thing for me in developing customer experience."

Tara Campbell, Mayor, Yorba Linda, California

"We rolled out the mn.gov website, which basically changed the way that our customers, our citizens, are able to interact with their state government. And so being able to intuitively find what you're looking for, to be able to shop from home for that fishing license, or to find out what the hours are of the Department of Motor Vehicles, to understanding where your local officials are, all that's now consolidated in one place … It's about accessibility."

Johanna Clyborne, former Commissioner and CIO, Minnesota

Here are some examples of how governments at all levels are using Twitter to engage with their customers and provide insightful information and services.



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Industry Spotlight

Learning and Development Grow as Priorities for Agencies to Keep Employees Engaged

An interview with Joey Zumaya, Manager of Public Sector at LinkedIn Learning

There are 168 hours in a week. For the average worker, about a quarter of those are spent in an office - which, in government, can sometimes be limited in terms of staff and technology.

That's a lot of time to put up with a situation that's inefficient - both for the people themselves and government, which is constantly looking for ways to maximize its workforce. And yet, because of shifting demands in workforces and technology, that's often what happens.

But it doesn't have to be that way. GovLoop recently interviewed Joey Zumaya, Manager of the Public Sector at LinkedIn Learning, about how talent developers in government can maximize workforce engagement and mission outcomes. LinkedIn Learning is a training management and measurement platform that offers thousands of courses.

"In order to effectively serve citizens, your workforce has to be competent at the technology, processes and skills needed to do so" Zumaya said.

Uniquely challenging to government, millennials and baby boomers often share the same office space and perform similar jobs, but have very different technology skills and expectations. While one might find a 2008 word processing interface outmoded, another might find it newfangled.

"In order to effectively serve citizens, your workforce has to be competent at the technology, processes and skills needed to do so."

This skills and communication gap that persists in government can directly seep into employee engagement and outward-facing customer experience (CX), slowing response times and leading to inconsistent responses.

Talent developers need to identify these skills gaps and address them. Government executives, therefore, should make learning and development (L&D) a priority for agencies, and offer more autonomy to talent developers to select and implement the best programs.

They are. The good news is that despite tightening budgets across many agencies, 43% of talent developers surveyed in a recent LinkedIn Learning report said they expected an increase in funding. Furthermore, 59% spend more on online learning than they did three years ago.

Traditional email marketing has been a productive tool for engaging employees, but agencies can still struggle to reach managers and understand specific needs.

That's where online L&D comes in, offering better reach and precision. Online dashboards can communicate areas of strength and weakness to show managers and employees a clear path to improved performance with recommended courses.

LinkedIn Learning provides a central hub for online learning, where 50 new courses are added every week. That same platform also pinpoints skills gaps and tracks the effectiveness of prescribed courses.

The result is greater than content and productive employees. A more connected, complete workforce helps governments alleviate strains and strengthen CX.

"When government agencies think about shifts in technology and generations, there's a little bit of anxiety and a little bit of risk perceived," Zumaya said. "But we see that there's much more reward than risk."

TAKEAWAY

An engaging L&D program can prepare agencies for better engagement when given organizational constraints, such as shortages in staff, budget and modern technology.

Get Smart Quick: Implementing 21st Century IDEA

Public-facing federal websites and digital services can often lack the features and accessibility afforded by their private-sector counterparts. A new law strives to change the status quo by promoting modernization of government agency technology and previously non-digital, paper-based processes.

21st Century IDEA aims to increase efficiencies by promoting data-driven, secure, personalized and mobile-friendly websites. The law establishes minimum standards for federal websites and encourages agencies to digitize manual processes and accelerate the use of electronic signatures. As of April 2019, agencies were awaiting implementation guidance from OMB and specifics on website design standards from GSA.

Rep. **Ro Khanna**, D-Calif., introduced the bill in May 2018. It passed the House on Nov. 29 and the Senate on Dec. 11 before Trump signed it into law Dec. 20, 2018.

Rep. Khanna answered questions about 21st Century IDEA in an interview with GovLoop.

GovLoop: What were the driving factors that prompted this legislation?

Khanna: I wanted to make sure that when every American interacts with their government, they have a positive experience. Too many folks felt their experiences with government were outdated and not user-friendly: websites felt clunky, forms needed to be printed out, signed and then faxed. We also know that digital interactions in federal agencies can save the taxpayer tremendous amounts of money. In the IRS, for example, in-person interactions cost over $40 on average, while digital transactions cost just $0.22 on average. The technology to make these experiences better and cheaper exist, and I felt that as the member of Congress who represents Silicon Valley, I was in a unique position to bring some of these innovations to our federal government.

"I wanted to make sure that when every American interacts with their government, they have a positive experience."

What were some challenges you faced pushing this legislation forward? How did you tackle or overcome those challenges?

Khanna: We found a great coalition of supporters across party lines to help move this legislation. At the time, Democrats were in the minority, and thus structurally it was challenging to move legislation. Working with key Republicans like John Ratcliffe and Rob Portman helped us overcome that obstacle, though.

What will some short term and long-term successes look like?

Khanna: I'm confident that federal agencies will meet the requirements that are in this bill. Success will be the American citizen feeling that there is no difference between interacting with the private sector and government.

What impact will this have on the workforce and the citizens they serve?

Khanna: This legislation will make it easier for the federal workforce to serve citizens. A lot of these changes will streamline the interaction that Americans have with their government.

What's next?

Khanna: It is up to each executive agency's Chief Information Officer to oversee the implementation of this law. There is some interest in putting the IDEA bill requirements on the FITARA [Federal Information Technology Acquisition and Reform Act] scorecard, so we will explore to see if that is the best way to keep track of the progress. If not, we will look at other ways to ensure compliance. I look forward to working with OMB and the White House Office of American Innovation to ensure the requirements of the law are met. I serve on the Oversight [and Reform] Committee and the Government Operations Subcommittee that has jurisdiction over this legislation. I have great trust in Chairman [Gerry] Connolly to conduct proper oversight over the implementation of this legislation. We will be able to do oversight to make sure these changes are made so we can better serve those we represent.

21st Century IDEA Act Checklist

June 20, 2019 → ***December 20, 2019*** → ***December 20, 2020***

Electronic Signatures

Submit plan to Congress and OMB to accelerate electronic signatures, receive guidance from OMB on process to prioritze services to digitize.

- Increased efficiency
- Faster time to service
- Improved processes

Website Modernization

Ensure new and redesigned federal websites meet modern standards.

- Accessible to those with disabilities
- Consistent in appearance
- Industry standards for security
- Mobile-friendly
- User-centric

Digitize Government Services and Forms

Digitize new and existing forms and access non-digital processes.

- Web-based
- Mobile-friendly
- Personalized
- Non-duplicative

Implementation Guidance from OMB

As of April 2019, agencies were awaiting guidance from OMB on how to implement the law. The legislation calls on CIOs to oversee aspects of the law, including coordinating internal and external CX programs and providing guidance for digital service delivery, but a senior administration official stressed that CX will not fall squarely on the shoulders of federal CIOs.

"Everyone in an organization is responsible for CX," the official said. "CIOs are a critical strategic partner in the federal effort to raise our customer experience maturity. Technology helps make many of our improvements happen, but CX is more than the service delivery mechanism."

Case Study

How USCIS Takes a 21st-Century Approach to the Online Experience

The U.S. Citizenship and Immigration Services (USCIS) is heavily invested in accessible, mobile-friendly online tools and is well positioned to align with 21st Century IDEA's requirements.

USCIS sees its mission as empowering individuals to navigate their immigration journey in a way that best meets their needs, Courtney Winship, Chief of the Digital Services Division, Office of Citizenship and Applicant Information Services at USCIS, said during a February 2019 GovLoop online training. Each month, more than 25 million visitors interact with the agency's digital tools, and the agency's case management tool alone receives 350,000 visits a day.

For example, visitors use the agency's online resources to find relevant information about their case status, change their address and calculate potential fees associated with their application.

To meet users' needs, Winship and her team work to understand their challenges using journey maps and to create a personalized experience. This helps build trust and show individuals that "you're not just a file moving from office to office, but you are an individual and a person that the agency is interacting with," she said.

Creating a user-centric experience is a key tenet of 21st Century IDEA and something Winship holds in high regard. In the past six to eight months, her division merged to form a cohesive unit and brought together employees focused on the website, online self-service tools, accounts for online filings, content and design, and opportunities to integrate with contact center staff.

"We are really aiming to create that 360-view and help people navigate more smoothly," she said. The agency aims to take a mobile-first approach and ensure it complies with Section 508 of the Rehabilitation Act, which requires that federal IT, such as websites, be accessible to individuals with disabilities.

In anticipation of OMB's implementation guidance, Winship said the agency is considering success metrics to identify gaps and areas of improvement when it comes to adopting digital tools. USCIS is also working with the Federal Web Managers Council in hopes of sharing opinions that can shape future website standards.

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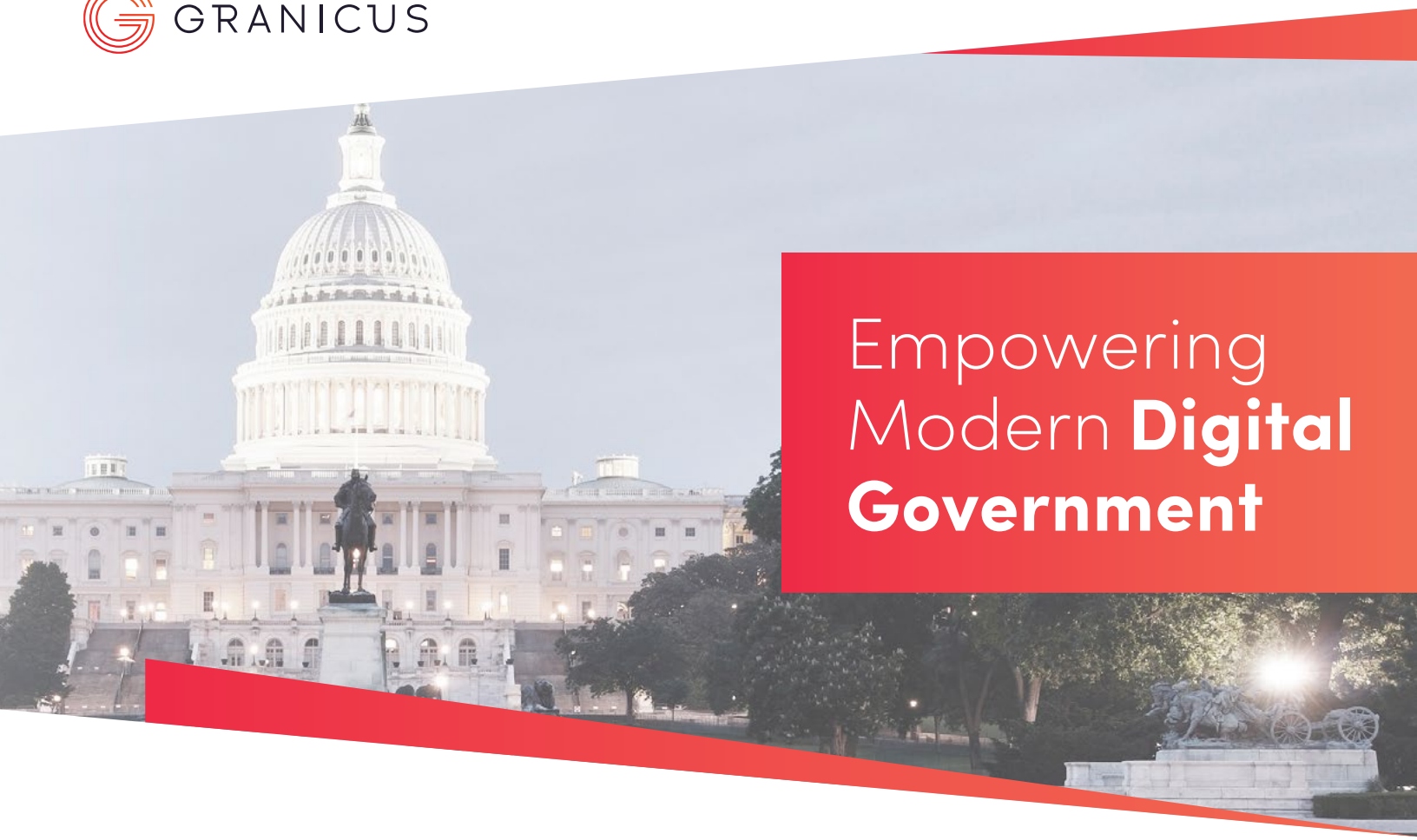

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Industry Spotlight

A Citizen-First Mindset Drives Better Government Services

An interview with Angy Peterson, Vice President for Digital Engagement Services at Granicus

Across government, citizen-facing services are undergoing an evolution – from merely providing information online to delivering timely and personalized experiences to the public. But as agencies roll out and enhance their digital capabilities, they must find ways to engage with the people who need those services most and in the ways that best meet their needs.

The key is understanding who those individuals are and how they interact with government services.

In a recent interview with GovLoop, Angy Peterson, Vice President for Digital Engagement Services (DES) at Granicus, explained how a citizen-first mindset drives improved government services. Granicus is a leading provider of cloud-based solutions that empower governments to better serve citizens.

For any organization, the stakes for delaying improvements to digital services are high, Peterson said, citing an internet trends report that found 82% of consumers stopped doing business with an organization after a bad digital experience. Executing a quality digital engagement plan is key to keeping citizens and customers informed and empowering them to access the services they need.

In Michigan, for example, the state's Department of Education partnered with DES to launch a strategic email and text message campaign, aimed at raising participation in its free summer meals program. This led to more than 3.6 million served meals in 2016, up from 3.1 million in 2015.

The ultimate goal for agencies is targeted engagement at lower costs. Budget constraints are common across government, so officials need to be cost-effective and demonstrate the impact of their proposed initiatives, Peterson said, "If you can't measure it, you can't improve it."

That's why agencies must find ways to be more strategic and think big picture – even in the midst of managing large, programmatic efforts. "They must be able to still respond and react to the day to day fires that come up." The answer? Implement an engagement strategy.

"Granicus helps clients get clear on their goals, and helps them better understand their citizen audiences," Peterson said. They can also help map an agency's ideal citizen journey.

> "It's really that citizen-first mindset that makes a difference."

This journey includes reviewing touchpoints or steps that individuals take when they interact with an agency, from search engines to sign-up forms to different integration points on their website.

"For one large federal agency, we took their email list from 20,000 to eight million in a year and a half, which is huge growth," Peterson said. "That was because of the digital engagement services used."

Acquiring a citizen-first mindset is achievable for governments at all levels. When agencies start thinking like their audience and determining who they are, what they need, and how they can reach them, then they can maximize that knowledge to form a cohesive strategy.

TAKEAWAY

An engagement strategy can help federal, state, and local governments meet citizen expectations and deliver measurable improvements.

Case Study

A Customer's Experience

Conversations around CX typically come from the agency's perspective – how government employees are assessing customers' needs and issues. For this section, we're highlighting an experience from the customer's point of view.

Maryland resident, **Emily Jarvis**, tied the knot Dec. 9, 2017, and began the process of changing her last name in late 2018. Here, she shares her ongoing struggle to update her driver's license with her new name. We chronicle Emily's journey and compare it with the standard name change process. The goal of this case study is to illustrate the challenges that customers face in their quest to interact with government.

"The most frustrating part is the lack of communications between the various parts of the Virginia DMV. You call one person and your story isn't tracked through the system, so you have to go through the whole thing again."

Emily Jarvis, Maryland Resident

Driver's license name change

1. **Obtain an original or certified marriage license with the raised seal from the clerk's office where you filed your license.**
   - **Emily:** *Called the county clerk's office in the county where she got married. She had to print out paperwork online to request the documents, get the form notarized and then mail it in.*
2. **Apply for a new Social Security card by mailing in an application to your local office or going to the office and filling it out. Your new card should be in your hands within 10 business days.**
   - **Emily:** *Called to schedule an in-person appointment because there wasn't an option to do it online. After the appointment, she received her card within 10 business days.*
3. **Obtain a new license with your new last name at your local Department of Motor Vehicles (DMV) office.**
   - **Emily:** *Went from the Social Security Administration (SSA) to the DMV but her name change with SSA had not cleared in the DMV's system. She was turned away after waiting for two hours.*
   - *Two weeks later, she returned to the DMV with the necessary documentation only to find out she had a hold on her license. (She had recently moved from Virginia to Maryland and already had a Maryland license with her maiden name on it.)*
   - *Neither state's DMV could tell her why a hold is on her license, and she was told to call every few days to track the status of her claim.*

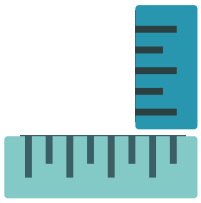
Since starting the process to update her driver's license in January, Emily was notified in late March that she can complete and return paperwork to the DMV – via snail mail – to clear the hold on her account and finally get a new license.

5 Core Functions of a Successful CX Program

There are many ways to measure the success and maturity of customer experience efforts at your agency, whether it's audience engagement on social media, call wait times, website traffic or satisfaction surveys. For this guide, we referenced the federal government's guiding principles for executive branch agencies to improve CX.

OMB updated its guidance that provides an overview for agencies of the budget process, also known as OMB Circular A-11. The guidance now specifically includes a section on managing CX and improving service delivery – what it is, why it matters and actions agencies must complete. The goal is to shift from making CX a disjointed, compartmentalized effort to a departmentwide – and eventually governmentwide approach – that improves customer satisfaction, transparency and consistency across programs.

Below are the core CX functions that agencies are focusing on, plus a brief definition of and best practices for each:



Measurement:

Defining and instituting CX outcome measures.

Governance and Strategy:

Institutionalizing CX by identifying responsible executives and leaders, organizing supporting resources, and establishing decision-making processes.

Culture and Organization:

Acquiring and developing the talent required to incorporate and improve CX within agency activities and empowering all employees to adopt a CX mindset.

Customer Understanding:

Implementing activities and conducting qualitative and quantitative research across organizational silos to map intra-agency customer journeys.

Service Design:

Adopting a customer-focused approach to the implementation of services, involving and engaging customers in iterative development and using digital technologies.

We recently polled the GovLoop community to understand what area of CX they feel their agency is weakest in or needs the most help with.

- Defining and measuring CX outcomes - **15%**
- Governance and strategy - **20%**
- Creating a culture of CX - **13%**
- Understanding the customer journey - **25%**
- Implementing CX in our digital technologies - **27%**

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Industry Spotlight

Enhancing Citizen Digital Experiences With Data Insights

An interview with Robert Withers, Director of Public Sector at New Relic

Digital transformation involves fundamentally changing the way an organization conducts business. It's about more than a new tool or website. What propels true transformation is understanding what citizens want from government services and how technology and process improvements can meet those needs.

Driving these changes are requirements for agencies to comply with laws that mandate modernization, such as the 21st Century Integrated Digital Experience Act (IDEA). In a recent interview with GovLoop, Robert Withers, Director of Public Sector at New Relic, a leader for providing real-time performance insights for monitoring citizens experience, explained why it's critical for government to deliver modern digital services and how agencies can achieve that goal.

Understanding the citizen experience is rooted in the use of accurate quantitative and qualitative metrics, Withers explained. "An agency can't judge its success from surveys anymore. They need real-time metrics."

Although digitization may be just another consideration on a long list of items that agencies must prioritize, it could ultimately reduce the cost of delivering more efficient services. A crucial part of delivering better services is managing current user interactions in real time so that citizens are heard and reflect positively on their experiences.

All of these considerations tie into providing better customer experiences. "If agencies cannot understand the experience being delivered, monitored and tracked, then they really don't know where to invest for improvements," Withers said.

The bad experience may be due to a problem on a citizen's internet browser, or a fault with the agency's technology.

"If agencies cannot understand the experience being delivered and monitored and tracked, then they really don't know where to invest for improvements."

New Relic's digital services provide agencies with real-time data metrics that they can use to react and improve any issues their citizens might have. Previously, these agencies relied on surveys and more static means to gauge customer feedback. New Relic is helping agencies understand how all the pieces and parts that are used to deliver a service are interacting together. That means having insights across the service from the citizen to the data; and all the infrastructure components needed to make that happen. To be used instantly for the citizens experience, and at the same time used to find and predict efficiencies.

Withers explained that if you're a citizen, your experience with the service matters. However, there are many stakeholders, from operations staff to applications owners, involved with creating and maintaining the service. All stakeholders need common insights to their services; and displayed based on their role.

"There are many stakeholders who are affected by this move to digitize," Withers said. "For example, citizens care most about their experience with a service, while developers are focused on how the code performs and C-level executives are focused on how that software is driving business outcomes. New Relic provides insights based off of data to allow all the different stakeholders to benefit."

TAKEAWAY

Modernization can be complicated, especially when agencies monitor customer interactions and feedback to provide better experiences. Insights provided by companies like New Relic can better help agencies understand every part of the process.

Case Study

Yorba Linda Revamps Website, Launches Mobile Tracker

Challenge: Rebranding the City's Reputation for Poor CX

Tara Campbell remembers when customer service was an issue for the city. "People felt like City Hall wasn't working with them. It was almost working against them," said Campbell, who serves as Mayor of Yorba Linda, California. "A big thing for us is making sure that we have a better reputation now, working to make sure we're a business-friendly city."

That meant ensuring that businesses undergoing the permitting process had a good experience with the city. News travels quickly when they don't, so Campbell focused on building the city's reputation for providing stellar CX.

Solution: Developing a Mobile-Friendly, Accessible Website

When Campbell became Mayor in 2018, one of her priorities was revamping the city's website. "You couldn't find anything on our city website, and the problem with that is a normal customer or resident doesn't know what department to go to for their concern or need," she said.

She envisioned a website that was easy to navigate, accessible and mobile-friendly. "Over 60 percent of people access the internet from their phone, and so if we're going to be accessible to our customers and provide them with that greater experience, we better be going and providing a platform where they're already going," Campbell said.

The new website launched in March 2018 and includes a Google-like search function so that residents don't have to waste time looking through different departments to find what they need. As part of that website overhaul, the city also developed a Citizen Request Tracker.

Let's say a resident sees a broken swing at a park. They can take a picture of the swing and upload it to the tracker from their phone. That photo will be geo-tagged so city workers know where it's located. Residents can also opt to receive notifications about the status of a project.

Campbell highlighted one example in which a resident reported a streetlight using the tracker, and within 24 hours, city workers fixed it and notified her that the issue was resolved. "Sadly, we just don't have the staff there that are out in our city 24/7 monitoring everything, and so our residents are our eyes and ears that are out there all the time," Campbell said.

She also shared best practices for how her staff tackled each of the core CX functions highlighted in the previous section:

Measurement: The city is working with its department heads to establish solid metrics and gauge the effectiveness of the new website. Among the metrics Campbell plans to track are how many residents submitted issues or concerns via the website and Citizen Request Tracker, and how many of those issues were resolved. If the issue wasn't resolved, why not? Campbell also wants to know how many residents reported problems through other means, such as contacting a city employee or council member.

Governance and Strategy: When the city redesigned its website and developed the Citizen Request Tracker, all department heads were involved. "Whether you're dealing with businesses – maybe it's business license issues vs. paving of streets vs. park maintenance – we brought all of them in because they're the experts on knowing how we solve those situations," Campbell said.

Culture and Organization: "We very much empower … our department heads," Campbell said. That approach has proven effective for developing creative solutions to CX and services. It also helps that CX is a top priority for the city manager and City Council, and department heads are well aware of that. CX is about more than words but showing what you stand for through actions.

Customer Understanding: The city is working to create new journey maps to understand the full experience customers have when requesting services or reporting an issue. "One thing we realized is, sometimes it is an interagency issue," Campbell said. For example, maybe a request went to the Parks and Recreation Department, but Public Works also needs to get involved. Or maybe the request got lost while being transferred to another department. Having a complete view of the customer journey will help address these issues.

Service Design: The goal is to ensure that the city is doing what's best for its residents in terms of functionality and ease of use. A key part of that was making the city's website mobile-friendly because most residents use mobile devices. Yorba Linda is also considering how to expand its reach on social media to deliver information in a format that's conducive to the public's needs.

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Case Study

Q&A With the Veterans Experience Office

VA is playing a key role in shaping how the federal government improves CX.

OMB tapped VA last year to be a lead agency partner tasked with improving the usability and reliability of the federal government's most critical digital services. Collectively, those agencies are also focused on creating measurable improvements in customer satisfaction and increasing trust in the federal government by improving the experience citizens and businesses have online, in person or via the phone.

VA was identified as a high-impact service provider in government and was instrumental in shaping guidance to improve federal programs' CX.

To better understand how VA is tackling CX internally, GovLoop sat down last fall with VA's **Dr. Lynda Davis**, Chief Veterans Experience Officer, and **Barbara Morton**, Deputy Chief Veterans Experience Officer.

The interview below was lightly edited for clarity and length.

GovLoop: What are some key things you're doing to ensure that the culture keeps employees engaged and positively impacts CX?

Davis: The concept of customer service for Secretary [Robert Wilkie] is not just those veteran's families, caregivers and survivors that we are pledged to serve. He sees it inseparable from employee service and employee engagement. This is a part of the maturity process of any agency looking at becoming customer-centric. Without the organization changing its culture and the employees equipped to deliver in a customer-centric manner, this will not work. It is not sufficient to have business processes. It has to be adapted to the government context and those specific customers in that context. Veterans get services outside the federal government, and they get them inside the federal government. When they're inside the federal government, there's a slightly different dynamic, but we have to be even more customer-centric than when they receive services from the private sector. The secretary has committed us to do employee service and employee engagement, and, luckily, we have the ability to do that through our Veterans Experience Office and are engaging with our Veterans Health Administration (VHA) to start.

Are there any new initiatives, changes or improvements that we can expect to see as a result of the OMB circular work? How are you shaping CX?

Davis: We have a program called Veteran Signals. That is a way in which we survey our veterans for their input – both qualitative and quantitative – about their experience when they use our services. This is now implemented at VHA for outpatient experience. We get their feedback in real time, and we're able to use that to inform our leadership and directors of our business, hospitals and departments to look at trends or look at a certain challenge a particular department is having and may need additional resources for.

How do the surveys work and what types of things are you asking the veterans?

Morton: One of our two bookends is interviewing veterans and creating journey maps. The questions that we ask are based on the journey maps and the moments that matter most to the customer. Traditionally, we've not necessarily focused on the moments that matter most to the customer. So that's a different approach that we're bringing. The questions are based on those moments that matter or based on the journey maps and interviews that we've done with veterans. They're short and sweet questions, and they're based on a model that we use that really focuses on was it an easy experience, was it an effective experience, did you feel valued as a customer and do you overall have a feeling of trust in the organization because of your experience? And they're not just a series of questions. We also have open, textbox comments to allow participants to provide other feedback. We categorize those in three ways. One is a compliment, another is a concern and another is a recommendation. What we found is we actually get quite a bit of compliments, not as many concerns and some recommendations as well.

> "It is not sufficient to have business processes. It has to be adapted to the government context and those specific customers in that context."

How does VA measure trust?

Davis: The trust score was one of the early additions of the Veterans Experience Officer, and it's based on the Forrester model of using customer trust. It talks about trust and the sub-metrics of expectedness, efficiency and emotional resonance of an experience or a service that is delivered. In the Veteran Signals process, we could adapt the questions further to not just macro trust scores, which are good to know if you're trending in the right direction organizationally, but they're hard to take action on. When we had the specific comments and the ability to base our questions on what the veterans cared about, it became more relevant to them and more useful to us.

Based on the feedback and the metrics, how would you assess the level of trust veterans have in VA?

Davis: It has continued to go up since we began the surveys in 2017. We also break it down by specific area, and what we find is that veterans have a higher degree of trust and comfort and confidence in their providers than they do in the processes, like a scheduling process. It's sometimes the business process, the mechanism, the logistics, of getting in to see those providers that is the challenge, especially in the Veterans Health Administration. They will feel good about the regional office representative from the Veterans Benefits Administration who can work with them on the phone and take the time to see them even in person, but the process of getting a rating and determining their vet benefits, which change over time, can be a challenge. One of the things we're doing with the data we're getting now, as we're changing the culture, is to then go back and change our business processes.

Conclusion

The customers you serve are accustomed to getting what they need, when they need it, with a click, tap or swipe. They want to toggle between mobile-friendly websites and social media, or in-person visits and phone calls. Regardless of the medium, the expectation is consistent, timely and personalized services.

Increasingly, digital platforms are driving more robust customer experiences, but technology alone does not drive CX. The ability to measure success and fully understand how your customers interact with various services and their overall experience is vital. Use these metrics to benchmark where you are today and weigh opportunities for improvement in the future.

Ultimately, improving CX requires a cultural shift that accounts for every employee's role in serving customers – whether internal or external. This transformation starts at the top and flows throughout an organization from leaders down to empowered frontline employees.

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For more information about this report, please reach out to info@govloop.com.

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CX Self-Assessment

This is a tool the Trump administration provided to help agencies assess where they are in their CX journey. Use this assessment to benchmark the maturity of your agency's CX program as beginner (CX level 1), intermediate (CX level 2) or more advanced (CX level 3). Each question ties back to the five core functions of a strong CX program: measurement, governance, organization and culture, customer research, and service design.

CX Level 1 | CX Level 2 | CX Level 3

		YES	NO
MEASUREMENT	We have defined Customer Experience metrics in line with the government-wide reporting requirements.	○	○
	We have identified quantitative, objective customer-experience related metrics that we report on with our feedback metrics.	○	○
	We are aligned with agency-wide customer service level standards including call centers and touch points in different mission areas.	○	○
	We have a "Voice of the Customer" strategy for collecting CX feedback and measures across our entity's entire purview.	○	○
	We have a central view of how our entity is doing on CX at Secretary, Regional, Program, Front-Line, or other appropriate levels.	○	○
	We publicly release our CX performance data–the results of our surveys, touch point survey levels, and quantitative metrics.	○	○
GOVERNANCE	We have sub-entity or program leadership dedicated to a specific customer segment CX strategy.	○	○
	We have an Executive that is responsible and dedicated to the entity's CX strategy.	○	○
	We have a CX strategy that is either aligned with or specifically a component of our overall agency strategy.	○	○
	Significant policy decisions and large investments require CX activities and documentation as part of the review process.	○	○
	We support our CX employees to spend time on sharing best practices and tools governmentwide and participate in CX activities.	○	○
	We have identified where our customer journeys overlap with other agencies and have created mechanisms to work together.	○	○
ORGANIZATION & CULTURE	All employees receive a training in which they are oriented to who the entity's customers are and our CX strategy.	○	○
	We have a library of CX trainings that are annually updated and a method for collecting and sharing CX stories.	○	○
	We have job codes and positions that are specific to CX skill sets and roles.	○	○
	We evaluate employee performance against role-specific CX metrics.	○	○
	We have awards and recognition specifically for exemplary CX behavior.	○	○
	We have a team(s) of people that are able to support programs with CX activities.	○	○

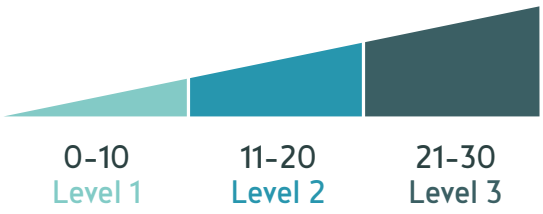
Continued on next page ⟶

		YES	NO
CUSTOMER RESEARCH	We use ethnographic research techniques such as interviews and observational studies to better understand customer behavior.	○	○
	We have a central, entity-wide catalog of our customers and detailed personas that is annually reviewed.	○	○
	We have a central, entity-wide catalog of our customer journeys and prioritized bottlenecks that is annually reviewed.	○	○
	We complete customer segmentation/analysis activities at least annually.	○	○
	We have a regular mechanism for collecting employee feedback and places in which they believe our programs could be improved.	○	○
	We share the results of customer segmentation/analysis activities with agency leadership, employees, and the public.	○	○
SERVICE DESIGN	We have mechanisms for involving stakeholders in co-creation of programs and improvements.	○	○
	We are moving our IT organization towards agile, iterative design processes.	○	○
	We have adopted CX tools or other resources from other government programs or developed our own for others to leverage.	○	○
	Existing IT and digital investments are tested on an ongoing basis using human-centered design processes.	○	○
	New IT and digital investments are tested using human-centered design processes.	○	○
	All programs and entities that interact with the public have human-centered design capacity.	○	○

Tabulate your score on the self-assessment.
Award your agency one point for every "yes" response.

Measurement	/6
Governance	/6
Organization & Culture	/6
Customer Research	/6
Service Design	/6

We scored /30



AREA OF FOCUS

In the next fiscal year, we are working to build our capacity and activities in _____ and _____.

(Select at least two of the five categories above)

"Everyone in an organization is responsible for CX ... Technology helps make many of our improvements happen, but CX is more than the service delivery mechanism."

–Senior Administration Official

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