Your Guide to Improving Customer Experience Through **Inclusion**, **Engagement** **&** **Data**

govloop

Contents

Executive Summary

I want you to take your government hat off for a moment. Think about the last time you made a request to — or used a service provided by — a federal, state, local or tribal government agency.

What was your experience like? Was that interaction positive? Did you get the help you needed?

Well, I took my GovLoop hat off and relived an experience that I had in December 2019, when I visited three government offices in two states within 48 hours. Talk about a whirlwind. I split my time between a police precinct and a Social Security Administration (SSA) office in New York City with my grandmother, and a Department of Motor Vehicles office in Maryland, where I got my REAL ID driver's license.

I vividly remember each of those experiences, but what I carry with me is **how each person serving me made me feel.** I remember the SSA representative who said it was her job to make my grandmother's life easier, not harder, and went above and beyond to help my grandmother replace her Social Security card.

Our next stop that day was to a police precinct to report the card, along with my grandmother's wallet and other personal belongings, missing. The last time I had visited a police station was in college to do a ride-along with a cop, so you can imagine the angst I felt entering an office that was unfamiliar to

The author, Nicole Blake Johnson, with her grandmother in NYC

me. I was admittedly nervous and unsure of whom to ask for help. What started as a tense visit ended with an employee listening intently to my grandmother and helping us file a police report.

I also remember the DMV employee who took the time to quickly and empathetically assess the needs of people in line at the front desk. That meant getting out of her seat and standing with us, explaining the different reasons why someone would be in line, and directing them to the right place based on their needs and appointment times. Was she required to handle the situation in that manner? No. But it made all the difference because she cleared the bottlenecked line in seconds, and I was able to meet my appointment time.

So why am I sharing these stories? I want you to understand the mindset and approach that I took to writing this guide. My goal is for readers to channel their inner customer so that they can advocate for the people they serve in new ways. I want readers to not only understand but to gain actionable insights around inclusion, engagement and data that can make all the difference when serving others.

This guide is packed with case studies and takeaways that you can put into practice now. You'll hear from current and former government professionals who are adapting to new ways of serving customers as they simultaneously battle the impacts of COVID-19. They represent large and small agencies at the federal, state, local and tribal levels.

Let's get started.

- Nicole Blake Johnson
Managing Editor, GovLoop

What's Top of Mind in Government CX?

The way customers interact with you and your agency doesn't have to be flashy to be effective. In fact, simple things, such as the ability to complete and sign forms online or from a mobile device, a user-friendly website, and clear messaging that speaks to a customer's pain points, can go a long way. These investments are no longer nice-to-haves in this era of COVID-19. Responsiveness followed by action to resolve an issue can make all the difference.

But this approach to serving others begins with a mindset that first acknowledges you actually have customers. This may seem like rogue thinking for many government agencies.

→ Who is your customer?

"The word customer in CX implies a business transaction, which it can be. However, your customer may be a different stakeholder, a person for whom you're seeking to design a better experience that is not transactional. This person may be an employee or member of the general public. It's important to be clear about which customer segment you're supporting at a given time."
— General Services Administration (GSA) Office of Customer Experience's "Customer Experience Services Evaluation and Buying Guide"

→ What service(s) are you providing?

This question isn't easy to answer for agencies that don't see themselves as having a customer service role. Defining what a service is starts with understanding what customers need from your agency and how you meet those needs. From there, you can think through how customers access those services, whether in person, online or a combination of interactions.

Many government agencies rely on surveys to glean customer feedback. Here's an example from Prince George's County, Maryland's Click 311 service. →

→ What is a customer-first mindset?

Seeing the public as customers is still a new concept for many agencies, especially those with a regulatory or national security mission. Their objective to ensure safety may seem directly at odds with this new paradigm of seeing the public as customers. But that doesn't have to be the case. In fact, having a customer-first mindset can ease regulatory burdens for the agency and the customer — when done right. (See page 24 to learn about the approach the Transportation Security Administration's [TSA] social media team is taking.) A customer-first mindset doesn't necessarily mean the customer is always right. Rather, it means:

- Advocating on behalf of, not working against, customers

- Designing and building with, not separate from or in isolation from, customers

- Serving with empathy, not apathy

For more background on what CX means in government, including an agency self-assessment and other resources, make sure to check out GovLoop's previous guide: "Government's Customer Experience Playbook."

Prince George's County Click 311
Customer Satisfaction Survey

Accessed CountyClick 311 via Call Center Representative
* Required

Were you happy with the speed in which your call was answered? *
○ Yes
○ No

How satisfied were you with the friendliness & courtesy of our call center staff? *
○ Extremely Satisfied
○ Very Satisfied
○ Somewhat Satisfied
○ Slightly Satisfied
○ Not Satisfied

Stephanie Thum, a Certified CX Professional and former Vice President of Customer Experience at Export-Import Bank,

is a tireless advocate for improved customer experiences in both government and industry. Here are some key insights she shared with GovLoop about moving from the concepts of CX to construct:

- **Be willing to do the work.** CX must be interwoven into the fabric of your agency. It doesn't happen naturally; it's deliberately designed. A foundational part of that work should include an administrative policy and strategic plan that guide all agency employees so that they're on the same page concerning processes, tools and mindset. That fosters collaboration.

- **Talk about CX in business terms.** Just like the private sector, government agencies have a business side that matters to senior leaders and directly impacts mission. Can you show the correlation between improved CX and business value? Value could mean monetary savings, but also reduced wait times, more self-service options for the public that free up internal staff and more.

- **Know the various channels through which your agency solicits customer feedback.** One of the big issues Thum has seen around CX is that although people are in charge of CX oversight, they don't always know how many are surveying customers and where that feedback resides. This leads to data silos and security risks.

- **Don't forget your internal customers.** An increasing number of internal operations, including IT help desks, are embracing CX practices and principles. They're establishing governance procedures, and measuring, monitoring and triaging issues that impact internal customers.

- **Celebrate small victories all the time.** For example, whenever you see an agency leader talk about customers in their congressional testimonies, that's always a win that isn't celebrated enough. It can help bridge some of the gaps that can emerge when lawmakers want to hold agencies accountable for improving services without providing enough funding.


> **Stephanie Thum, CCXP** @stephaniethum · Jul 4
> Customer experience should be about more than compliance. ✓
>
> If you're sending out customer surveys and don't know why, or don't intend to do anything with the results, that's like hearing the words of a song but not the music.
>
> Tune in. 🎵🎶
>
> #CX
>
> 💬 2   ♻ 5   ♡ 19

> **Stephanie Thum, CCXP** @stephaniethum · Jul 10
> One sure way to low #survey response rates: bad survey design.
>
> For example: can customers answer questions the way they want, or are they boxed into the answers you think are best? Give them space to answer as they wish. ✓
>
> Bad surveys are everywhere. Hire a pro to help. #CX
>
> 💬 1   ♻ 4   ♡ 15

> **Stephanie Thum, CCXP** @stephaniethum · Jul 13
> Collect the feedback #customers want to give. Ask meaningful questions.
>
> What's more important? Whether they would recommend you, or whether they #trust you to keep their safety in mind in the online and offline worlds? ✓
>
> #CXUnplugged #CX
>
> youtu.be/PI255ow9upA
>
> "The dimensions of CX are changing. Customers are also looking for clean, contactless, inclusive, and privacy-centric experiences."
> –Stephanie Thum, CCXP
>
> 💬   ♻ 1   ♡ 2

> **Stephanie Thum, CCXP** @stephaniethum · Jul 10
> 📱 #Tech and data are big things in #CX, but they aren't the only things.
>
> How do you create structure, org alignment + action around the data the tech gives you? When/where are you going to present the data?
>
> That's #governance. It's part of the discipline of CX.
>
> 💬   ♻ 3   ♡ 7

Follow Thum on Twitter for daily doses of practical advice for improving CX.

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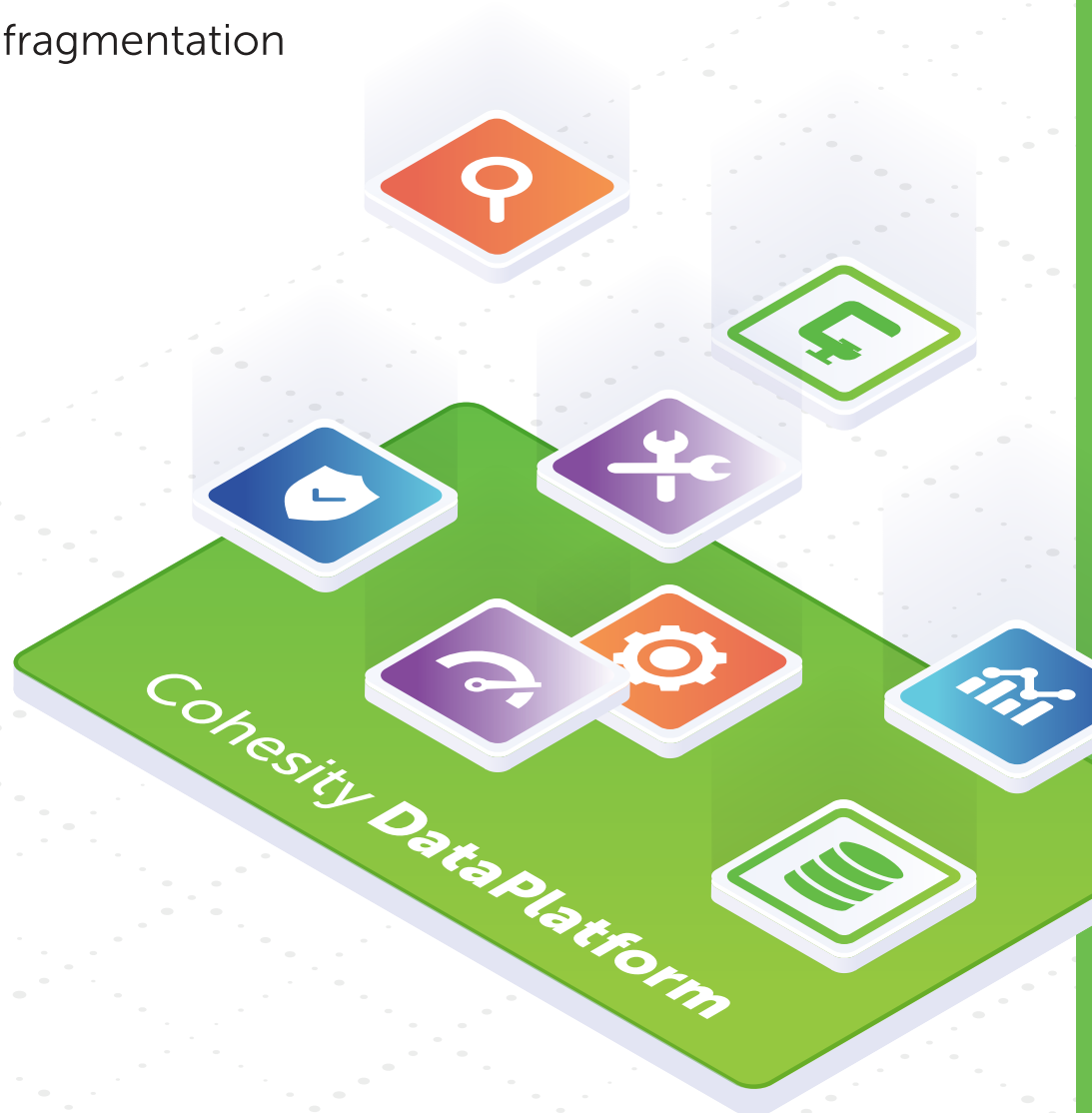
What's Your Data Telling You About Customers' Experiences?

An interview with Steve Grewal, Federal Chief Technology Officer, Cohesity

One of the most powerful — yet often underused— assets that agencies own is something employees interact with daily across multiple platforms and systems.

That asset is data — in all its various forms. That data helps you identify who your customers are, map their journeys, and critically analyze what products and services you're delivering and what effects a sub-optimal customer experience (CX) has.

"Data is the new oil," said Steve Grewal, Federal Chief Technology Officer at Cohesity, which specializes in enterprise data management. "When it comes to competitive differentiation, customer delivery and constituent services, it's all about the data."

Grewal, who spent 16-plus years in government before joining Cohesity, encouraged public-sector employees to stay focused on the data and CX outcomes they want to achieve. He shared three data-centric issues to prioritize.

1. Address mass data fragmentation

Mass data fragmentation (MDF) is the proliferation of data — across silos, clouds and management systems — that prevents organizations from fully benefiting from its value.

The problem with MDF is threefold, Grewal explained. First, it's inefficient and forces agencies to use point solutions to manage data across their environments. Second, it's not cost-effective and expedient because agencies end up copying data across environments as a workaround. Third, it perpetuates dark data, or data that agencies don't have detailed knowledge about, such as its location, owner and access history.

"Whatever architecture you decide to focus on, based on mission, service levels and cost points, always consider the data layer," Grewal said. "Think about data across your environment in a common and unified way."

2. Streamline disaster recovery via the cloud

For the most part, the government still relies on traditional disaster recovery (DR) models. There's data center infrastructure that sits idle until it's needed for DR purposes, but that's a very expensive insurance policy, Grewal said. With the cloud, agencies can move from a static insurance policy to an on-demand model in which infrastructure is available and activated in the event of a disaster or disruption.

One option is tapping into the benefits of public cloud to serve as a secondary DR site. "You can reduce that spend and repurpose those dollars elsewhere, while also maintaining the level of service your agency requires," Grewal said.

3. Modernize data protection and resilience

How does your agency think about data resilience and access in the event of an incident? What about data protection and how that spans offices and departments, clouds and government data centers?

"No matter what, you want to be in control of your own destiny," Grewal said. "Even if there is an outage, whether in the cloud or onsite, if you have an additional layer of protection, you are better-equipped to restore operations and access to your data." Increasingly, agencies are thinking about data protection and backup as an enterprise capability.

The Energy and Justice departments are among the Cohesity customers taking a fresh look at their entire IT portfolios, including infrastructure and cybersecurity, using a data-first approach.

"As innovation continues to disrupt and agencies have more options, you want to ensure that you're still managing your data in the most effective means and viewing these efforts through a CX lens," Grewal said.

CX in the Era of COVID-19

For many government agencies, the coronavirus has dramatically changed operations, including employee workplace arrangements and processes to provide external services to the public. Below we've highlighted some examples.

- Prince George's County, Maryland, hosted a series of **Tele-Town Halls** to keep the community updated about COVID-19 and the impact.

- Several state and local agencies in California and the city of Sacramento teamed up to **equip buses with free wireless hotspots** in communities with limited high-speed internet access during the COVID-19 pandemic.

- The Veterans Affairs Department saw a 1,000% increase in **telehealth video appointments** between February and May 2020. The jump from 10,000 to 120,000 video appointments a week is attributed to VA providers and veterans taking precautions against COVID-19.

- The Small Business Administration worked around the clock to **disburse $349 billion in loans** to small businesses that suffered economic impacts because of the coronavirus.

Update: 21st Century Integrated Digital Experience Act

When Congress passed legislation in December 2018 to standardize the look and feel of government websites and to promote the use of accessible, web-based services, it felt like a big win.

Advocates who had worked to move the ball forward on these types of efforts for years welcomed passage of the 21st Century Integrated Digital Experience Act (IDEA), which they touted as a needed boost for improved government CX.

Frankly, the law also felt like a big win for anyone who has received painfully clunky government services. But more than a year and a half since the law took effect, what has changed?

Before we dive into the meat of that conversation, it's worth acknowledging that COVID-19 has accelerated some of the work that the law intended to do — at least in the short term. For example, agencies have been forced to sign documents using electronic signatures and to address both the capacity and shortcomings of government websites.

COVID-19 became the burning platform that demanded better government/citizen interactions and accountability in a way that 21st Century IDEA could not.

Fitting a Square Peg into a Round Hole

Based on conversations with government employees working to make the law's words a reality, several issues became apparent. Chief among them: The law is a classic example of good intentions that can lead to confusion and attempts to fit a square peg into a round hole.

What became clear is that to make CX a part of how agencies do business, lawmakers who crafted 21st Century IDEA and law implementers in the executive branch should have had early and frequent consultation.

As of early August 2020, the Office of Management and Budget (OMB) has not issued formal guidance to agencies explaining how they should implement the law. The process for issuing guidance is bureaucratic and can take months of back-and-forth and multiple reviews. OMB also has other tools at its disposal, including its budget authority, which includes shaping agencies' budget requests through policy guidance. In this instance, agencies would need to show how their funding requests align with the administration's CX priorities.

In lieu of formal guidance for implementing the law, OMB is using federal working groups and the President's Management Agenda as avenues to galvanize agencies around CX priorities. Part of the issue that OMB and other agencies have had to grapple with is messaging and reconciling best practices with what's actually written in the law.

Government Leaders Say CX Must Be Bigger Than the CIO

For starters, the law tasks agency chief information officers (CIOs) with coordinating and ensuring alignment of internal and external CX programs and working with the chief financial officer, program managers and other leaders to ensure proper funding to support the implementation of 21st Century IDEA.

Although the law specifically identifies CIOs as the point people for coordinating CX efforts, neither OMB nor agency leaders see CX as a responsibility that falls squarely on technology leaders. Speaking

> *"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."*
>
> — Senior administration official

at the Adobe Digital Government Symposium 2019, government leaders shared their thoughts on the law and implementation at their agencies.

When asked about 21st Century IDEA, Barbara Morton, Deputy Chief Veterans Experience Officer at the Veterans Affairs Department, said she "would advocate for broader applications of CX outside of just technology."

"I think the IDEA Act is awesome," she said. "It's a great start."

Morton said she is excited for the day when governmentwide CX is hardwired into the DNA of government.

Although technology is a key enabler of better CX and CIOs often lead the charge of tech adoption, CX must be viewed holistically across channels, offices and locations.

"Everyone in an organization is responsible for CX," a senior administration official told GovLoop in 2019. "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."

Messaging Matters: Implementing Website Standards vs. Design Principles

In January 2020, GSA published what it called "website standards to help federal agencies deliver a great digital experience." By law, that's what GSA was required to do, as noted in its blog post:

21st Century IDEA (Public Law Number 115-336 §3(e)). *Compliance With United States Website Standards. — Any website of an executive agency that is made available to the public after the date of enactment of this Act shall be in compliance with the website standards of the Technology Transformation Services of the General Services Administration.*

There are a few things to unpack here. First, let's acknowledge the decades of work that GSA has done around web design, accessibility and providing best practices for agencies to reuse rather than rebuild. But that work was boiled down to and referenced as "website standards," implying set requirements that all agencies must follow.

That's in direct contrast with the way GSA has viewed and described its work. It was never meant to be prescriptive or rigid. In fact, here's what GSA said: "The U.S. Web Design System encourages

incremental adoption by agencies through its maturity model. The maturity model provides a practical path for agencies to build solutions that best meet their missions and needs, and to adapt the U.S. Web Design System as they adopt it. It also facilitates continuous improvement — not just one-off, all-or-nothing redesigns."

GSA has been using more of a carrot approach, not the compliance stick, to make it easier for agencies to build accessible, mobile-friendly websites using its open source toolkit. Calling something a standard when it is not might seem trivial, but words matter.

The intent was not to establish rigid standards but to provide a series of guides on how to design websites that are well-structured and built on solid code. GSA does not enforce compliance with the law, and it isn't clear how OMB intends to do so.

In its blog post, GSA rightfully categorized its work as "design principles" that "provide teams in government with a guiding light for making design and technical decisions." Those principles are outlined below.

- **Start with real user needs:** Real user needs should inform product decisions.
- **Earn trust:** Trust must be earned every time.
- **Embrace accessibility:** Accessibility affects everybody; build it into every decision.
- **Promote continuity:** Minimize disruption and provide a consistent experience throughout services, over time, and across agencies, platforms, and devices.
- **Listen:** Evaluate and improve your product by listening to your audience and learning from what you hear.

What agencies ultimately have are sensible guidelines and best practices that they should follow — with or without a law. The hope is that they choose to do the right thing. Some already have, and there's a growing open source community focused on this effort.

Even though the fanfare around 21st Century IDEA has faded, the intent behind it is to help agencies view their CX efforts in a holistic way that includes technology but does not start and stop with technology. Here are some things to think about:

- Consider what your mission entails and what needs must be met.
- Determine how you structure services to meet those needs and to measure performance and collect the right feedback at the right time.
- Think through what your digital presence and strategy will be to support the needs and the mission.
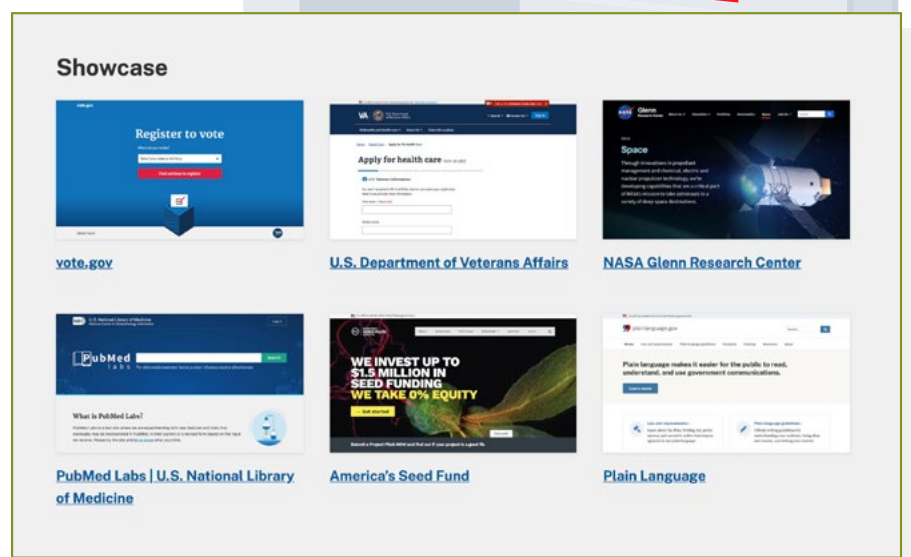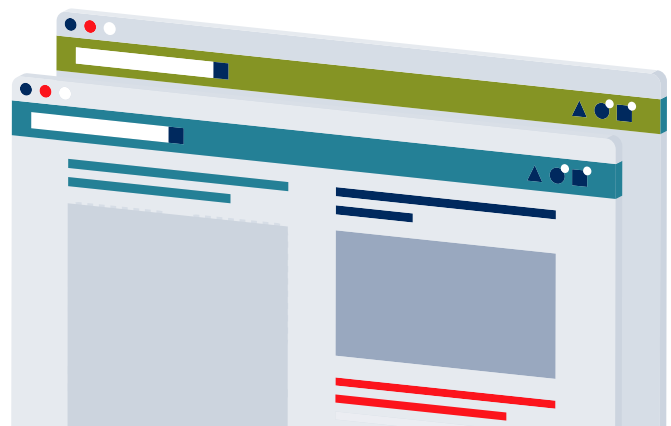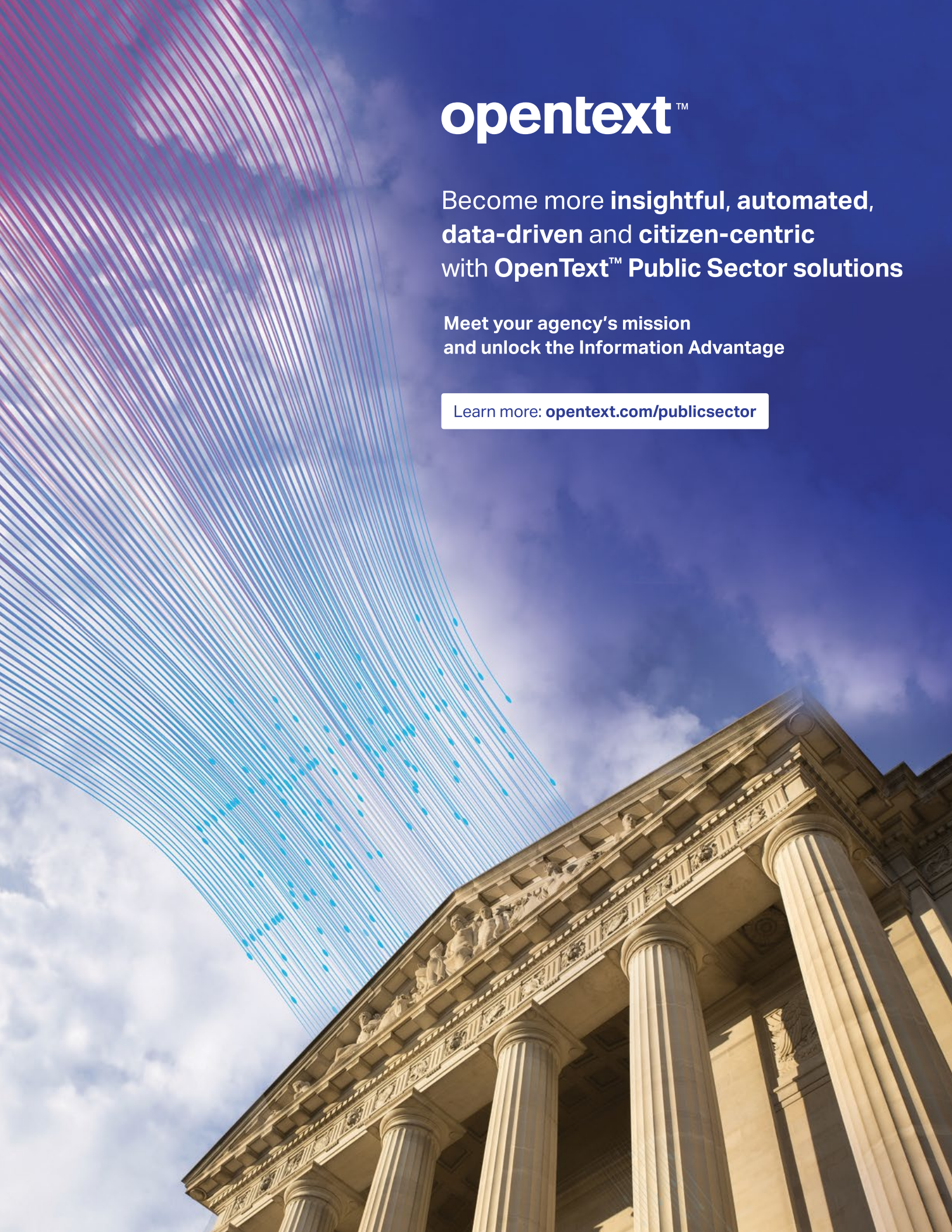
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A 3-Pronged Approach for Prioritizing CX

An interview with Brian Chidester, Principal Industry Strategist, OpenText Corp.

The way citizens interact with government agencies doesn't begin and end with a modern website or a flashy mobile interface. It's deeper than that — much deeper — and the COVID-19 pandemic has highlighted this truth in new ways.

Now more than ever, agencies need modular solutions on the front end and back end that can quickly scale and support change, said Brian Chidester, Principal Industry Strategist at OpenText Corp., which provides enterprise information management solutions for the public sector.

Take Miami-Dade County, Florida, for example. When Hurricane Dorian tore through parts of the nearby Bahamas in 2019, the county stood up a website in two hours to provide hurricane relief and emergency information to those affected. The key to the county's success was a modular approach to customer experience (CX) that prioritized accessibility and ease of use.

"When I speak about citizen services, I think of it in three prongs," Chidester said: The citizen is at the center of the equation, and the other two prongs are the external portals that facilitate public/government interactions and the foundational back-office systems and processes.

"If you're looking to redefine what CX is in government, it is really important that you look at your back office first," Chidester said. He shared three key areas that agencies should prioritize.

1. Future-proof your enterprise

"What agencies should be prioritizing are platforms that future-proof their enterprise," Chidester said. Agencies cannot afford to build systems for their current state. COVID-19 has proven that rapidly changing circumstances require governments to be nimble and adaptable.

They must consider customers' evolving needs, whether current and future systems and processes can support those needs, and how they can achieve that goal securely. "It's important that governments look at those situations across the board," he said.

2. Use a platform that's adaptable

As you future-proof your enterprise, you want to invest in a platform that is adaptable. But how adaptable? "You need a platform that's adaptable enough, so you don't need to know what's going to happen," Chidester said.

No one can predict the future with absolute certainty, but we do know that digital platforms are the way of the future. In today's environment, digital platforms have been critical for continuity of government services.

True digital transformation helps agencies shift from legacy infrastructure and frees them up to embrace emerging technologies such as artificial intelligence.

3. Prioritize cybersecurity innovation

The availability and security of citizen services is vital to your future-proof strategy. Government agencies are the target of millions of attempted intrusions daily. The barrage of attacks is beyond the scope that any human can mitigate. Some attacks have successfully crippled government systems.

"That's why we have tip-of-the-spear security solutions being used at the highest levels of government," Chidester said. Security should be an inherent foundation of any CX effort your agency pursues, including the technology solutions and the vendors that partner with your agency.

"There is incredible innovation happening in cybersecurity, but that innovation is also happening on the hacker side," he said.

Governments must think holistically about the convergence of CX, digital transformation and secure, adaptable platforms. The efficacy of citizen services depends on it.

Make Inclusion Your CX Superpower

When you think about inclusion in the workplace, what comes to mind? Is inclusion a core value at your organization? Does it permeate the various facets of your operations, including hiring and recruiting, problem-solving, team building, and decision-making, all of which shape how you serve your colleagues and external customers?

Inclusion doesn't just unite people from diverse backgrounds with ethnic and individual differences and various lived experiences. Inclusion gives them a voice and ensures that their words, views and ideas carry weight as collective decisions are made about how to serve a diverse public. It also shines a light on overlooked spots within your organization when it comes to providing an experience designed with the customer in mind.

In this section, we share examples of how agencies are embracing inclusion. We explore how their efforts have strengthened their workforces and led to improved experiences for their customers, better products and services, and an open mind to new possibilities.

How the Pentagon's Digital SWAT Team Does It

How you treat the people who need your help is a decision that starts long before they walk through your doors, visit your website, call for help, send an email or reach out via social media.

It starts with an intentional decision about the team you assemble to meet the customers where they are and to collaboratively address their needs with empathy.

"It needs to be a legitimate executive priority," said Brett Goldstein, Director of the Defense Digital Service (DDS), endearingly known as the "SWAT team of nerds." DDS designers, engineers, product managers and bureaucracy hackers have been working side-by-side with military personnel to design and implement innovative solutions in the Defense Department (DoD) since DDS's 2015 launch.

Inclusiveness isn't a numbers game or a check-the-box exercise for Goldstein and his team. It can't be when lives are at stake and your customer base has needs that span cities, states, countries and continents.

That's why DDS's focus is clear and concise: engage in meaningful projects and develop a diverse and healthy team. These are building blocks for meaningful CX, but what do they actually look like in practice?

It starts with making people the priority, internal honesty and corresponding actions. "My longest, consistent weekly meeting is a [human resources] meeting," Goldstein said. "We meet every week, and we go through everything."

Out of those conversations came a realization that whom DDS interviewed and how they interviewed them needed to change if they wanted to assemble a diverse team to tackle tough problems for DoD customers.

"It was really focusing on humanizing the process," said Christan Johnson (CJ), Digital Service Expert-Talent Acquisitions at DDS. "Every step of the way, we're engaging with the candidate, whether it's text, whether it's an email, whether it's just keeping up with the small things that they tell you about themselves, and just really making sure that we're focused on the person, and not the process."

DDS also shifted the focus to conducting blind interviews to reduce the chance that biases would overshadow a candidate's experience. For example, initial interviews are conducted by phone and the hiring team is encouraged not to look at a person's LinkedIn profile unless it's on their resume. Feedback about the candidate isn't discussed until the weekly HR meeting — and that's by design.

> Between March and June 2020, (during COVID-19), DDS onboarded **20 new team members remotely**. In July 2020, the team was still actively recruiting and had 10 additional candidates nearing the end of the hiring process.

"The team often says I have a really good poker face in regard to candidates because I don't give my opinion until after their interview," Johnson said. She doesn't want her opinions about a candidate to sway anyone else's.

Johnson works closely with her colleague Kristi Crear, DDS Digital Service Expert-Talent Management and People Ops, who ensures that diverse candidates feel included and a part of the team.

"We can recruit all day, but if we don't have that inclusiveness within the organization, diversity is still not going to work overall," Crear said. "That being said,...once you find the people, you have to be able to integrate them into that workforce, and work with them so that they are able to be themselves and put all their diverse ideas out there. **With that inclusive workforce as well, you're going to get folks who are more creative.** You're going to get better ideas. You're going to get ideas that people generally don't think of all the time, so it's going to help your mission and your bottom line overall as well."

Fostering an inclusive work environment — whether virtual or in person — creates space for idea sharing and collaboration. DDS's communication tool of choice is Slack, and there's a designated group, known as channels, for new employees. It's aptly called "New to the DDS Hood." There, new employees can ask questions, better understand things that seem foreign to them, and connect with other team members.

"This allows them to be open and honest about things that they…probably wouldn't share during weekly standups, or even when they're sitting with their cohorts," Johnson said. They're also partnered with a buddy.

Inclusion thrives and permeates how DDS designs digital services for military families, detects and evaluates threats posed by small-Unmanned Aerial Systems, and approaches all projects. This effort doesn't start and end with the director or HR team. It's a cultural mindset that employees buy into. Inclusion is their CX superpower.

Want to learn more?

- In many ways, DDS is a microcosm of what governments at the federal, state and local levels are trying to do in pockets. We break down how diversity and inclusion have shaped specific DDS projects.

- Government's bureaucratic hiring process is often at odds with the desire to develop a diverse and inclusive team. Find DDS tips for hacking the bureaucracy here.

Snapshot: DDS Workforce
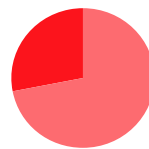

59% male
41% female
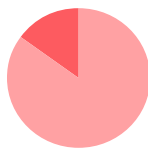
85% white
15% minority

July 2019

53% male
47% female

72% white
28% minority

June 2020

"But we're not done! We will continue to partner with organizations who highlight women and people of color in tech to source top talent."

Katie Olson, Deputy Director, DDS

Are You Including the Right People and Asking the Right Questions?

Early and often, you should ask yourself these questions: Am I including the right people in the conversation, and am I asking the right questions to gain insights? Depending on where you sit in an organization, the answers will differ.

Noha Gaber, Director of Performance, Strategy and Innovation at the Architect of the Capitol, knows this well. Speaking at the June 3 Virtual Government CX Conference @930Gov (GovLoop was a sponsor), she shared several ways that you can begin to make inclusiveness a priority to close the experience gap for all customers and employees.

- Approach your work with empathy, and make that a core value, rather than a check-the-box exercise.

- View customer experience and inclusion as a learning journey.

- Include the right people with the right expertise in the conversation and listen to them. For many organizations, there is a gap between knowing the right things to do and actually doing them.

- Understand the why behind what's necessary.

- Find those leaders and champions who have the bandwidth to understand the why and prioritize this within the business goals.

National Library of Medicine: Designing Services With a Virtual, Worldwide Community in Mind

When everyone is heads down with projects and focused on meeting deadlines, it's hard to step back and think strategically. You're too busy putting out fires to ask probing questions about how employees and the public interact with your services, what's changed and how to adapt for the future.

But these types of conversations are too critical not to have. Sometimes a simple question is all it takes to spark meaningful dialogue. We spoke with Adam Korengold, an analytics professional in government, about what those conversations look like at the National Library of Medicine (NLM) — the largest biomedical library in the world.

Korengold recalled a meeting he attended in late 2019 with NLM product owners where someone asked: What do you think the biggest change to the library has been during your time here?

"I've only been with the library for about two years.… And there were people in that room who had been with [NLM] for 20-plus years. And, so, what most of them said was people."

When they started working at the library before the 2001 terrorist attacks, the National Institutes of Health campus, which includes NLM, was not enclosed by a fence.

"You would walk into the reading room in the library, the main reading room at the National Library of Medicine, any hour of the day. After hours, it would be filled with people that were trying to get a book from the stacks, or they were looking in the reference collection. They were sitting at a table doing their research."

There was a high level of demand for the library's in-person services at that time.

"Well, that's not where most of our services are provided now. We're virtual," Korengold said. That's also the case with professional sporting leagues such as the National Basketball Association (NBA).

Consider this stat: 99% of NBA fans watch basketball games through a media platform. Only a tiny percentage of fans watch games in arenas, NBA Commissioner Adam Silver told ESPN.

What can government agencies glean from this fact? Well, as the way your agency interacts with customers changes, so must your questions. For NLM, the question has become: What is the experience of visiting the library and using its services?

Data also plays a vital role in these conversations. Hear more from Korengold on pages 31 and 32 about the cultural shift required to make data-informed decisions about CX.

Creating Inclusive Library Experiences

GovLoop has seen an uptick in librarians engaging with our resources, so we want to spotlight some ways that local libraries are serving as trusted sources for information, providing space for community gatherings and dialogue — even virtually — and much more.

Maryland: Prince George's County Memorial Library System

Washington, D.C.: DC Public Library

Maryland: Baltimore County Public Library

California: San Jose Public Library

You Can't Have Inclusion Without Accessibility

Inclusiveness and accessibility go hand in hand. They are foundational pillars to ensure that agencies provide what internal and external customers need and that people can access those services in ways that work best for them. Earlier, we discussed how inclusive teams lead to better CX.

But retaining diverse teams once you bring them into the organization must be a priority if the goal is to serve a diverse public.

A recent Government Accountability Office (GAO) report highlights areas of improvement for agencies to retain, train and provide reasonable accommodations for employees with disabilities. The report found that although agencies exceeded their goals for hiring individuals with disabilities, 39% stayed less than a year and 60% stayed less than two years.

The Office of Personnel Management (OPM) does not track the root causes for these departures. But GAO recommends that the agency track and report retention data and that agencies assess the impacts of training and obtain employee feedback on reasonable accommodations. These accommodations often include providing ergonomic adjustments or modifications to the layout of workspaces, providing sign language interpreters at meetings and events, and adjusting work schedules to allow employees with chronic medical conditions to attend medical appointments and complete their work at alternate times or locations.

As the nation's largest employer, the federal government must be a model for other employers. What input and experiences do agencies lose out on by not retaining employees with disabilities? How do these losses impact their ability to serve their workforce and the public?

Nearly 60% of employees with disabilities hired from 2011 through 2017 stayed for less than 2 years:

Less than 1 year
39.3%

1 to 2 years
18.9%

2 to 3 years
13.8%

3 to 4 years
9.5%

4 to 5 years
6.6%

5 to 6 years
6.1%

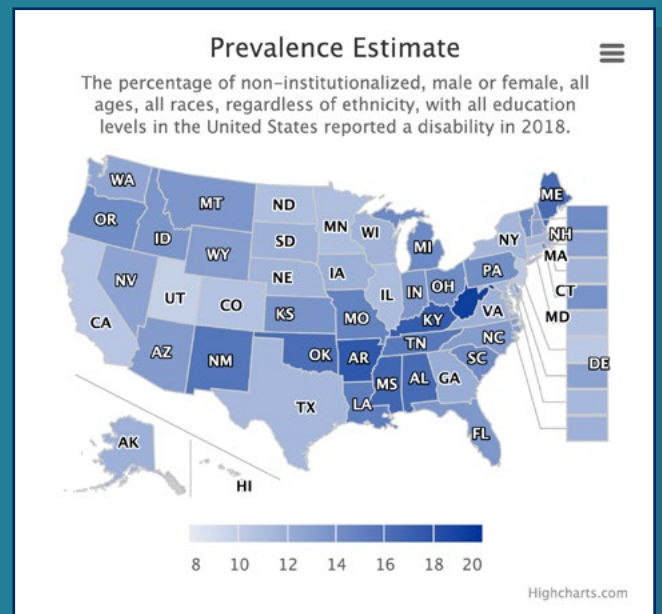6 to 7 years
5.7%

7 years or more
0.0%

Note: These numbers show only employees hired between 2011 through 2017 and the duration they were retained during that time period. These numbers include full-time permanent hires and part-time or temporary hires

Source: GAO

Prevalence Estimate

The percentage of non-institutionalized, male or female, all ages, all races, regardless of ethnicity, with all education levels in the United States reported a disability in 2018.

8 10 12 14 16 18 20

Highcharts.com

Source: disabilitystatistics.org

GRANICUS

Is Your Organization **Struggling?**

COVID-19 has been a game changer for every public sector and private sector organization in the world.

It changed nearly everything about how citizens and customers interact with organizations of every shape and size.

Whether you were swept into digital experiences or are just now getting started, this guide contains practical frameworks, tactics, and use cases for getting it right.

Download this guide now and start using these tips that can help provide convenient, personalized solutions for citizens in a good times and bad.

Identifying Quick Wins on the Path to Better Customer Experiences

An interview with Angy Peterson, Vice President, Granicus Experience Group

Throughout the COVID-19 recovery and response efforts, engagement with public sector communications has been high. But how can agencies turn this critical surge in demand into a broader digital transformation effort?

"Find quick wins to remove even small barriers for your constituents, then start to build momentum and a foundation for a long-term transformation strategy," said Angy Peterson, Vice President of Granicus Experience Group (GXG). This team of analysts, communicators, strategists and tech experts focuses on helping governments build better citizen experiences. GXG is part of the services arm of Granicus, which provides a unified civic engagement platform for government.

"With customer experience (CX) initiatives front and center in the wake of the pandemic, Granicus has seen several governments move away from department-focused communications and toward intent-based experiences, allowing the constituent to focus on their pressing or priority tasks," Peterson said.

She added that successful digital transformation efforts require a measurable, scalable and secure digital foundation, but they're about more than just the right technology. "Developing a constituent-centered, data-driven strategy alongside an agile, iterative organizational culture is also key," Peterson said.

She offered these tips for identifying quick wins on your CX journey:

1. First, understand your constituents' needs and expectations, then build your communications strategy

Thanks to Amazon, Facebook, Google and Netflix, people expect digital experiences and services to be personalized and optimized. "I expect sites to understand my possible or relevant interests based on what I've clicked on before or information I've already provided," Peterson said. "When they anticipate and meet those expectations, or, more importantly, help me achieve my goal — big or small, whether I'm buying groceries online or choosing a short-term rental for a post-COVID vacation — I come back for more."

Government organizations can do this, too, building value-based relationships that deliver on constituents' wants or needs or expectations. The key: Deliver services and communications that meet people's needs and your goals, and you'll also reduce risk, build trust and even boost employee morale.

2. Make it a priority to understand your constituents' current pain points

Map the end-to-end experience for accomplishing whatever that critical goal or action is. That means reviewing each online and offline touchpoint and interaction to identify gaps and opportunities.

3. Brainstorm whether communications or content could help clarify a process

"We've found that people often need more education around a process — what steps to take, what happens next, anticipated turnaround times and more," Peterson said. That understanding and information can alleviate call center volume and potential criticism on social media.

"Granicus' civic-engagement technology enables a high-performing customer experience with technology and services designed to transform your website, email and SMS outreach, and digital forms and services into a scalable, measurable and secure digital foundation," she said.

Whether you're serving an applicant, taxpayer or veteran, Granicus' mission is to empower you to build better customer experiences. "The time is now to maximize the public's engagement with a transformed customer experience," Peterson said.

Improve CX From the Inside Out: Engaged vs. Satisfied Employees

What compels an employee to go beyond what is required and provide what's needed? What moves them to listen and serve with compassion and empathy? Tinisha Agramonte, former Director of the Commerce Department's Office of Civil Rights, explained it this way: When diverse people feel engaged at work beyond just satisfaction, it creates optimal customer experiences.

"If you have an engaged workforce, it does correlate to improved CX," Agramonte said during a panel at the Virtual Government CX Conference @930Gov.

Satisfied employees will get the work done, and they're content, for the most part, whether it's with their work schedule and accommodations or other benefits. They view their jobs as just that — a job. In contrast, engaged employees are passionate about what they do. Not only are they focused on getting their work done, but they want to see the organization succeed. They don't see their jobs as work they must do but rather as work they want to do.

This level of engagement doesn't happen by chance or through osmosis. It is taught, demonstrated, reciprocated and established as a core value that starts with leaders and flows throughout the organization.

Exceeding What's Required to Meet the Needs of Tribal Members

Sylvia Johnson doesn't call the people she serves customers; she calls them family.

And when you're helping family members, it isn't uncommon to drive them to a doctor's appointment, or to swing by their house in the evening to drop off emergency supplies or diapers.

Although Johnson's title is Office Clerk for the Alabama-Coushatta Tribe of Texas Social Services Office, what she gives of herself far exceeds her job description and doesn't end when her Livingston, Texas, office closes at 5 p.m.

> "I've had people say to me, 'Well, why do you do that? It's not in your job description. You're just supposed to answer the phone. You're just supposed to do this; you're just supposed to do that,'" Johnson explained. "It also states in our job descriptions 'other duties as assigned.' And this is another duty as assigned."

"But it's not your job, [and] you're not paid to do that," are comments that Johnson is used to hearing. Her response: "It doesn't matter. It's still a job duty that has been assigned. And I'm going to do it if I can do it, if I'm able to do it."

She describes the Alabama-Coushatta Tribe of Texas as one big family, in particular because of its size. "The tribe is not that huge," she said. There are fewer than 1,500 members on the tribal roll, and about 500 live on the reservation.

Part of what drives Johnson is a deep understanding that people have needs outside the hours of 8 a.m. and 5 p.m. A little more than a year ago, the team decided to program office phones to route to an employee's cell phone after hours so that members could still get help. Who that employee is shouldn't come as a surprise.

"I've had people call me...Sunday evening and say, 'Hey, my power went out, or my water got cut off,'" Johnson said. A quick fix could mean providing battery-operated lighting and bottled water until the office opens on Monday to process paperwork and fully resolve the issue.

Engaged Employees Serve With Empathy

Johnson's proximity to those she serves isn't just in miles or physical distance. It's deeper than that. It's how she's wired. She wants to erase the stigma or burden that some tribal members feel when it comes to asking for help. That's her greatest challenge: encouraging people to get the help they need.

But that challenge compelled her and her colleagues to think of creative ways to get the word out, whether through social media or other means. And sometimes the issue preventing people from getting help is awareness. Johnson knows this firsthand because she didn't know that the social services program existed before joining the staff nearly six years ago — even though she worked in the building next door.

Over the years, Johnson has worked in multiple positions on the reservation, including as a police dispatcher, a cashier, retail trainer and in the finance department. About 75% of the employees she's trained are younger than she is, and the time she spends investing in them directly benefits the people they serve.

Her motto is simple yet effective: From a business standpoint, the customer's wallet is what sustains the organization and your job. From a moral perspective, don't treat others how they treat you. Treat each customer with respect and empathy. Welcome them with a warm smile and acknowledge them. Even if they don't respond, be the bigger person; be the better person.

Engaged Employees Have the Right Perspective

The Transportation Security Administration (TSA) was at a crossroad in 2015. There had been countless press reports and personal accounts of poor passenger experiences with TSA agents.

But those interactions were symptoms of a larger issue. At the time, agency leaders bristled at the notion of serving customers.

"We were not there to ensure a pleasant customer experience," David Johnston, TSA Social Media Adviser said of the general attitude All that mattered was planes taking off and landing safely. Those two benchmarks were the key internal measures of how well TSA performed.

Public perception did not align with internal metrics, however. There was enough recognition that people generally had a negative opinion of TSA and that something needed to change. What began as a pilot program to field questions from airport passengers has grown into a critical tool for connecting with customers, hearing about their experiences and staying abreast of issues at airports that authorities should be aware of.

> *"Our role as a security-focused organization did not have to be in opposition to creating a pleasant customer experience."*
>
> — **TSA Social Media Adviser David Johnston**

The Obama administration launched AskTSA, a multiplatform social media account that provides travel security information and answers users' questions. As of June 2020, AskTSA has had more than 1 million social media engagements. It lives on Twitter, with the handle @TSA, and on Facebook Messenger. TSA agents monitor the accounts, regularly posting pre-flight information about security checkpoints, answering questions and helping to locate lost items.

"We pretty quickly recognized that we were providing a bigger role than just the answering of questions," Johnston said. *"The impact that we were having for TSA was that we were ensuring people were better prepared when they arrived at the airport security checkpoint. So we were allowing our officers not to have to deal with as many issues that could have been resolved if people had more information before they reached the airport, which allowed them to spend more time really doing their true security function."*

> **16% of social media interactions** with the TSA account were **negative** when it launched in 2015. Since 2017, that figure has floated below 5%.

Adjusting to COVID-19

A big part of what draws attention to and engagement with TSA's social media account is the humorous tone and cute dog photos that pepper its content. But that drastically changed in the early days of the COVID-19 pandemic, when tensions were extremely high and there were many uncertainties around travel and the risks associated with flying.

"We shifted our strategy to be very focused on passenger safety," Johnston said. That meant clearly sharing with passengers what they could expect at airports, informing them of guidance such as wearing masks and handwashing, and amplifying the voices of authoritative government sources.
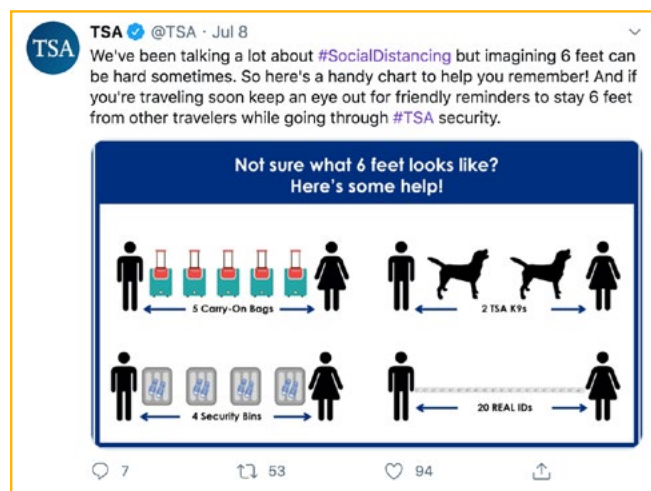
"We would get a lot of questions about [whether] it is safe to travel," Johnston said. "And that was something that we did not feel like was our role to make that recommendation. So we really tried to provide information and connect people with the experts so that they could make their own choice."

As the situation evolved, so did TSA's operations. The more information the agency could provide about security checkpoints, carry-on luggage protocols and overall travel experiences, the better equipped passengers were to make thoughtful decisions.

Providing timely information using the right tone and messaging has been a key focus for Johnston and his colleagues, especially during COVID-19. As travel gradually begins to pick up again, you'll definitely notice the humor coming back into play.

"We will come to a point where we can get back to joking about things and providing lighthearted content, but right now we just want travelers to understand what they need to know to travel and travel safe," he said.

TSA ✔ @TSA · Jul 6
If you're planning to travel on #NationalFriedChickenDay, know that your wings are good to fly. Avoid fowl play and place your snacks into a plastic bags. Then place that bag into the security bin. This will help you speed through security. #TravelTips

💬 6   🔁 36   ♡ 58

TSA ✔ @TSA · Jul 8
We've been talking a lot about #SocialDistancing but imagining 6 feet can be hard sometimes. So here's a handy chart to help you remember! And if you're traveling soon keep an eye out for friendly reminders to stay 6 feet from other travelers while going through #TSA security.

Not sure what 6 feet looks like?
Here's some help!

5 Carry-On Bags
2 TSA K9s
4 Security Bins
20 REAL IDs

💬 7   🔁 53   ♡ 94

Maybe you're an engaged employee but need a little advice as you aim to improve customer experiences. Here are some tips from Johnston.

- Be OK with honest feedback. Conversing with customers means that you have to open yourself up to hearing bad things about yourself and your agency. If you don't engage, you might be able to turn a blind eye, but those conversations are happening whether you're involved or not.

- You must divest yourself from a binary mindset and understand that we often operate in gray areas. You can't dismiss people's experiences either because you see them as one-offs or because they don't align with what you believe to be true about the way your agency serves others.

- There's no substitute for jumping in and getting started. Accept the fact that you won't know everything. Be open to learning on the fly.

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Shifting Digital Transformation into Hyperdrive

An interview with Bob Osborn, Chief Technology Officer, Global Government, ServiceNow

The COVID-19 pandemic has demonstrated to agencies that resilience is more important than ever. Resilience involves providing products and services, no matter the circumstances. Now, many agencies are working toward resilience by digitally transforming their operations.

But fortifying agencies' resilience will require them to dramatically morph their people, processes, and technology. Only after this change occurs can agencies weather tomorrow's emergencies and still serve citizens.

Fortunately, cloud computing's flexibility and simplicity can fuel the sturdiness agencies seek. Using cloud, agencies can improve their operations, boost their speed, and make their workforces more agile.

Bob Osborn is Chief Technology Officer (CTO), Global Government, for ServiceNow. The ServiceNow platform is designed to help agencies create digital workflows that connect people, processes, and systems. He explained how cloud could help agencies take three steps toward permanent resilience.

1. Extend workforces and workflows

As the coronavirus outbreak demonstrates, agencies sometimes need their employees to collaborate effectively over large distances. And these workers also need to quickly and efficiently provide products and services to citizens. "When you separate people, it's like you explode the office," Osborn said. "And it illuminates the brittleness of the processes agencies have been using up to this point."

Osborn said agencies now realize they can't prioritize technology over people or processes. To digitally transform their resilience, agencies must upgrade all three areas equally.

Ultimately, cloud can juggle agencies' people, processes, and technology no matter their location.

2. Keep serving customers

According to Osborn, agencies' resilience relies on constantly pursuing mission success. Whether it is viruses or other emergencies, agencies can't let surprises stop them from serving citizens. "To be able to provide services in the most trying circumstances is nirvana for agencies," Osborn said.

Cloud can strengthen agencies' resilience with its consistency and reliability. Even better, it can quickly and easily deliver products and services to the public. "Things that were done manually are now potentially online capabilities," Osborn said. "It takes the pain away from citizens."

3. Stay up to speed

Agencies at every level have long struggled to keep up with private-sector innovation. Fortunately, cloud can help agencies keep up with new developments in technology. As a bonus, these new tools can also keep agencies operating despite internal and external pressures. "We're continually refreshing our suite of applications," Osborn said of ServiceNow. "It keeps the government on top of technology."

For instance, cloud can significantly reduce the time agencies spend developing applications for resilience or other concerns. "We can develop applications in hours, days, or weeks rather than months or years," Osborn said.

Additionally, cloud providers such as ServiceNow can help agencies become more proactive. By digitally transforming their resilience, agencies are ready for any challenge. **"We call this anticipatory government," Osborn said. "We're in the position to deliver services before citizens need them."**

Let Data-Informed Decisions Guide CX Efforts

When data sits idle in desktop folders, databases or Microsoft Excel files, it's hard to see how that information can change lives, save lives and challenge old assumptions.

But it's crystal clear to Tammy Roust. As Illinois' Chief Data Officer (CDO), her data evangelist role crosses county boundaries and even state lines. Her primary focus includes integrating systems within the state, training employees on data technologies, and executing strategic and tactical projects that involve data.

There's even an acronym to sum up these initiatives and responsibilities: CITE (pronounced sit-tay). It stands for collaborate, integrate, train and execute.

Passion Projects Driven by Data and CX

Roust explained how her passion for making life easier for people shapes her data-driven projects. She brings a unique perspective to problem-solving, looking at solutions with a math and science lens but also an empathetic heart.

She was the first in her family to attend college, and she's experienced the social safety net firsthand. "When we talk about data informing public policy, it's not an abstract concept to me," Roust said. "Every policy choice we make is what mathematicians call a constrained optimization problem, where we try to maximize the benefits to our citizens relative to the cost."

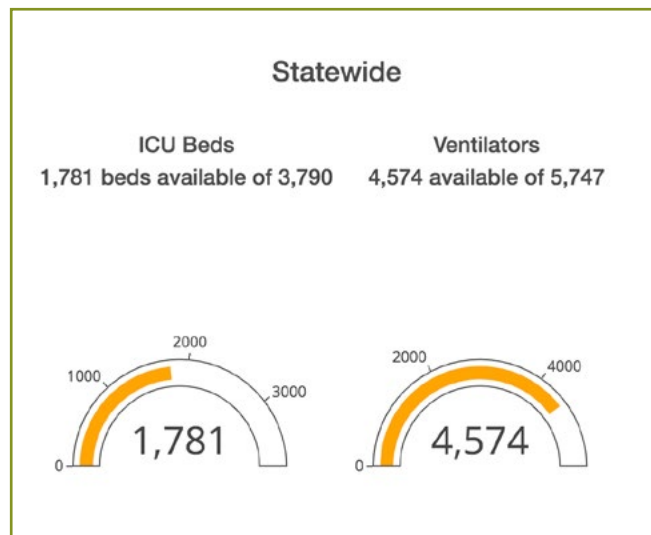## How does Roust decide which passion project to tackle first?

"For me, the easiest way to make the value of data integration obvious is to take the most painful thing that you do and to automate it," she said.

Internally, her goal is to free up subject-matter experts to focus on what they're passionate about rather than manipulating data and reporting it.

"A lot of the things we do in the public sector are around reporting," Roust said. "And by automating those activities, we can develop richer, better
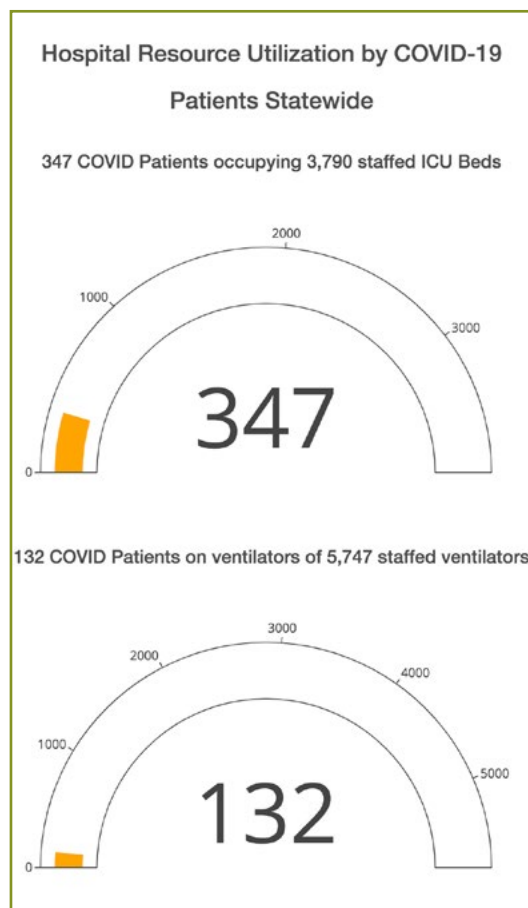
analytics, which benefit the staff and management, and the citizen experience, and the public."

Using automation to track hospital availability utilization is one of her passions, and it's critical as the nation grapples with COVID-19.

In Illinois, three full-time employees used to gather data about available beds in hospital intensive care units (ICUs). They had to log into an external system that hospitals use to report their utilization data, extract Excel files and manually analyze data before passing it on to others for further analysis. Reviewing utilization data over time required the same manual process — but even more extensive effort.

Those activities are now automated, including information gathering from the external website, the analytics process, the visualization of those analytics and the reporting around the results. As a result, employees spend more time applying their subject-matter expertise to help make decisions that impact the public.

Hospital Resource and COVID Patient Data as of 8/2/2020, 11:59PM

Source: Illinois Department of Public Health

The state is using data to shape public policies.

The automated data gathering and analysis that Roust is championing is critical to the state's five-phased plan for reopening.

"Until COVID-19 is defeated, this plan also recognizes that just as health metrics will tell us it is safe to move forward, health metrics may also tell us to return to a prior phase," according to "Restore Illinois," the state's initial framework for reopening. "The plan is based upon regional health care availability, and it recognizes the distinct impact COVID-19 has had on different regions of our state as well as regional variations in hospital capacity."

Understanding the state's ability to respond to a considerable increase in COVID-19 patients is a key factor in determining the phased reopening of schools, businesses, gatherings and more. Roust explained that officials considered the daily and historical availability of hospital beds across the regions during various times, including flu season and before and during COVID-19, to understand to what extent hospitals could expand and contract ICU bed availability.

Roust also warns against creating data silos – a warning that applies to governments of all sizes.

Challenge: "Data siloing is a problem that I have seen across different enterprises," Roust said. "But within the state enterprise itself, there are semi-autonomous agencies that operate with multiple funding flows. And because of budget shortfalls in recent years, they have had to develop these operational silos. And the solutions that they developed were developed in these silos."

Solution: "What we need to do now is to rescue the stranded data produced in the operational silos so it can be joined to other efforts, and to build solutions that span the enterprise," she said. "I would be remiss if I also didn't point out that in addition to this culture shift, we also have to do a substantial knowledge transfer because the state has a substantial fraction of the employees who are currently eligible for retirement. So we'll [be] modernizing technology, cultural transformation and knowledge transfer at the same time."

Initiatives and conversations around data can be difficult for various reasons, even if the intended outcomes are to benefit customers.

We've compiled some helpful tips for shaping how you think about data to support CX.

Tammy Roust, Illinois CDO

- "The big lesson that I have is to build your bridge before you need it," Roust said. The first letter in the state's CITE initiative represents collaborating. "You need to reach out and make connections and develop trust. And that is true whether you're a public-sector or a private-sector entity."

- Once you've developed that connection, then you can start the conversation about what data needs exist in your organization or across agencies. Framing is everything. When talking about data, ask people what they need or what they want to work on; not what they have.

- "You can have the fanciest machine learning algorithm in the world, but it doesn't do you any good if your only ally at the agency leaves before the value of that algorithm becomes evident to everybody," she said. "So you want to start off with the thing that is most annoying, use that to build your relationship and then eventually you can move to the fancy machine learning algorithm if that's of value to that agency."

Adam Korengold, analytics professional in government

- Addressing the cultural change around data orientation is crucial. The mindset must shift from data being something scary and hard to understand and collect, to data being something that can assist you.

David Johnston, TSA Social Media Adviser

- See your data journey as evolutionary. In the early days of TSA's social media foray and figuring out how to use feedback and metrics, "we first of all had to figure out what type of information we had in our possession, and...who needed that information, who could benefit from hearing about a specific problem that happened in one airport, or take specific issues that passengers were experiencing systemwide" Johnston said.

- "It was a process that started small," Johnston said of the agency's use of social media data to improve CX. "I think it's something that our TSA leadership really relies on now to get a better understanding of how policy is really put into practice."

Go Forth With a Product Owner Mindset

You've made it through this guide, full of best practices, case studies and actionable tips for providing your customers with positive experiences. But I want to leave you with a thought from analyst Korengold.

He challenges those who are serious about CX to make the cultural shift from project management to product ownership. So what does that mean exactly?

Generally speaking, project management focuses on delivering a project on time and on budget. A product ownership mentality measures success based on delivering maximum value to the people being served.

"What's embodied in that is this notion of empathy, which is [understanding that] my customers know what they need better than I do," Korengold said. "As much experience as I have delivering a product,...if I want to know how successful I am, I need to measure that through the eyes of my customers."

This shift is nuanced, and maybe you don't own the entire process or you're expected to carry out directives that have been handed down to you. Regardless of what piece of the CX journey you touch, here are questions to keep in mind as you prioritize the people you serve:

- How effectively did I help you solve your problem?
- How effective was the staff you worked with?
- Would you be willing to recommend this service, and to what degree?
- Could you find the information you were looking for when you needed it?

It's not enough to deliver a product or service. Understanding if that product or service meets the needs of intended customers is what true CX is about.

> "*What's embodied in that is this **notion of empathy**, which is [understanding that] my customers **know what they need** better than I do. As much experience as I have delivering a product, ... if I want to know how successful I am, I need to measure that **through the eyes of my customers**.*"