



**Recommended
Functions
for a
Customer Experience
Office**

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ACT-IAC Institute for
Innovation with the
Customer Service Task Force



American Council for Technology—Industry Advisory Council:

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Executive Summary

This paper was initially commissioned by the Department of Veterans Affairs (VA) as result of its commitment to transform the agency into an organization that delivers exemplary service to veterans and their dependents and exudes an atmosphere whereby employees are even prouder of their work to serve veterans. The VA established a centralized Customer Experience Office at the enterprise level to bring focus to this goal. Greg Giddens, Executive Director of the Enterprise Program Management Office, VA, asked the ACT-IAC Customer Service Task Force through the Institute for Innovation to describe the primary functions required to establish a Chief Veteran Experience Office (CVXO) based on best practices. After an initial brainstorming session with the Task Force and the VA, we identified seven areas to be discussed. They include:

- Customer Experience (CX) Strategy
- Customer Experience Innovation
- Channel Management
- Business Improvement / Performance Management / Customer Advocacy
- Research, Data and Insights
- Marketing and Outreach / Partner Relationships
- Culture

As VA is not unique in government in its desire to improve citizen services, the work done for the VA became the basis for this paper. Each of the above areas are briefly described in the following document with recommended goals for the first 90 days, responsibilities and tasks, staffing levels, and critical partnerships. The appendices provide further recommendations from an Example of a Chief Customer Care Office Staffing Plan (Appendix A) and Recommendations from the U.S. Digital Services Playbook (Appendix B).

The Institute for Innovation and Customer Service Task Force welcome agency feedback and comments and looks forward to continued discussions with those government entities established to advance the citizen experience with government.

Customer Experience (CX) Strategy

CX efforts typically fail due to a lack of a clear strategy. A well-conceived strategy lays out a roadmap for a CX program that identifies tasks, defines dependencies and identifies pipelines for improvement. The CX strategy should link the overarching vision to existing agency ecosystems, capture the voice of the customer and influence the transformations needed across the ecosystems of metrics, business processes, technology, people and culture. In this way, customer-centric thinking permeates the entire organization.

CX Innovation

How customer experience is viewed and measured is rapidly evolving in most organizations. The agency should realign its core competencies and modernize metrics to reflect this changing environment. For example, call time, once considered a key metric for call centers, is no longer as relevant as solving problems. Though agencies must acknowledge past delays or backlogs, the future focus should be on remediating problems and forward motion. CX innovation is happening across government and private industry. Agencies can borrow and adapt proven best practices, while motivating internal and external resources to come forward with great ideas. Technology can serve as an enabler as agencies transform to a customer-centric culture. The combination of culture change and technology can yield highly visible wins. By collaborating with the CIO office, an agency can improve internal and customer-facing systems with user-centered design principles. Interviews with customers and customer service employees can identify the biggest problem areas to bring focus to technical solutions.

Channel Management

Embrace the “no wrong door” principle and help veterans find the answers they need, no matter which channel they choose. Define the experience the agency wants to deliver for each channel and across channels. Every component should collaborate so as to streamline a cohesive journey for citizens. For those citizens who still prefer in-person service or talking to people, consider investigating ways to transition them to other more efficient and effective channels. Some citizens view government customer service offices as a place to engage socially with others with similar interests/needs. This may be an important component for some who need compassion and empathy as much as a completed form or an answer to a question and should be considered as the agency designs its goals for the future citizen experience. Channel Management should not only mean that the citizen has one view of the agency but that the agency systems and processes have one view of the citizen and their needs and interactions with the agency. For this reason, coordination across the agency is a vital component for success.

Business Improvement / Performance Management / Customer Advocacy

Advocacy and Voice of the Customer (VoC) are key to identifying and fixing problems. Citizens can help triage persistent issues and help identify changes to the process that will enable their needs to be met. Well-conceived performance management standards and key metrics will drive action ~ what gets measured will get done. Checklists can be used to document business improvement and standardize common processes across the agency. Customers should always get the same high level of service regardless of location or channel. Customer advocacy should align to business improvements. Clarity around needs definition should precede automation. By piloting improvements, citizens can test and hone potential solutions until the best solution is found and assimilated across the agency enterprise. Automation can streamline tasks, save money and bring organizational consistency. Internal support systems should be assessed against goals as they have a significant impact on fulfillment.

Research, Data and Insights

Data should drive customer service decisions. By collecting both quantitative and qualitative data, reports and key findings can be shared organizationally. Those data can spur action planning. Collaboration with the CIO office can institutionalize the use of research tools such as customer relationship management (CRM) software or communication tools for constant improvement. A small technical team can have a huge impact. Enterprise architecture views of the “as is” and the “to be” are critical to the design of a sound business process for customer service delivery and measurement as well as ongoing strategies to easily share relevant data with citizens.

Marketing and Outreach / Partner Relationships

A dedicated communications team can convey the overall vision, gain buy-in and educate internal and external stakeholders. The communications team should provide a continuous flow of improvement data, identify and promote small wins and good news stories. This flow will combat naysayers. Inundate employees with CX values and expectations until those values are ingrained throughout the organization. External communications and outreach should be both proactive and reactive. It is not possible to over-communicate results ... the more communication - the better. As part of the change process, it is important to under-promise and over-deliver. The messaging will change as feedback is obtained from the stakeholders. It is critical to gain buy-in and support from senior agency leaders of the operational and regional organizations.

Culture

Culture is one of the most critical success factors. Engaged employees provide better service. There are many reasons employees may be disengaged -- and many ways to improve engagement. Human resources management tools, including hiring, training, rewards, performance management, etc., can help employees assimilate to the new citizen-centric culture.

Citizen service should be infused into every employee's DNA across the agency. In some cases, employees know what needs to be done, but current systems, rules, laws or policies do not allow employees the freedom to do the right thing for their customer. In other cases, performance metrics do not support providing better citizen service. Those are the things that you need to -- and can -- change. It is critical, therefore, that those responsible for cultural change clearly understand the difference between real barriers to change and historical practice. The new Presidential mandate creating a Secretarial Customer Service Award Program can help instill new cultural values. The leadership team should ensure that plans are aligned across the agency and support the overall goal of improving citizen service.

Levels of “Ownership” for Each Function

As each agency is different, this paper will not recommend whether or not the Citizen Experience Office should “advise”, “own” or “adopt then hand back” the function. We do strongly urge an leadership team discussion and decision about each of these functional areas and the role of the Citizen Experience Office to effect change. Each recommendation should be considered against these three levels and may depend on the maturity of the functional area and agency governance structure.

Internal and External Stakeholders

Critical to the success of any citizen experience program is the identification and engagement of stakeholders for each functional area as it is unlikely they will be same for each area. The influence internal and external stakeholders can wield over each functional area cannot be underestimated. By engaging the appropriate stakeholders early in the process, they will typically move into a supportive posture. Worst case, the citizen experience leadership will understand the various perspectives of the stakeholders and can plan accordingly.

Example of a Customer Care Office Staffing Plan

As many government agencies are establishing enterprise-wide offices to promote customer care, an example of such an organization is provided in Appendix A. The information provided should be a starting point for governance and organizational discussions. Implementation of this draft staffing plan will vary by agency based on the overall goals for the customer care program. This example recommends five divisions:

- Immediate Office of the Chief Customer Care Officer
- Office of Strategy, Research, Marketing and Metrics
- Office of Customer Advocacy, Voice of the Customer, Business Process Improvement and Partnership
- Office of Digital Services and Data and Channel Integration
- Administrative Services

Recommendations from the [U.S. Digital Services Playbook](#)

The U.S. Digital Services Playbook recommends that the needs of citizens – not constraints of government structures or silos – should drive technical and design decisions. Appendix B addresses four recommendations from that document:

- Understand what the customer needs
- Address the whole experience from start to finish
- Keep it simple and intuitive
- Build the service using agile and iterative practices

Each recommendation has a checklist of tasks and a set of key questions designed to promote a comprehensive view of the topic.

Introduction

Project Objective

Provide the agency with recommendations for their new Customer Experience Organization, including structure, roles and responsibilities, best practices and leading thinking for customer experience offices. Provide recommendations for business practices, training, metrics and measurements. .

Project Methodology

The ACT-IAC Customer Service Task Force led this work under the auspices of the Institute for Innovation. The Task Force met with the VA leadership tasked with establishing a Veteran Experience Office. The Task Force established the seven functional areas and drafted each section. The information was combined into a single document and submitted in draft form to the VA leadership for review. This draft became the basis for further discussion. VA requested some modifications that were implemented and report was finalized.

The Task Force recognized that the challenges faced by the VA are similar to those in other agencies. The document was modified so that those seeking to improve citizen services could potentially benefit from the work of the Task Force and Institute for Innovation.

For purposes of this document, the terms "citizen" was used to describe a broad pool of individuals from which "customers" would emerge for service.

Chief Citizen Experience Office Functional Areas

1.0 Customer Experience (CX) Strategy

1.1. Description

A CX Strategy is a roadmap that guides the creation of a citizen-centric organization. It should outline a plan to deliver an improved experience when citizens interact with the agency including accessing services or data. It must align with the organization's overall strategy and is critical to improving service delivery and customer experience. The CX Strategy should include:

- The authorities of the Chief Citizen Experience Office (CCXO) and the CX governance.
- A clear understanding of your customers
- A roadmap for achieving the experience you want to provide to customer
- What the future Voice of the Customer Program will look like and how to best leverage the work that has already been done in this area
- How the agency plans to meet customer expectations, including deadlines and desired outcomes, and measure progress
- Whether a Citizen's Bill of Rights is necessary (much like IRS' "Taxpayer Bill of Rights")
- An outline for the process and procedures that will be used to engage employees
- The organization's customer-centric operating principles and values

The CX Strategy needs buy-in from the organization's highest levels across the agency and should create a standard for the agency enterprise using a small but influential high-level organization. The agency's key executives should be empowered to implement the strategy and held accountable for results. The CCXO should develop and share a clear and concise description of the experience that the organization will deliver to its customers and communicate it in a disciplined way to all employees and contractors. In some aspects, the CCXO should "own" certain programs, data and services that are enterprise-wide and critical to the customer service experience.

The CX Strategy should build a customer-centric culture and embed customer-first thinking into the organization's DNA. As part of the CX Strategy, the agency should create a dashboard of key customer performance data that can be monitored at a glance. The metrics used in the dashboard will drive the priorities and place an emphasis on the importance of a systematic approach to understand the customer. A dashboard can provide the transparency needed to achieve broad ownership and accountability for improving customer service across the enterprise.

1.2 Goals for First 90 Days

- Identify where you are, and where you want to be as an organization; determine what success will look like in 90 days.
- Define the authorities of the CCXO, the overall CX governance structure (e.g., Customer Advisory Board, Agency Advisory Committee), and your customer-centric operating principles and values.
- Stand up the new CCXO Office, including staffing, budget, office space, contractor support, etc.
- Leverage the Secretary's Advisory Board (or equivalent) to gain and receive the executive support required for an enterprise-wide transformation. This board can also help develop plans and provide guidance and support.
- Provide weekly briefings to the Deputy Secretary and Chief of Staff, and set up a schedule to brief the Secretary on plans, progress, challenges, risks, and help needed.
- Develop a clear understanding of citizen expectations by reviewing existing data from Voice of the Customer interviews and then create a roadmap for the experience you want to provide. This will determine what the future Voice of the Customer Program will look like.
- Identify internal and external stakeholders:
 - Identify key organizations within agency, and the support needed to accomplish early wins, especially from IT and Communications.
 - Meet with external stakeholders including the Hill, OMB, and key external stakeholder organizations, to fully understand their concerns, ideas, and recommendations.
- Assess the need for a cross-agency Customer Service Panel for advice, buy-in and advocacy that includes representatives from the Administrations.
- Prepare an initial briefing for Congress and Hill staff and maintain communication with the Hill on a regular basis.
- Begin reviewing all external communications for the "customer" lens.
- Form a front-line customer service group across different organizations and channels.
- Identify how to measure progress in meeting customer expectations, including deadlines and desired outcomes.
- Develop relationships between the CCXO organization and liaisons to other critical agency partners like DOD, SSA, CMS as appropriate.

As part of strategy creation, the agency should:

- Analyze current customer feedback.
- Identify major points of interaction that lead to high frustration, and outline pilot programs to address each point.
- Create a detailed journey map of several scenarios of a citizen's experience in dealing with the agency. Cover various points of view from several different customers.

- Map the current customer experience to actual agency business processes, systems and data and identify where processes and systems and repositories can be improved.
- Pick several journeys and scenarios that can be improved upon right away, to take advantage of low hanging fruit, and share success stories early and often.
- Communicate early wins to demonstrate the commitment for change. Consider input from internal ideation to fuel the pipeline.
- Outline methods to engage employees agency-wide and improve upon that engagement.
- Determine how existing agency staff can be used/retrained, rather than hiring/growing the agency further. Consider the roles of other stakeholders as strategy is developed initially and updated over time.
- Understand the previous efforts to improve CX and determine what worked, what did not and why.
- Align with the agency's data strategy and examine ways to provide more transparent data and information to citizens on a pro-active basis and by using all channels, including social media.

1.3 Task: Create the CCXO

- As soon as possible, develop and get approval from the Secretary for an annual budget for both government and contractor expenses, and a staffing plan, including SES slots and possibly Presidential Innovation Fellows.
- Obtain office space for the entire CCXO organization as soon as possible.
- Dedicate senior budget and HR people and detailees to help stand up the new office.
- Have the Secretary mandate that all operating organizations in the agency designate a senior person (SES level) as the liaison to the CCXO.
- Prepare for first kickoff meeting of the Customer Care Council, and have the Secretary open the meeting. All operating heads should attend, as well as the designated liaisons.
- Design a new Customer Service Awards Program for the agency Secretary.

2.0 Customer Experience (CX) Innovation

2.1 Description

CX Innovation is responsible for the creation of new tools, approaches, or methods that will improve customer experience and drive differentiation and long-term value. CX innovation is more technology heavy than other areas. [Note: There is a significant overlap between CX innovation and CX strategy.]

2.2. Goals for First 90 Days

As a result of the top priority journeys or pain points to be tackled, the agency should:

- Initiate an innovation mining effort to begin capturing where innovation is already happening within the agency. This innovation program should capture data that will collect best practices and be used as the underpinning data to design and deploy new services.
- Collect best practices from the private and public sectors that relate to the mission of the agency.

2.3 Responsibilities

Designate a Champion of Customer Service Innovation at the agency

- Champion the best customer experience from both commercial and government – should be “in touch” with what the private sector is doing in CX and related fields.
- Help the organization move away from a functional (this is how we do it) to a customer-centric model (*this is how we should do it*).

Create a Hub for CX Design, Innovation and Implementation

- Work collaboratively across the agency to innovate the entire customer experience; avoid focusing on a single user experience or one silo of the enterprise, rather act as the strategic hub.
- Work collaboratively across agency silos to plan, project manage and implement solutions that emerge from the innovation process.
- Develop a process to elicit employees' ideas for improved customer service.
- Lead the steering committees that monitor progress.
- Advise on the continual improvement and the solutions that emerge from the innovation process.
- Evaluate and optimize the customer experience with a focus on:
 - Clear definition of what customer experience should look like, based on voice of the customer data and front-line employee observations.
 - Clear understanding of private sector innovations in related programs.
 - Involving executives in listening to customer experiences.
 - Advising on people, process and technology changes that will drive customer satisfaction, achieve mission outcomes, reduce cost or lower customer effort.
 - Understanding and aligning with other influencers on the citizen's experience. For example, veterans' experience starts with their military service.
- See Appendix B for design guideline recommendations from the [U.S. Digital Services Playbook](#)

2.4 Tasks

- Define current channels of customer experience.
- Define, document, follow and measure the customer journey / experience.
- Define, document, follow and measure emerging customer needs and behaviors.
- Collaboratively define and introduce new concepts for improvement.
- Determine best allocation of resources per project for maximum ROI.
 - Manage physical and virtual design spaces, lead facilitation and collaboration sessions.
- Implement planning and project management of new concepts.
- Define key performance indicators (KPIs) for current and future customer experiences.
- Innovation mining: Identify the agency's centers of customer experience innovation.

This is not a one-time task. This is a continual look at agency customer experience innovation. Measurement and analytics must be consistent from the beginning and are critically important to track and report. Reporting should not just be up the organization, but should be transparent across the enterprise and, potentially, to the public. To establish a thriving innovative environment requires a culture change led from the most senior executives and infused throughout the organization.

3.0 Channel Management

3.1 Description

Channel management should engage in systematically planning, implementing, monitoring, integrating and revising all channels of communication within and between organizations. These can include online, in person, by phone, and through stationary or mobiles devices. Channel management can ensure that customers receive an excellent experience while being efficient and effective. To provide an integrated experience for the citizen, channel management must be deliberate and robust.

3.2 Goals for First 90 Days

- Inventory all channels to account for every website, contact center, or other contact channel; determine the role of each in the customer experience.
- Review the channels for consistency, accuracy and the customer lens.
- Establish goals for channel consolidation, and metrics for success.
- Establish a cross-functional team that will target one organization/department for holistic review of content from multiple perspectives.
- Develop a plan for integrating the customer experience across channels.

- Focus on Contact Center call flows, points of engagement, multichannel options, scripting and user feedback to identify areas for optimization.
- Own the “look and feel” user experience of all websites.

3.3 Responsibilities

Develop communication strategies, design internal and external communications directives and manage the flow of information, including online communications.

3.4 Tasks

Evaluate, update and maintain all communications channels for:

- Usage
- Consistency of content / messaging
- Accuracy
- Timeliness
- Ease of use / consumption-level of detail / overall user experience

4.0 Business Improvement / Performance Management / Customer Advocacy

4.1 Business Improvement

4.1.1 Description

Business improvement addresses customer lifecycles, service lines, and transaction interactions. It focuses on establishing and improving agency performance across several stakeholder perspectives (e.g., customer, agent, agency, partner). Tasks are geared to understanding and addressing customer needs and success criteria, operational capacity and incentives to establish and sustain strong CX/CS outcomes.

4.1.2 Goals for First 90 Days

- Align function with agency strategy and priorities.
- Establish business improvement team.
- Develop and validate business improvement framework.
- Define the key customer experience opportunities to improve.
- Identify the needs of different organizational groups.
- Identify active and planned business improvement initiatives.

4.1.3 Responsibilities

The business improvement function should be empowered with significant influence/control over business improvement planning and execution as culture and competencies mature. This authority should be balanced through a senior leadership committee that guides, supports and promotes change across the agency.

4.1.4 Tasks

- Define the key customer experience opportunities for improvement.
- Establish a framework for describing interactions from the customer point-of-view.
- Help different organizations map existing processes and identify problem areas.
- Understand and align with currently used business process improvement methodologies.
- Help different organizations design improved processes.
- Identify needs of different organizational groups.
- Collect, share, and communicate best practices across the agency.
- Manage the execution of customer experience improvement projects.
- Track and guide progress of customer experience improvement initiatives.
- Manage CX improvement coordination.

4.2 Performance Management

4.2.1 Description

Performance management consists of activities required to establish success criteria, baseline and measure organizational performance, interpret results, and produce performance outcomes.

4.2.2 Goals for First 90 Days

- Establish team.
- Identify and assess existing measurement frameworks, metrics and tools based on a shared agreement and accountability for desired outcomes.
- Define and validate agency CX/CS measurement framework.
- Define performance metrics, measurement and reporting requirements.
- Establish/identify data collection model and supporting repositories.
- Establish CX dashboard concept/prototype.

4.2.3 Responsibilities

The CCXO should be the authoritative and independent assessor of agency CX performance with the authority to establish measurement requirements across service lines and to escalate deviations from service reporting requirements to senior agency officials.

4.2.4 Tasks

- Define customer experience measurement frameworks.
- Establish CX/CS measurement and reporting requirements.
- Identify and manage service metrics.
- Create CX dashboard.
- Track metrics and report results.

4.3 Customer Advocacy

4.3.1 Description

The public expects to have a voice in how government services are designed and delivered, so agencies also need to advocate for customers at every level. The Customer Advocacy function, which may include stakeholders, gives the customer a place to go when complex issues arise. Critical to success is the formation of a partnership with the stakeholders so that they are engaged in the various aspects of the effort to improve the veteran's experience.

4.3.2 Goals for First 90 Days

- Recommend improvements for the top three customer tasks.
- Develop criteria for case referral to a Customer Advocacy function.
- Create a draft Customer Advocacy Process Handbook (to be vetted).
- Develop charter for a Customer Advocacy Committee that is formed on a partnership with the various internal and external stakeholders.

4.3.3 Responsibilities

This team should work in coordination with the Voice of the Customer team to ensure that they fully understand the issues being brought to the agency and define the role of the Customer Advocacy function. There has already been a substantial effort in this area that can be leveraged for future decision-making. If there are complex customer problems, create a function to elevate and resolve problems quickly. In some cases, changes to rules or regulations may be needed and referred to the appropriate organization.

Determine the needs of each customer group and develop mechanisms to infuse the Voice of the Customer into all business decisions. Use existing data developed to capture customer needs and develop various personas to increase customer understanding. Use customer data and feedback to develop journey maps. Tackle high-impact tasks first then identify and fix pain points and broken processes. Use cross-functional teams to develop iterative, agile solutions. Empower the CCXO staff to interview customers, review business processes and work with program offices to re-tool programs to better meet customer needs.

4.3.4 Tasks

- Identify / align with / amplify customer voice.
- Identify CX/CS advocacy opportunities.
- Establish and maintain an advocacy process handbook.
- Establish / maintain internal/business advocacy capabilities.
- Establish / maintain customer advocacy capabilities.
- Report advocacy performance metrics.
- Facilitate customer screening (i.e., connecting customers with right provider).
- Facilitate issue resolution.
- Chair a Customer Advocacy Committee to coordinate / communicate advocacy efforts.
- Consider forming an external advisory board, leveraging associations, and other pertinent groups.
- Collaborate with business improvement teams.
- Develop "customer advocates" to communicate agency process improvements within communities.

This function requires partnering with agency service lines / offices. The customer advocate must operate under separate management from the service line to properly represent the customer. Customer advocacy functions can be instantiated through business improvement efforts to align with process and cultural change efforts.

5.0 Research, Data and Insights

5.1 Description

This function empowers the agency to make data-driven decisions around the customer by establishing repeatable and sustainable practices that create a consistent shared understanding of who customers are, what they want and need, and how they perceive their interactions with the agency.

5.2 Tasks

Stand up a Voice of the Customer program that leverages the work that has already started in this area to further:

- Define a customer experience metrics framework that aligns with how customers judge an experience, and is consistent across functional and business unit silos.
- Identify existing tools and processes that monitor these metrics and identify where new mechanisms need to be created.
- Identify tools, best practices and benchmarks to measure customer satisfaction, task completion, ROI, etc.

- Set up a centralized point for all customer understanding data. Deliver recurring, actionable visualized reports. Assign both management and front line teams responsibilities to improve results.
- Solicit quantitative and qualitative feedback from customers (e.g., surveys, interviews, focus groups, usability studies).
- Collect unsolicited feedback from customers about their experiences with the organization (e.g., by mining calls, emails, or social media posts).
- Collect operational data about customer interactions (e.g., success of solving customer problems via phone or email; web pages viewed, errors encountered).
- Provide a way for customers to proactively submit ideas, and collect and review these ideas for possible implementation.
- Keep customers informed on how their feedback is being used; publicize wins and progress.
- Develop a “To Be” data strategy and ongoing process aligned with Channel Management for proactive provisioning of data and information to customers.
- Define specific customer experience metrics for employees and organizations based on how they contribute to overall customer experience quality.
- Document and share customer understanding in a way that is easy for all employees.

6.0 Marketing and Outreach/Partner Relationships

6.1 Description

Communication is one of the most critical components for ensuring that all employees, stakeholders and citizens are fully aware of the agency's efforts to improve the customer experience. Sharing ongoing successes is a critical component of this activity. The agency should develop a marketing and outreach strategy to reach customers, stakeholders, the public and employees. The communications team will need to identify key partners with whom the agency should engage to support ongoing operational improvements. Social media tools, videos and testimonials are an effective way to communicate success. Effective communication is dependent on the audience segmentation and personas so that you “speak” to your intended audience. The use of social media, for example, would be an effective mechanism to communicate to certain generations but not others.

6.2 Responsibilities

As the agency continues through the transformation journey, it will need a robust marketing and outreach plan. This plan needs to be grounded in customer personas (including one for internal agency employees). The purpose of the marketing and outreach strategy is to:

- Inform agency employees about their success in making a positive difference in the lives of citizens.

- Develop a regular means of communication (e.g., newsletter or blog) to communicate achievements (success stories), progress and plans for improved customer service.
- Motivate the agency workforce to continue the quest for better service.
- Inform external stakeholders and partners about customer service successes.
- Enlist satisfied customers and partners to tell their stories, and leverage partnerships to enlist advocates to share good stories.
- Communicate the brand promise and expectations broadly, both internally and externally.

Convey information in a way that is clear, concise, and action-oriented. Help people understand information the first time they read it, so they can take appropriate action.

- Use plain language with stated key points.
- For every project, write a short statement showing the purpose and what was accomplished. Use that content in news releases, on the web, etc., to maintain consistency anywhere you talk about the project.
- Show you are listening; if someone tells you “I hate long lines,” follow up and say “We heard you hate long lines, so here’s what we’re doing to fix them.”

6.3 Tasks

The communications team should oversee all outgoing communications to ensure it has the “customer lens”. Consistent and focused communications should mend customer and public perception. The team should identify how to transparently share plans and progress. It is not enough to do good work—the agency must be transparent about problems and solutions, to build trust with customers, employees, partners and the public.

Good customer service is dependent on the customer service ecosystem—partnerships. The agency needs a strategy for partner relationships, so they are aware of the issues and concerns of both partners and customers. In addition, the partner relationship strategy should include measures of success based on a common understanding of the issues and goals.

7.0 Culture

7.1 Description

Culture is the key to everything! Engaged employees want to provide better service to their customers. Therefore, the agency should make considerable effort to create a culture of innovation and customer service where every employee fully understands what they need to do to be customer-centric. A customer-centric culture involves:

- Clear vision, principles and customer-centric values that can be communicated on an ongoing basis to the agency employees.

- An avenue by which employees can voice ideas on how to improve the customer experience.
- A process to hire employees, from contact center agents to executives, with a passion for customer experience.
- A consistent onboarding process to ensure that new employees understand the customer service values.
- Ongoing training to ensure that the values are continued over time.
- Design and leverage the new Secretary's Customer Service Awards Program to reward and recognize employees for new ideas and successes in delivering and improving service (also consider how to factor in the customer viewpoint in these awards).
- A systematic way for "success stories" to be told across the agency will create an enterprise-wide culture that starts with new approach to the customer experience.
- Processes such as telling "customer stories" at the start of every staff meeting.
- Introducing a critical element into the performance plan of every agency employee pertaining to the role they play in improving customer experience.

7.2 Goals for First 90 Days

- Work closely with the communications team to collect success stories about improving service or breaking down barriers.
- Begin to understand where customer service breaks down. Through data and feedback from stakeholders relevant congressional committees, and other partners, determine how to resolve issues; assign responsibility to a process improvement team.
- Ensure that external stakeholders are aware of the efforts within the agency to improve service.
- Engage with industry partners, including vendors who provide customer-facing services and treatment, to strengthen those relationships. Collaborate and embrace these partners to improve customers' outcomes and satisfaction.

7.3 Responsibilities

The agency workforce's attitude is critical to its organizational transformation. Employees that feel valued and respected will generally have higher morale, will be better employees and provide better service. For this reason, success will largely depend on the sense of partnership across the internal stakeholders and commitment to the program goals.

Culturally, employees must understand how stovepipes hamper the agency's ability to provide outstanding customer service. The CX team should enable a culture where a citizen can call the agency and have questions answered and problems solved in a timely, courteous manner, no matter how varied or complex.

Encourage employees to elevate barriers to service, such as helping primary care providers to manage care when received outside of an agency facility. Understand why there is a waitlist and identify solutions.

7.4 Tasks

Develop a Customer Service Vision, and map from “as-is” to “to be.” To achieve success, the agency must look internally and externally at points of entry for success and failure.

Additional best practices for transforming to a customer-centric culture:

- Establish a sense of urgency and outline a plan for change.
- Recognize and reward “customer-first” behavior. Tie performance goals to customer service and overall satisfaction.
- Reinforce a “customer-first” vision at all levels of the organization and actively involve all employees in this endeavor.
- Review Employee Viewpoint Survey (EVS) scores to identify what is working and areas for improvement.
- Update recruitment and hiring processes, to attract customer-focused employees to join the agency; modernize the onboarding process to emphasize customer service values; look to internal staff that can be retrained before hiring new people.
- Launch storytelling campaigns and identify champions throughout the organization.
- Develop a rigorous training program, not only for new employees, but provide regular refreshers over time (e.g., Zappos).
- Publicly reward desired behaviors and outcomes.
- Enlist support from partners and stakeholders to show the positive impacts of change and improvement.

In town hall meetings, allocate time for citizen input and have a mechanism to get back to these customers to demonstrate what the agency is doing to implement reasonable recommendations. Agency websites (both external and internal) should make it clear that customer service is a key value at the agency. Until agency employees walk the walk, be careful about too much bravado around customer service as a priority.

Customer and employee satisfaction surveys can be useful if they include quantifiable performance metrics as well as key performance indicators. Before creating new surveys, understand what is currently in place across the entire organization to measure satisfaction and whether there are information gaps. Consolidate surveys to prevent survey fatigue and ensure statistics are valid and contain actionable information. Ensure that customers and employees are not being asked to fill out multiple and repetitive surveys.

Transforming culture will be hard and requires the commitment of all. Bring together employees and customers to talk about experiences. Is this the “year of the employee/customer?” Culture eats strategy. Aim for a customer-centric culture. Customers need to be in the DNA of every employee and systems need to be put in place to support. Create a Chief “Permission” Officer to give employees permission to do the right thing for customers.

Summary

The American Council for Technology-Industry Advisory Council is honored to assist the government in this critical area. ACT-IAC believes these recommendations will assist the government in its goal to provide the best in customer service to our nation's citizens. We invite and look forward to future discussions to accelerate positive change for our nation's citizens as they seek services from their government, whether it is federal, state, local or tribal.

Appendix A

Example of a Customer Care Organization Staffing Plan

As focus is brought to customer service, some agencies are standing up discrete organizations that have enterprise-level responsibilities. The following proposed staffing plan was developed as an example of the functions that should be included in an Office of the Chief Customer Officer (CCO). While this example addresses the federal level, it could be easily adapted to other levels of government. This appendix should be viewed as a launching point for discussions on governance and organizational design.

The Office of the Chief Customer Officer should have five direct reports, organized as described below:

1. **Immediate Office of the CCO** – Chief Customer Care Officer and Deputy CCO, both SES. One Executive Assistant and one Administrative Assistant.
 - Total 4 people

2. **Office of Strategy, Research, Marketing, and Metrics** – Responsible for designing and maintaining all customer experience metrics and standards, developing and maintaining a Customer Care Strategic Plan and Road Map, aligned with the agency Strategic Plan and other strategic plans, and for issuing annual and quarterly reports and monthly metrics updates. Research arm for innovation and advances in improving overall veterans' customer experiences. Coordinates, develops and implements overall marketing strategies for helping citizens access agency services and transition them to digital services as appropriate. Liaison to the employee satisfaction organization, and coordinates with OMB on things such as the CAP Goal of Customer Service.
 - One GS-15, three subordinate GS-15's and four people per sub-organization.
 - Manages the Customer Care Council for the CCO and sets priorities for activities under the CCO, and across the agency, for improvements in customer service. Takes the lead to work with the Office of Customer Advocacy, Voice, Business Process Improvement and Partnerships to develop appropriate personas and conduct the customer journey initiatives. These two organizations should also work together to plan and implement the Secretary's Customer Service Award Program.
 - Sub-organizations could be Strategy and Research Branch, Marketing Branch and Metrics and Reports. One Administrative Assistant to Office Director. Strategy and Research Branch could include a liaison to agency Privacy Officer.
 - Total 17 people.

3. **Office of Customer Advocacy, Voice, Business Process Improvement and Partnerships** – Responsible for collecting all customer experience metrics, holding focus groups with customers and external stakeholders. Focus groups could include customers, external stakeholders and any direct customer service providers from within the agency.

Establishes internal and external partnerships to redesign business processes for improved customer service delivery across the agency. Owns the business process “as-is” and “to-be” view for the Business Reference Model for the overall Enterprise Architecture, also charts business process improvements for integrated service delivery. The Partnership organization, as part of this office, can be set up to receive input from external organizations. Should also have internal partnerships with operating organizations and regions as appropriate, to ensure accurate and timely data collection against all metrics. Should set up a Customer Advocate organization as either an initial or secondary entry point for citizens. Could potentially own all contact centers, or at least one that's a single number to call for help, and this center could direct all calls to appropriate help/contact centers.

- Three branches could be Customer Voice and Metrics, Customer Advocate and potential owner of the single contact center, and the Partnerships and External Liaisons Branch.
 - One GS-15 leader and three GS15 direct report branch chiefs and an Administrative Assistant. Four GS-15s, one Administrative Assistant, and four people per branch (not considering the single contact center.)
 - Total 17 people
4. **Office of Digital Services and Data and Channel Integration** – Business owner of all systems related to customer experience data, responsible for providing the enterprise architect view of how systems facilitate the improvement of integrated customer service delivery and metrics collection. Should prepare the “as-is” and “to-be” systems and data view of improved integrated services delivery across channels, and collection of data against metrics. Responsible for the digital services transition plan and roadmap.
- Could be two branches, Systems and Services Branch and a Data Branch. Three GS15s and one Administrative Assistant and four people per branch.
 - Total 12 people
5. **Administrative Services** – Responsible for budget preparation and execution, HR liaisons, COTRs and technical contract management, office management processes and other liaisons to agency management offices. Provides support to all other branches and the immediate office of the CCO and helps implement all agency management directives.
- Budget Branch, HR, Facilities, and Management Branch, and a Technical Contract Management Branch.
 - One GS-15 leader and three GS-15 branch chiefs and one Administrative Assistant plus three people per branch.

Appendix B

Recommendations from the U.S. Digital Services Playbook

Understand What the Customer Needs

Successful digital projects begin by exploring and pinpointing the needs of the people who will use the service and the ways in which the service will fit into their lives. Whether the users are members of the public or government employees, policy makers must include real people in their design process from the very beginning. The needs of citizens — not constraints of government structures or silos — should drive technical and design decisions. We need to continually test the products we build with real people to keep us honest about what is important.

Checklist

- ✓ Early in the project, spend time with current and prospective users of the service.
- ✓ Use a range of qualitative and quantitative user research methods to determine people's goals, needs, and behaviors; be thoughtful about the time spent.
- ✓ Test prototypes of possible solutions with real people, in the field if possible.
- ✓ Document the findings about user goals, needs, behaviors and preferences.
- ✓ Share findings with the team and agency leadership.
- ✓ Create a prioritized list of user stories, which are short descriptions of the goals the user is trying to accomplish.
- ✓ As the digital service is being built, regularly test it with potential users to ensure it will meet peoples' needs.

Key questions

1. What user needs will this service address?
2. Why does the user want or need this service?
3. Who are your key users?
4. Which people will have the most difficulty with your service?
5. What research methods were used?
6. What were the key findings from users' current experience?
7. How were the findings documented? Where can future team members access the documentation?
8. How often are you testing with real people?

Address the Whole Experience from Start to Finish

We must build digital services with an understanding of the range of ways a person might interact with our service, including the actions they take online, through a mobile application, on the phone, or in person. Every encounter should move the user closer towards the desired outcome, whether that encounter is online, offline or multichannel.

Checklist

- ✓ Understand the different points at which people will interact with the service – both online and in person.
- ✓ Identify pain points in the current way users interact with the service, and prioritize these according to user needs.
- ✓ Design the digital parts of the service so that they are integrated with the offline touch points people use to interact with the service.
- ✓ Develop metrics that will measure how well the service is meeting user needs at each step of the service.
- ✓ Address all aspects of cultural, economic, educational or geographic concerns, so it is easily readable and understandable by target audience.

Key questions

1. What are the different ways (both online and offline) that people currently accomplish the task the digital service is designed to help with?
2. Where are user pain points in the current way people accomplish the task?
3. Where does this specific project fit into the larger way people currently obtain the service being offered?
4. What metrics will best indicate how well the service is working for its users?

Make It Simple and Intuitive

Using a government service should not be stressful, confusing, or daunting — it is our job to build services that are simple and intuitive enough that users succeed the first time, unaided. In the final analysis, did the person get their question answered AND/OR did they solve their problem or achieve the outcome they were looking for?

Checklist

- ✓ Create or use an existing, simple and flexible design style guide for the service.
- ✓ Use the design style guide across related digital services.
- ✓ Provide users with clear information about where they are in the process as they use the service.
- ✓ Follow accessibility best practices to ensure all people can use the service.
- ✓ Provide users with a way to exit and return later to complete the process.
- ✓ Use language that is familiar to the user and is easy to understand.
- ✓ Use language and design consistently throughout the service, including in the online and offline (non-digital) touch points people use to interact with the service.

Key questions

1. What primary tasks are the users trying to accomplish?
2. What is the reading level of the language the service uses?
3. What languages is your service offered in?
4. If a user needs help while using the service, how do they go about getting it?
5. How does the service's design visually relate to other government services?

Build the Service using Agile and Iterative Practices

We should use an incremental, fast-paced style of software development to reduce the risk of failure by getting working software into users' hands quickly and by providing frequent opportunities for the delivery team members to adjust requirements and development plans based on watching people use prototypes and real software. A critical capability is being able to automatically test and deploy the service so that new features can be added often and easily put into production. Following agile methodologies is a proven best practice for building digital services, and will increase our ability to build services that effectively meet user needs.

Checklist

- ✓ Ship a functioning "minimum viable product" (MVP) that solves a core user need addressed by the service as soon as possible, and not longer than three months from the beginning of any new digital project, using a "beta" or "test" period if needed.
- ✓ Run usability tests frequently to see how well the service works for users, and identify improvements that should be made.
- ✓ Ensure the individuals building the service are in close communication using techniques such as war rooms, daily standups, and team chat tools.
- ✓ Keep delivery teams small and focused; limit organizational layers that separate these teams from the business owners.
- ✓ Release features and improvements multiple times each month.
- ✓ Create a prioritized list of features and bugs, also known as the "feature backlog" and "bug backlog".
- ✓ Use an "issue tracker" to catalog features and bugs.
- ✓ Use a source code version control system.
- ✓ Ensure entire team has access to the issue tracker and version control system.
- ✓ Use code reviews to ensure quality.

Key questions

1. How long did it take to ship the MVP? If it has not shipped yet, when will it?
2. How long does it take for a production deployment?
3. How long in days are the iterations/sprints?
4. Which source code version control system is being used?
5. What tool is being used to track bugs and issue tickets?
6. What tool is being used to manage the feature backlog?
7. How often do you review and reprioritize the items in your feature and bug backlog?
8. How do you collect user feedback during development and how is that feedback to improve the service?
9. At each stage of usability testing, what gaps were identified in addressing user needs?

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Institute for Innovation

Established in 2011, the ACT-IAC Institute for Innovation was chartered to promote innovation in the delivery of government services and operations. It develops and delivers high-quality strategic advice that reflects cross-industry recommendations based on the consensus of experts from ACT-IAC's member companies and government liaisons. Through ethical collaborative discussion, the Institute recommends approaches to key issues affecting government where information technology can be or is a factor and a broad spectrum of perspectives is required.

The Institute commissioned the 2012 Quadrennial Government Technology Review to develop a series of reports and executive briefings for consideration by the next administration. Each report focuses on the use of information technology to address a national challenge. These papers, and additional information on the Institute, can be found on: www.actgov.org/quadrennial.

- Empowering Citizen-Driven Government through Collaboration and Service Delivery
- Educating our Workforce for Today's Jobs in Science and Technology
- Improving Population Wellness and Reducing Growth in Healthcare Costs
- Enhancing National Security Through Responsible Information Sharing and Identity Management
- Unleashing the Power of Information Technology to Reduce the Budget Deficit
- Delivering Mission Results by Aligning Business and Information Technology
- Tackling the Nation's Biggest Challenges by Investing in Information Technology Solutions

In 2013, the Institute for Innovation was challenged to develop recommendations to "Transform the Way Government Builds Solutions". The paper proposes changes for OMB's consideration that span acquisition strategy and risk mitigation, acquisition policy, accelerated implementation and information sharing.

In 2014, the Institute launched an innovation showcase and award program that culminated in a highly attended February event featuring 30 innovations that benefit government. We started a proof-of-concept for a collaborative website for innovators to promote their solutions, share best practices and discuss issues of mutual interest. A recognized leader in innovation addressed a group on the key principles to make innovation work.

The work of the Institute is made possible through the support of partners from non-profit organizations and for-profit companies. Thought leaders from these partners, and representatives of the ACT-IAC leadership team, guide and govern the Institute, but do not influence project recommendations in keeping with ACT-IAC's commitment to maintaining a non-partisan, vendor-neutral, collaborative environment. Members of the Institute for Innovation are as follows:

- Lisa Akers, ASI Govt. (IAC Executive Committee Liaison)
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