

## SECTION 280 – MANAGING CUSTOMER EXPERIENCE AND IMPROVING SERVICE DELIVERY

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### Summary of Changes

Provides continued guidance to agencies on implementing the Federal Government’s customer experience framework, and information for agencies on how to effectively manage customer experience improvement efforts. Updates include additional information for agencies on leading practices for measuring and managing customer experience.

### 280.1 To which agencies does this section apply?

The general guidance in sections [280.2](#) through [280.8](#) are government-wide guiding principles that all Executive Branch agencies can use to improve customer experience. High-Impact Service Providers (HISPs), which are those Federal entities designated by OMB to have high-impact customer-facing services (as defined in section [280.9](#)), are required to implement the guidance in sections [280.10](#) through [280.13](#).

### 280.2 Who is a Federal Government customer?

For the purposes of this guidance, “customers” are individuals, businesses, and organizations (such as grantees, state and municipal agencies) that interact with a Federal Government agency or program, either directly or via a Federal contractor or even a Federally-funded program. Federal government customers could also include public servants and employees themselves in their interactions with Federal processes.

### 280.3 What is Federal Government customer experience?

Customer experience (CX) refers to a combination of factors that result from touchpoints between an individual, business, or organization and the Federal Government over the duration of an interaction and relationship. These factors can include ease/simplicity, efficiency/speed, and equity/transparency of the process, effectiveness/perceived value of the service itself, and the interaction with any employees. Similar

to their application in the private sector, these factors can drive the overall satisfaction and confidence/trust with the program, agency, and the government at large.

#### **280.4 What is Federal Government service delivery?**

“Service delivery” refers to the multitude of diverse interactions between a customer and Federal agency such as applying for a benefit or loan, receiving a service such as healthcare or small business counseling, requesting a document such as a passport or social security card, complying with a rule or regulation such as filing taxes or declaring goods, utilizing resources such as a park or historical site, or seeking information such as public health or consumer protection notices.

A “service” is defined as the sum of the help provided--by an agency and its partners--throughout the process a customer goes through to obtain, receive, or make use of a public offering (or comply with a policy). This definition is inspired by customer perception; customers perceive the series of interactions as a whole when they combine to solve a need. The degree to which those interactions are effectively coordinated, easy to navigate, and mitigate uncertainty, largely determines their satisfaction and trust. Services, as experienced by the customer, cut across organizational functions. They need not align exactly to formal Federal budgets, programs, or org charts. They do however require management and collaboration to be delivered effectively. For more detail on a Federal service delivery model, please visit the resources section of <https://performance.gov/cx>.

Services start with an occasion of need, are processed as a self-service workflow or series of interactions, and end with achieving an outcome. For example, most Federal Government services can be categorized as one of several service types:

- Administrative: Requesting or renewing items that do not require an extensive eligibility determination or multi-stage review processes such as getting a license, passport, or social security card.
- Benefits: Applying for or progressing through more complex government processes to determine eligibility and degree of benefit such as immigration, Medicare, Veterans’ Health services, or a small business loan.
- Compliance: Completing required actions such as filing taxes, submitting information for or engaging with an auditor, environmental reporting, or completing a survey mandated by law.
- Recreation: Utilizing public spaces such as national parks and historical sites, or visiting museums.
- Informational: Providing authoritative knowledge-based resources to the public such as designing labels, releasing warnings, requiring disclosures, or providing health recommendations.
- Data and Research: Conducting or funding research, maintaining and preserving artifacts, collecting, analyzing, reporting, and sharing data.
- Regulatory: Providing clear guidance to support commerce, transportation, employment rules, workplace safety, public safety (e.g., ensuring clean water, safe medicines); enabling reporting of grievances (e.g., consumer protection).

**280.5 What is the purpose of implementing this guidance?**

Implementing the guidance specified in this section will establish a more consistent, comprehensive, robust, and deliberate approach to CX across government.

The purpose of this guidance is to:

- Establish a CX-mindful culture across Federal Government services;
- Improve customer satisfaction with and trust in Federal Government;
- Provide structure and consistency around how agencies/programs approach CX;
- Promote program accountability and governance mechanisms to improve quality and service;
- Ensure high-impact programs are making progress in growing CX program maturity, service definition, and applying leading practices<sup>1</sup>;
- Ensure high-impact programs are receiving and acting upon customer feedback to drive performance improvement and service recovery;
- Allow for government-wide comparative assessment of customer satisfaction; and
- Ensure transparency through public reporting.

**280.6 How should agencies manage customer experience?**

The core CX functions are summarized in the categories of:

- **Measurement:** Defining and instituting CX outcome measures, as well as service operational measures, to ensure accountability for improving service delivery and communicating performance across the organization and to the public, routinely analyzing and making use of this data;
- **Governance and Strategy:** Institutionalizing CX by identifying executives and leaders responsible, organizing supporting resources, defining the processes by which strategic decisions incorporate customer perspective, and aligning CX strategy and activities with business decisions, initiatives and investments within the agency's broader mission and strategic priorities;
- **Culture and Organization:** Acquiring and developing the talent required to incorporate and improve CX within agency activities, and empowering all employees to adopt a CX mindset through training, performance measurement, and rewards;
- **Customer Understanding:** Identifying the main occasions that result in the public making use of or interacting with Federal services and conducting qualitative and quantitative research across organizational silos to map intra-agency customer journeys, as well as cross-agency journeys where applicable, to build and continually refine a knowledge base of the agency's customer segments and needs, integrating disparate customer interaction and administrative data; and,
- **Service Design and Improvement:** Adopting a customer-focused approach to the implementation of services, involving and engaging customers in iterative development, leveraging digital technologies and leading practices to deliver more efficient and effective interactions, and sharing lessons learned across government.

Each fiscal year, agencies and programs that provide services to customers should complete a Customer Experience Capacity Assessment across these maturity model categories and develop an action plan identifying focus areas for increasing capacity and conducting specific CX activities based on the result of

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<sup>1</sup> For examples of leading practices and industry frameworks for managing customer experience, please review the annual CX Capacity Assessment template provided on [performance.gov/cx](https://www.performance.gov/cx).

the assessment and what they have learned through qualitative and quantitative customer feedback. A CX Capacity Assessment tool and Action Plan template are provided annually on the [CX MAX Community page](#).

### 280.7 How should customer experience be measured?

To assist in developing comparable, government-wide scores that enable cross-agency benchmarking (when relevant) and reduce burden on the public, programs providing services to the public should measure their touchpoint/transactional performance. To do so, collect feedback:

1. On the services of highest-impact using customer volume, annual program cost, and/or knowledge of customer priority as weighting factors. Reference Federal Services Definition in [280.4](#).
2. In as a real-time manner as possible: immediately following or within 48 hours of completion or exiting the service interaction.
3. In as few questions as possible leveraging what we know drives experience (see top experience drivers in chart below) in the design of the survey.

For those entities identified as HISPs and required to submit their CX data for public reporting, transactional customer feedback surveys must include:

- A required overall trust score of the entity in response to a Likert-scale question (preferred 5 point) Agencies should use the statements below as a sentence base and make only minor edits. Any requested modification to the wording of these statements must first be discussed with OMB prior to implementation in order to maintain reporting comparability government-wide;
  - *This interaction increased my trust in [Program/Service name].*
  - *I trust [Agency/Program/Service name] to fulfill our country's commitment to [relevant population].*
- A required overall score of the transaction (satisfaction) in response to a Likert-scale question (preferred 5 point);
  - Agencies should use the statements below as a sentence base and make only minor edits, using a 5-point Likert scale. Any requested modification to the wording of these statements must first be discussed with OMB prior to implementation in order to maintain reporting comparability government-wide.
    - *Please rate your experience [5 star option].*
    - *I am satisfied with the service I received from [program/service name].*
- A required series of questions or choices to assess relationships between the overall score and experience drivers relevant to the service (see chart below).
- 1 question allowing but not requiring free response (unless format, such as an IVR-based survey, does not enable).
- If applicable and necessary, as few questions as possible that enable the agency to make use of the data, such as a question regarding the purpose of a visit or call, for a total survey length of no more than 15 questions.

Agencies are to submit these surveys for approval under the OMB A-11 Section 280 Umbrella Clearance that can be established at the department level using the templates provided on [CX MAX Community page](#). Individual collection requests under this clearance will be reviewed by a customer experience subject matter expert in an effort to further streamline the review of these types of collections.

Baseline statements for each driver are provided, and HISPs may make adjustments to the wording as necessary for mission and circumstance-specific customization based on the type of service (see section [280.4](#)) or transaction type (for example, it may not involve an interaction with an employee). It is important that whenever possible, agencies ask the fewest number of questions, and map each question to one of the

categories below, so that we might identify at a government-wide level which elements are most impactful on satisfaction and trust within different types of Federal services.

Customer Experience Drivers	Driver Sub-Categories
<b>Service Quality</b>	<b>Service Effectiveness / Perception of Value</b>
	My need was addressed / My issue was resolved. / I found what I needed. / My question was answered.
<b>Process</b>	<b>Ease / Simplicity</b>
	It was easy to complete what I needed to do. / It was easy to find what I needed.
	<b>Efficiency / Speed</b>
	It took a reasonable amount of time to do what I needed to do. / I found what I needed on the site quickly.
	<b>Equity / Transparency</b>
I was treated fairly / I understand what was being asked of me throughout the process.	
<b>People</b> <i>(If applicable for a transaction)</i>	<b>Employee Interaction / Warmth / Helpfulness / Competence</b>
	Employees I interacted with were helpful. / The Call Center Representative was committed to solving my problem.

*Note: These domains are in alignment with leading practices from both the private and public sectors, including Fortune 500 companies, market research institutions, and international organizations.*

Assess experience drivers one of three ways:

1. Individual questions for each driver on a 5-point Likert scale (strongly agree) to (strongly disagree)
2. A multiple choice question asking “How can we improve” or an equivalent question with a set of drivers to which the participant may choose all that apply
3. Two multiple choice ‘choose all that apply’ questions, one for selecting which drivers had a positive impact and one for those that had a negative impact

In general, agencies should follow these leading practices for feedback surveys:

- For applicable services, customer feedback should be obtained as close to the time of the transaction as is possible. For example:
  - A persistent button on a website for providing feedback
  - A prompt at the end of the service engagement
  - An email or other message sent soon after the engagement
  - A kiosk near the exit of a room or building where a service took place
- Make data available to program managers as frequently as practical (e.g., daily, weekly, monthly).
- To the extent possible, feedback collection mechanisms should be brief, thereby imposing minimal burden on customers and sampling techniques may be used on high-volume transactions to reduce burden, when appropriate.
- Administer surveys applying practices for optimizing response rate, for example, presenting only a single-screen (even on a mobile device) version of the survey.
- Agencies should have an overarching measurement and collection plan that captures timing for transaction, journey and relationship customer feedback, taking stock of all data collection efforts

and minimizing survey fatigue. Based on this strategy, OMB is open to conversations regarding how and when trust measures are collected. Definitions of these three points in time:

- Transaction (immediately following or within 48 hours): Measuring the customer perspective after a single, stand-alone interaction such as after viewing a website to find a piece of information, purchasing a park pass, or speaking with a contact center employee.
  - Journey: Measuring the customer perspective after a series of interactions, completion of a multi-stage process such as applying for and receiving/managing Federal student aid, filing taxes, or a specific period of someone’s life such as transitioning from military active duty.
  - Relationship: Measuring the customer perspective reflecting on the lifetime of their engagement and series of transactions and journeys with a service providing agency.
- Agencies are encouraged but not required to also solicit relationship-level customer feedback reflecting on customers’ overall lifetime of interactions across agency services and perception of the agency as a whole. In this case, measuring the customer perspective reflecting on the lifetime of their engagement and series of transactions and journeys with a service providing agency.
  - Data should be coded so that it can be sorted for action by organizational units, such as office location.
  - Relevant service level indicators (e.g., wait times) and usage statistics (e.g., leveraging the Digital Analytics Program (DAP)) appropriate to each service should also be collected and measured.
  - CX data collected, including customer feedback data on satisfaction, trust, drivers of experience and service level metrics, should be made publicly available; for example, through the program website and the performance.gov CX dashboards, and included in the Annual Performance Report (see section [280.8](#)).

As overall CX program maturity and capacity increases across the Federal Government, OMB may provide guidance for additional types and levels of measurement.

### **280.8 How should customer experience be reflected in the agency’s Annual Performance Plan?**

Agency Annual Performance Plans should include indicators for outcomes related to customer experience and relevant service levels. This should include customer feedback data collected as described above in section [280.7](#), as well as service level indicators (e.g., wait times, website utilization data) appropriate to their program. More information on integrating this information into the Annual Performance Plan is included in section [210](#).

### **280.9 What programs have been identified as High-Impact Service Provider (HISPs)?**

High-Impact Service Providers are those Federal entities designated by OMB that provide high-impact customer-facing services, either due to a large customer base or a high impact on those served by the program. A HISP is one that interacts with the public to provide a transactional service or perform a regulatory function in which time, money, or information is used to receive a good, service, or authorization. HISPs will be reviewed and updated periodically by OMB. The current list of HISPs is available at [Performance.gov/HISPs](#).

### **280.10 What additional steps should HISPs take to manage customer experience?**

Given the significance of the services they provide, HISPs must:

- Collect customer feedback in accordance with section [280.7](#);
- Submit data dashboards to OMB at a minimum quarterly, until feedback data is provided directly to Performance.gov through an open application programming interface (API) (once developed);
- Conduct an annual CX Capacity-Assessment (submitted to OMB by January 31<sup>st</sup>) and create a CX Action Plan (submitted to OMB by April 30<sup>th</sup>) annually;
- Embed more customer-focused practices into their service design and delivery such as conducting customer research through qualitative and quantitative research and journey mapping, and continually user-testing program elements with customers to refine and improve.

OMB will meet with each HISP to provide support and clarification of expectations.

#### **280.11 What shall the data dashboards submitted to OMB include?**

A data reporting template will be provided on the [CX MAX Community page](#). The template includes instructions, a section for reporting on the overall customer experience measures above, as well as values across each of the customer experience driver measures, a placeholder for program-specific service-level indicators as appropriate, and space to summarize recent accomplishments.

#### **280.12 When are the data dashboards due?**

HISPs will provide a feedback data to OMB each quarter until data is reported directly through an API to Performance.gov. Agencies (many of who are collecting data in real-time) should submit their data as soon as they are able to following the last day of the quarter. Submittals will be due the last business day of the month following the last day of the quarter. For FY 2021, these due dates are January 29<sup>th</sup>, April 30<sup>th</sup>, July 30<sup>th</sup>, and October 29<sup>th</sup>. See section [200](#).

HISPs without the current capacity to collect data using the government-wide measures must identify a target date for reporting of these metrics not to exceed FY 2021, Quarter 1.

#### **280.13 What shall HISP CX Capacity Assessments and Action Plans include?**

The content of CX Capacity Assessments and Action Plans shall address the core CX functions outlined in section [280.6](#) and include these primary components:

- **Organization/Accountability:** Describing how the HISP's CX resources are organized, the leadership responsible for CX, and what measures are in place to ensure program accountability for CX performance improvement and service delivery;
- **CX Program Maturity:** Providing the results of an annual capacity assessment of the CX program maturity using the maturity model noted above and describing initiatives underway or planned to improve CX program maturity;
- **CX Data Collection and Metrics:** Describing the types of data collected to support CX assessment, the methods for obtaining feedback, and the methods used to report the data internally and publicly; and

- CX and Service Delivery Improvement: Describing the initiatives underway or planned to improve the program’s service delivery. This should include how the agency is integrating CX activities with the 21<sup>st</sup> Century Integrated Digital Experience Act (IDEA) initiatives underway. When rationalizing, modernizing, or digitizing websites, forms, and services under IDEA, agencies should use HISPs as a means for prioritization. The CX Action Plan and annual IDEA report to Congress should also be in alignment.

Templates for the CX Capacity Assessment and Action Plan are provided on the [CX MAX Community page](#). CX Capacity Assessments shall be completed and submitted to OMB by January 29<sup>th</sup>, 2021. Capacity-Assessments are meant to be a mechanism for an intra-agency convening and discussion of CX management, and HISPs should engage at a minimum performance representatives, program leadership, front-line employees, and functional representation such as IT, Operations, Communications, Digital, etc. Action Plans shall be completed by April 30<sup>th</sup>, 2021, submitted to OMB, and will be made publicly available on performance.gov.