Customer Experience
Center of Excellence

Playbook

GSA

IT MODERNIZATION
Centers of Excellence

Introduction

Customer Experience (CX) is not new; industry has been doing CX for a long time. Agencies may already be applying some or all of these best practices.

What is new is the government's central focus on CX with efforts such as the President's Management Agenda (PMA) for improving customer experience, the 21st Century Integrated Digital Experience Act (IDEA), and the Federal Agency Customer Experience (FACE) Act to support CX practices. All of these efforts emphasize the government's focus on improving the customer experience with accessing information and services.

The Customer Experience Center of Excellence (CoE) works to develop a better understanding of customer needs. The CX-CoE team is translating those findings into action. The team developed this 13-play Playbook for practitioners in all levels of government to establish or improve CX practices, and to foster a CX mindset within—and across—government agencies. While not every play will apply, they can help your agency get started with small, quick wins to build up expertise and gain confidence.

Introduction continued →

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Introduction

This playbook represents a synthesis of ideas gathered from interviewing several subject-matter experts (SMEs) and leaders in CX and Human-Centered Design (HCD). This synthesis is according to relevant laws, policies, and guidance, including the updated OMB Circular A-11 "Managing Customer Experience and Improving Service Delivery." Whether you are just curious about CX, already dabbling in CX, or a professional CX practitioner, this playbook can offer insight to enhance your agency's CX presence.

Key Concepts

Throughout this document, we will refer to the following key concepts:

- **Framework –** A set of methodologies and approaches for delivering a product/service
    - Human-Centered Design (HCD): A framework of processes that integrates a broad set of practices around understanding the needs, wants, and limitations of people interacting with a product/service, and that involves those people in the design process. It includes User-Centered Design (UCD), which deals with a person's interaction with a digital product.
- **Methodologies –** A set of rules governing the design effort, depending on the focus.
    - Human-Centered Design (HCD): A broad application of HCD to focus on the entire customer's journey to achieve a particular outcome, and identify their pain points and moments of delight to help prioritize design tasks. HCD encompasses other methods as needed.
    - Service Design: Focuses on understanding and improving the quality of various interactions among users, employees, and any supporting staff behind the scenes to deliver a service.
    - User Experience (UX)/User Interface (UI) Design: Related disciplines focusing respectively on the end-user's experience with specific digital products as part of their overall journey, and how the user gets information from, and interacts with specific applications and websites.

Key Concepts continued →

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Key Concepts

- **Approach –** Outlines the specific process used to execute the design and development
  - Design Thinking: General human-centered methodology of discover, design, prototype, test, implement, and repeat. Intensely collaborative and iterative with a goal to develop something useful to end users.
  - Data:
    - Quantitative: Focused on quantifying the problem by way of generating numerical data or data that can be transformed into usable insights. It quantifies attitudes, opinions, behaviors, and other defined variables and generalizes results from a larger sample population.
    - Qualitative: Focused on establishing answers to the whys and hows of questions (unlike quantitative). Qualitative research involves asking participants about their experiences of things that happen in their lives. It enables stakeholders to obtain insights into what it feels like to be another person and to understand the world as another experiences it. Findings are described in writing, rather than numbers.
    - Operational: Measures the efficiency and effectiveness of an organization. Establish key performance metrics such as key performance indicators (KPI), return on investment (ROI), quality assurance, marketing outcomes, employee satisfaction and customer satisfaction.

Customer Experience Plays

PLAY

1. Choose Your Projects Strategically
2. Set Goals and Expectations
3. Identify Your Customers
4. Walk in Your Customer’s Shoes
5. Share and Act on Recommendations
6. Build a Service Catalog
7. Measure What Matters
8. Analyze and Publish Metrics
9. Reduce, Reuse, Recycle

Customer Experience Plays

PLAY

Choose Your Projects Strategically

As you start, find a range of projects that can benefit the most from CX methods. Look for those key customer challenges that have high visibility and high impact, but lack a key owner. You must be able to tackle these key challenges in small sections so you can gain quick wins. Succeeding in the right initial projects will help build trust in your capabilities and prove the value of CX at your agency.

KEY QUESTIONS

- **Which projects can show high value with the least effort and cost?**

CHECKLIST

- [ ] Use data to help identify these:
    - [ ] Leadership's high-visibility initiatives
    - [ ] Opportunities to save money (e.g., consolidating similar surveys)
    - [ ] Persistent customer issues
    - [ ] Existing metrics that could use a CX perspective (e.g., call-center data, operational KPI data, any customer/employee survey data)
- [ ] Look for projects that have high customer impact but require low effort to get traction (e.g., save customers time, make things easier, decrease employee burden).
- [ ] Start small and get quick wins to gain confidence, build trust, and generate momentum. Focus on one or two customer needs instead of their entire journey while you learn the techniques and develop expertise.
- [ ] Find projects that will have concrete results and measure their real change or progress over time.

Play 1 continued →

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Choose Your Projects Strategically

CHECKLIST

- [ ] Data:
  - [ ] Gather data about where the most customer interactions are concentrated.
  - [ ] Find out which programs fund the most services.
  - [ ] Obtain report of dollars currently spent on customer feedback and contact centers.
  - [ ] Collect reports from contact centers of high-volume customer pain points.
  - [ ] Create journey maps to identify high-impact customer pain points.
  - [ ] Review existing key performance indicators (KPIs) and metrics.
- [ ] Tools:
  - [ ] Review current CX government-wide resources and match to leadership goals.
  - [ ] Prepare an impact/effort matrix for potential projects to find high-impact, low-effort options.
  - [ ] Compare existing survey tools to identify opportunities to reduce duplication or overlap.
- [ ] Engagement:
  - [ ] Find out from leaders which projects they prioritize.
  - [ ] Understand customer engagement, team missions, and rules and regulations to identify partnerships opportunity.

Set Goals and Expectations

Many of your stakeholders (and even your leadership) won't know your CX's purpose and methods. Explain your goals and manage expectations so you get them to cooperate. Above all, make sure you listen: not just to your external customers, but to your internal customers and stakeholders, too.

KEY QUESTIONS

- **Is the problem statement of your research for the selected project clear to you and your stakeholders?**

CHECKLIST

- [ ] Identify business owner(s) who will eventually take over the work.
- [ ] Identify success metrics.
- [ ] Define a specific customer goal or objective to drive the research. Work backwards from the goal to plan relevant research activities. Example: "We want a person to easily get a passport in seven days."
- [ ] Determine where your stakeholders are largely focused: on technology, on business needs, on human resources, or on customer impact. Often, your project will start emphasizing one of these, and you may need to steer your stakeholders to rebalance these four elements.
- [ ] Assure stakeholders the purpose is not to audit current operations, but rather simply to listen, above all else, to customers/staff about their experiences.
- [ ] Prepare a written agreement (e.g., Memorandum of Understanding (MOU), engagement letter) describing the goals and approach of the activity, planned tasks and schedule, and level of participation for all parties.
- [ ] Maintain flexibility to adjust the plan as you learn more about the customer.

Play 2 continued →

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Set Goals and Expectations

CHECKLIST

- ☐ Data:
  - ☐ Identify the business owner(s) to gain access to data.
- ☐ Tools:
  - ☐ Obtain a signed MOU, engagement letter, Interagency Agreement, or ad hoc/informal letter of agreement.
  - ☐ Prepare a project work plan.
- ☐ Engagement:
  - ☐ Get executive sponsorship.
  - ☐ Talk to other stakeholders who may be affected by or interested in this project.
  - ☐ Understand the constraints of stakeholders to build trust so that you can shift your approach as needed, without losing momentum.

Identify Your Customers

Before you can understand your customers, you have to know who they are. Then you can create personas representing your different customer types. You'll use those personas as reference points to focus your thinking on your customers as you develop solutions to meet their needs.

KEY QUESTIONS

- **Who are your customers (whether direct or indirect)?**
- **How well do you know them?**

CHECKLIST

- [ ] Identify who your program/agency/cross-agency consortium serves, which may include internal and external agencies, vendors, citizens, and employees.
- [ ] Document a persona (i.e., fact-based, yet fictional representation) for each customer you identify, capturing demographics, preferences, and activities related to your program/service and desired outcomes. Show that you not only identify your customers, you actually understand them.
- [ ] Data:
    - [ ] Collect data about visitors to the website, call center, social media, but use the data cautiously—not all visitors to these channels are your customers.
    - [ ] Identify unique characteristics that clearly distinguish specific customers from one another (e.g., programs they participate in, products they produce, etc.).
    - [ ] Review existing customer segmentation data—a persona could represent a defined segment.
- [ ] Tools:
    - [ ] Synthesize existing customer insights to determine who your customers are and what motivates them.
    - [ ] Have workshops to select traits and have a picture (e.g., photograph or illustration) that belong to each persona to bring the persona to life.
- [ ] Engagement:
    - [ ] Interview a sample of the customers to gain insights into their values, needs, perspectives, and pain points.
    - [ ] Involve a cross-functional group of stakeholders to get many perspectives.

Walk in Your Customer's Shoes

Once you've identified your customers and done your initial research, you can truly understand your customers and their needs. You'll use a variety of techniques to gather qualitative and quantitative information about your customers' experiences from their point of view when they interact with your organization.

KEY QUESTIONS

- **What does a customer experience and feel while accessing your program/service across multiple channels?**

CHECKLIST

- [ ] Develop a customer journey map for your program/service, including activities and touchpoints with your agency. Highlighting pain points, points of delight, moments of truth, and the customer's emotional state. Make sure the journey map addresses service recovery to understand what the customer's experience when something happens that they don't expect.
    - [ ] To build further empathy and understand the entire customer experience, consider also developing a broader journey map that describes your customer's overall objective, of which your program may be just one step. The broader journey may even include other agencies. For example, the journey a new business owner takes to obtain a permit is just one piece of a broader journey that includes obtaining licenses, finding and building out space, having inspections, getting insurance, hiring employees, etc.
    - [ ] For a deeper dive, consider blending the journey map with your business process map to demonstrate the full design required to deliver the service depicted in the journey.
- [ ] Review existing customer feedback, both qualitative (e.g., surveys with open text/seeking opinions, interviews, roundtables, etc.), and quantitative (e.g., surveys yes/no, scaled questions, website analytics) to learn your customers' direct and indirect preferences.
- [ ] Document your work at each step: what you did and how you did it, both for future efforts and to share knowledge.
- [ ] Gather and document lessons learned after each activity to capture what went well and what needs work. You can use these for new activities and future projects.

Play 4 continued →

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Walk in Your Customer's Shoes

CHECKLIST

- [ ] Data:
  - [ ] Review existing customer feedback data: social listening reports, contact center trends.
  - [ ] Capture information about the customer journey: touchpoints, experiences, and technology used.
- [ ] Tools:
  - [ ] Select from various methods for working with customers and stakeholders to get feedback, develop options, and set priorities, described by GSA 18F.
  - [ ] Conduct qualitative research: ethnographic interviews, customer roundtables, town halls, listening tours, surveys, and journey mapping.
  - [ ] Prepare and circulate workshop reports to describe the activities and outcomes.
- [ ] Engagement:
  - [ ] Provide access to—and build relationships with—your customers in person.
  - [ ] Work with leadership and customer-facing staff to identify candidate locations and individuals to interview.
  - [ ] Get buy-in from local offices.
  - [ ] Hold workshops with stakeholders to keep them informed and to help prioritize upcoming activities.

Share and Act on Recommendations

After you've done your research, you'll need to synthesize the data, analyze your findings, highlight insights, and prioritize recommendations. You must be able to effectively communicate your work so your stakeholders and leaders understand the impact of your findings and proposed solutions.

KEY QUESTIONS

- **How can the customer experience improve?**
- **How will you share your findings with a broader audience to gain visibility and implement recommendations?**

CHECKLIST

- [ ] Form insights and recommendations for improving customer experience using various methods:
  - [ ] Develop tools that can help solve customer problems (e.g., write the customer's name on a cup to personalize the experience; give customers a handout showing their customer journey at the beginning to reduce their anxiety; hire the right staff to perform unique functions, train staff for specific skills, etc.).
  - [ ] Deploy technology that addresses customer preferences (e.g., va.gov uses a single portal so customers can get multiple veteran benefits).
  - [ ] Establish engagement opportunities for continual customer feedback (e.g., local community boards that solicit comments directly from customers, roundtable discussions).
  - [ ] Advocate for policy changes that can remove barriers to or further enhance good customer experience.
- [ ] Publish insights and recommendations along with your methodology and approach for distribution to agency leadership and/or the public.
- [ ] Contribute articles to blogs/newsletters about your activities to spread the word and raise visibility.
- [ ] Where possible, keep the people you interviewed aware of your findings to close the loop—delivering a good customer experience for those who helped with your research.
- [ ] Brief key stakeholders on actionable recommendations they can take to improve customer experience.

Play 5 continued →

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Share and Act on Recommendations

CHECKLIST

- ☐ Understand the capacity of stakeholders for implementing recommendations.
- ☐ Work with stakeholders to prioritize recommendations.
- ☐ Plan to implement changes.
- ☐ Data:
  - ☐ Review interview notes and evaluate results from prioritization activities (e.g., card sorting exercise).
- ☐ Tools:
  - ☐ Use techniques such as mind mapping to synthesize raw notes and identify key insights.
  - ☐ Write stories that represent different customer experiences to help people better relate to the findings.
  - ☐ Prepare a brief to share recommendations with stakeholders.
  - ☐ Use methods like an impact/effort matrix to prioritize implementation opportunities.
- ☐ Engagement:
  - ☐ Meet routinely with the team(s) responsible for implementing recommendations to share insights and support prioritization of activities.
  - ☐ Develop relationships with content channel owners to publish your materials, artifacts, and findings with stakeholders and customers along the way.

Build a Service Catalog

A successful CX engagement in an organization can often lead to others—but only if people know what you've done, what you can do, and how your CX expertise can help them. Your goal is to raise awareness, capability, and demand for CX in your organization.

KEY QUESTIONS

- **Do potential partners know the work your team can support?**

CHECKLIST

- [ ] Identify the CX services your team can support, such as workshops, ethnographic research, survey design, journey mapping, Voice of the Customer practice, human-centered design, service design, consultation, customer data synthesis, etc.
- [ ] Make the offerings flexible enough to meet your clients' unique demands, but standard enough so you can offer them consistently.
- [ ] Publish the internal CX standard operating procedures (SOPs) to give to prospective clients and leadership.
- [ ] Meet with department heads and suggest areas that customer experience practices can help with their business objectives.
- [ ] Data:
  - [ ] Catalog prior and ongoing CX efforts to date.
  - [ ] Evaluate your staff's skills and project experience.
- [ ] Tools:
  - [ ] Create repeatable processes and products that you can provide in customer experience engagements.
  - [ ] Prepare templates for frequently used activities.
- [ ] Engagement:
  - [ ] Share the standard operating procedures (SOPs) manual as you assemble it with your stakeholders.
  - [ ] Get feedback from clients regarding work your team has performed.

Measure What Matters

The right analytics are meaningful, tell a coherent story, and lead to key insights and better decisions. Here's how to make sure that the metrics you develop lead your organization to quantifiable, sustainable improvements.

KEY QUESTIONS

- Are you asking customers the right questions?
- Are you collecting the right metrics in the right way?
- Are your efforts making a difference for the customer?

CHECKLIST

- [ ] Review your goals and work backwards to identify metrics that measure progress towards those goals. For inspiration, look at:
    - [ ] The moments that matter in the customer's journey to help validate the impact of any efforts to improve the customer experience affecting those moments.
    - [ ] Failure demand, such as spikes in calls to the contact center, where customers have self-identified pain points in their experience.
    - [ ] Your agency's defined performance metrics and/or Cross-Agency Priority goals.
    - [ ] The OMB A-11 Circular section 280 for recommended customer experience metrics.
- [ ] Make the metric relevant— tie it to a specific customer transaction, not just the customer's relationship with your agency.
- [ ] Adjust the metric to keep data unbiased. For example, customer satisfaction is influenced by the nature of the activity—paying taxes will have a lower satisfaction score than visiting national parks—so ask questions about the process instead of the outcome (e.g., Did you understand the requirements? How easy was the process? Were agents pleasant/helpful? Were issues resolved soon enough? Did you understand the factors that affected your outcome? Did you trust the individuals you worked with?).
- [ ] Keep the metric simple so it can be easily understood, tell a clear story, and enable decision makers to gather what actions can be taken to reach the corresponding goal. To stay effective, keep surveys simple—ask few questions and ask straightforward questions.

Play 7 continued →

Measure What Matters

CHECKLIST

- [ ] Assign an owner to each metric. Without someone accountable for acting on it, the metric is worthless.
- [ ] Clarify the actions(s) that the agency can take to improve based on the metric's outcome (e.g., an increase or decrease in value). Don't measure something if you can't change the outcome.
- [ ] Decide how often the metric will be reviewed. The more real time the metric, the more effective any actions related to it will be.
- [ ] To assure trust in the data, capture reference information about each metric, such as when last updated, from which system(s), how it was calculated, etc.
- [ ] Find the best source for your metric:
    - [ ] Qualitative methods like open text surveys and social media posts.
    - [ ] Quantitative methods like website analytics and contact center data.
- [ ] For each metric, establish a baseline to compare to future results to understand how your initiatives are affecting customer experience.
- [ ] Identify a way to check the pulse to understand how initiatives you undertake to improve customer experience impacts the customer satisfaction.
- [ ] Find opportunities to integrate customer feedback data from other channels, programs, and business areas to provide a more rounded view of the customer experience (i.e., Voice of the Customer).
- [ ] Data:
    - [ ] Review contact center data for customer pain points.
    - [ ] Review existing data sources for customer feedback.

Play 7 continued →

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Measure What Matters

CHECKLIST

- [ ] Tools:
  - [ ] Review the Paperwork Reduction Act (PRA) guidelines before suggesting new surveys.
  - [ ] Review the customer journey map.
  - [ ] Implement a tool to integrate feedback mechanisms and provide a central reporting approach for the Voice of the Customer results.
  - [ ] Review the OMB circular A-11 section 280 for the questions different services should ask about customer experience (see Resources: Understand CX/Design Standards).
  - [ ] Use general surveys GSA provides to jump start your feedback collection.
- [ ] Engagement:
  - [ ] Develop relationships with those responsible for customer feedback across different channels to get their buy-in and support.
  - [ ] Hold workshops with feedback channel owners and business intelligence leads to improve data collection agency-wide.

Analyze and Publish Metrics

Even the best-crafted analytics have little value if they don't reach the right people. Make sure your analytics are used to make data-driven decisions. Give them to stakeholders and decision makers with the context they need to understand them.

KEY QUESTIONS

- **With whom are you sharing your metrics to highlight successes and drive business decisions?**
- **How are you sharing your metrics?**
- **How transparent are your metrics?**

CHECKLIST

- ☐ Analyze metrics for insights and success stories, however incremental, to share with agency leadership and build momentum.
- ☐ Share the metrics routinely with stakeholders and decision makers to prioritize work and drive changes towards meeting stated goals.
- ☐ Use success stories and quick wins, framed with customer-centric achievements, as a way to gain support for more investment.
- ☐ Data:
  - ☐ Obtain data from various channels pertaining to the customer experience, including website analytics, survey data, contact center data, social media data.
- ☐ Tools:
  - ☐ Develop a dashboard for access to important metrics and share it with decision makers and possibly the public.
  - ☐ Publish interesting results in agency blogs and newsletters.
- ☐ Engagement:
  - ☐ Present metrics to decision makers to provide more context for business prioritization.
  - ☐ Use measurement as an opportunity to maintain contact with the business.

Reduce, Reuse, Recycle

Maintain your analytics and reporting so they stay relevant while business requirements, environmental factors, and customer expectations change. If your organization isn't regularly using your reporting to make content improvements, you need to re-examine your reports.

KEY QUESTIONS

- How useful are the metrics?
- Are any adjustments needed?

CHECKLIST

- [ ] Evaluate existing qualitative (e.g., surveys) and quantitative (e.g., website metrics) measures and methods for usefulness. Each metric should be:
    - [ ] Goal-oriented to provide a target,
    - [ ] Relevant to a specific customer transaction,
    - [ ] Unbiased by the outcome of a customer's transaction,
    - [ ] Simple to understand and act on,
    - [ ] Owned by a responsible business owner,
    - [ ] Actionable so undesired outcomes can be corrected, and
    - [ ] Timely with an appropriate frequency to make effective decisions.
- [ ] Form a working group to routinely evaluate the metrics for effectiveness, comply with government standards, and align with industry trends.
- [ ] Choose the disposition for each metric:
    - [ ] Keep metrics that are still useful,
    - [ ] Discard metrics that are not useful or no longer needed,
    - [ ] Modify metrics that can be improved, and
    - [ ] Add metrics that are missing.
- [ ] Data:
    - [ ] Review data from various channels for the customer experience, including website analytics, survey data, contact center data, and social media data.
- [ ] Tools:
    - [ ] Poll decision makers to learn which metrics they find useful.
- [ ] Engagement:
    - [ ] Hold workshops with program and agency leadership, channel owners, and other stakeholders to evaluate the metrics.

Get Your Bearings

Agencies in both the public and private sectors continually innovate how they identify and solve CX challenges. Stay abreast of CX innovations and best practices so your organization can use them to ensure that you are doing everything you can to deliver the best possible customer experiences.

KEY QUESTIONS

- **To what extent is your organization able to support CX practices currently?**
- **How do they compare with industry best practices?**
- **Where can you start?**

CHECKLIST

- [ ] Assess what metrics are currently captured to measure CX, how they are captured, and the overall strategy for measuring CX.
- [ ] Assess the level of leadership support for CX activities.
- [ ] Assess the governance for CX activities.
- [ ] Assess training and incentives provided to employees inside and outside government to foster a CX culture.
- [ ] Assess the extent of customer research performed to evaluate the customer experience for programs and services.
- [ ] Assess the capacity to implement service design concepts, including staffing, business processes, and technology.
- [ ] Learn from the experts—borrow from other agencies and use industry best practices to determine what best suits your agency.

Play 10 continued →

Get Your Bearings

CHECKLIST

- [ ] Data:
  - [ ] Learn from public-sector agencies with CX expertise:
    - [ ] GSA's Centers of Excellence,
    - [ ] GSA's Office of Customer Experience,
    - [ ] Office of Personnel Management's The Lab @OPM, and
    - [ ] Department of Veterans Affairs (VA) Veterans Experience Office (VEO), etc.
  - [ ] Review customer feedback data already being collected.
  - [ ] Review and study CX practices from industry leaders.
  - [ ] Review studies and reports from leading research and consulting firms.
- [ ] Tools:
  - [ ] Review the OMB Circular A-11 section 280 for guidance on what to measure.
  - [ ] Complete the Office of Management and Budget (OMB) CX Maturity Assessment.
- [ ] Engagement:
  - [ ] Gather input from program managers, data analytics teams, communications teams on existing measures, collection methods, and infrastructure.
  - [ ] Gather input from leadership on staffing, resources, priorities, and strategy.
  - [ ] Gather input from human resources on available training and incentives.
  - [ ] Gather input from program managers on current techniques for gathering customer insights.

Build a Partnership

By being an effective advocate for CX capabilities, you can turn clients into CX evangelists, identify more high-impact projects, and raise awareness of both CX's benefits and your organization's ability to use CX to solve customer challenges.

KEY QUESTIONS

- **Whom can you partner with to develop a CX culture and presence?**
- **Do you have a common language and share a common vision?**

CHECKLIST

- [ ] Talk frequently with leadership to get buy-in. Cite the PMA, public- and private-sector case studies, and real data to show actual benefits.
- [ ] Build relationships with your internal and external stakeholders to increase integration and prevent isolation.
- [ ] Collaborate, don't dictate—make allies, not demands.
- [ ] Use the same language (or decide together on the language) to ensure a common understanding and spur progress towards meeting customer needs.
- [ ] Engage continually with employees because they can be a great source of ideas and insights.
- [ ] Focusing on employee experience will lead to delivering better customer experiences.
- [ ] Involve all the stakeholders in the co-creation process, including skeptics and dissenters—give them a stake in the game.
- [ ] Find other employees with a shared passion for focusing on customer experience.
- [ ] Meet with them regularly to discuss ideas and form a mentor network.

Play 11 continued →

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Build a Partnership

CHECKLIST

- ☐ Data:
  - ☐ Collect a list of key stakeholders.
  - ☐ Gather case studies from CX leaders.
  - ☐ Review glossaries, information about the program(s) and service(s) you'll be addressing, and information about how customers talk about these.
- ☐ Tools:
  - ☐ Hold workshops to introduce CX and establish common language.
  - ☐ Research the return on investment (ROI) for CX efforts.
- ☐ Engagement:
  - ☐ Build relationships with the technology owners, communications channel owners, program/service owners, and contact center owners.

Establish Your Foundation

Learn how to develop and maintain CX capabilities in your agency. By effectively communicating the value of CX across the enterprise, you can engage natural allies—people who already have a CX mindset, even if they don't have a name for it—and support them with guidance, training, and a framework, to help build an enduring and expanding CX footprint.

KEY QUESTIONS

- **Do you have clear governance?**
- **Do you have adequately skilled and well-trained staff?**
- **Do you have available funding?**
- **Do you have good business processes?**

CHECKLIST

- ☐ Prepare a CX strategy, vision statement and/or mission statement to guide your team towards the same goals and mindset.
- ☐ Work together to identify your specific goals, principles and/or priorities.
- ☐ Consider the most applicable staffing approach. Decide whether it's better to train employees to practice CX or educate staff about CX and hire contractors to perform the work, and re-evaluate the approach as needed.
- ☐ Start with one or two employees adept at navigating the agency and building relationships. An official CX Office and/or Chief Experience Officer are not prerequisites to get started, but might be an ultimate goal for highly service-oriented agencies.
- ☐ Get creative with funding—find cost savings with small efforts like streamlining existing projects (e.g., consolidating surveys), to fund more work.
- ☐ Develop an intake process for evaluating new projects consistently, and be transparent with your selection/prioritization criteria.

Play 12 continued →

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Establish Your Foundation

CHECKLIST

- [ ] Data:
    - [ ] Inventory customer feedback mechanisms to seek opportunities for consolidation.
- [ ] Tools:
    - [ ] Publish and share your strategy/vision/mission statement.
    - [ ] Prepare a statement describing your purpose or core belief, how you'll fulfill that belief, and what you will do to fulfill that belief. Here's a Ted Talk from Simon Sinek: How Great Leaders Inspire Action.
    - [ ] Attend Lab@OPM tutorials on CX strategy and design.
    - [ ] Document your intake process for new CX projects as a reference for potential stakeholders.
- [ ] Engagement:
    - [ ] Hold workshops to train staff about CX practices.
    - [ ] Invite experts from government and industry for added perspective.
    - [ ] Identify and connect CX practitioners throughout the agency.
    - [ ] Establish a CX Champion within each business unit / program to spread knowledge and understanding about CX throughout your agency.

Foster a Customer-Centric Mindset

Without a concrete vision, tools, and processes, "customer-centric" can remain an aspirational slogan. To start organization-wide change and instill a customer-focused culture, you need to make sure everyone understands the benefits of CX and how they can apply it to their specific lines of work.

KEY QUESTIONS

- **How well does your organization infuse customer experience into the culture?**

CHECKLIST

- [ ] Make customer experience a top agency priority.
- [ ] Establish goals for programs and services aligned with delivering a good customer experience.
- [ ] Provide training opportunities for employees to become knowledgeable about CX and HCD.
- [ ] Create performance incentives (e.g., performance evaluation goals) for employees based on CX excellence.
- [ ] Hire people that have a customer-centric attitude.
- [ ] Identify and prioritize opportunities for IT to support CX (e.g., website analytics).
- [ ] Break down walls between organizations involved in a single customer journey by inviting them to participate in your CX activities.
    - [ ] E.g., collaborate with the contact center to deliver a good end-to-end experience, and
    - [ ] Aim to increase the first contact resolution percentage.
- [ ] Break down walls between organizations involved in a single customer journey by inviting them to participate in your CX activities.
- [ ] Give employees a way to suggest ways to improve customer experience.

Play 13 continued →

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Foster a Customer-Centric Mindset

CHECKLIST

- [ ] Create a way for employees to share customer experience best practices they have developed.
- [ ] Celebrate employees and programs that demonstrate CX innovation and excellence.
- [ ] Identify your customers (See Play 3) and involve them regularly when designing programs, services, online features, etc.
- [ ] Data:
    - [ ] List core competencies and skills needed to practice CX.
- [ ] Tools:
    - [ ] Hold design workshops to train staff about CX practices.
    - [ ] Implement, review, and act on website metrics.
    - [ ] Develop online training or study guide about CX for employees.
    - [ ] Review the Contact Center CoE Playbook for best practices.
- [ ] Engagement:
    - [ ] Work with human resources to build CX incentives into employee performance evaluations and provide access training courses about CX.
    - [ ] Develop relationships with leaders from other organizations interested in creating a seamless customer experience.
    - [ ] Involve IT in discussions regarding adopting CX tools.

Additional Resources

→ Customer Experience Service Catalog (PDF)

→ USDA Direct Farm Loans Journey

Contributors

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