



Customer Experience (CX) Maturity Model

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Introduction

A recent [executive order](#) on transforming customer experience and service delivery holds 17 agencies accountable for 36 specific commitments, but it is a call to action for the entire federal government.

“Our government must recommit to being ‘of the people, by the people, [and] for the people’ in order to solve the complex 21st century challenges our nation faces. Government must be held accountable for designing and delivering services with a focus on the actual experience of the people whom it is meant to serve.”

— The Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government

The CX CoE has created this framework to help organizations transform their federal service delivery. It is designed to provide organizations with a deeper understanding of how to measure their maturity level, and tactics to get to the next level.

Although the CX Maturity Model does not represent or constitute official guidance, it can help you take your organization’s CX Maturity to the next level. Tailor the model to meet your agency’s specific needs.

How prepared is your agency to translate the executive order into meaningful action?

The CX CoE has created this model to help organizations transform their federal service delivery. It is designed to provide organizations with a deeper understanding of how to measure your agency’s maturity level, and how to get to the next level.

CoE's CX maturity model

- A customer's experience is the sum total of their interactions with an organization and its services.
- Customer experience (CX) work is interdisciplinary. Creating exceptional services requires design, development and organizational expertise.
- CX work is wide-ranging, often encompassing the experiences of both internal and external customers. It goes beyond digital services and extends into supporting policies, internal processes and governance structures of the service.
- For example, Transportation Security Administration (TSA) efforts to reduce wait times for airport passengers may require redesigning the experiences of TSA screening officers which may include process improvements as well as digital solutions.
- Central to improving or introducing a service is having well-defined customers, and a clear understanding of their needs. The well-defined needs of well-defined customers should be at the center of any effort to introduce or improve a service, but not all agencies are prepared to do that. Some lack the necessary CX maturity. They don't have the expertise or they lack the structure and flexibility required.

Each federal agency fits into one of these five levels of CX maturity:

- **Reactive:** Agencies with a rudimentary understanding of their customers
- **Tactical:** Agencies who have had occasional forays into customer research, usually as part of larger IT projects
- **Strategic:** Agencies with enough customer-related initiatives to warrant aligning research and analysis efforts
- **Foundational:** Agencies whose CX efforts are coordinated and fit very intentionally within well-articulated strategies
- **Customer-centric:** Agencies structured primarily around the measurable satisfaction of their customers' needs

The five levels work together, and agencies can choose to use them:

AS A MODEL:

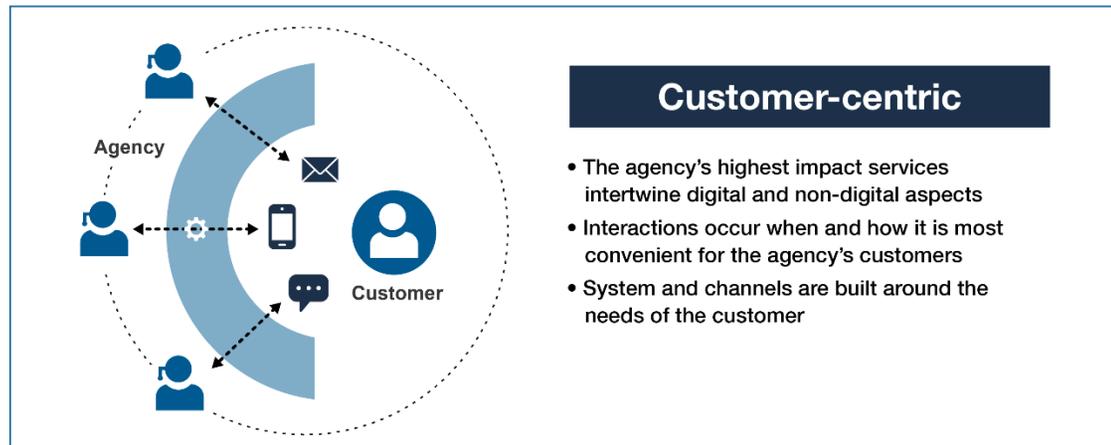
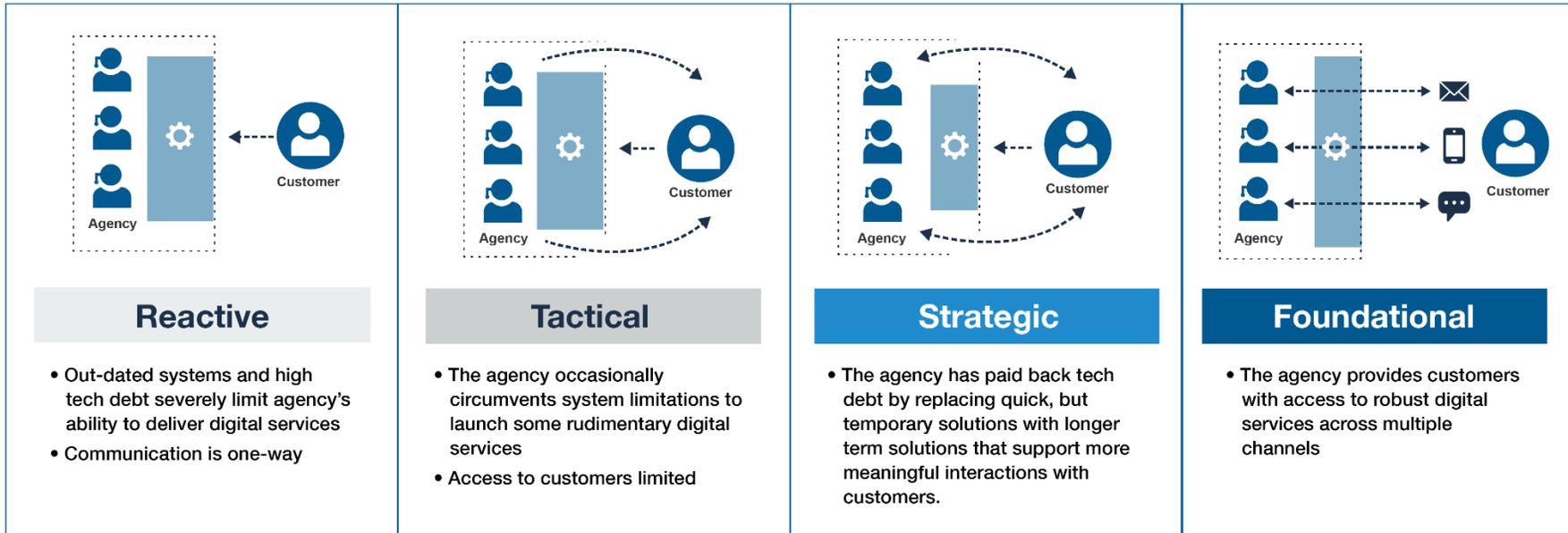
- The levels are a progression towards an ideal state. Each level requires the full realization of the levels below it.
- All agencies say they are customer-centric (especially after the release of the Customer Experience and Service Delivery executive order), but there is no skipping levels in this model.
- An agency at the strategic level can only get to the customer-centric level after they have coordinated their CX efforts as part of well-articulated strategies (a foundational-level activity.)

AS A DIAGNOSTIC TOOL:

- The levels are a way to define an agency's maturity level.
- Levels are based on their current capabilities and activities.
- Once located, the agency can consider the tactics appropriate for moving to the next level of maturity.



How agencies at different levels of CX maturity deliver digital services



KEY

- Systems
- Customer
- Agency staff and contractors
- Channels*

* Channels are any form of interaction between the client and the agency

Indicators for CX maturity levels

	Reactive	Tactical	Strategic	Foundational	Customer-Centric
HCD Tools	None	Occasionally used by contractors	Standardized, toolkits exist	Unavoidable, integrated with development	Ubiquitous
HCD Practices	None	None	Introduced, supported by contractors	Agency committed to a set of practices	Ubiquitous
Access to customers	Severely limited	Limited	Available mostly through CX or UX projects	Regularly scheduled interactions, project-based deep research	Interactions are essential to all or more operations
Voice of the Customer (VoC)	Call center is the only potential VoC source	Contact center is only potential VoC source	VoC tools in use, but analysis is not well-coordinated	Dedicated CX roles, elements also found in non-CX roles	Sophisticated VoC tools, required for many operations
CX in job descriptions	Nonexistent	Mentions of customers or UX	Some roles tied to CX performance	Dedicated CX roles, elements also found in non-CX roles	CX executives and managers
Departments with CX expertise	None	None	Incidental or none	One or two	Several

Additional essential CX elements

To help build improved customer experiences for all people, Diversity, Equity, Inclusion and Accessibility (DEIA) are essential. These principles and customer experience are inextricably linked; and because in government, there is no single “target customer”, these principles are even more important. Furthermore, using DEIA principles should not just be about accommodating or retrofitting but it should be about using these lenses at the outset to create the best possible experience for all the people an organization is meant to serve. Thus, regardless of the level of their CX maturity, all organizations should also optimize the following essential elements of customer experience, as described below.

Diversity

Customer experiences should be free of institutional bias.

- **What this means for defining customers:** The definition of customer types needs to consider the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, and beliefs of the American people. Also, opportunities to reflect underserved communities should be aggressively pursued.
- **What this means for CX teams:** Teams are made up of people from different communities, identities, races, ethnicities, backgrounds, abilities and cultures.

Equity

The organization should treat all customers fairly, justly and impartially.

- **What this means for customer research:** During interviews, researchers need to identify potential barriers customers may encounter when they interact with the organization and its services.
- **What this means for CX teams:** Team organizers need to support the widest possible participation in CX initiatives.

Inclusion

The organization should help everyone feel welcome to become their customers.

- **What this means for CX activities:** The quality of interactions between the organization and its customers is assessed regularly.
- **What this means for CX teams:** Mechanisms are in place to regularly gauge interactions between team members and other ways of measuring team health.

Accessibility

The widest possible audience should be able to experience the organization's services to the fullest. It is important to be 508-compliant, use plain language, ensure language access, and strive for excellence.

- **What this means for CX activities:** The organization ensures that people with disabilities can independently access, and interact with, every outward-facing artifact and digital channel.
- **What this means for CX teams:** Teams accommodate members, and customers, with disabilities and those who speak different languages, so they can fully participate in all activities. The [18F accessibility guide](#) provides best practices.

The maturity journey

“[Agencies] often view customer experience as a trade-off, and when the budget season rolls around, customer experience initiatives starve. Agencies instead invest in outcomes where they see a clear link to value, such as cost reduction.”

—McKinsey & Company

- **Putting federal customers at the center of service development is a relatively new concept, so all agencies are at the reactive level initially.** Reactive agencies are the ones who tend to define customer needs based on piecemeal data and the subjective opinions of subject matter experts and stakeholders, and some do not consider their customers. Evolving software development practices over the last 20 years have increasingly involved people who will use the software that is developed. It leads to better solutions and deeper adoption.
- **Agencies who have matured to the next level in the model, the tactical level, occasionally or regularly conduct user research as part of their software projects.**
- **Maturing from the tactical to the strategic level of the model doesn't happen accidentally.** An agency has to harvest data from unrelated software projects and learn how to analyze, organize and utilize the research.
- **Agencies ascend to the strategic level when they use research to understand their customers' needs and to guide the development of more effective services.**
- **Agencies that have matured to the foundational level coordinate their CX efforts to fulfill well-articulated strategies.** Every part of that is difficult to do at a federal agency. Making CX work a priority is particularly hard.

- **In order to mature from the foundational level to the customer-centric level, an agency would have to give itself over completely to CX.** Currently, many agencies haven't done the restructuring necessary to centralize their operations around customers and their needs. Such structuring could result in a federal agency unlike many others.
- **The customer-centric level of the maturity model is aspirational today.** Its purpose in the CX maturity model is to define an ideal state that agencies can strive for, even if they might never attain it.
- **Designing and delivering services that satisfy the well-defined needs of well-defined customers is hard.** Maturing CX capabilities takes time, but the journey towards customer centricity can be as valuable to an agency as arriving at the destination.

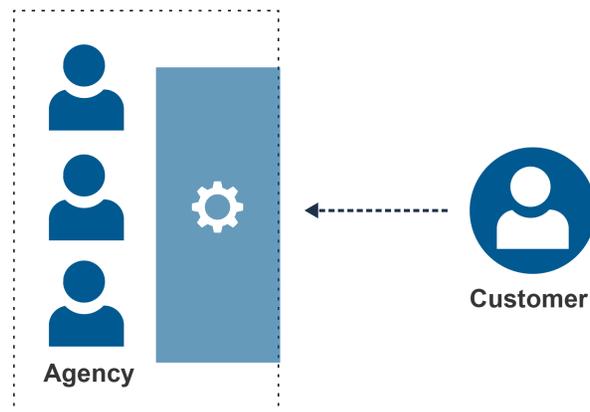
Identify your agency's maturity level

One way we determine an agency's CX maturity level is to look at how well they support these core functions:¹

- **Measurement:** Collecting and analyzing data for customer-experience-related outcomes
- **Governance and strategy:** Institutionalizing CX by holding agency leaders accountable, defining processes and aligning business initiatives
- **Culture and organization:** Hiring CX experts and supporting human-centered design (HCD) tools and processes
- **Customer understanding:** Collecting qualitative and quantitative data about customer needs and customer journeys
- **Service design and improvement:** Fixing broken services and introducing new ones, always with customers and their needs at the center of development

¹ OMB Circular No. A-11, Section 280, "Managing Customer Experience and Improving Service Delivery," https://www.performance.gov/cx/assets/files/a11_2020_sec280.pdf, retrieved March 1, 2022.

Agencies at the Reactive Level



These agencies tend to react to customer problems in silos and are less likely to make decisions based on customer feedback and data.

- Out-dated systems and high tech debt severely limit agency's ability to deliver digital services.
- Communication is one-way.

Support for CX Core Functions at the Reactive Level:

- **Measurement:** There are no standards for describing or tracking CX-related outcomes.
- **Governance and strategy:** CX is seldom or ever a factor in agency strategic or operational planning.
- **Culture and organization:** There is no CX expertise on staff, contractors with CX or HCD experience are few or none . No HCD tools or processes. Organization confuses CX with customer service.
- **Customer understanding:** Few or no agency resources for collecting or analyzing data about customer needs.
- **Service design and improvement:** Projects for introducing or improving services are treated as technology challenges exclusively.

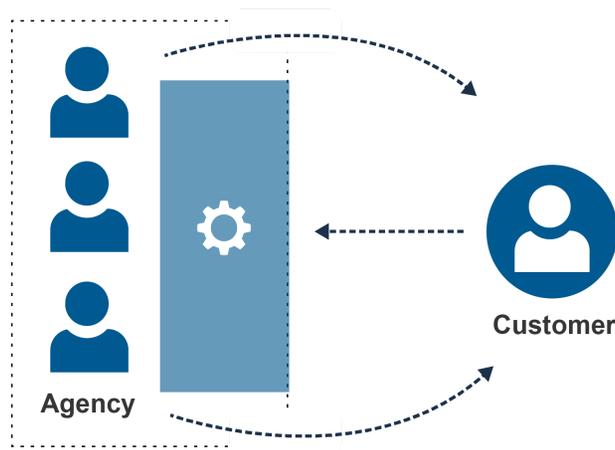
Your agency might be at the reactive level if any of the following sounds familiar:



Check any statement that applies to your organization:

- You are more wet than agile:** Waterfall methodology dominates your agency's software projects, with traditional requirements gathering front-loaded and focused on system features rather than on the needs of the people who need to use the software.
- Your agency doesn't value design:** Even when agile practices have made their way into an agency, design is often narrowly and superficially defined. By focusing solely on the visual, agencies and their contractors devalue design and minimize its impact. And they use the terms HCD, UX, UI and CX interchangeably, if used at all.
- Your agency doesn't invest in professional design:** Developers or business analysts pull double duty as designers and the design process entails stealing assets from other projects or adapting a framework with little understanding of how to fit it to the unique needs of the project.
- Your agency doesn't know how to test solutions with users:** Often, user acceptance testing (UAT) is scheduled in situations where user research or usability testing would have been more appropriate. (The purpose of UAT is to confirm that software has satisfied business requirements, while user research is conducted to understand the people who will use the software, and usability testing is a way to gauge if people will use software as its designers intended).
- You don't know your customers:** Your agency hasn't invested in user research, nor mechanisms to systematically hear the voices of their customers, so if staff and leadership talk about customers at all, they base their conversations on assumptions and personal experience.

Agencies at the Tactical Level



These agencies' services often feel disjointed to customers. Customer data and insights inform the design decisions of some individual touchpoints.

- The agency occasionally circumvents system limitations to launch some rudimentary digital services.
- Access to customers is limited.

Support for CX core functions at the Tactical Level:

- **Measurement**

There are few or none agency standards for describing or tracking CX-related outcomes. Measurement tools or processes are sometimes brought in by contractors.

- **Governance and strategy**

Customers are sometimes a factor in agency planning, but there is no formalized approach to CX.

- **Culture and organization**

There is no CX expertise on staff, some contractors with CX or HCD experience. HCD tools or processes are sometimes brought in by contractors.

- **Customer understanding**

There is a limited history of collecting or analyzing data about customer needs.

- **Service design and improvement**

Projects for introducing or improving services are treated as technology challenges exclusively.

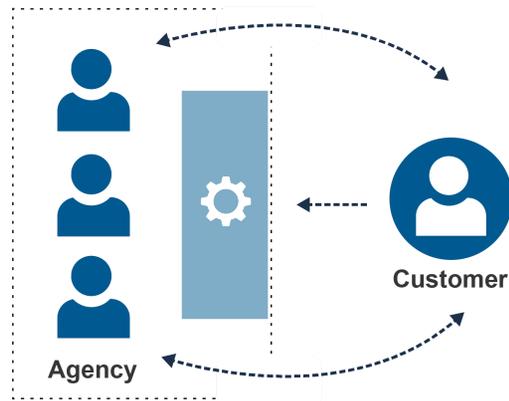
Your agency might be at the tactical level if any of the following sounds familiar:



Check any statement that applies to your organization:

- You can't build on success:** A successful customer-related project in one part of your agency has no impact on any other parts of the agency. Every project has to make its way through the organization as if nothing like it has ever been tried before.
- Your agency doesn't learn:** HCD techniques that were brought in by contractors, including interviewing methods, co-design methods, and testing designs with users, leave with the contractors when the project is completed. In some cases, personas or other CX artifacts may linger, but their value is largely misunderstood.
- You may avoid some hurdles, but your agency seldom removes them:** Like whispered urban legends passed from generation to generation, undocumented agency policies that restrict meaningful conversations with customers are hard to dispell. Project requirements focused solely on system capabilities are another common hurdle, as is UAT misused as usability testing.
- Your leadership doesn't walk their talk:** Press releases loaded with CX buzzwords are cheap, but delivering customer-centric services will require a serious commitment by your agency. If your leaders evangelize about making things “intuitive” and “user friendly,” but expect CX capabilities to mature without direct investment, they're just talking the talk.
- You know your customers ... but just a little:** Maybe you collected piecemeal user research from past projects or you unearthed a few streams of customer data trickling through your agency, but those data points are difficult to align. Analysis is rudimentary and unsophisticated.

Agencies at the Strategic Level



Customer research informs decisions at these agencies. An agency at this level coordinates efforts to optimize multiple touchpoints with customers, rather than improving one at a time.

- The agency has paid back tech debt by replacing quick, but temporary solutions with longer term solutions that support more meaningful interactions with customers.

Support for CX core functions at the Strategic Level

- **Measurement:** The agency maintains standards for describing and tracking CX outcomes.
- **Governance and strategy:** Customer needs are a factor in agency strategic and/or operational planning.
- **Culture and organization:** Some CX and/or HCD expertise on staff and there are contractors with CX or HCD experience. HCD tools or processes exist somewhere in the organization.

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- **Customer understanding:** The agency has a way to collect and analyze customer needs and the information is shared, though not necessarily consistently across the organization.
 - **Service design and improvement:** A group or groups within the agency has at least discussed an HCD approach to introducing or improving services.

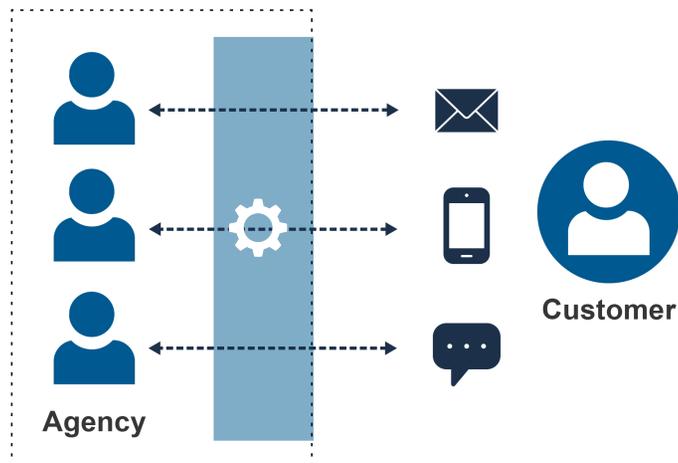
Your agency might be at the strategic level if any of the following sounds familiar:

Check any statement that applies to your organization:



- Your agency overestimates the value of policy:** Customer experiences improve when you deliver better services. Action, not words, are at the heart of CX. To mature, agencies must focus on building and fixing things that matter to the people who depend on them.
- Your agency mistakes design theater for design:** Some experience design tools have made their way into federal agencies, but their value is often diminished by how they are being used. Personas and journey maps are two examples of this:
 - Personas:** Personas are representations of the different types of people who use an agency's services. Personas can foster a team's empathy for their customers, but more importantly, the process of creating them is a powerful way to explore user needs. Unfortunately, personas have become just another item on project checklists.
 - Journey maps:** A journey map displays how a person interacts with a service. It describes each stage of the interaction and includes any obstacles that the person may encounter along the way. The popularity of journey maps has spiked over the last couple of years, largely because they tend to be beautiful and project teams like to hang them on walls to show them off to stakeholders. What often gets lost is their true value. When a project team does the hard work of researching and analyzing the information needed to build a journey map, they gain deep insight into customer touchpoints, system strengths and weaknesses and the efficacy of potential solutions. The journey of creating a journey map is more important than the deliverable that comes out of it.
- Your agency's CX efforts are trapped in an office:** If an organization has customers, then everyone in the organization is responsible for some aspect of the customer experience. Because of this, it's unrealistic to expect that centralizing the responsibility in a CX or CIO office will improve customer experiences. Having a single office lead all CX initiatives makes it too easy for other offices to minimize their own commitments.
- New CX money pays for contracts, not internal growth:** It is a major accomplishment when an agency commits funds for a CX initiative. And it is a major missed opportunity when that money pays for expertise that disappears when the project is over. Increasing internal CX capabilities is not a training challenge primarily. The challenge is doing the hard work of bringing CX responsibilities in-house.

Agencies at the Foundational Level



High impact experiences feel cohesive. Customer data and insights are often used to drive decisions and actions.

- The agency provides customers with access to robust digital services across multiple channels.

Support for CX core functions at the Foundational Level:

- **Measurement:** Metrics for CX outcomes are collected and analyzed throughout the agency. Measurement activities are at a high quality and timed appropriately.
- **Governance and strategy:** Customer needs are a factor in agency strategic and/or operational planning.
- **Culture and organization:** CX and HCD experts on staff design solutions and oversee contractors' CX work. Standardized HCD tools and processes are available for all projects.

- **Customer understanding:** Project teams research customer needs. Research data and analysis is accessible across the organization.
- **Service design and improvement:** The agency designs, funds and launches service design projects that satisfy the well-defined needs of well-defined customers in measurable ways.

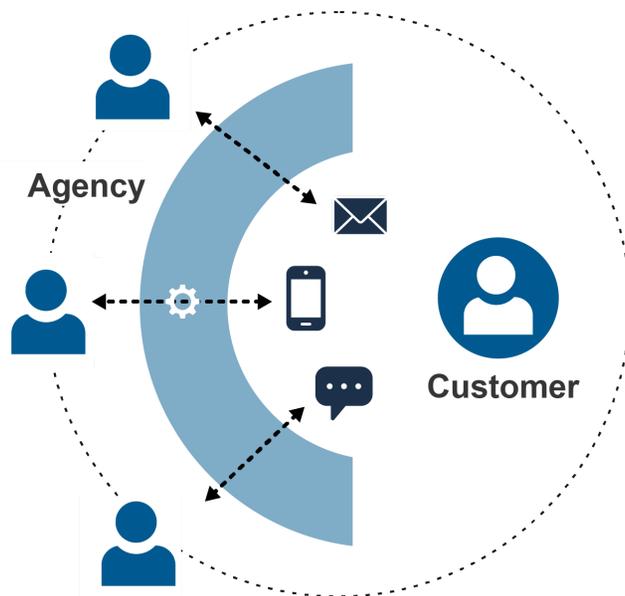
Your agency might be at the Foundational Level if any of the following sounds familiar:



Check any statement that applies to your organization:

- Your agency develops robust digital services:** Customers can experience the agency's services via the channels that are most convenient to them.
- Your agency uses what they have:** They hack or adjust existing structures as needed to deliver digital services for their most important customers.

Agencies at the Customer-Centric Level



- The agency's highest impact services intertwine digital and non-digital aspects.
- Interactions occur when and how it is most convenient for the agency's customers.
- Systems and channels are built around the needs of the customer.

Most agencies are still striving to reach this level. If an agency is at this level, this is how they would support CX core functions:

- **Measurement:** The agency is structured to optimize customer data collection. Key customer data is also collected independently of projects.
- **Governance and strategy:** All agency strategy is filtered through a CX lens. Optimizing delivery to customers is a driving force for operational planning.
- **Culture and organization:** All staff, regardless of role, participate in some way in the design of customer experiences. CX professionals hold leadership positions. The agency is highly selective in its use of outside CX expertise. HCD tools and processes are commonly understood and used by agency staff.
- **Customer understanding:** All projects are traceable to agency customers and their needs. A store of key customer data is analyzed and maintained.
- **Service design and improvement:** The agency delivers measurably exceptional digital services.

To become truly customer-centric, an agency has to commit to a much more radical approach, one that fundamentally, irrecoverably alters it. It would need to be restructured around the well-defined needs of well-defined customers in order to deliver exceptional services that intertwine digital and non-digital aspects. The performance of each service would be monitored and measured continuously. Customer data would guide further development.

Tactics to get to the Next Level

An agency must align their efforts with a realistic analysis of their current maturity level. This means that substantial moves like naming a Chief Experience Officer (CXO) and establishing a CXO office are largely wasted at agencies that aren't ready for it. Hiring a CXO at a reactive or tactical agency would be like building a dam where there is no water.

How to Mature from Reactive to Tactical

- 1. Aggressively connect with customers.** If a reactive agency wants to move up to the next level of CX maturity, the most important thing they can do is to expose more of their staff to more of their customers. Direct contact with customers is essential for understanding their needs and gauging how well your agency is meeting them. There are several reasons federal agencies (not just ones in the reactive category) resist interviewing the people who use their services:
 - **They think user research is illegal:** They believe, incorrectly, that the Paperwork Reduction Act (PRA) forbids it. (In fact, PRA specifically allows observing and interviewing customers.)
 - **They think it will make them look bad:** Some feel that investing in research implies that they don't already know their customers. They also worry about the impact of negative customer feedback circulating within their organizations. (In both cases, avoiding the data won't make the problems go away.)
 - **They have limited resources:** Some are worried that they won't be able to respond to the problems that are reported --- a valid concern. The primary focus of foundational research is on understanding the people that an agency serves, not addressing immediate needs. (Immediate needs are usually part of the data that gets collected, but needs should be analyzed for underlying issues and grouped with similar issues across the organization.)
- 2. Define customers based on conversations with staff from all levels of the agency.** In agencies with more mature CX capabilities, these discussions are informed by extensive research and can result in major cross-departmental initiatives. But even without hard data, conversations can still have a positive effect on your agency's culture. The definitions that come out of it can be validated (or challenged) with research undertaken later, as the agency matures.
- 3. Mine call center data for customer experience insights.** Some federal agencies have transformed their call centers into multi-channel contact centers, installed customer relationship management (CRM) systems and experimented with artificial intelligence. But others have left their call centers relatively unchanged over the years. The primary goal of call centers is to help the people who need agency services. With minimal investment, they can also be a source for robust and timely information about customer needs.

4. **Leverage front-line staff members.** If your agency has customers, then somebody is dealing with them on a regular basis. Their insights can be valuable and should be collected, collated and reported out to the rest of your organization.
5. **Tie contract deliverables to customer satisfaction.** Some of the largest government contractors are only now expanding their CX capabilities, but whatever little progress they've made is likely to be more than a reactive agency has been able to accomplish. Agencies can better leverage government contractors by adding rudimentary customer satisfaction requirements to statements of work and performance work statements, especially for projects that will result in public-facing digital products or services.

How to Mature from Tactical to Strategic

1. **Leverage contractors to actively build CX capabilities.** Agencies that may not be ready to staff up with CX professionals can team their people with contractors for projects that include HCD activities. When appropriate for these kinds of tasks, contracts should include explicit language around training agency staff to be able to run similar activities after the contract is complete. Also, agencies with funding for voice of the customer tools (on-site chat, off-site surveys, etc.) should consider training staff to support them rather than paying a vendor.
2. **Operationalize contact with customers.** This can mean allowing staff to listen to incoming contact center calls or something more aggressive like sharing video from the user research of ongoing projects. In all cases, providing consistent exposure to customers, on the same day and time every week or month, is a key for maturing an agency.
3. **Share.** If an agency hasn't matured enough to coordinate customer experience efforts across the organization, the next best thing is to get the people doing the work to talk with those who are doing similar things.
4. **Focus acquisition documentation on customer needs.** It's never too early to identify who will use the services your agency develops and what of their needs will be addressed as the result of a particular project.
5. **Buy, rather than rent UX staff.** More and more federal agencies are hiring user experience designers, user researchers and content strategists on staff to be HCD front-line workers. The effort of supporting and advancing UX professionals will force a deeper understanding of human-centered design within the organization.

How to Mature from Strategic to Foundational

1. **Develop an enterprise-level customer data strategy.** It takes creativity to expand existing data streams to include customer data. It may also lead to structural changes. For example, your agency may need to adjust its contact centers so the data they produce better aligns with, and feeds other customer data sources within the agency. In addition to key performance indicators (KPIs), agencies should experiment with customer performance indicators (CPIs) that measure their success delivering on customers' desired outcomes.
2. **Operationalize HCD.** Build and coordinate design systems, based on the U.S. Web Design System, for customer- and employee-facing digital services. Develop internal expertise in user research and make it available across the enterprise.
3. **Make CX count.** Include hard data goals about customer satisfaction in the performance plans of non-CX professionals, especially leadership.
4. **Use the CXO primarily as a facilitator.** Introduce a Customer Experience Officer (or adjust the role if it already exists) to support, but not lead initiatives across the agency. Avoid the urge to make their office responsible for the agency's success with customers; make departments responsible for their own CX success or failure.
5. **Champion service design acquisitions.** Service design is a holistic way of organizing people, infrastructure, communication and material components to optimize customer experiences. Historically, the difficulty of funding projects that intertwine physical and digital elements severely limited the number of U.S. federal government service design initiatives. But the reward for the agencies that put in the extra effort can be great. Service design transforms organizations.

How to mature from Foundational to Customer-Centric

1. **Blow it up.** To become customer-centric, a foundational agency would need to rebuild its internal structure, transforming a traditional, largely hierarchical organization into one built around the optimization of customer data collection and analysis.

2. **Make service design a core capability.** Build a pipeline where customer data leads to customer strategy which leads to the continuous development of services that intertwine digital and non-digital assets.
3. **Add traceability.** Trace all projects that aren't involved in service design to the satisfaction of specific customer needs.
4. **Promote CX experts to leadership.** Not just OCXO roles. A CIO with CX expertise, for example, would have a powerful impact on the organization.
5. **Make CX count.** Build CX outcomes into all staff and leadership performance plans.