



BEYOND THE BASICS

Leading Practices for Improving Customer Experience in Government

OCTOBER 2017



PARTNERSHIP FOR PUBLIC SERVICE

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- Generating research on, and effective responses to, the workforce challenges facing our federal government
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INTRODUCTION

The federal government is aiming at a moving target when it comes to improving customer experience. As many federal agencies make progress on delivering readily accessible, user-friendly services, the private sector continues to innovate and set expectations even higher.

With ongoing focus on strengthening citizen services from the Trump administration, following a similar effort during the Obama administration, federal agencies have taken important steps toward this goal. Many agencies use information they solicit from customer surveys and customer feedback tools to improve services. Agencies also are providing more options for citizens to interact with government online, including on their mobile devices. More than 40 percent of visits to federal government websites now come from mobile devices, according to General Services Administration data.

These efforts have led to some promising increases in satisfaction with government services. For example, the Transportation Security Administration's score in Forrester's Federal Customer Experience Index rose over the last two years. In 2017, its scores for customer service, respect and communication increasing by nine, eight and 14 points, respectively. The IRS's score for digital services increased 16 points in Forrester's 2017 index.¹

Despite some gains, customer satisfaction with government still lags almost all other industries and sectors, according to both Forrester and the American Customer Satisfaction Index. And steps that not long ago were considered to be innovative in government, such as bringing more services online, are quickly becoming commonplace. Astute federal leaders are now looking for more advanced customer experience practices to keep pace with rising citizen expectations.

This issue brief is part of a multiyear initiative by the Partnership for Public Service and Accenture Federal Services to help improve customer experience in government. It highlights three promising customer experience practices for government, which are fairly well-established in the private sector. They include doing rigorous, in-depth customer research; connecting customer interactions across service-delivery channels; and using online virtual assistants to quickly answer citizen questions.

This brief examines findings from federal agencies that have explored these strategies, and highlights challenges, lessons learned and results that can inform federal leaders as they seek innovative approaches to improving citizen services.

¹ Rick Parrish and Margaret Rodriguez, *The US Federal Customer Experience Index, 2017*. Forrester Research, Inc., September 6, 2017

Promising Customer Experience Practices



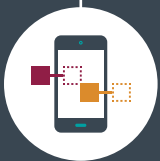
Conducting in-depth customer research

Agencies often use customer surveys as a first step in understanding citizens' perspectives, but gain only limited insights from the results. The Department of Veterans Affairs and the Office of Federal Student Aid are taking customer research a step further by using randomized controlled trials and applying the concepts of human-centered design to look beyond what customers say and understand how they behave and experience services. These research methods combine information from multiple sources, revealing critical insights that they would not have gotten from surveys alone.



Connecting customer interactions across service-delivery channels

Many agencies develop and launch different customer interaction channels in isolation, without coordinating them to serve citizens seamlessly. The USA.gov team took an "omnichannel" approach, by unifying content in one knowledge base and organizing staff around functional areas such as content development, marketing and performance management. Previously, it had organized by website, contact centers and other channels. This approach enables USA.gov to ensure content is consistent across all channels, providing a more unified and consistent experience for customers.



Using virtual assistants to meet citizens' needs

Agencies are turning to technology to help answer citizens' questions and guide them through routine transactions. The U.S. Citizenship and Immigration Services launched one of the federal government's first virtual assistants, integrating information from the agency's website and contact centers into a single knowledge base. The virtual assistant helps customers get quick and accurate answers to questions without having to search through the website or call a contact center.

CONDUCTING IN-DEPTH CUSTOMER RESEARCH



Government services are not always designed with the user in mind, which often leaves citizens feeling frustrated, confused, and with a negative impression of government. Many agencies use customer surveys as the primary mechanism to understand citizens' perspectives, gather their opinions or gauge their satisfaction. However, basic customer surveys may only reveal that citizens are unhappy with a service, without providing insight into why, and what actions leaders can take to improve.

To gain deeper understanding of citizens' needs and perspectives, some agencies are using broader, more rigorous research strategies. These agencies are examining multiple sources of information and data to pinpoint the root causes of customer experience problems and identify solutions.

This in-depth customer research includes using methods such as randomized controlled trials and applying the principles of human-centered design, bringing rigor and depth to customer experience efforts.

Definition: Human-centered design creates products and services around the needs, wants, perspectives and behaviors of people. It uses empathy and understanding to meet the needs of users, looking more at the nuances of individuals' behaviors and experiences than opinions. A core component of human-centered design is to learn what customers need using qualitative research methods such as interviews, first-hand observation and focus groups.

Redesigning the appeals process for veterans through the principles of human-centered design

In the past three years, leaders at the Department of Veterans Affairs have launched efforts to improve the veterans' experience and are redesigning their services from the veterans' perspective. Using human-centered design, the VA untangled a complex and bureaucratic appeals process, and generated solutions—enacted in recently signed legislation—to improve the lives of veterans. Human-centered design involves “designing with users, not for them” and “getting into peoples' spaces to observe their behaviors,” according to Marcy Jacobs, digital service lead at the VA.

The VA engaged with veterans in their homes, observed their behaviors when interacting with VA services, and listened to their most pressing needs. The agency used a variety of human-centered design tools such as mapping a veteran's journey through VA services, and creating personas of customers who interact with the department.

For example, the VA used human-centered design to gain a

deeper understanding of how veterans experience the appeals process for disability claims.

In 2015, the VA estimated that more than 440,000 veterans had disability appeals pending, with thousands of appeals older than 10 years.² To put a face to these numbers, the department conducted extensive research, which included interviewing more than 90 veterans from different generations who were at different stages of the appeals process.

The VA used the information it gathered to develop a map of the veteran's journey through the appeals process. The mapping helped department staff visualize the different stages of the process as well as the possible thoughts, actions and emotions veterans experienced at each stage. “I can't express how useful the journey maps are for finding and uncovering problems that were not initially found in the process,” said Denise Kitts, executive director for enterprise veteran operations at the VA. “Human-centered design

breaks the problem down in a way that allows you to take action, gives you the opportunity to understand the pain points and then shows you the service design opportunities.”

One of the main insights gleaned from this research was the immense frustration and confusion veterans felt when they had to restart the appeals process over after submitting new evidence for their claim. This unnecessarily prolonged the appeals process, enabling ailments to worsen and creating more stress for the veteran, the research showed.

As a result of its research and collaborative efforts with veteran advocacy groups, the VA proposed a simpler and more transparent appeals process that would enable most veterans to receive a final decision within a year of filing the appeal. This new process was included in legislation signed into law in August 2017.

Understanding student loan borrowers through randomized controlled trials

More than 42 million people with student loans carry more than \$1.3 trillion dollars in outstanding federal student loan debt.³ To help keep borrowers from defaulting on their loans, the office of Federal Student Aid relied on information from randomized controlled trials that observed how borrowers responded to certain messages.

2 “Department of Veterans Affairs Board of Veterans' Appeals Annual Report Fiscal Year 2015.” BVA, 2015.

3 U.S. Department of Education - Federal Student Aid Office. Federal Student Aid Port-

Federal Student Aid, an office of the U.S. Department of Education, receives input from borrowers through many feedback mechanisms, including customer surveys. This information helped the agency determine the type of messages it wanted to test and the segment of borrowers to target. “It all started with looking at customers and how they behave differently,” recalled Jessica Barrett Simpson, senior advisor for the borrower experience at FSA.

folio Summary [Data file]. Retrieved from <http://bit.ly/2xTnXBI>

Results from one survey suggested that borrowers in default preferred to be prompted with positive messages about available support so they could take action on their overdue loans. To test this, FSA collaborated with what is now known as the Office of Evaluation Sciences at GSA to conduct behavioral customer research using randomized controlled trials. FSA sent a segment of its customers a particular message, and then studied how those customers responded compared with a control group that did not receive the message.

The tests showed something different than the surveys. They revealed that borrowers in default on their loans were more likely to take action after getting a negatively framed message about the potential consequences of default.

This demonstrates that relying on what customers say in surveys only solves part of the puzzle. To fully understand how customers use government services and respond to outreach, agencies also need to take into account how they actually behave. “There is a gap between intention and action when it comes to

observing customers,” Simpson said. “People may intend to do certain things in the future but might not actually take that action when the time comes.”

Some messages had the opposite effect from what FSA intended, demonstrating the importance of rigorous customer research and testing. “Certain communications and messages could be harming people, and unless you do this kind of testing, you can’t see what is having a successful, positive impact or harmful, negative impact,” Simpson said.

By taking the analysis a step further and observing customers’ actions, FSA learned about the type of messages that resonate with specific segments of borrowers. As a result of agency analysis, FSA sends customers more effective communications that result in the desired actions.

KEY INSIGHTS



Use several methods to ensure the agency understands customer experience. Agencies’ research should include both quantitative and qualitative research methods, such as data-gathering and interviews, to collect enough information to paint a complete picture of a citizen’s experience. “Quantitative data is good for a wide but shallow view, and deeper insights come from qualitative research,” said Jacobs. “Watching people interact and observing behavior can give us insights into things we’ve never really been able to figure out before.”



Ensure all citizens are treated evenhandedly. The federal government needs to provide equitable treatment to everyone. This presented a challenge for FSA when it wanted to test which messages worked most effectively by sending different messages to different customers.

To address this issue, the agency ensured that each customer received the same basic information, changing only the tone or the layout of the messages to see what worked better. When FSA established a control group and held back a message from a segment of borrowers, it did so only temporarily, sending the message to the control group at a later date. This allowed enough time to analyze the message’s impact and still provide the information to the control group in a reasonable timeframe.

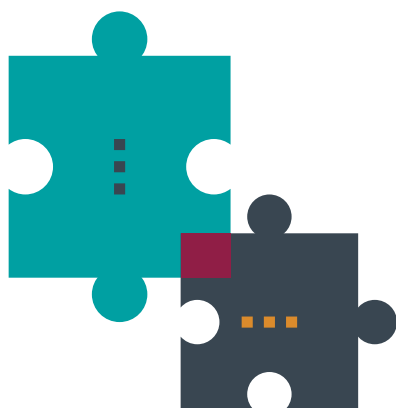


Take advantage of technology. Another challenge for FSA was finding the proper technology to support its research. The process of sending and testing messages was not automated initially, so it was a time-consuming and error-prone process to make simple changes and generate reports from the data on what messages worked better. The agency invested in a new marketing tool that can automate processes involved in testing messages and measuring their effect.



Develop a recruitment strategy. When the VA conducted human-centered design research, it ran into a challenge—how to recruit a group of participants that included a wide range of veterans of varying ages from across the country. The department turned to field managers, front-line employees and partners in veterans service organizations—those with vast knowledge of the veterans community who could connect researchers with veterans at the grassroots level.

CONNECTING CUSTOMER INTERACTIONS ACROSS SERVICE-DELIVERY CHANNELS



Over the past 10 years, federal agencies have opened many new avenues to interact with citizens. In the past, people had the option to go to an office, call or write a letter. Now, in many cases, government services and information are more easily available through websites, email, online transactions or chats, and social media inquiries.

Unfortunately, most agencies developed and launched these additional channels separately, without coordinating them to serve citizens seamlessly. Some leaders are now looking to adopt an “omnichannel” approach that delivers a consistent and connected experience across these different communication channels and devices. This holistic approach enables citizens to interact effectively with agencies using whatever channel and device they prefer.

This approach could reduce confusion and ensure that citizens get consistent and correct agency information regardless of the channel they use. And it could help government deliver a convenient and easy experience for citizens, who could choose their preferred method of getting service and switch to another channel without having to provide duplicative information or start processes from the beginning.

USA.gov adopts a new approach

USA.gov synthesizes information from many government websites, organizing it around important topics to citizens. Managed within the General Services Administration, USA.gov's website, contact center and social media presence serve as a central access point for citizens in search of basic government information, such as how to renew a passport or obtain a grant. It also helps those who need government services but do not know where to start.

In 2014, separate GSA teams managed the website, the contact center and the agency's social media presence. Each team had its own system for developing content, with different standards and review processes, leading to confusion and growing discrepancies in information, according to Sarah Crane, former director of USA.gov, and currently acting assistant commissioner for the office of products and programs at GSA.

To simplify and improve customer experience, the USA.gov

team shifted to a new approach: The agency develops content once and then adapts and publishes it for use online, in-person and any other way customers get their information. This new approach required adopting a new content management strategy, with content structured for and consolidated into one easily searchable knowledge base. It also required reorganizing staffing and internal operations. Employees are now grouped by functional areas such as content development, marketing and performance management, enabling them to work collaboratively across all service-delivery channels.

With this new approach, the website became the "single source of truth," and that information feeds into contact centers and social media teams, Crane said.

This shift was an important step for ensuring consistent information across all channels no matter how customers choose to interact with the agency, according to John Yuda,

acting public experience portfolio lead for the office of products and programs at GSA. Standardizing how the agency deals with content enables USA.gov to treat content as structured data (i.e., information with a high degree of organization that is easily searchable), helping USA.gov to provide better information to citizens.

This work has enabled USA.gov to deliver consistent information to citizens across multiple touchpoints, according to Crane. It has reduced duplication because content does not need to be created from scratch on each channel, and it has freed staff to focus on other priorities. For example, a standardized approach to the agency's content has enabled USA.gov to explore new tools like a chat bot to answer questions posted to their Facebook page.

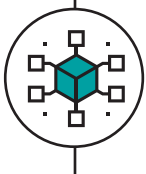
KEY INSIGHTS



Align organizational structure with customer needs. Federal agencies have not typically organized their offices and divisions with the customer in mind. As was the case with USA.gov, the offices working on different channels for the same service are often housed in different parts of the organization. This set-up keeps employees from collaborating with one another easily, even though they serve the same customers, and it can lead to duplicative, fragmented or inaccurate agency information.

For a smooth experience across all delivery channels, Yuda recommended having the same manager oversee as many channels as possible, and establishing clear and consistent performance measures across delivery methods to ensure that everyone is working toward common goals.

If it is not feasible to reorganize, leaders can take steps to foster collaboration across divisions in other ways. For example, staff designing digital services at the Federal Emergency Management Agency get input from the agency's call center representatives about the issues disaster survivors deal with and how they approach the agency for assistance.



Look beyond the agency's information sources. Creating an effective omnichannel experience in government requires agencies to find ways to provide citizens with information and services they need, whether it is from their own organization or from other sources. Treating content as structured data is enabling GSA to seamlessly and readily provide information on government services to websites that



citizens already use, such as Google or Facebook. “I’m not interested necessarily if anyone even visits USA.gov. I’m more interested in reducing the number of steps that citizens need to go through to get information, so they can have better services for less time and work,” Yuda said.

Understand how content is presented effectively across different channels. The USA.gov team hit some bumps in the road in implementing its new approach, discovering that even when the content is consistent, what works well on the website does not always work as well for the contact center, according to Crane and Yuda.

“Personnel at contact centers wanted to have a bigger knowledge base because the more searchable content, the better,” Crane said. On the other hand, she said, there is often less value in adding more in-depth information to a website since visitors can become confused and overwhelmed by too many details.

For that reason, the team has had to work some flexibility into its approach and recognize that some of the information used for the contact centers does not need to be published on the USA.gov website.

“I’m not interested necessarily if anyone even visits USA.gov. I’m more interested in reducing the number of steps that citizens need to go through to get information, so they can have better services for less time and work.”

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USING VIRTUAL ASSISTANTS TO MEET CITIZENS' NEEDS

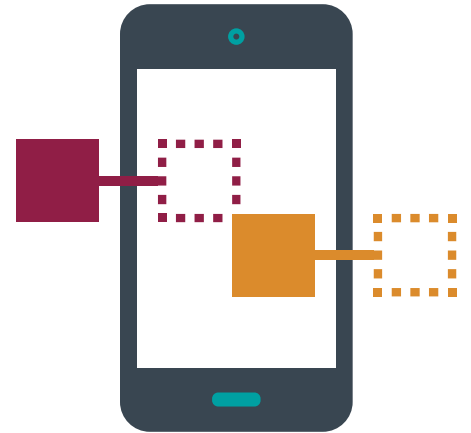
Many federal agencies that deliver services to the public struggle to answer citizens' questions in a timely, complete way and help them through routine transactions like checking the status of a benefit application. Virtual assistants and other technologies can automate simple functions such as answering basic questions and guiding citizens through transactions. This leads to quicker and more convenient services, and saves money and staff time.

The early versions of virtual assistants are search tools that can understand a question, scan large amounts of information and respond accurately without human intervention. As technology advances, sophisticated artificial intelligence tools are becoming available that can deal with more complex questions and can learn and improve on their own.

These technologies also can help improve interactions for citizens who prefer to speak to a person. Many businesses have implemented intelligent software that can collect basic information from callers as the phone call proceeds, listening to and analyzing conversations, and providing instant feedback to a call representative or supervisor who is interacting with the caller. Software can analyze conversations and quickly prompt representatives with the information callers need so live contact center representatives do not spend valuable time searching for content. Representatives might also get feedback that they are speaking too quickly, or that the caller seems frustrated.

In the private sector, Gartner, a technology research and advisory company, reports that 25 percent of customer service channels will integrate virtual assistants by 2020.⁴ Government, for the most part, is not as far along. Most agencies are just scratching the surface when it comes to automated tools to serve citizens, with several agencies making initial explorations. In 2017, the General Services Administration created the Emerging Citizen Technologies Program, which brings federal agencies and the private sector together to discuss strategies and best practices for adopting advanced technologies. As a part of this program, the agency conducted a pilot with more than a dozen agencies, working with them to develop several artificial intelligence prototypes for improving citizen services.

“This technology is not the future. It’s right now,” said Justin Herman, who leads this work at GSA.



⁴ Brian Manusama, *Market Guide for Virtual Customer Assistants*, Gartner, Inc. November 23, 2016.

A Virtual Assistant for U.S. Citizenship and Immigration Services

In 2015, the U.S. Citizenship and Immigration Services launched one of the federal government's first virtual assistants to answer customers' questions about the citizenship and immigration processes. The agency's experience with building and launching this online assistant, called "Emma," offers insights for other agencies exploring this technology.

The agency operates one of the federal government's largest contact centers, and typically receives about 14 million phone calls a year. One goal with Emma was to help the agency manage this call volume, while meeting an increasing demand from customers for online, self-service options, said David Simeon, former division chief of innovation in the customer service and public engagement directorate at USCIS.

The agency contracted with a vendor to purchase the software for Emma. It built Emma's knowledge base by feeding it information from the agency's website and the scripts that contact center representatives use to help callers.

Staff tested Emma by posing questions and making tweaks based on whether the virtual assistant could respond correctly. Emma is different from more advanced AI technologies in that this assistant does not really learn on its own but, rather, requires human intervention and monitoring to improve the technology's effectiveness.

During the testing period, more than 135,000 people asked Emma questions. As the virtual assistant was asked more questions, the responses became more accurate, according to Robert Genesoni, branch chief of the customer engagement

center at USCIS. Emma was tested for more than a year, first with federal staff and then with a limited set of actual customers such as immigration applicants and attorneys. In 2015, when Emma was deployed, the virtual assistant was able to answer correctly 80 to 85 percent of questions.

Since December 2015, Emma has responded to more than 10.3 million inquiries from more than 3.3 million unique users. Additionally, a Spanish-speaking version of Emma has responded to 1.6 million inquiries from more than 470,000 unique users since June 2016. Emma has a success rate of 91 percent in English and 89 percent in Spanish. Customers can now use Emma to get quick answers to many of their questions, rather than searching through the website or calling a contact center.

KEY INSIGHTS

The agency's staff who worked on Emma shared several insights for others considering the use of virtual assistants to support customers.

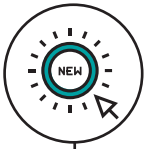


Stay focused on the goal and make sure the technology aligns with it. Agencies should start their AI efforts with a focus on the goal and ways to support the mission rather than a fixation on technology, according to Herman at GSA. "Don't start with AI. Start by talking about problems and solutions," he said.

Emma has been successful in accomplishing its goal of helping customers navigate the USCIS website and get quick and accurate answers, according to Simeon. While some agencies are considering adopting virtual assistants as a strategy to reduce call volume, USCIS has not yet seen a significant reduction in calls since launching Emma.

One reason, according to Simeon, is that the virtual assistant project is part of a multichannel strategy, and not all the components have fully reached maturation. "Whenever an agency implements a new technology, your biggest challenge is trying to make people understand and know what the technology will do and what it can't do in isolation," Simeon said.

Emma developed a broad focus as more offices became involved in the project, and it is able to answer almost any general immigration question. Emma was not designed, however, to be able to assist customers with specific business transactions. For example, the virtual assistant cannot take people's contact information and generate a request for an immigration officer to contact them about their case, as a live agent can.



Drive adoption through customer outreach. For virtual assistants and other technologies to be effective, customers must know they exist and choose to use them. Agencies launching virtual assistants need to inform their customers about these new tools, update information on their websites and other customer materials, explain how a virtual assistant can help customers, and encourage them to use these technologies rather than call a contact center, according to Genesoni.

Agencies can also target outreach to the customers most likely to use these self-service technologies, or provide additional support to customers who might be hesitant to do so.



Have a strategy for a quick switch to a human being when needed. Agencies should develop a plan for what will happen when the virtual assistant cannot answer a customer's question. USCIS recently launched a chat feature on its website so customers who cannot get an answer from Emma can be connected as soon as possible to an agent without having to call the agency.



Be ready to adapt to advanced technology. AI technologies are improving rapidly. In the few years since Emma was built, more sophisticated systems became available that can learn on their own, formulate new responses and store more information at lower costs. Agencies exploring these technologies should be ready to adapt to these changes, and make sure systems and contracts are flexible enough to incorporate new technology as the AI field evolves.

CONCLUSION

Although government leaders face obstacles in adopting the leading customer experience practices outlined in this brief, they can learn important lessons from others in government and the private sector who have begun to tackle these issues. By conducting thorough customer research, harnessing the power of technology to improve services, and streamlining customer interactions across service delivery channels, they can take important steps toward improving services. These improvements can help agencies deliver on their missions, and lead to increased trust and confidence in government among citizens.

Many agencies have made progress in implementing initial customer experience improvements, but they should not rest on early successes. Leaders must look beyond the basics and push their agencies to adopt advanced customer experience practices that can help make lasting improvements in how their agencies deliver services to the public.

APPENDIX I

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