

For the People

In President Lincoln’s celebrated words, the government exists to serve the public - *by the people, for the people*. Today, there is a growing movement across Federal government to fulfill this vision and mission through customer experience (CX).

CX in government is becoming a key measure of performance and a core driver of the business, and there is undeniable evidence that a focus on CX leads to public benefit in terms of better service delivery.¹ Improved service delivery directly leads to increased trust, additional innovation, measurable cost avoidance, and other operational efficiencies.²

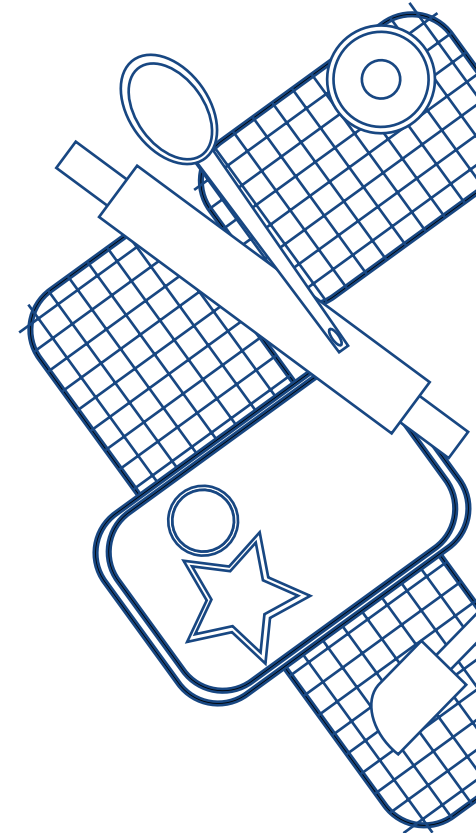
Federal agencies are embarking on a deliberate journey to blend and balance the values and virtues of how government operates within its bureaucratic framework and folding in CX as a cornerstone of the business.³ By making an intentional commitment to CX in government, agencies are achieving measurable results and positive impacts *for the people*.

1 Office of Management and Budget, Circular A-11, Section 280
www.whitehouse.gov/wp-content/uploads/2018/06/s280.pdf

2 Veteran trust in VA reaches all time high (June 5, 2020)
www.va.gov/opa/pressrel/pressrelease.cfm?id=5464

3 Veteran trust in VA health care rises above 90 percent for the first time (April 30, 2020)
www.va.gov/opa/pressrel/pressrelease.cfm?id=5435

- **Customer Experience**
OMB Circular A-11, Section 280 defines “Customer Experience” as a combination of factors that result from touchpoints between an individual, business, or organization and the Federal Government over the duration of an interaction and relationship.
- Agencies measure CX through a variety of domains highlighted in OMB A-11, including ease, effectiveness, emotion and trust.



For CX Practitioners:

How To Use This Cookbook

As with any transformational initiative, certain **key ingredients** exist that maximize the opportunity for positive impact. This is particularly so in government, given that there are many levers to utilize that drive change, relevance, and prioritization. As with any recipe, it is important to make **adaptations** to a particular culture and environment to scale and sustain CX. Finally, different **sequencing** options may exist depending on the climate of an organization and readiness to embrace the change and move toward CX. Some organizations will require all of the ingredients in a rigid sequence while others will require only a few key ingredients adapted to serve organizational needs. Whatever the case, defining these key ingredients coupled with making organization-specific adaptations and organizationally appropriate sequencing will illuminate a path to institutionalize CX as a lasting and co-equal core business discipline in government.

A note about OMB Circular A-11, Section 280

In June 2018, OMB issued, for the first time ever, specific guidance regarding the implementation of CX programs and accountability across federal agencies - High Impact Service Providers (HISPs) - that provide direct services to the public. This Cookbook highlights specific key ingredients that agencies can utilize to implement CX and fulfill the spirit and intent of this transformational CX A-11 directive.

- 1 President's Management Agenda
www.whitehouse.gov/wp-content/uploads/2018/03/Presidents-Management-Agenda.pdf
- 2 OMB, Circular A-11, Section 280
www.whitehouse.gov/wp-content/uploads/2018/06/s280.pdf

Prepping

- Know Agency Ecosystem**
Understand the levers of government operations and current agency culture, and how to actualize opportunities and minimize risks.
- Build the Coalition**
Identify like-minded CX thinkers and influencers.

Mixing

- Identify Key Ingredients**
Select any combination of ingredients from the **8 CX Cooking Categories** that will maximize positive impact within your organization.
- Adapt & Adopt**
Incorporate and adapt best CX practices from private sector, across government, and within the agency.

Baking

- Sequence & Execute**
Align key ingredients in an order that matches cultural readiness to support the needed bake times and engagement with appropriate organizational levels.

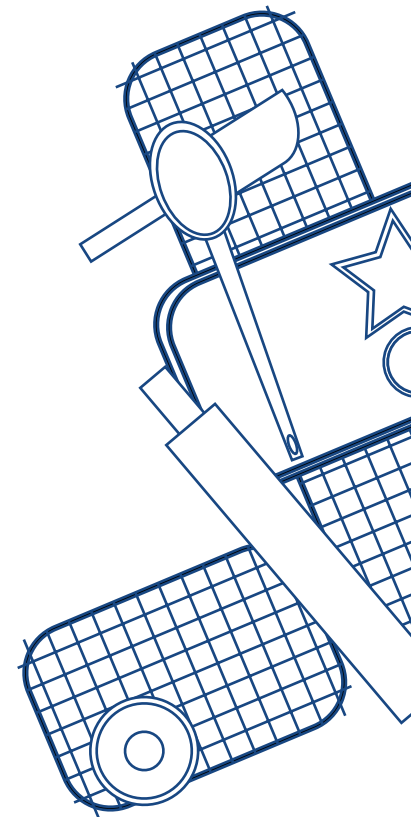
Before Getting Started

Knowing What You Do Know

- **Government Understanding:** Understanding government, its constraints, its levers, is critical to understanding how to implement any new initiative, including CX. Career public servants are experts with this distinct skill set, and through their experience, they know how to navigate through the government environment to execute, scale, and sustain.
- **Agency Understanding:** Understanding the particular agency's culture is also key, as every organization is different. Identifying what is important to the agency, how initiatives receive prioritization in terms of leadership visibility, funding, etc., how one makes CX relevant to agency mission and strategy, and knowing how to tie CX to anything that is important in the agency's culture and operations enables the organization to clearly see how CX fits in.

Knowing What You Don't Know

- **Unpredictability is a Given & Agility is Required:** Implementing any new initiative, particularly one like CX that demands a different way of thinking and problem-solving, will require constant adaptation and pivoting. It likely will not move in a straight line. Being comfortable (enough) with the unknown is important, and constant adaptation is required.
- **Borrowing from Private Sector:** Many of CX best practices are gleaned from the private sector, and as many career public servants have never worked in industry, it is important to take best practices from industry and know how to pull what's relevant, adapt it, and blend it in the public sector environment for maximum positive impact. The private sector can offer much in terms of CX best practices and cutting-edge methodologies, but often times, those practices and methodologies cannot be strictly "copied-and-pasted" in the government environment; instead, those that understand the mechanisms of government must adapt these practices to fit the culture and ecosystem.



The 8 CX Cooking Categories

By baking-in a variety of ingredients from within the **8 CX Cooking Categories**, agencies can achieve measurable results with positive impacts for the public.



- 
Strategy: Utilizing Internal & External Levers in Government to Fold CX into the Organization
- 
Operations: Folding CX into Governance, Performance Metrics, Human Resources & Acquisitions
- 
Funding: Secure Funding to Execute, Scale, Sustain & Mature Agency's CX Program
- 
Organization: Positioning CX Program in the Agency for Maximum Impact
- 
Culture: Utilizing Agency Mission, Training & Leadership Development Programs to Drive CX Now & in the Future
- 
Incentives: Reinforcing CX as a Core Business Discipline by Incentivizing CX Performance & Behaviors
- 
Partnerships: Leveraging Partnerships Inside & Outside of Government to Meet Mission, Build Capacity & Bring in Cutting-Edge CX Practices
- 
Capabilities: Implementing CX through Customer Understanding / Human-Centered Design (HCD), Measurement, Service Design & Delivery of Tangible CX Tools to Employees

Prepping

Know Agency Ecosystem

Understand the levers of government operations and current agency culture, and how to actualize opportunities and minimize risks.



Build the Coalition

Identify like-minded CX thinkers and influencers.



Mixing

Identify Key Ingredients

Select any combination of ingredients from the **8 CX Cooking Categories** that will maximize positive impact within your organization.



Adapt & Adopt

Incorporate and adapt best CX practices from private sector, across government, and within the agency.



Baking

Sequence & Execute

Align key ingredients in an order that matches cultural readiness to support the needed bake times and engagement with appropriate organizational levels.



<input type="checkbox"/> Agency Leadership <input type="checkbox"/> Top Down & Bottom Up <input type="checkbox"/> Leveraging Catalysts <input type="checkbox"/> President's Management Agenda <input type="checkbox"/> Existing Legislation <input type="checkbox"/> Agency Strategic Plan <input type="checkbox"/> Agency Regulations <input type="checkbox"/> Agency Policies / Directives <input type="checkbox"/> Agency Priority Goal (APG) & Annual Performance Plan (APP) <input type="checkbox"/> Programming, Planning, Budget, Execution (PPBE) <input type="checkbox"/> Agency Risk Registry <input type="checkbox"/> Data Strategy <input type="checkbox"/> Communications	<input type="checkbox"/> Governance <input type="checkbox"/> Agency Performance Measures <input type="checkbox"/> SES & GS Performance Measures <input type="checkbox"/> CX Positions & Capacity <input type="checkbox"/> Acquisitions	<input type="checkbox"/> Budget Authority (BA) <input type="checkbox"/> Reimbursement Authority (RA) <input type="checkbox"/> Hybrid BA/RA <input type="checkbox"/> Tie Funding Request to IDEA Act, Evidence Based Budget, PMA, APG, OMB Circular <input type="checkbox"/> Leverage Detailees & Other Term Partnerships	<input type="checkbox"/> Agency Chief Experience Officer <input type="checkbox"/> Direct Report to Agency Secretary <input type="checkbox"/> CX FTE <input type="checkbox"/> Existing CX Practitioners	<input type="checkbox"/> Employee Alignment with CX Practice In Mission: Empathy-Driven vs. Security Driven vs. Transaction-Driven <input type="checkbox"/> CX Included as Agency Core Value <input type="checkbox"/> Servant Leadership <input type="checkbox"/> Employee Experience (EX) <input type="checkbox"/> Employee Innovation <input type="checkbox"/> Co-Designed CX Solutions (Employees & Customers) <input type="checkbox"/> CX Hubs / CX Communities of Practice <input type="checkbox"/> CX Integration in Agency Leadership <input type="checkbox"/> CX Training / Certifications <input type="checkbox"/> CX Recognition	<input type="checkbox"/> Federal Employee Recognition (i.e. Gears of Government Award) <input type="checkbox"/> Agency Employee Recognition <input type="checkbox"/> Favorable Budget Determinations <input type="checkbox"/> CX Bonuses <input type="checkbox"/> CX Details / Rotations <input type="checkbox"/> Publish CX Feedback	<input type="checkbox"/> Federal Customer Experience Initiative (FCXI) <input type="checkbox"/> Lab @ OPM <input type="checkbox"/> Presidential Innovation Fellows (PIF) <input type="checkbox"/> United States Digital Service (USDS) <input type="checkbox"/> GSA Digital Services (18F) <input type="checkbox"/> White House Leadership Development Program (WHLDP) <input type="checkbox"/> GSA Centers of Excellence (CoE) <input type="checkbox"/> Agency Innovation Groups <input type="checkbox"/> Academia <input type="checkbox"/> Non-Profits <input type="checkbox"/> Federal Advisory Committee (FAC) <input type="checkbox"/> Private Sector Partners	<input type="checkbox"/> CX Framework <input type="checkbox"/> Human-Centered Design (HCD) Practice <input type="checkbox"/> Real-Time CX Surveys <input type="checkbox"/> CX Data Analytics & Artificial Intelligence (AI) <input type="checkbox"/> Back End Business Processes <input type="checkbox"/> Tangible CX Tools <input type="checkbox"/> Omni-Channel Technology Initiatives <input type="checkbox"/> Communications & Engagement
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Strategy

Bake Time



12-24 Months

Organizational Level



Senior Leadership

Key Ingredients:

- Agency Leadership
- Top Down & Bottom Up
- Leverage a Catalyst
- President's Management Agenda
- Existing Legislation
- Agency Strategic Plan
- Agency Regulations
- Agency Policies / Directives

- Agency Priority Goal (APG) & Annual Performance Plan (APP)
- Programming, Planning, Budget, Execution (PPBE)
- Agency Risk Registry
- Data Strategy
- Communications

Utilizing Internal & External Levers in Government to Fold CX into the Organization

- **Agency Leadership:** make the business case for CX through evidence of impact (actual or anticipated; in your organization or in other organizations) for any and all levels of agency leadership - from Secretary to Division Chief and in between - based on what is relevant and important according to leadership priorities; in the best of cases, agency leadership already endorses CX as a top priority or assigns CX as a key agency transformation initiative
- **Top Down & Bottom Up:** plan to infuse CX through agency-wide, leadership-driven initiatives and local or grassroots efforts
- **Leverage a Catalyst:** leverage a catalyst to drive CX and clearly tie CX to address the burning platform; as frustrating for those both inside and outside of government, sometimes a crisis is what forces collective action - for VA, the 2014 crisis at the Phoenix VA Medical Center regarding wait times inspired creation of VA's first-ever dedicated CX office in the Veterans Experience Office (VEO), for FEMA, a 60-minute fraud investigation post Hurricane Sandy enabled them to re-organize their program and as part of that, adopt more customer-focused practices
- **President's Management Agenda (PMA):** tie agency program to PMA CX initiative and other priority initiatives
- **Existing Legislation:** leverage Evidence-Based Budget Act and newly developed Agency Learning Agendas, 21st Century Integrated Digital Experience Act (IDEA) Act and other existing statutes as authorities to drive CX practices and implementations
- **Agency Strategic Plan:** incorporate CX principles and / or any key capability associated with it (such as CX data (HCD, focus groups, real time surveys), tangible CX tools (training, leadership practices, toolkits / artifacts), modern technology (public-facing, employee-facing)) into the agency's long term strategic plan; include macro agency-wide journey map as compass for strategic plan
- **Agency Regulations:** include CX principles in the Code of Federal Regulations
- **Agency Policies / Directives:** incorporate CX principles, core capabilities, framework, and practical application into agency policies / directives
- **Agency Priority Goal (APG) & Annual Performance Plan (APP):** utilize APG to amplify and publicly report on CX initiatives
- **Programming, Planning, Budget, Execution (PPBE):** utilize PPBE programs to plan for CX initiatives in the short, medium, and long term
- **Agency Risk Registry:** advocate for CX initiative to become part of agency's risk registry
- **Data Strategy:** incorporate CX as part of the agency's data strategy to ensure that CX occupies a co-equal space with operational metrics to measure performance
- **Communications:** building a solid CX business case demonstrating clear return on investment, and performance improvements; share CX stories at all levels of the organization to highlight impact

Operations

Bake Time



24-36 Months

Organizational Level



Senior Leadership

Key Ingredients:

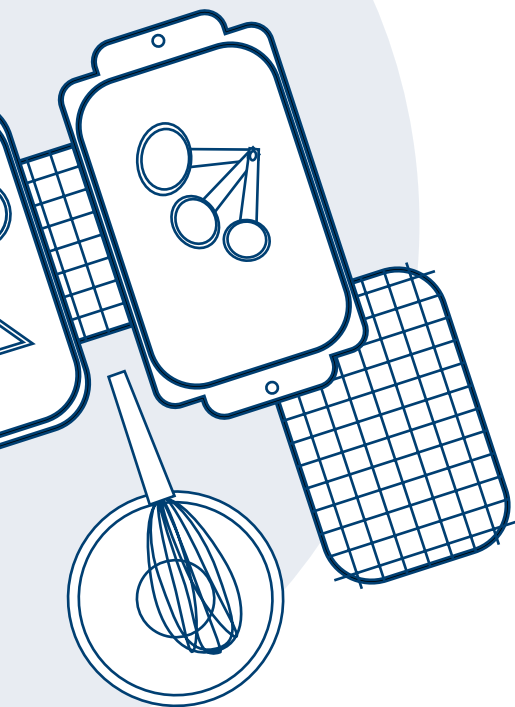
Governance

Agency Performance Measures

SES & GS Performance Measures

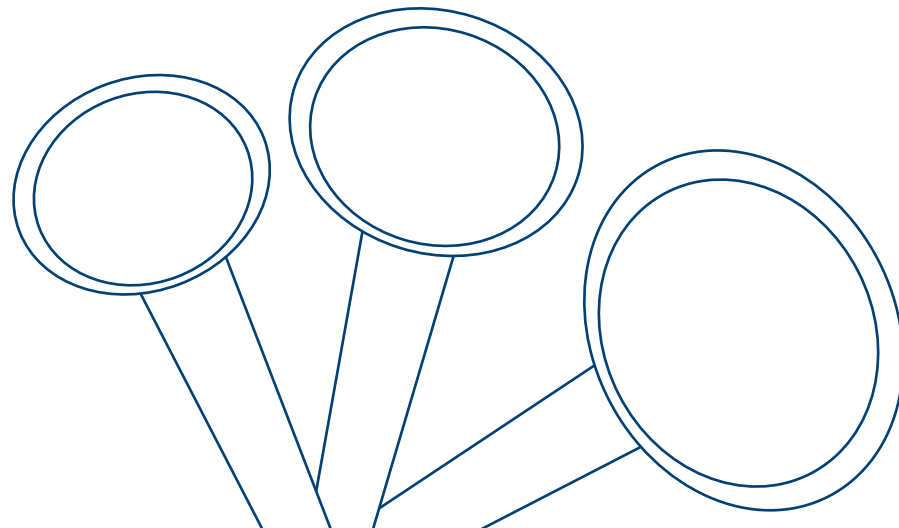
CX Positions & Capacity

Acquisitions



Folding CX into Governance, Performance Metrics, Human Resources & Acquisitions

- **Governance:** securing a platform, to include CX insights and data, in agency governance processes, including boards and councils at a local / facility level and at a national, agency-wide level; ensures that CX data is shared at multiple levels throughout the agency and illuminates how service recovery and performance improvement will be addressed; ensures transparency and accountability, and aligns with OMB Circular A-11 guidance
- **Agency Performance Measures:** elevating CX performance at an agency level to secure a co-equal space with other operational metrics, such as agency outputs (i.e., call center volume, appointments scheduled, applications processed), financials, personnel, etc.; good place to start at an agency-wide or local level is measuring trust and other OMB Circular A-11 domains
- **SES & GS Performance Measures:** baking CX into senior leadership performance plans as well as GS performance plans to drive the focus on and accountability for CX performance
- **CX Positions, Position Descriptions (PDs) & Building Internal HCD Capacity:** embedding CX into positions throughout the organization, classifying PDs with CX and HCD components, and building an internal design practice to enable the agency to deliver services through the lens of the customer; benefits to in-house HCD capacity include cost savings from not procuring costly HCD contracts, institutional and cultural knowledge of the business; leverage cross-agency CX hiring pilots, such as the OPM and Federal Customer Experience Initiative (FCXI) CX Strategist hiring initiative
- **Acquisitions:** including HCD requirements and customer experience measures as requirements in any acquisitions or requests for information; leveraging GSA's Customer Experience Services and Evaluation Buying Guide to assess and procure CX services



Funding

Bake Time



6-12 Months

Organizational Level



Senior Leadership

Key Ingredients:

Budget Authority (BA)

Reimbursement Authority (RA)

Hybrid BA/RA

Tie Funding Request to IDEA Act, Evidence Based Budget, PMA, APG, OMB Circular

Leverage Detailees and Other Term Partnerships

Secure Funding to Execute, Scale, Sustain & Mature Agency's CX Program

- **Budget Authority (BA):** pros: authorizes a line item of fenced funding specifically for CX and institutionalizes CX as a core business discipline; cons: competing with other program needs for funding with limited ability to scale up, as annual BA is set by legislation
- **Reimbursement Authority (RA):** pros: provides ability to scale up with greater contributions or demand and leverage economies of scale as a CX shared service; cons: optional contributions mean that if priorities change the capability might disappear or be greatly reduced
- **Hybrid BA/RA:** provides a good option that balances a portion of permanent funding to sustain CX capabilities so it is not personality or administration-driven with ability to scale up and welcome new / unplanned business
- **Tie Funding Request to IDEA Act, Evidence Based Budget, PMA, APG, OMB Circular A-11:** build the case for CX funding by leveraging authorities that serve as drivers of CX implementation
- **Leverage Detailees & Other Term Partnerships:** with limited funding, leverage FTE detail opportunities within or across agencies; partnerships with sister agencies; Lab @ OPM, PIF or other partnerships for 1-2 year term engagements

Organization

Bake Time



24-48 Months

Organizational Level



Senior Leadership

Key Ingredients:

Agency Chief Experience Officer

Existing CX Practitioners

Direct Report to Agency Secretary

CX FTE

Positioning CX Program in the Agency for Maximum Impact

- **Chief Customer Experience Officer (CXO):** establishing a permanent CXO position - political or career - to demonstrate the agency's permanent commitment to CX; a political appointee will have a seat at the table with other appointees to drive CX transformation at the highest levels of the organization, and a career will have deep understanding of the agency, and how to lead and achieve transformation in government
- **Direct Report to Agency Secretary:** elevating CX, and the customer, to a Secretary direct report through CXO assures access to shape agency strategy and decision making, and visibility at the highest level
- **CX FTE:** dedicating FTE to embed, execute and apply CX as a permanent business discipline in the agency; commitment of permanent resources maximizes opportunity for CX capability to sustain across time and administrations; start small, then build over time as the CX program matures
- **Identify & Partner with Existing CX Practitioners:** develop CX program with existing resources, leveraging experienced CX detailees in-house, across agencies, or through partnerships with key programs like PIF, the Lab @ OPM, GSA CoE, and others

Culture

Bake Time



24-48 Months

Organizational Level



All Levels

Key Ingredients:

- Employee Alignment with CX Practice In Mission: Empathy-Driven vs. Security Driven vs. Transaction-Driven
- CX Included as Agency Core Value
- Servant Leadership
- Employee Experience (EX)
- Employee Innovation

- Co-Designed CX Solutions (Employees & Customers)
- CX Hubs / CX Communities of Practice
- CX Integration in Agency Leadership
- CX Training / Certifications
- CX Recognition

Utilizing Agency Mission, Training & Leadership Development Programs to Drive CX Now & in the Future

- **Empathy-Driven Mission vs. Security-Driven Mission vs. Transaction-Driven Mission:** understanding how to institute CX in different mission environments so employees see how CX fits in their areas
- **CX Included as Agency Core Value:** tying CX to agency mission and values enables employees to see the pertinence and connection of CX to the daily business and operations
- **Servant Leadership:** hardwiring servant leadership principles into agency programs, practices and training
- **Employee Experience (EX):** foundational to mission, building a strong EX program is integral to all components of CX programs
- **Employee Innovation:** creating innovation networks and partnering with agency innovation networks to encourage employee innovation from the front lines and bake in CX initiatives within those existing networks
- **Co-Design CX Solutions with Employees and Cross-Functional Teams:** bringing employees into the design research with customers and solutioning process allows them to be up close and personal with customer perspectives from a learning and empathy orientation outside of the traditional work environment; leveraging cross-functional teams also brings a valuable mix of perspectives and expertise from employees at different levels and disciplines from across the organization
- **CX Hubs / CX Communities of Practice:** driving integration, collaboration, scaling, CX skills development, and sharing of CX best practices to foster a CX-oriented culture
- **CX Integrated in Leadership Development Programs:** focusing on new and emerging leaders to drive the CX movement now and in the future; including HCD training and projects to practice the practical application of CX and design to real agency challenges
- **CX Training / Certifications:** building the in-house CX competencies and capabilities as far and wide as possible to optimize institutionalization of CX thinking in the organization; leverage existing CX training and programs that build CX practitioners, such as GSA's Amplify Program
- **CX Recognition:** utilizing awards and other communications to highlight and champion individuals, teams, and / or efforts of notable impact on CX

Incentives

Bake Time



6-12 Months

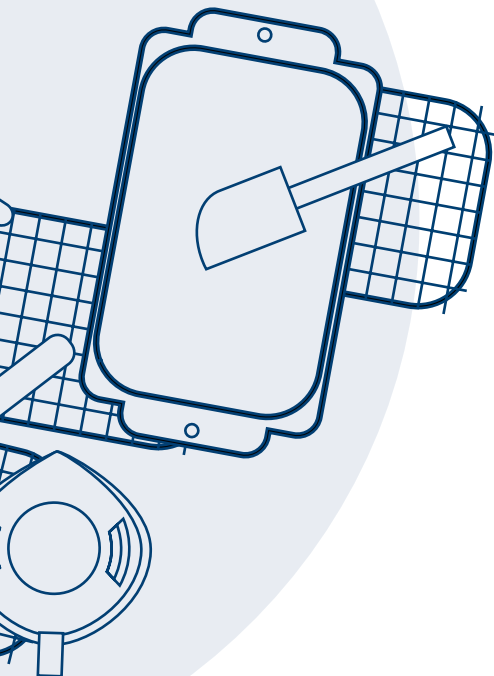
Organizational Level



Senior Leadership & Middle Management

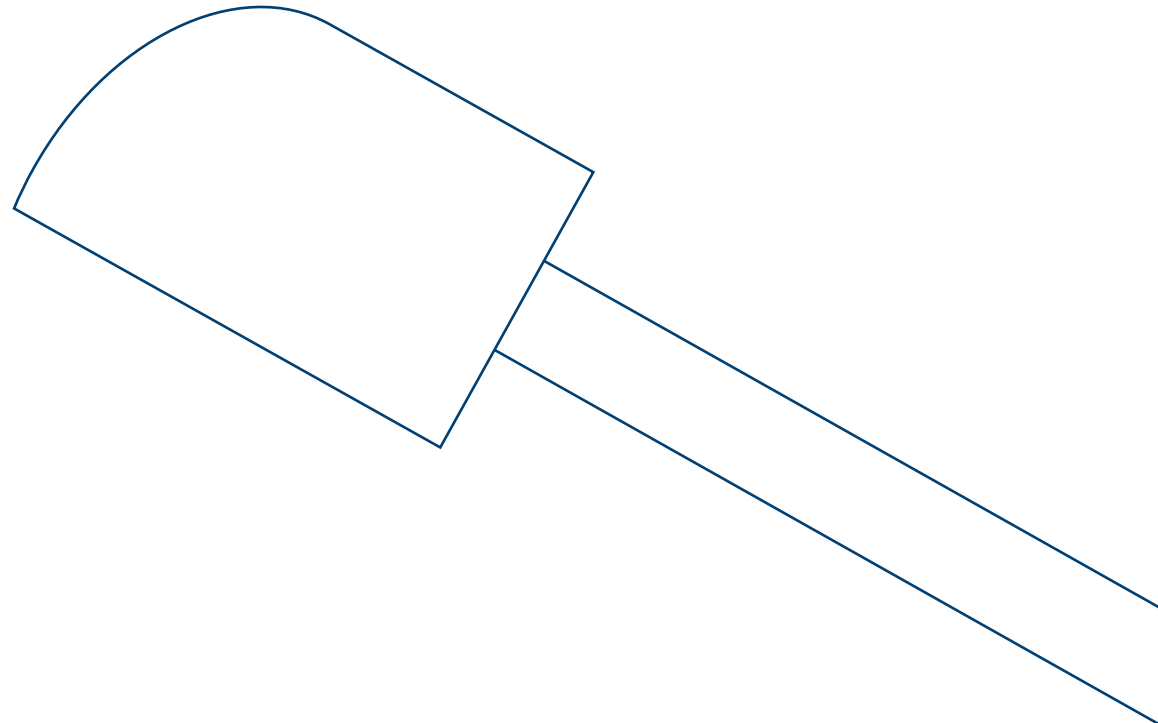
Key Ingredients:

- Federal Employee Recognition
- Agency Employee Recognition
- Favorable Budget Determinations
- CX Bonuses
- CX Details / Rotations
- Publish CX Feedback



Reinforcing CX as a Core Business Discipline by Incentivizing CX Performance & Behaviors

- **Federal Government Employee Recognition:** elevating agency employees who are driving CX by nominating them and their teams for Gears of Government Award
- **Agency Employee Recognition:** leveraging or establishing a new CX recognition program within the agency at the Secretary or senior leadership level
- **Favorable Budget Determinations:** reinforcing the importance of CX by explicitly tying budget decision-making to programs that are driving CX
- **CX Bonuses:** instituting a special contribution award or other monetary awards program to recognize individuals and teams that execute and implement CX initiatives
- **CX Details / Rotations:** supporting intra-and / or inter-agency details / rotations with a CX focus so employees can learn and practice CX and bring that knowledge base back to the organization
- **Publish CX Feedback:** utilizing CX feedback to share across the organization and individual business lines to highlight employees who deliver outstanding CX



Partnerships

Bake Time



12-24 Months

Organizational Level



All Levels

Key Ingredients:

- Federal Customer Experience Initiative (FCXI)
- Lab @ OPM
- Presidential Innovation Fellows (PIF)
- United States Digital Service (USDS)
- GSA Digital Services (18F)
- White House Leadership Development Program (WHLDP)
- GSA Centers of Excellence (CoE)
- Agency Innovation Groups
- Academia
- Non-Profits
- Federal Advisory Committee (FAC)
- Private Sector Partners



Leveraging Partnerships Inside & Outside of Government to Meet Mission, Build Capacity & Bring in Cutting-Edge CX Practices

For collaboration and sharing of CX best practices from experts inside of government:

- **Federal Customer Experience Initiative (FCXI):** driven by permanent FTE at OMB focused on government-wide customer experience, a cross-agency CX governance body to drive the CX movement, enable cross-agency CX collaboration and projects, facilitate sharing of best practices, management of Federal CX Strategist Hiring Program, and other strategic cross-agency CX initiatives
- **Lab @ OPM:** for HCD support from experienced designers from various industry backgrounds
- **Presidential Innovation Fellows (PIF):** for HCD, technology coding, and other industry-informed expertise
- **United States Digital Service (USDS):** for agile design and digital support; HCD, rapid prototyping; cross-agency pilots / initiatives
- **18F:** for technology support from industry-informed experts
- **White House Leadership Development Program (WHLDP):** to leverage a premier leadership development program that includes cross-agency rotations, which may include driving and implementing CX
- **GSA Centers of Excellence (CoEs):** for a focused team to enable the development and maturation of CX capabilities, such as GSA Touchpoints Surveys, GSA Amplify Program
- **Agency Innovation Groups:** to spark, seed, spread CX innovations and scale across multiple facilities or agency-wide

For collaboration and sharing of CX best practices from experts outside of government:

- **Academia:** for partnering on CX-oriented publications, pilots
- **Non-Profits:** for CX collaboration, such as with the Partnership for Public Service (PPS), which is a non-profit, non-partisan group with a robust CX practice area, convenes cross-agency CX round tables on a quarterly basis and produces annual government CX reports; the American Council for Technology and Industry Advisory Council (ACT-IAC), which is an industry-government collaborative that enables free exchange / flow of ideas across government and industry outside the acquisitions process and environment
- **Federal Advisory Committee (FAC):** to understand the customer perspective using an organized, formal advisory board methodology
- **Private Sector Partners:** to attend CX conferences and other forums to learn the latest CX practices in industry

Capabilities

Bake Time



24-48 Months

Organizational Level



All Levels

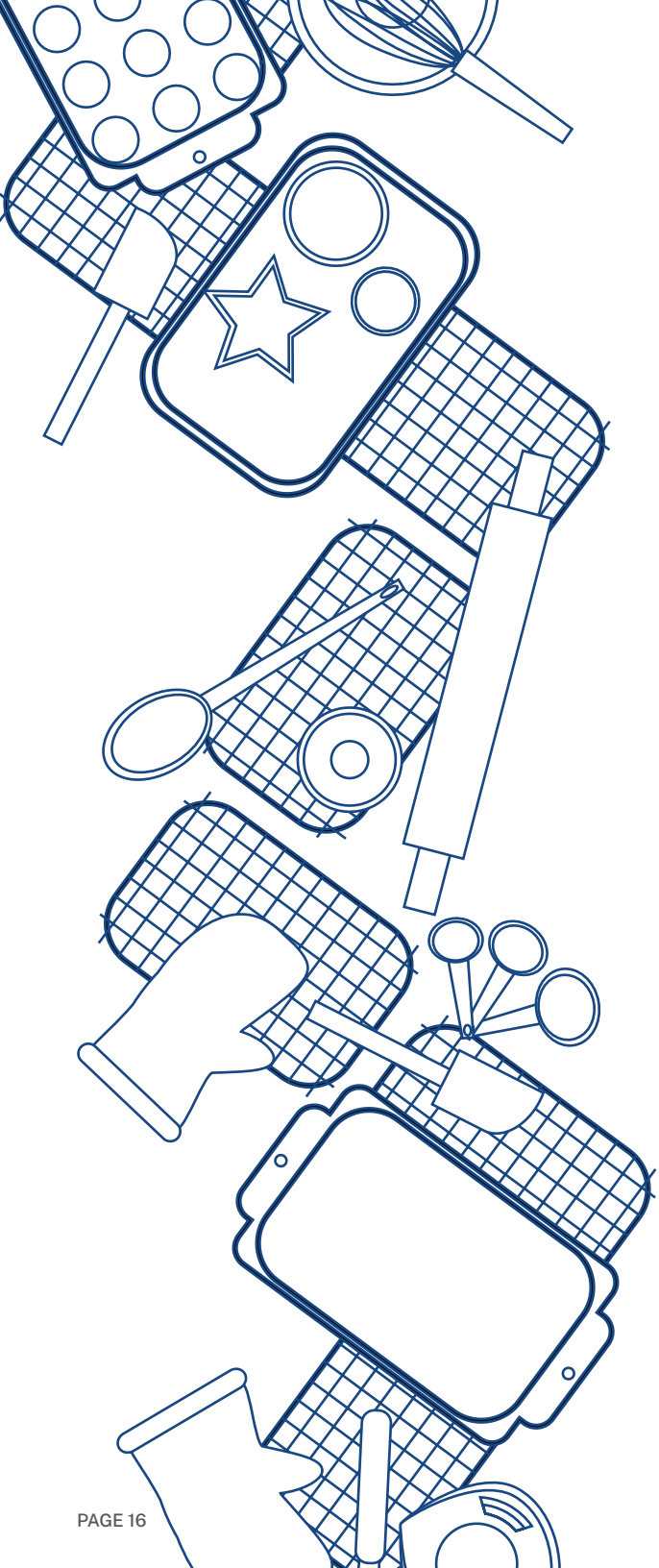
Key Ingredients:

- CX Framework
- Human-Centered Design (HCD) Practice
- Real-Time CX Surveys
- CX Data Analytics & Artificial Intelligence (AI)
- Back End Business Processes

- Tangible CX Tools
- Omni-Channel Technology Initiatives
- Communications & Engagement

Implementing CX through Customer Understanding / HCD, Measurement, Service Design & Delivery of Tangible CX Tools to Employees

- **CX Framework:** define a CX operating framework, starting with HCD, borrowing CX best practices from industry and adapting them to government, applying CX capabilities, deploying tangible tools, offering CX communications and engagement, and measuring impact to drive individual service recovery and system-wide performance improvements
- **Human-Centered Design (HCD) Practice:** build an HCD practice in-house or partner with HCD experts, like the Lab @ OPM; leverage HCD tools and guides
- **Real-time CX Surveys:** implement and mature real-time CX surveys that measure agency performance on the moments that matter most to the customer based on HCD insights in alignment with OMB Circular A-11 CX domains; include free text comments in surveys for a deeper understanding of CX; leverage government-wide CX survey capabilities, like GSA Touchpoints
- **CX Data Analytics & Artificial Intelligence (AI):** develop robust CX data analytics and AI to address CX pain points and drive decision-making to improve the customer experience; leverage and aggregate other types of existing data (i.e., operational, administrative, social media scraping) to understand the customer holistically across multiple channels; ensure that a dedicated data analytics team, with the help of automated AI and natural language processing methods to identify key themes and trends, synthesize and interpret data so employees and leadership can understand how to act upon it, rather than just relying on data dashboards to interpret on their own; assign full-time analysts to provide analysis of customer touchpoints, interpret and identify insights, and provide specific actionable recommendations
- **Back End Business Processes:** ensure that back end business processes can absorb, adapt to and respond to influx of CX survey data, insights and analytics
- **Tangible CX Tools:** utilize HCD insights, journey maps, personas, service blueprints, ecosystem maps, and CX survey data to prototype, test, iterate, pilot, and deploy tangible CX tools to empower employees to deliver dynamite experiences; examples of tangible CX tools may include: CX training, leadership practices, guidebooks / tool kits, action plans, CX certifications, etc.; measure impact of CX tools implementation to determine additional or long-term CX implementations
- **Omni-Channel Technology Initiatives:** drive integration of customer-facing and employee-facing digital and data systems to deliver a unified experience across channels, including digital, telephonic, and in-person
- **Communications & Engagement:** connect with customers and strategic partners at the local, regional, and national level



CX Agency Recipes

Adaptations & Sequencing

In This Section:

- CX Agency Recipes
- Fillable Recipe Card

CX Agency Recipe: TSA

My Takeaways:



Transportation
Security
Administration

Prepping

Identified administrative data that already exists - customer feedback data (gathered from TSA Contact Center) and employee engagement data (gathered from Transportation Security Officer (TSO) / Series 1802 Federal Employee Viewpoint Survey (FEVS)) - to visualize and understand where employee engagement could be connected with customer experience.

Ingredients:

Increased measurement capacity by collaborating with GSA's Office of Shared Solutions and Performance Improvement data team, Federal CX team at OMB, and FEVS team at OPM.

Mixing

The Customer Service Branch (CSB) (approximately 7 FTE) coordinates with Customer Support Manager (CSM) positions (approx. 170 FTE) aligned to every airport across the country. In addition, HQ CSB personnel have all formerly served in the field/in airports.

Ingredients:

Culture elements like scaling employee innovations in one place to others, building a CX Community of Practice for CSMs, and building empathy between HQ and field staff, engaging combined top-down and bottom-up approaches to CX.

Baking

Prototyping and measuring results of smaller scale efforts to determine long-term CX blueprint / implementation plan. Pilots include an Employee CX training and recognition program, improving passenger awareness of TSA communication channels, and improving communications to passengers on additional screenings.

Ingredients:

Service design skills like agile development enabled team to rapidly change tack during COVID-19 response, re-prioritizing sprints toward initiatives that could train and engage field staff during a period of lower passenger volumes.

CX Agency Recipe: FSA

My Takeaways:

Prepping

Federal Student Aid (FSA) instituted a CX entity that combined multiple functions (such as communication, ombudsman, and customer analytics) in 2010, and since has continued to grow and adapt their structure to support this work. Today, the Deputy Chief Operating Officer, Student Experience and Aid Delivery reports directly to the Chief Operating Officer of FSA, and as part of the “Next Gen Federal Student Aid Initiative,” the entirety of FSA has reorganized around a 21st century vision of a Federal Student Aid delivery organization. The Department of Education’s priority goals include customer feedback score targets.

Ingredients:

Governance and accountability for experience in performance measures and the new org structure raises a focus on the customer to the top tiers of leadership and embeds CX as part of overall strategy.

Mixing

As part of the Digital and Customer Care Program, FSA conducted user, employee, and stakeholder research virtually and across the country to better understand customer, customer service agent, and partner pain points. Some sample outputs of user research were customer mindsets, journey maps, and process maps that will be used to guide future design work and prioritization.

Ingredients:

Understanding of Paperwork Reduction Act (PRA), PRA pathways, and development of an appropriate fast-track umbrella clearance for customer research work.

CX Agency Recipe: FSA



Baking

FSA launched the new and improved StudentAid.gov, a single digital front door where students, parents, and borrowers can now research and manage their financial aid without having to log in multiple times or access multiple websites. The site consolidates the content and functionality previously housed on StudentAid.gov, StudentLoans.gov, FSAID.ed.gov, and NSLDS.ed.gov.

Ingredients:

Well thought-out procurement strategy and flexible contract allows iteration and responsiveness to ever-changing customer needs.

CX Agency Recipe: BTFA

My Takeaways:



U.S. Department of the Interior
Indian Affairs

Prepping

In its refresh of its most recent strategic plan, the Bureau of Trust Funds Administration (BTFA) (formerly the Office of the Special Trustee for American Indians (OST)) incorporated the establishment of a Chief Beneficiary Officer that reports to the Principal Deputy Special Trustee.

Ingredients:

Tapping the Governance and Strategy CX maturity elements, BTFA leveraged the strategic planning process by: a.) elevating the role of an individual dedicated to CX and b.) formalizing shared ownership of CX across the Agency. When combined, these ingredients will ensure that the customer's perspective is incorporated and prioritized in strategic improvement efforts that cut across program silos, while reducing the customer burden/effort.

Mixing

BTFA is now working to establish a Beneficiary Service Council to operate cross-functionally and is empowered to connect parts of BTFA for the purpose of ensuring that the beneficiary experience is consistently being considered and improved throughout the organization.

Ingredients:

Tapping into an employee culture, inherently oriented toward the beneficiaries, BTFA identified individuals to represent their function or office. A charter is being drafted to formalize and drive the effectiveness of the Council. A future iteration of the Council will take on an even broader role by including representatives from other federal agencies as well as Tribes.

Baking

Re-setting to take a more agile, iterative, and customer-focused approach to the design and delivery of digital self-service and individual account management.

Ingredients:

Federal Innovation labs to assist BTFA with understanding how it can leverage existing IT contracts and develop paths forward towards a more integrated and comprehensive approach for a more streamlined digital experience for customers, potentially leveraging digital experts within government.

CX Agency Recipe: GSA

My Takeaways:

GSA

Prepping

General Services Administration (GSA) helps the federal government get its work done. As such, understanding and meeting customer needs is a necessity. In 2014, GSA formed a team to focus on improving customer interactions with the agency – the first agency-wide CX Office in the Federal Government.

Ingredients:

- Direct report to agency leadership.
- Founding director came from the private sector; utilized private sector consultants to shape CX office vision, strategy, and implementation.
- Early projects aimed to deliver small, quick wins and included centralizing and redesigning surveys to reduce the survey burden on customers, developing an action planning process to address customer feedback, and producing journey maps for each of the Federal Acquisition Service's business lines to identify major customer pain points.
- Included Customer Relationship Management (CRM) metrics in their leadership performance plans and business focus.
- Established a voice of the customer program. Added CX language in operational tool, including performance plans and hiring process.

[More >](#)

CX Agency Recipe: GSA

My Takeaways:

Mixing

In 2016, Office of Customer Experience (OCE) was officially established, including an annual budget and a Chief Customer Experience Officer. The office matured and expanded initiatives to impact: feedback collection and survey governance, leading enterprise-wide understanding of key customer journeys, customer / user-centered digital experience, CX training, building a GSA CX community and practice, and contributing to cross-government CX definition, orientation, and development.

Ingredients:

- CX is included in the Agency Strategic Plan.
- CX Policy from the GSA Administrator underscores “GSA’s unwavering commitment to a culture of high performance and customer focus”.
- GSA Order on Management of GSA’s Digital Presence: OCE leads customer experience strategy, feedback and priorities for customer experience across all websites.
- Formalized CRM governance to align on customer engagement strategies across GSA; include executive leadership.
- Built capacity for CX through leading workshops in tandem with training in HCD. Leveraged partnership with the LAB @ OPM.
- Collaboration and cross-pollination with like-minded organizations at GSA, including 18F, Centers of Excellence, PIF Program, and Technology Transformation Service (TTS). Created a comprehensive services catalog for the agency. Worked with 18F on a service engagement framework and accompanying placemat communications tool.



CX Agency Recipe: GSA

My Takeaways:

GSA

Baking



OCE's priority continues to be embedding customer-oriented thinking into agency operations - establishing it as an agency priority and core value. How this happens continues to evolve, with a focus on the reach and visibility of CX, integration of service design, enhanced feedback collection and reporting, and championing a one-GSA customer experience. OCE is also participating in and leading cross-government CX capacity building and visioning.

Ingredients:

- Partnership with OMB on the Federal Agency Customer Experience Act (FACE) of 2019 (still under review).
- With executive leadership, developing customer data dashboards for agency customers.
- Leads focused customer understanding engagements each year with offices across the agency. Each project is grounded in analysis of existing data, includes new customer research, yielding insights, and opportunities to tailor actions to improve the customer experience.
- Expand CX mindsets at GSA and in government-wide digital experience: 21st Century IDEA Act, governance, user-centered design, customer personas and journey mapping.
- Ongoing support and partnership with the President's Management Agenda, Cross Agency Priority Goal on Customer Experience.
- Created a guide for agencies building CX capacity.

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CX Agency Recipe: VA

Prepping

In April 2014, VA experienced a significant catalyst that sparked a new, focused orientation on customer experience for Veterans, their families, caregivers, and survivors. The Phoenix VA wait time crisis led to a new VA Secretary, who saw a significant gap in VA business operations, namely, the need for a VA Enterprise-wide customer experience capability. The first-ever VA-wide CX office - the Veterans Experience Office (VEO) - was thus established in January 2015, with a Chief Veterans Experience Officer as a political appointee who directly reports to the VA Secretary. VEO then, and now, was funded through reimbursable authority, and the organization initially leveraged VA detailees, Presidential Innovation Fellows, partnerships with the Lab @ OPM, the United States Digital Service, and others while building the footprint with permanent FTE.

VEO tapped into CX expertise from industry partners to understand CX best practices that it could adapt and bring into government – the blending and adapting of this expertise to the unique government environment by career public servants would ultimately enable the CX transformation. VEO also formed a like-minded coalition of the willing with a number of key VA organizations, including the Office of Enterprise Integration (OEI), which integrated the Veteran Experience in VA’s multi-year Strategic Plan and included CX measures of trust, ease, effectiveness, and emotion as a VA Agency Priority Goal (APG); and the Veterans Health Administration (VHA), including VHA’s Innovation Ecosystem, which was an early adopter of the concepts, ideas, and potential imbued in building a patient experience program across the Nation as VEO’s first CX proof of concept. VEO created VA’s first-ever Veterans Experience Journey Map to help visualize and tell the story about customer experience, showcasing how VA fits into the life journeys of Veterans, their families, caregivers, and survivors.





My Takeaways:

Ingredients:

- Agency leadership
- Leveraging catalysts
- Agency strategic plan
- Agency performance metrics
- Reimbursable authority
- Leverage detailees & other term partnerships
- Agency Chief Experience Officer
- Direct report of Agency Secretary
- CX FTE
- Empathy-driven mission
- Lab @ OPM
- PIF
- USDS
- Existing CX practitioners,
- Agency innovation groups
- Private sector partners



[More >](#)

CX Agency Recipe: VA

Mixing

VEO together with VHA embarked on a multi-year journey to establish VA's first-ever patient experience program, which would prove the concept, value and impact of CX on the lives of Veterans, their families, caregivers and survivors. It began with identifying core CX capabilities (“the what”) and an operating framework (“the how”) of how to apply and implement a CX program.

The core capabilities included CX data, comprised of human centered design insights and real-time CX surveys powered by artificial intelligence, machine learning and analytics to understand and measure improvements; prototyping, building, testing and implementing tangible CX tools based on CX data to empower employees to deliver outstanding experiences; enabling, user-friendly technology for Veterans and employees; and local community engagement and strategic partnerships to connect Veterans with resources outside VA. The new CX framework to be tested included beginning with HCD and industry research culminating in VA's first-ever Veteran patient journey map that identified key moments that mattered most to the Veteran, bright spots and pain points in the journey. In collaboration with VHA employees and its innovation network, and based on the HCD insights and adapted industry best practices, VEO developed, prototyped and tested tangible tools, such as CX training, leadership rounding practices, toolkits, and other programs, to empower employees to deliver great experiences to Veteran patients. Key partnerships with non-profits, industry affiliates and academia helped further inform opportunities to adopt and adapt best practices to a government environment. In addition, a new Federal Advisory Committee (FAC) focused on Veteran family members, caregivers, and survivors was formed to ensure a holistic understanding and view of the experiences of those that support Veterans, particularly as it relates to healthcare. Further, a modernized patient advocate tracking system was developed and deployed to ensure that VHA employees could seamlessly track and resolve customer experience issues with the latest, integrated technology.

My Takeaways:



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CX Agency Recipe: VA

Mixing (continued...)

At an agency-wide level, VEO also embraced its role as lead agency partner with OMB to lead the President's Management Agenda (PMA) Cross-Agency Priority (CAP) Goal of Improving Customer Experience with Federal Services beginning in 2018. In this role, VEO shared lessons learned with sister agencies on how VA stood up its first ever agency-wide CX organization and also helped shape the transformative OMB Circular A-11 Section 280 guidance for all agencies. In August 2018, under a new Secretary, who identified customer experience as VA's "prime directive," VA issued its first-ever CX policy, which outlined the core capabilities and framework housed in VEO as VA's lead CX organization, governance structures, including cross-VA councils and integrated project teams, that would ensure that CX data was hardwired into VA strategy and decision-making with regular reporting to the VA Secretary, Deputy Secretary and other VA senior leaders, and accountability measures that would hold not only VA as an organization accountable for performance in CX, but also individuals at the SES level as well.

The graphic is a stylized recipe card with a white background and a light blue border. At the top, there is a row of vertical lines representing a vented lid. Below the lid, on the left side, is a circular icon with a wheel-like design and the word "My" inside. To the right of this icon, the text "Takeaways:" is written in a blue font. Below the text, there are seven horizontal lines for writing, with the first line being slightly longer than the others.

Ingredients:

- Agency policy
- President's Management Agenda
- Agency priority goal & annual performance plan
- Existing legislation
- Governance
- SES performance measures
- Employee innovation
- CX hubs / communities of practice
- Co-design CX solutions with employees & customers
- CX recognition
- Federal employee recognition
- Agency employee recognition
- HCD practice
- Real-time CX surveys
- CX data analytics & AI
- Back end business processes
- Tangible CX tools
- Omni-channel technology
- CX framework
- Academia
- Non-profits
- Federal Advisory Committees

VA



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CX Agency Recipe: VA

My Takeaways:

Baking

VA has continued to build on the initial vision and infrastructure created at the outset to bake in, scale and sustain CX as a core business discipline at VA now and in the future. A key driver of doing so rested in the May 2019 amendment to VA's Code of Federal Regulations. Specifically, 38 C.F.R. Part 0 outlines VA's Core Values and Characteristics, which set forth standards of all employee behaviors. Understanding that CX must be part of those core values, characteristics and VA-wide standards of behavior, VA amended the regulation to include, for the first time ever, Customer Experience Principles. The regulation expressly declares that CX is the responsibility of every VA employee, and enumerates that VA measures CX through common metrics of ease, effectiveness, and emotion, all of which drive trust in the organization.

In parallel, there continue to be many ingredients that VA and VEO pursue to ensure that CX is baked into every nook and cranny of the organization. Specifically, VA's first-ever CX Directive, which permanently codifies the Secretary's August 2018 CX policy, is near finalization, and VEO is developing a Customer Experience Institute to build internal VA CX capacity, to teach CX concepts and curriculum, and to enable the practical application of CX through project work, mentoring, coaching, and ultimately certification as a CX practitioner at VA. Partnering across agencies through the Federal CX Initiative will enable VA and non-VA practitioners to share best practices, learnings, and further offers the transformational opportunity to apply CX to cross-agency journeys. To maintain a vigilant focus on CX, VEO has identified continuing the emphasis on CX year over year as an item for consideration for VA's risk registry, and has further requested a small amount of budget authority to ensure that the VEO capability becomes a permanent part of the VA budget. A legislative proposal to codify VEO at VA is also under consideration.



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CX Agency Recipe: VA

Baking (continued...)

VA through VEO and key partnership with VA's Human Resources Administration (HRA) has also recently completed the first-ever employee experience journey map and insights report, which highlights the moments that matter most to VA employees from recruitment to retirement, bright spots and pain points. VA will apply the same recipe blueprint in building out this program, modeling after the rich CX journey it began with a game-changing catalyst in 2014.

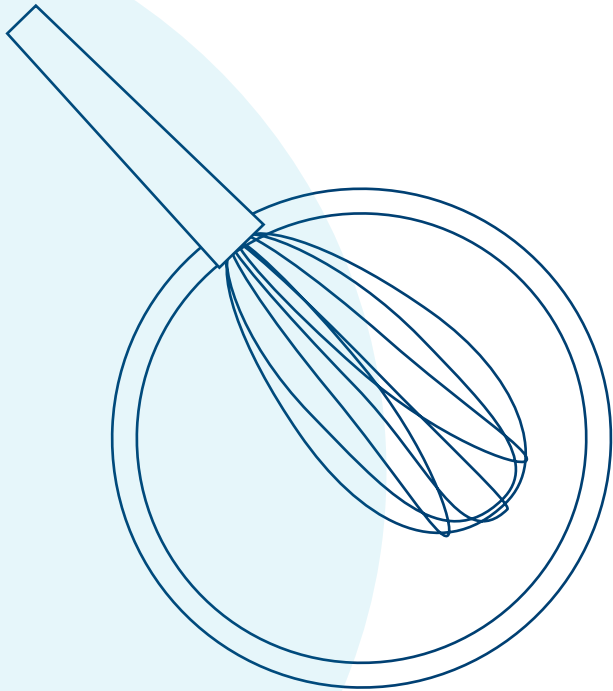
Ingredients:

- Agency regulations
- Agency directives
- Agency risk registry
- Communications
- CX positions & capacity
- CX included as Agency Core Value
- Servant Leadership
- Employee Experience
- Federal Customer Experience initiative
- CX training & certifications

My Takeaways:

CX Agency

Recipe:



Prepping



Ingredients:

Mixing



Ingredients:

Baking



Ingredients:

Resources

Kickstart Your CX Journey

- va.gov/ve
- performance.gov/cx
- lab.opm.gov
- HCD Design Phase Concept Guide
- CX Services Evaluation and Buying Guide

The 8 CX Cooking Utensils

The utensils used throughout this cookbook were carefully selected to illustrate and represent the important roles each of the 8 CX Cooking Categories play in growing an Agency CX program.



The Whisk:
The wire frame that combines all loose ingredients



The Measuring Spoons:
The tools and gauges, large and small, that power implementation



The Measuring Cup:
The fill line for necessary resources



The Rolling Pin:
The ability to mold and structure combined ingredients



The Melting Pot:
The organizational temperature that fuels collaboration and adoption



The Scraping Spatula:
The reward from concluding the prepping, mixing, and baking process



The Oven Mitt:
The insulator and open hand(shake)



The Slotted Spatula:
The flexibility and agility needed to flip, turn and move

OMB Circular A-11

Definitions

Federal Government Core Customer Experience Functions:

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

Federal Government Customer: For the purposes of OMB A-11 Circular guidance, customers are individuals, businesses, and organizations (such as grantees, state and municipal agencies) that interact with a Federal Government agency or program, either directly or via a Federal contractor or even a Federally-funded program. Federal government customers could also include public servants and employees themselves in their interactions with Federal processes.

Federal Government Customer Experience: A combination of factors that result from touchpoints between an individual, business, or organization and the Federal Government over the duration of an interaction and relationship. These factors can include ease/simplicity, efficiency/speed, and equity/transparency of the process, effectiveness/perceived value of the service itself, and the interaction with any employees. Similar to their application in the private sector, these factors can drive the overall satisfaction and confidence/trust with the program, agency, and the government at large.

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

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

The **CX** CUSTOMER EXPERIENCE Cookbook

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For additional information and resources, please contact: vets-experience@va.gov



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