Customer Experience Services Evaluation and Buying Guide
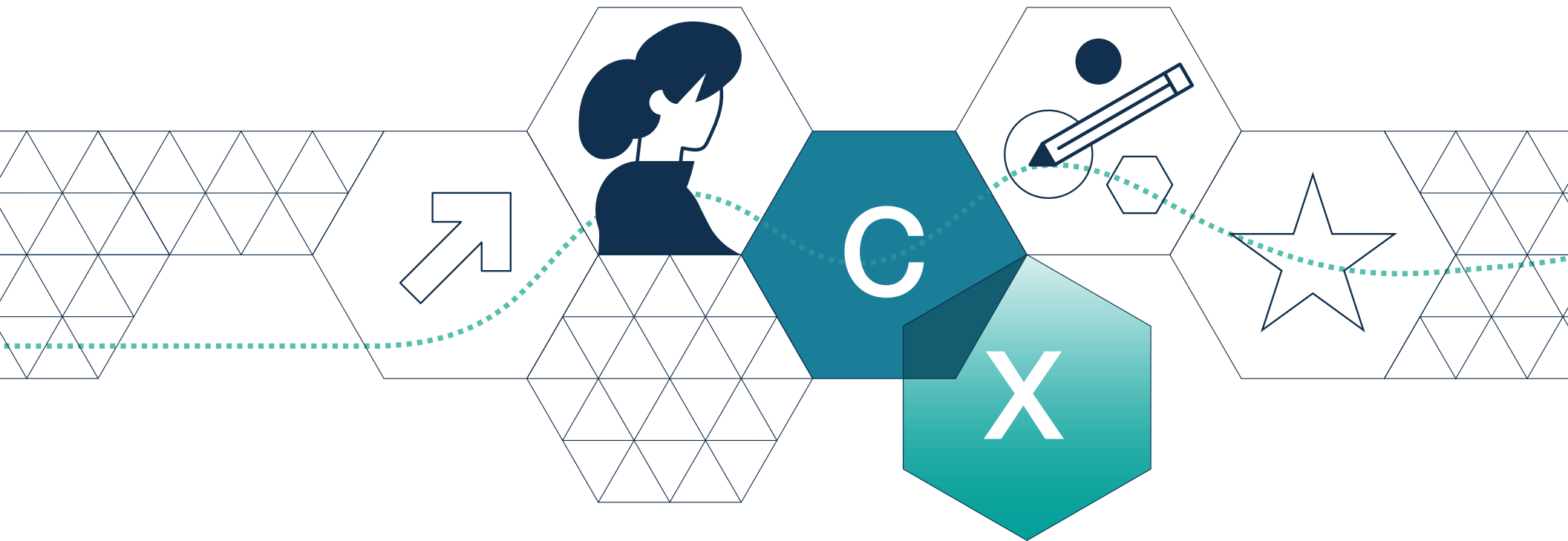
Customer-first mindset

The Federal Government is transforming how agencies improve service delivery by putting people at the center of those efforts. A new paradigm for this movement is considering the public as customers. Some agencies are developing how they do business to intentionally take on a customer-first mindset. In addition, new agendas and policies require agencies to measure and improve customer experience (CX). You may represent an agency that is already meeting those requirements and have a thorough understanding of your customers' journeys and needs. Alternatively, your agency may be just getting started, or you may simply be curious about the topic. This guide should be informative for all of these entry points.

Many businesses provide services that they claim are used to understand customer experiences and improve them. Some of these claims are reliable and some may not be. The purpose of this guide is to give evaluation recommendations to representatives of federal agencies as they shop amongst those providers. We provide a dual lens of what to seek and what to be cautious of. The guide orients to leading practices in industry and government, and the Office of Management and Budget's (OMB) annual budget guidance as context for seeking Human-centered Design (HCD) services to understand and improve customer experience.

CX in government

Customer Experience is an individual's perception of their collective interactions with an organization or a brand. It's not a new concept. As long as people have purchased goods or hired services, businesses and providers have sought to deliver quality experiences. Today, in the private sector, the most successful brands are highly attuned to customer needs and intentionally design experiences to meet and exceed those needs. The Federal Government is taking the cue. Agencies are looking differently at the public they serve. There is renewed attention on what people need from federal services. Furthermore, agencies are showing a commitment to identify service pain points so they can improve them for the customer.

The business of the Federal Government is to serve the American people.[1] The President's Management Agenda (PMA) is the Office of Management and Budget's plan for how the government should transform to deliver on this promise. One of the goals of the PMA is to provide a modern, streamlined, and responsive customer experience across government that is comparable to leading private-sector organizations. The PMA identified 25 High-Impact Service Providers (HISPs) who have numerous and key interactions with taxpayers. These HISPs were tasked to create a CX plan for their program and strategize the best ways to help their customers. OMB, in its annual budget guidance, defined what is required of agencies in a new section titled: "Managing Customer Experience and Improving Service Delivery".[2]

There is a lot to interpret and understand in order to act on it. Many of the HISPs were new to CX and recognized a need for support in order to meet requirements. But there was no guidebook on how to do it. Agencies new to CX have asked fundamental questions, such as:

- Who are our key customers in the CX framework?
- Which services or interactions should we focus on?
- What can and should we try to do in-house versus hiring staff or contractors to help with?
- What qualifications, skills, and experience are we looking for?
- What will they do when they get here?
- Where do we start?

As federal agencies mature in their CX practices, the following CX Roadmap offers an overview and guidance on what agencies should consider as they buy CX services. This guide also provides more specific guidance around the procurement of HCD services, questions to ask, and other factors to look out for when reviewing vendor submissions.

A note on the term 'customer'

You may be new to CX. If so, welcome. The word customer in CX implies a business transaction, which it can be. However, your customer may be a different stakeholder, a person for whom you're seeking to design a better experience that is not transactional. This person may be an employee or member of the general public. It's important to be clear about which customer segment you're supporting at a given time.

---

1   https://www.whitehouse.gov/omb/management/pma/

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

CX Roadmap

Focus on a persistent customer need.

Focus will concentrate momentum. Work with leaders and existing data to identify an agreed-upon pain point, then leverage contracts to bring speed and expertise to solve it.

Start with an inspiring vision for change.

Look forward and think of the story you want to tell others after the initial priority work is done. Then look backward and build a plan to realize that vision.

Think about how you will measure the impact of your CX efforts.

Stretch beyond the status quo. Envision what this service could look like in 5 years and aim to do that in 1 year.

Identify your needs and ask for help.

Find the people within and outside the organization whom you can partner with. The CX Cross Agency Priority Goal team and other agency CX professionals can help guide you through this process.

Engage stakeholders as partners and co-creators versus clients or direct reports.

Shape contractor relationships so they build the capacity of your program and agency (e.g., processes, training, templates, hiring guidance) while solving CX challenges.
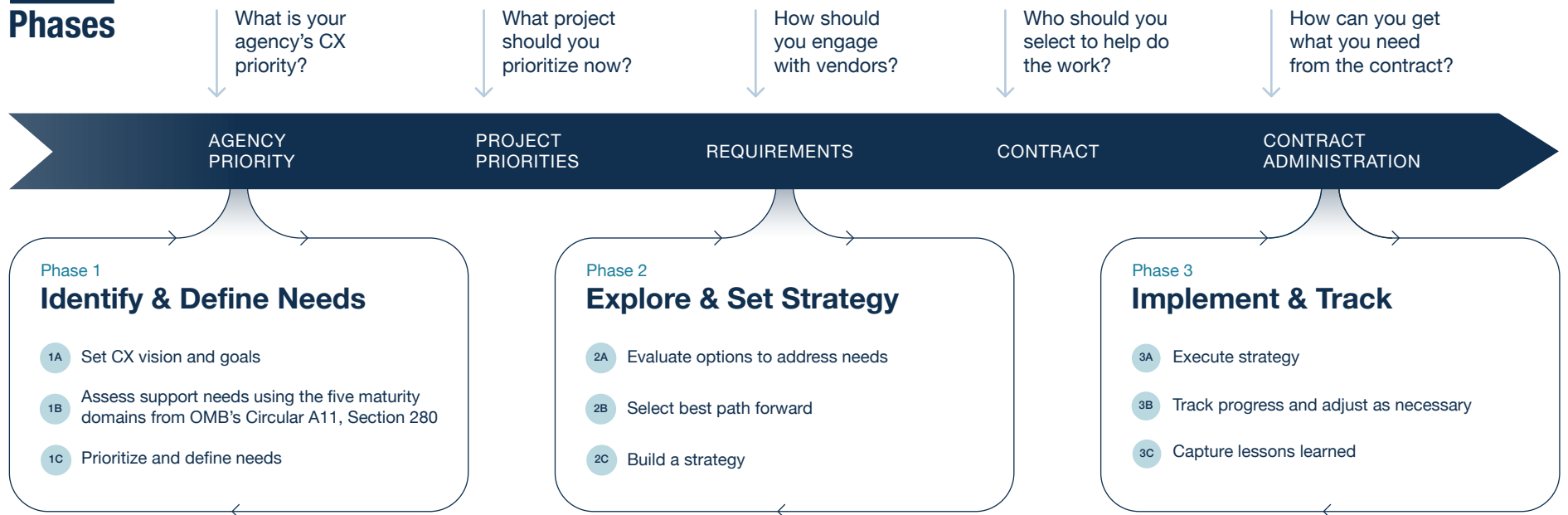
Share your research in the open.

Start talking to customers to ensure that you're solving the right problems for the right people.

Share your insights relentlessly with customers. Always keep them in the loop and they will be your biggest advocates.

Integrate periodic briefings to internal leaders within contracting agreements to share insights, choose pilots, and demonstrate results.

Phases

What is your agency's CX priority?

What project should you prioritize now?

How should you engage with vendors?

Who should you select to help do the work?

How can you get what you need from the contract?

AGENCY PRIORITY → PROJECT PRIORITIES → REQUIREMENTS → CONTRACT → CONTRACT ADMINISTRATION

Phase 1
Identify & Define Needs

- 1A Set CX vision and goals
- 1B Assess support needs using the five maturity domains from OMB's Circular A11, Section 280
- 1C Prioritize and define needs

Phase 2
Explore & Set Strategy

- 2A Evaluate options to address needs
- 2B Select best path forward
- 2C Build a strategy

Phase 3
Implement & Track

- 3A Execute strategy
- 3B Track progress and adjust as necessary
- 3C Capture lessons learned

Phase 1

Identify & Define Needs

1A Set CX vision and goals

Start by creating an aspirational description of the customer experience that your organization wants to provide.

Key questions for you to ask:

- What does great CX look like for our organization?

- What are the biggest CX challenges that we want to focus on?

- What should our goals be to meet those challenges; how will we measure progress?

1B Assess support needs using the five A-11 domains

Determine your greatest CX support needs. Frame your assessment around the A-11 CX maturity domains: Measurement, Governance, Organization & Culture, Customer Research, Service Design.

Key questions for you to ask:

- What projects should we take on to address our biggest challenges and advance our CX maturity?

- What are the CX capacity and skill gaps that we need to fill to effectively take on those key projects and advance our CX maturity?

1C Prioritize and define needs

Consider how your CX vision and goals align with those of your agency and leadership priorities.

Key questions for you to ask:

- What are the projects that we should focus on first?

- What resources will we need to take on our priority projects?

- How might we best describe those resource needs?

Phase 2

Explore & Set Strategy

2A Evaluate options to address needs

Consider the options for taking on priority projects and advancing the CX maturity of your organization.

Key questions for you to ask:

- How might we leverage existing resources?

- What are our options (beyond the existing resources)?

- For each option, what are the pros and cons, and what kind of return on investment might we expect?

2B Select the best path forward

After taking a hard look at each option, recommend your best path forward to decision makers.

Key questions for you to ask:

- Have you engaged with key stakeholders in evaluating your options and selecting your best path forward?

- What is the estimated cost and level of effort to implement your recommendations?

- What are the expected benefits of your selected option?

2C Build a strategy

Circle back to *Phase 1* and create a strategy that links your selected path with the vision, goals, and needs that you defined. Your partnership with acquisition staff is crucial at this stage.

Key questions for you to ask:

- What work should remain in-house vs. what should be contracted?

- For contracted work, what is your acquisition strategy?

- How will you measure success?

Phase 3

Implement & Track

3A Execute strategy

Ensure that you have the in-house CX skills and capacity needed to effectively execute your acquisition strategy. Consider partnering with other federal CX professionals.

Key questions for you to ask:

- Is there a pool of strong CX services vendors, vetted via market research or other means?

- Are all of the key ingredients for a solid acquisition in place (timeline, funds, Performance Work Statement (PWS)/Statement of Objectives (SOO), Quality Assurance Surveillance Plan (QASP), source selection plan, etc.)?

3B Track progress and adjust as necessary

As you onboard a CX services contractor, you'll want to communicate expectations and how you will partner to take on priority projects and advance the CX maturity of your organization.

Key questions for you to ask:

- Do you have a contract administration plan?

- Do you have a consistent cadence of communications and progress reporting activities in place?

- Have you engaged with all key stakeholders along the way and do you have a process in place to gather their feedback?

3C Capture lessons learned

As you learn what works/does not work, you'll want to capture those lessons. This is key to continuously improving your CX program.

Key questions for you to ask:

- Do we have a consistent process in place for capturing and sharing lessons learned?

- Is our CX program improving based on lessons learned?

Principles for evaluating CX service providers

The rise in attention on CX in government has brought an influx of articles, reports, books, and guides, which vary in emphasis and orientation. Most include putting the customer at the center of service evaluation and improvement. For this guide, we've surfaced five CX principles pertinent to evaluating service providers.

The evaluation criteria shared in this guide is synthesized from 108 responses to a Request for Information (RFI) completed by businesses on their capabilities to provide HCD services in the context of CX. GSA's Office of Customer Experience (OCE) initiated the RFI, reviewed the responses, and authored this guide. If you're more interested in the RFI and how OCE conducted the study, please skip to

If you're new to this approach, you may wonder what Human-centered Design has to do with customer experience. HCD is a method that service providers use to understand real customer needs and to design or improve service delivery based on that understanding. A firm may not use the term HCD; however, CX work will always center on the customer from start to finish.

5 CX principles

The firms which you consider should be able to address each of these principles in their case studies and responses.

1. Start with empathy for the customer

2. Use HCD practices to understand customer journeys and needs

3. Involve customers in service design improvements

4. Create, test, and refine ideas and solutions

5. Measure efforts against outcomes that point to tangible improvements in customer experience

Evaluation criteria of industry partners

What to seek

- A clear description of the firm's Human-centered Design methodology and how it has been applied in practice (see case study reference below)

- Fluency in applying customer experience principles and practices

- At least one in-depth case study that includes:
  - A clear focus on a customer experience project
  - A description of the firm's role, the scope of their work, and how they worked with the client and customers
  - The activities taken to understand customer needs and challenges across touchpoints
  - An explanation for how the firm and client focused on the domain for the project. Did the client hire the firm to execute tasks or to help frame the problem to be solved?
  - A description of the solution and how they arrived at it
  - Artifacts from the project, such as research materials, maps, diagrams, or prototypes

- A summary of the impact that the firm had on helping the client achieve customer-centered outcomes

- Relevant examples, details, and artifacts which demonstrate an understanding of all five OMB Circular A11, Section 280 domains (Measurement, Governance and Strategy, Culture and Organization, Customer Research, and Service Design)

Shortlist of responsibilities

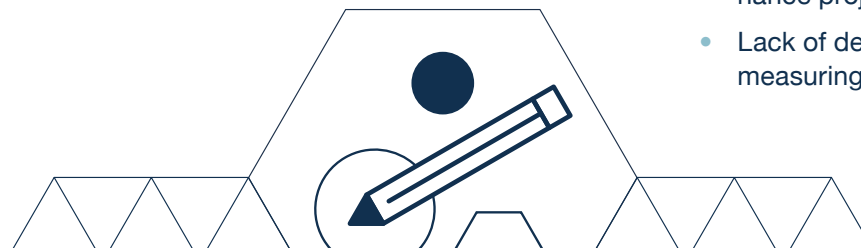Sample evaluation criteria for full-time staff or contract support:

- Lead and manage complex projects from discovery and design to technical development and implementation

- Utilize HCD methods, tools, and approaches, such as: design thinking, service design, content design, product design, behavioral science, ethnographic research, usability research, or accessibility assessment

- Develop research plans with an understanding of how disparate systems function and change over time with multiple user groups

- Execute research that helps programs better understand stakeholder needs to inform improvements to products, services, policies, and processes

- Produce user needs specs. & experience goals, personas, journey maps, storyboards, scenarios, flowcharts, and design prototypes

- Make findings relevant and impactful for design and action through a variety of formats such as insights, stories, videos, experiences and exhibits

- Design product and service ideas with low and high fidelity mockups using methods like sketching, wireframing, and/or prototyping

- Plan, manage, and execute on an idea from concept to launch to meet key milestones and real customer needs

What to seek (continued)

- Appropriate tools and approaches have been utilized for specific needs (e.g., personas for customer segmentation)

- Applied customer insights and evidence to set strategic design direction for projects

- Expertise using a variety of quantitative and qualitative customer feedback collection methods and tools

- Approach and examples of the firm collaborating with clients throughout projects, including evidence of teaching or training on HCD methods

- Experience working with multiple stakeholders across a delivery system and organization chart

- Quality design artifacts including: journey maps, service blueprints, personas, prototypes, wireframes, data visualizations, and customer stories. Don't be afraid to ask for these and other relevant examples in your engagements with industry

- Experience and/or familiarity working with systems, processes, policies, and regulations

- Ability to work efficiently and effectively moving through HCD processes

- Work that spans and integrates multiple channels (e.g., website or kiosk) and touchpoints (e.g. login or call for support) to improve CX

- Competent project management including: scoping, planning, staffing, using the right methods, meeting milestones, evaluation, reporting accomplishments, and staying on budget

What to be cautious of

- Lack of specificity and quality of the response overall, such as generic sales pitches

- Long list of certifications that are not relevant to your requirements

- Heavy on methods, services, and details about the firm while lightly covering case study details

- Emphasis on the design and deployment of complex technology solutions; may look like narrow focus on digital tools or touchpoints

- Lack of understanding of the differences between HCD, Agile, and Lean methodologies. For example, a vendor may describe a client project that followed the steps of an Agile development process as a sample of their HCD experience. Moreover, scout for businesses that deliberately mislabel or mischaracterize work to fit RFI criteria

- Pitching a pre-packaged solution vs. a tailored approach that is based on client's real customer needs

- Insufficient explanation of root cause analysis, customer understanding, and problem/opportunity framing

- Lack of relevant experience, examples, or evidence to demonstrate fluency with subject matter or ability to perform HCD work in service of CX projects

- Within a case study or project, there is no clear indication of how the firm's work has contributed to a measurable outcome

- Length of HCD projects: they typically are short term (weeks to months). Be skeptical of open-ended maintenance projects that last for years, without defined goals

- Lack of demonstrated competence in assessing and measuring customer experience

Questions for framing CX efforts and HCD services acquisition

In building a plan for acquiring HCD support services, there are a number of questions you'll want to address, such as:

- What support services do you need, e.g., initial discovery research, customer journey mapping, service design, establishing CX measures, CX capacity building?

- Are there specific CX challenges and opportunities that you want to take on?

- How might you leverage existing resources?

- What are your options (beyond working with the existing resources)?

- Have you engaged with key stakeholders in evaluating your options?

- What is the estimated cost/level of effort and benefits for each option?

- What work should remain in-house vs. what should be contracted?

- How will you measure success?

How might you engage with vendors

In an effort to improve awareness of how to engage with vendors, the White House published business strategies for departments and agencies to use. Visit this link to learn more about great ways to engage the vendor community: https://www.whitehouse.gov/wp-content/uploads/2019/05/SIGNED-Myth-Busting-4-Strenthening-Engagement-with-Industry-Partners-through-Innovative-Business-Practices.pdf

Once you have an acquisition plan to fulfill your HCD service needs, there are a number of ways to procure those services. GSA offers acquisition vehicles. Visit this site for more information: https://www.gsa.gov/buying-selling/products-services/professional-services

We also advise partnering with your agency's procurement services organization to explore your options for procuring HCD services.

Reference the Periodic Table of Acquisition Innovation: https://www.fai.gov/periodic-table/

The RFI

GSA's Office of Customer Experience (OCE) is the first agency-wide organization to focus solely on improving customer experience and fostering a customer-first mentality. The team assisted with many CX efforts under the PMA. In seeing that many HISPs don't have in-house expertise to perform HCD methods, OCE wanted to make it easier for them to find partners outside of the government. OCE sent a Request for Information (RFI) to industry using GSA's Market Research as a Service. The intent of the RFI was to provide HISPs and the rest of the government a base from which to start their search for partnerships.

The RFI asked firms to provide the following information:

- Currently held government contracts
- NAICS code
- Business size
- Socio-economic category

The RFI also asked respondents to answer questions on whether they had relevant experience providing certain types of services listed in the five domains of OMB's Circular A11, Section 280, Managing Customer Experience and Improving Service Delivery:

- Measurement
- Governance
- Organization & Culture
- Customer Research
- Service Design

Lastly, the RFI asked respondents to share a CX project with a medium to large client that spans the full-range from discovery to design to measurement. The RFI required them to submit one to three examples and to limit their submission to three pages. Of note for the reader, the following data includes vendors who currently offer HCD and CX services through GSA contracts and some who currently do not.

Data on RFI responses

OCE received a total of 108 submissions. The following are the small-business designations:

- 74 identifying as small-business
- 11 8(a)
- 10 Woman Owned Small Business (WOSB)
- 8 Small Disadvantaged Business
- 6 HubZone
- 6 Service-Disabled Veteran-Owned
- 6 Woman-Owned Business
- 4 Economically Disadvantaged WOSB
- 4 Veteran Owned Small Business

Here are the number of respondents who held government contracts through GSA:

- 76 Schedule 70
- 40 00CORP
- 14 Stars 2
- 11 OASIS Unrestricted
- 10 Alliant 2
- 1 OASIS Small Business
- 34 Other GSA Contracts
- 8 No GSA contract

What is an RFI in government?

A Request for Information (RFI) is a step in a procurement process that allows the government to gather information from service providers and stakeholders to define the goals toward a desired result. This is a collaborative step, one that creates a shared vision for success and leads to a more effective Request for Proposals.[1]

---

1 https://results4america.org/tools/rfi-guide-requests-information-can-improve-government-human-services-contracting/

Where to go for additional information

There are great resources available to federal agencies looking to advance CX and HCD at their organizations. Here are a selection sources that we recommend learning from:

- The CX Cross-Agency Priority Goal: https://www.performance.gov/CAP/cx/
- The Lab at the Office Of Personnel Management: https://lab.opm.gov/
- The GSA OCE: https://www.gsa.gov/about-us/organization/office-of-customer-experience
- The GSA CX Center of Excellence: https://coe.gsa.gov/coe/customer-experience.html
- The U.S. Digital Service: https://www.usds.gov/
- Defense Digital Service https://dds.mil/
- 18F https://18f.gsa.gov/, https://methods.18f.gov/
- Veterans Experience Office https://www.va.gov/ve/
- Digital.gov's Customer Experience Toolkit https://digital.gov/resources/customer-experience-toolkit/
- Paperwork Reduction Act: https://pra.digital.gov

This is the first version of this guide. You may have questions or concerns that are not addressed here. We welcome your feedback and comments to inform future versions.

Please let us know what you think of this. We want to make this valuable for any federal employee trying to make a better citizen experience. If you have any questions or comments, please email CustomerExperience@gsa.gov