Exploring EX + CX

Improving Federal Customer Experience and Service Delivery

ACT IAC Annual CX Summit

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US BY THE PEOPLE
FOR THE PEOPLE
WITH THE PEOPLE

After holding at the same (low) point since 2014, in 2019 and 2020 Federal satisfaction gained[1]

For the first time, SBA is conducting a customer experience survey through its 68 district offices, the point of delivery for most SBA programs and services

Monitoring search terms and call-center questions, *recreation.gov* discovered that the term "walk-up" was confusing to users on their site; changing that language to "first-come, first-serve" resulted in a 78% reduction in user searches and user comments

NextGen FSA consolidated multiple websites into a single, digital front door: StudentAid.gov. With this new site, students, parents, and borrowers will be able to access all the information and tools they currently use through an improved interface

The Bureau of Trust Funds Administration (BTFA) is in the midst of its first-ever customer journey mapping effort to visualize the "current state" of the beneficiaries' journey as they interact with BTFA at all touchpoints and through multiple channels

The Bureau of Consular Affairs has empowered certain front-line employees (even below the GS-13 level) with delegated authority to make decisions on opening a passport agency during the weekend or after hours for U.S. citizens who need to quickly reach family members abroad in extreme scenarios.

The General Services Administration launched *Touchpoints*, a low-cost, simple, and secure survey tool that enables agencies to easily spin up feedback surveys, with GSA managing a central PRA clearance averaging 2 days to cleared

Over 90% of outpatient customers of the Veterans Health Administration trust the VA to fulfill the country's commitment to Veterans

2018 – 2020 activity summary

agency enablers

Created "CX Strategist" position description for GS-13/14/15 levels w/ associated competencies, task descriptions, and interview questions / guides

Conducted government-wide SME-QA CX hiring pilot to hire more than 20 CX Strategists at more than 10 agencies

Created "CX Buying Guide" in alignment with CX maturity roadmap on types of services and how to navigate procurement

Worked with OIRA to create new umbrella clearance package, as well as entirely new "CX Desk" workflow

Developed trainings for agencies on customer journey mapping, each element of the CX maturity model in collaboration with MITRE, website analytics, and service definition workshop

Facilitated a C-suite / Assistant Secretary CX roundtable with the Office of American Innovation

Developed no-cost, PRA-covered survey tool: Touchpoints

central capacity demonstration

Published first-ever guidance on CX (OMB Circular A-11 Section 280)

Conducted deep-dives with all 25 High Impact Service Providers to assess maturity and identity priorities for development

Developed cross-agency journey map for Service Member transitioning to civilian employment

Supported the design of a $1M challenge with DOL, DOD, and VA based on journey map findings

Completed analysis of government-wide CX feedback data

Publically released CX Action Plans for all HISPs

Built individual HISP pages to share CX data on performance.gov

Supported budget examiners in the FY20 and FY21 budgeting process to allocate dollars to promising CX investments in alignment with CX Action Plans

Ongoing coaching with HISPs on their CX programs

Recent 2020 activities

last three months / initiatives to be completed by 12/30

Completed and packaged *Amplify* Customer Understanding Program for agency teams across government – it's all online!

Led cross-agency teams to complete two more journey maps:

> Individual with a disability customer journey map (CMS, DOL, ED, SSA, HUD)

> Individual surviving natural disaster customer journey map (FEMA, SBA, HUD, HHS)

Conducted CX Strategist SME-QA Hiring Effort

Release of VA's "CX Cookbook" plays and success stories

Completion of CX Data Case Studies on EX<<>>CX: TSA, VHA

- ❑ Identifying recommendations to address more structural, transformational actions to improve customer experience and Federal services to inform the next term and 2021 PMA

- ❑ Sharing soon: Blogposts on Feedback Data Lessons, Amplify, 2020 Reflection on Federal CX, Recommendations for the future of Federal CX

US

OMB Circular A-11 Section 280 institutionalizes CX practices and measurement

Office of Management and Budget Circular A-11 Section 280

Conduct an **annual self-assessment** against CX maturity model

Collect **customer feedback across government-wide metrics** and report quarterly, through public-facing dashboards

Develop **action plans** in line with annual agency strategy and budget efforts to improve customer experience maturity and measures

How can we layer Federal priorities + activities?

(Some of) Agency To-Do List

- ✓ Customer Experience

- ✓ Workforce of the Future

- ✓ Leveraging data as a strategic asset

- ✓ Foundations for Evidence-based policymaking Act and deliverables

- ✓ Federal performance framework and deliverables

Agency Case Study

Transportation
Security
Administration

Case Study: TSA

DHS Strategic Objective

6.2 Develop and Maintain a High Performing Workforce

6.2.3 Improve personnel training, professional development, and education opportunities

6.2.6 Improve leadership communication with the workforce

2019 CX Capacity Assessment + Action Plan

One of the lowest-scoring areas was "Organization & Culture" – and noted critical role of the front-line employees

Actions taken:

- Conducted customer feedback from sample of airports nationwide

- Focused on improving Transportation Security Officer (TSO) communication and training for additional screening

2020 CX Capacity Assessment + Action Plan

- How can we connect CX to priorities our leaders are engaged on?

- How can we better make use of our administrative data (employee feedback, operational data, customer feedback) to mission objectives (trust in TSA, security incidences)?

Case Study: TSA

What We're Trying to Connect and Learn

Customers require clear communication from Transportation Security Officers (TSOs) regarding security checkpoint procedures. Many passengers are not seasoned **travelers and thus unsure of what to expect at the screening checkpoint**. Additionally, **screening procedures change regularly and vary from airport to airport**. Given this, **clear communication from TSOs is critical to ensure a positive customer experience**.

The TSOs are trying to get passengers through the screening process as quickly as possible while maintaining the highest level of security. **Importantly focused on security, constantly ensuring they themselves understand updated policies or guidance, and facing the same stressors as travelers (parking, construction, etc.), TSOs must also deliver on customer experience objectives.**

21% of passengers surveyed stated that additional screening was not explained

Question

Do airports that have a more engaged workforce also have less customer complaints?

Data Sets

Federal Employee Viewpoint Survey (FEVS) data: filtered for TSO job series, by airport, and the Employee Engagement Index (EEI) which is comprised of 15 items grouped into 3 sub factors: Leaders lead – focuses on opinions on senior leaders, Supervisor – statements on direct supervisors, Intrinsic Work Experience – feelings about employee's work/workplace

TSA Contact Center complaint data: total count of calls labeled "complaints" for 2018, 2019

Airport Category data: TSA and the FAA classify US airports based on various factors such as throughput of passengers, number of takeoffs and landings, extent of passenger screening, and other security considerations

How Do I Read the Following Maps?

- Each circle represents an airport location

- Color of circle indicates number of complaints (darker red = more / top quartile of complaints)

- Size of circle indicates categorization size of airport

- Shading of circles indicates EEI score (more shading = more engagement, empty circle / bottom quartile of engagement)

Number of Complaints Received

Lowest   Highest

Employee Engagement

Highest   Lowest
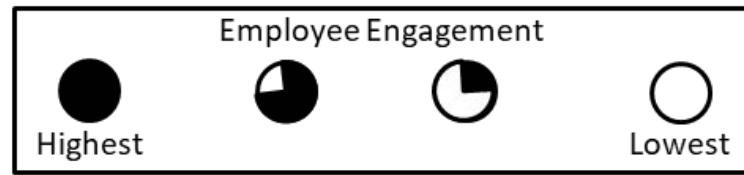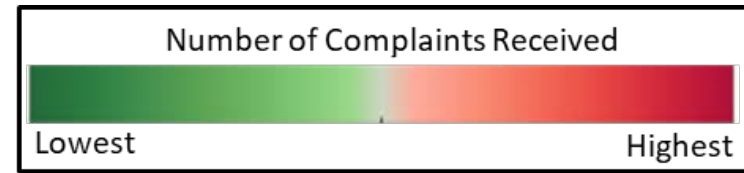
The size of the circle shows the throughput at the airport.

View 1: Employee Engagement + Passenger Throughput

View 2: EEI Layered with Complaint Data

Number of Complaints Received

Lowest — Highest

Employee Engagement

Highest — Lowest

The size of the circle shows the throughput at the airport.

*Customer satisfaction is represented by the number of complaints received.

View 3: EEI Layered with Complaint Data (Filtered Specific Airports)

O'Hare Airport

Midway Airport

Number of Complaints Received

Lowest — Highest

Employee Engagement

Highest — Lowest

The size of the circle shows the throughput at the airport.
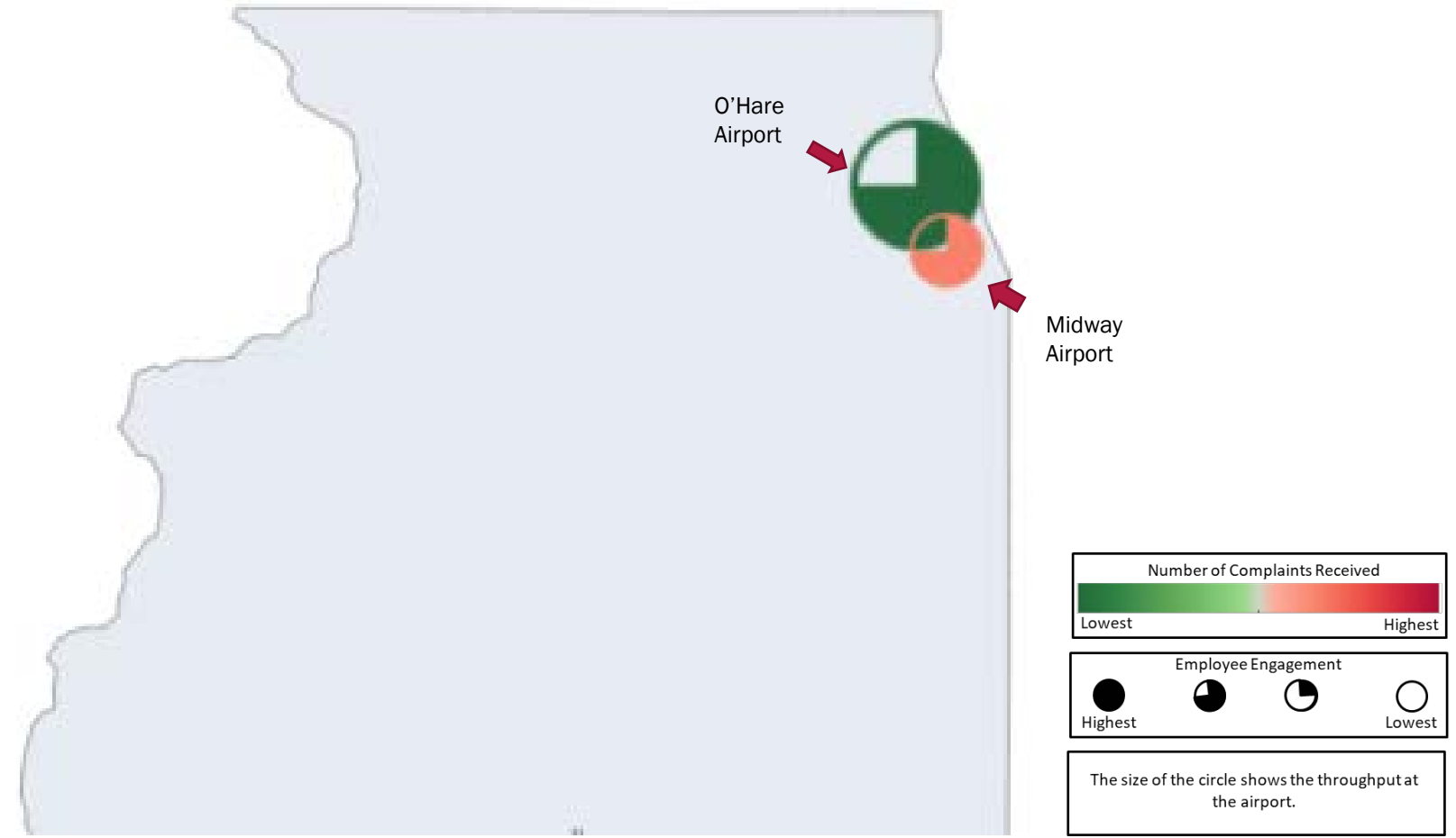
View 4: Similar Realities =/= Similar EX and CX
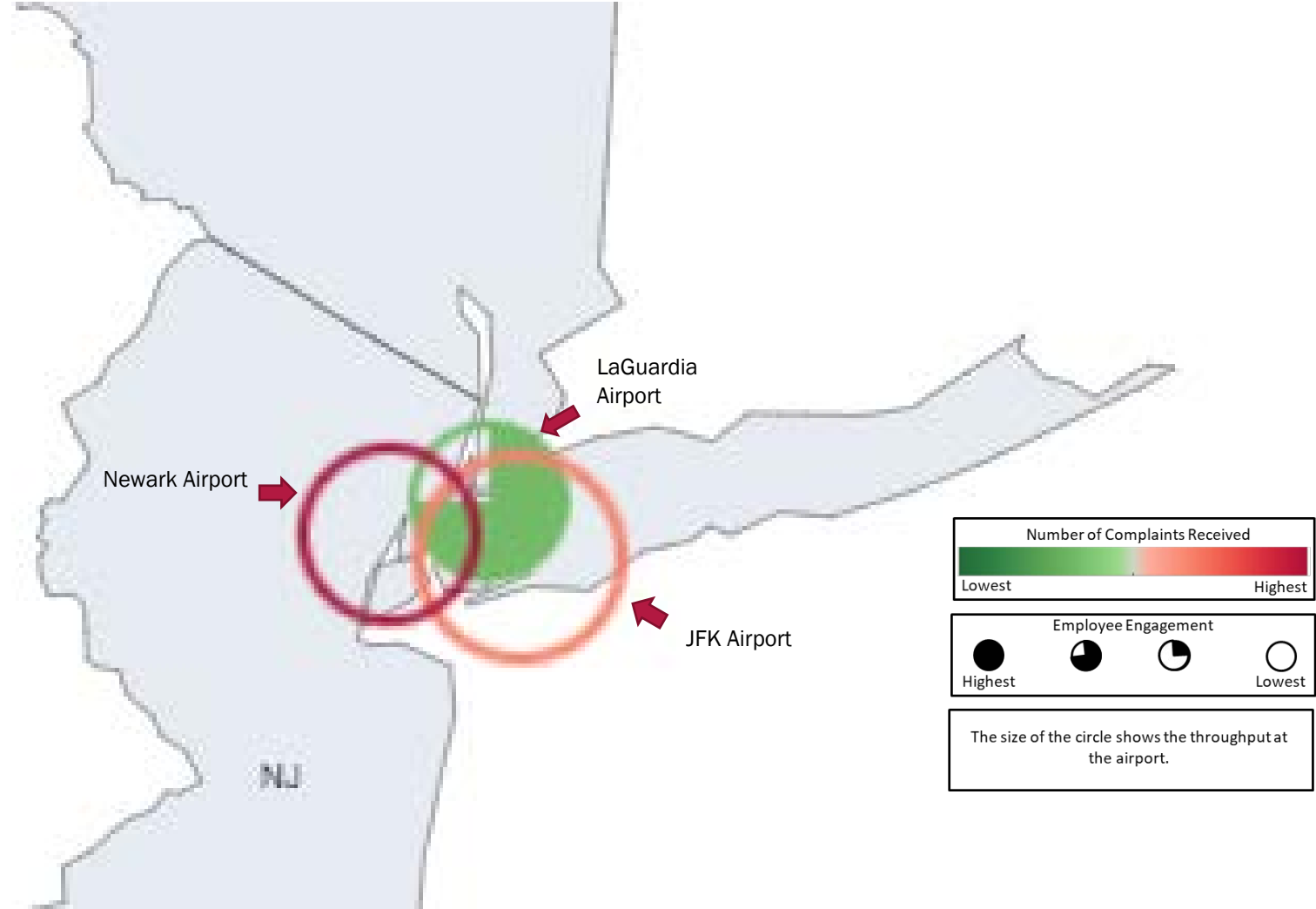
Agency Case Study

Case Study: VHA

Agency Strategic Objective

Promote a culture where every Veteran receives an exceptional experience which is easy, effective, and emotionally resonate to build trust. – VHA Patient Experience Mission

2019 CX capacity assessment + action plan

One of VHA's focus areas based on the 2019 CX Capacity Assessment was "Organization & Culture" - VA employees play an important part of providing great customer experiences. Our Veterans interact with VHA in a myriad of ways: calling a VHA call center, going to a VHA community-based outpatient clinic for a primary care appointment, visiting a VHA business office, getting admitted to one of VHA inpatient services, and all of these interactions are with VHA employees who had not received the same customer experience training. Furthermore, an effective customer experience training would also help improve employee experience.

Actions taken –

- *Deployed a CX standardized training across VHA ('Own the Moment' (OTM)). OTM teaches how to create great customer experiences by defining customer experience and shares three overarching principles based on VA's CX Principles (Ease, Effectiveness, Emotion): Guide the Journey (Ease); Understand and Respond to Needs (Effectiveness); and Connect and Care (Emotion). Own the Moment also introduces "the VA Way" to deliver great customer experiences. The VA Way is comprised of three elements: VA's Core Values (ICARE: **I**ntegrity, **C**ommitment, **A**dvocacy, **R**espect, **E**xcellence), VA Behaviors (WECARE: **W**elcome, **E**xplain, **C**onnect, **A**ctively Listen, **R**espond, **E**xpress Gratitude), and service recovery.*

- *VHA has trained **100,708 full-time employees** in OTM, which is 27.43% of all VHA employees (367,088) as of 10.2.2020*

Case Study: VHA

Agency Strategic Objective

Promote a culture where every Veteran receives an exceptional experience which is easy, effective, and emotionally resonate to build trust. – VHA Patient Experience Mission

2020 CX capacity assessment + action plan

2020 CX capacity assessment and 2020 CX Action Plan focused VHA's attention more on improving services directly and less on building internal capabilities. Another area of focus from 2019 was Customer Research. Leveraging human-centered design, VHA developed a journey map and tools to improve the Inpatient Experience in VHA Medical Centers/Hospitals. For 2020, VHA began deploying three inpatient experience tools to improve the discharge experience of our patients:

- *Discharge Checklist*

- *Journey to Discharge Booklet*

- *Caregiver Support Guide*

The full deployment of these tools will continue through FY21 due to COVID-19.

VA INPATIENT DISCHARGE EXPERIENCE JOURNEY MAP
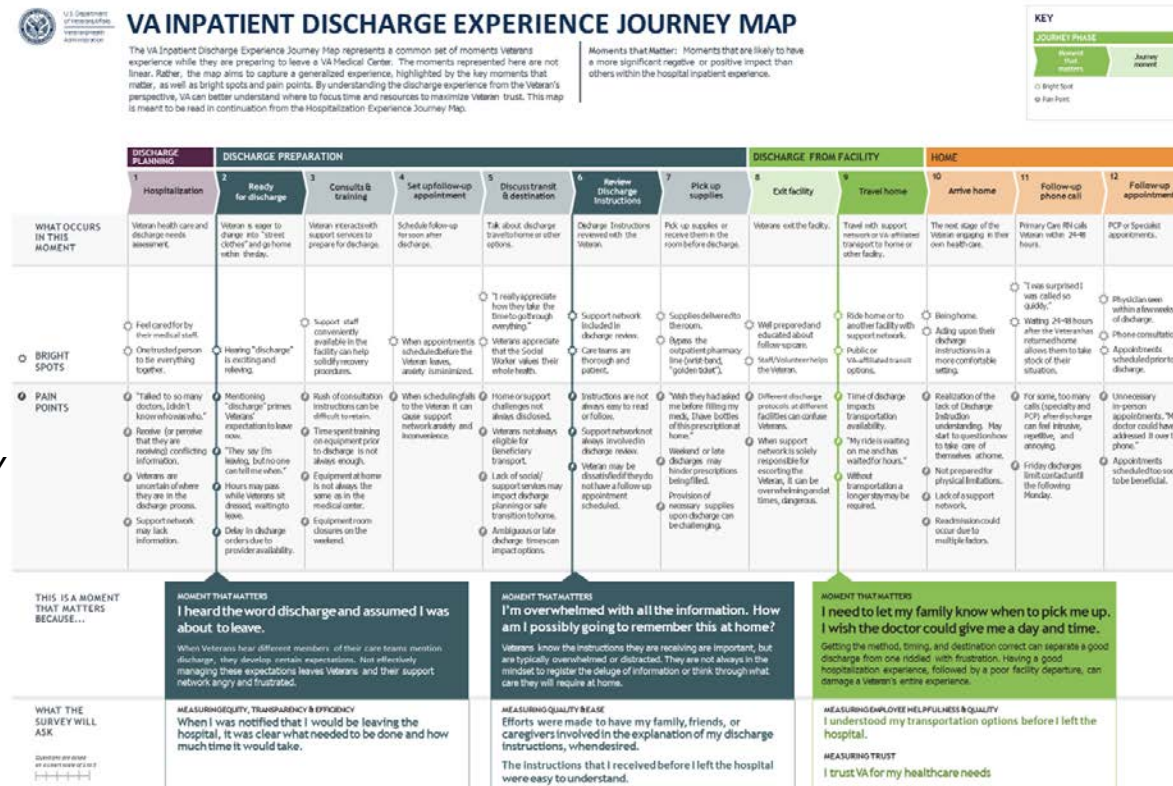
Case Study: VHA

VHA Outpatient Services:
Employee Engagement and Customer Satisfaction* Visualization

- Data from 136 facilities across the US

- <u>Customer satisfaction</u>: 87.5% of patients agree or strongly agree with the statement "I trust my facility for my healthcare needs."

- <u>Employee engagement (FEVS/AES scores)</u>: 58-81% (Federal Government average = 68%)

Agree or strongly agree with "I trust my facility"

Highest — Lowest

Employee Engagement

Highest — Lowest

The size of the circle shows the relative number of surveys collected at the location.

*Customer satisfaction is represented by the percentage of people that agree or strongly agree with the statement "I trust my facility for my healthcare needs."
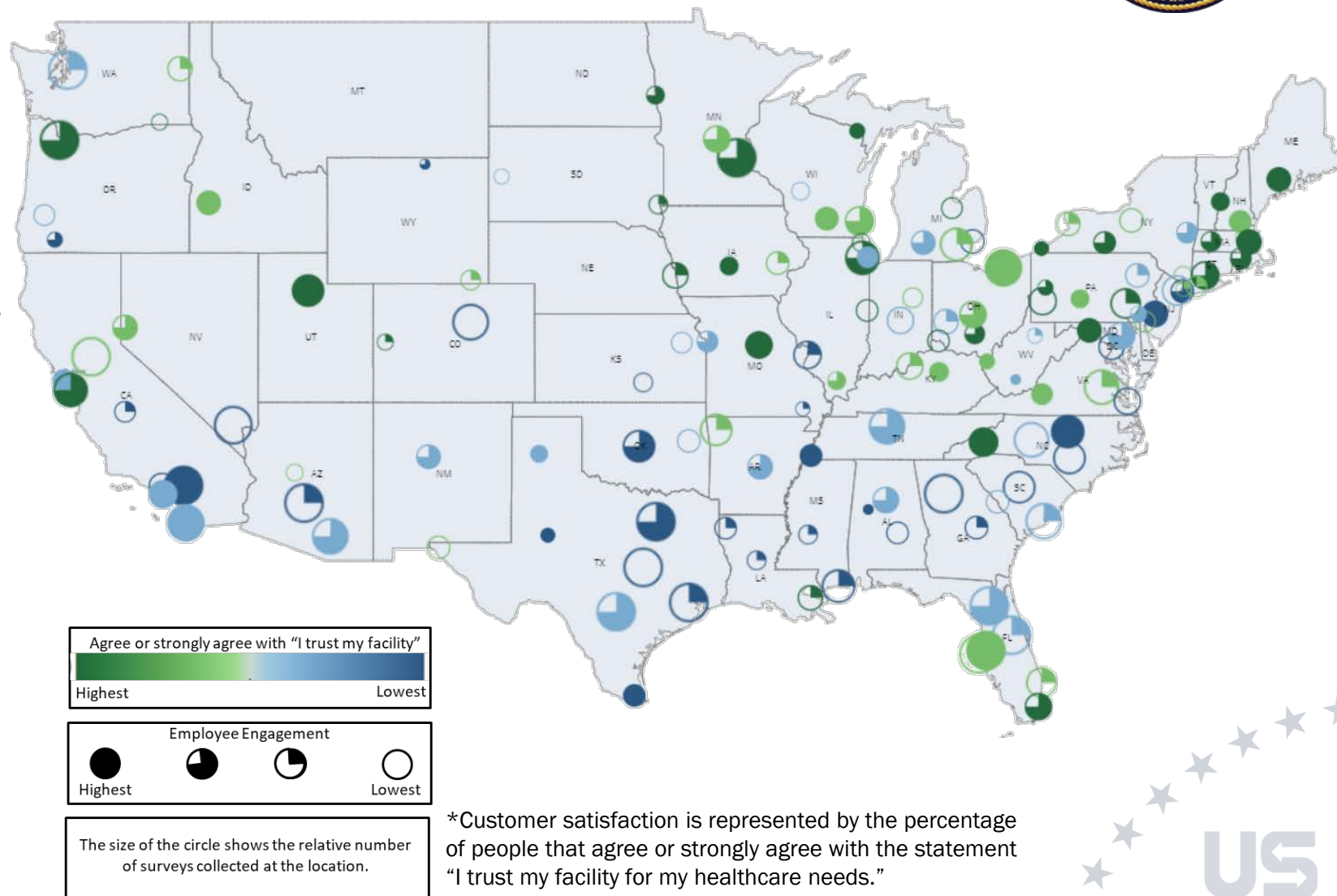
Case Study: VHA

VHA Outpatient Services:
Employee Engagement and Customer
Satisfaction* Observations

- VHA outpatient customer satisfaction shows a positive relationship with employee engagement

- Visualizations show range of performance and areas to explore further

- There are pockets within the same state or geographic area that have wide ranges of scores

- Dallas VAMC has brought in the voice of the employee to gain their insights and include in decision making
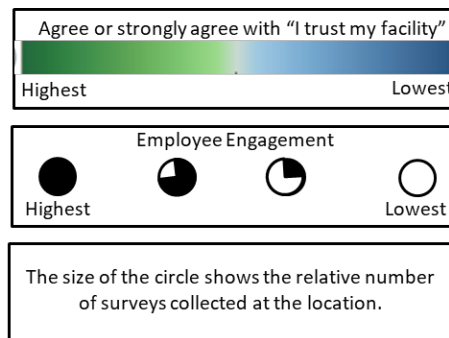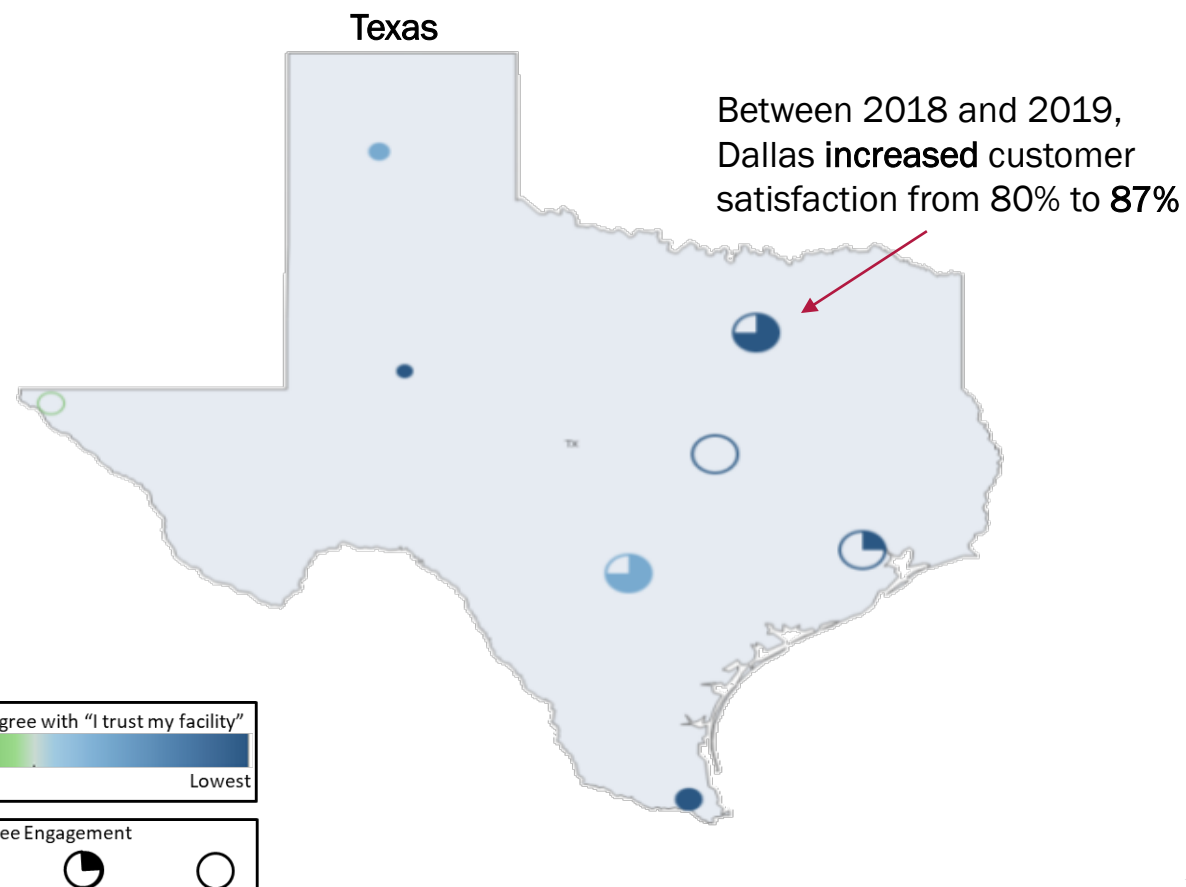
Texas

Between 2018 and 2019, Dallas **increased** customer satisfaction from 80% to **87%**

Agree or strongly agree with "I trust my facility"

Highest   Lowest

Employee Engagement

Highest   Lowest

The size of the circle shows the relative number of surveys collected at the location.

*Customer satisfaction is represented by the percentage of people that agree or strongly agree with the statement "I trust my facility for my healthcare needs."

Case Study: VA

VA Employee Journey Map

Objective: Provide **easy, effective and emotionally resonant** experiences **for employees across their workforce life-cycle** as members of the VA team. Leverage proven CX data, tools, technology and engagement capabilities that will support the culture of employee customer service so they **Choose VA**.

Identify the *moments that matter* to improve the employee experience (EX), which in turn will improve the customer experience (CX). By researching moments that matter (e.g., applying, hiring, onboarding), the team has identified bright spots and pain points encountered throughout an employee's journey with VA.

Delivered the following product in 2020:
- VA's first-ever **EX journey map** (from 'Considering and getting in' to 'Moving on') to identify key *moments that matter* to VA employees

Employee Experience

Customer Experience

Case Study: VA

VA Employee Journey Map

- 11,000 data points were captured from employee experience interviews

- 5 phases in which an employees' goals and expectations are distinctly different

  - **Considering & Getting in**

  - **Starting Up**

  - **Performing, Growing, and Adapting**

  - **Changing Roles**

  - **Moving On**

- Within the 5 phases, there are 23 employment stages a VA employee may encounter

- Within the 23 stages, 30 identifiable Moments that Matter are highlighted

SITE VISIT LOCATIONS
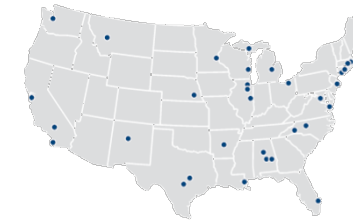
- Austin, TX
- Albuquerque, NM
- Asheville, NC
- Bedford, MA
- Birmingham, AL
- Boston, MA
- Brockton, MA
- Cleveland, OH
- Danville, IL
- Eatonton, NJ
- Elwood, IL
- Fort Harrison, MT
- Hines, IL
- Iron Mountain, MI
- Kent, WA
- Lincoln, NE
- Little Rock, AR

- Loma Linda, CA
- Milwaukee, WI
- Montgomery, AL
- Newington, CT
- New Orleans, LA
- Palo Alto, CA
- Saginaw, MI
- San Antonio, TX
- San Diego, CA
- St. Paul, MN
- Tuskegee, AL
- Washington, DC
- West Haven, CT
- West Palm Beach, FL
- West Roxbury, MA
- Winston-Salem, NC

SITE VISITS BY THE NUMBERS

11,000+ Data points   **33** Locations visited

INTERVIEWEE DIVERSITY

Interviewed a diverse set of VA employees across several variables:
- Workplaces: large facilities, small facilities, and telework
- Level: SES, general schedule, and wage grade
- Function: Veteran-facing and non-Veteran-facing
- Hours worked: part-time and full-time
- Job: Job title and program office
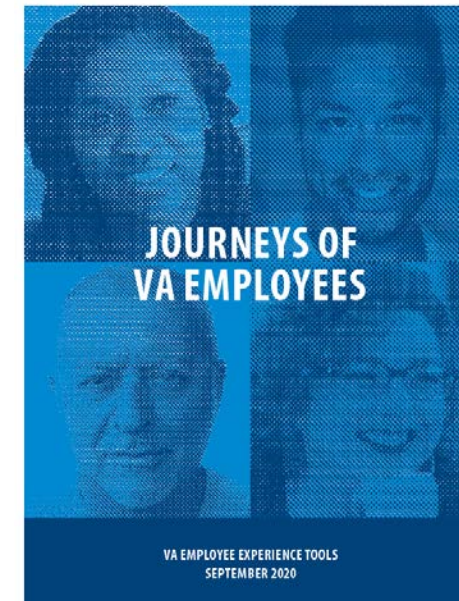
JOURNEYS OF VA EMPLOYEES

VA EMPLOYEE EXPERIENCE TOOLS
SEPTEMBER 2020

This map covers 23 career stages any VA employee may encounter, from searching to staying connected. These stages are organized in five phases in which each employee's goals and aspirations are distinctly different. Each employment stage lists out moments employees typically experience and calls out key Moments that Matter which may have significant impact on employees' experiences.

Not all VA employees are the same and there is no "one" VA employee. There are, however, a broad set of shared moments many employees will encounter. Different employee personas will experience and navigate these moments in varied and disparate ways. Using this journey as a guide to organize and align around, VA can plan for and design better experiences for employees.

DEPARTMENT OF VETERANS AFFAIRS · UNITED STATES OF AMERICA

Career Stages and Moments

Searching
- Finding out about jobs at VA
- Browsing available jobs
- Finding jobs that match my goals, interests, and skills

Applying
- Preparing my resume
- Filling out my application
  - MOMENT THAT MATTERS: Working through the tedious USAJobs process can be a deterrent for qualified applicants.
- Submitting my application and waiting to hear back
  - MOMENT THAT MATTERS: Future employees submit their application and feel like it's going into the abyss.

Interviewing
- Hearing back about my application
- Mentally preparing for my interview
- Attending my interview
  - MOMENT THAT MATTERS: The interview is a chance for a future employee to see whether VA and the role itself will be a good fit.
- Waiting to hear back

Receiving & considering my offer
- Considering the offer
- Wanting to see the work environment
- Deciding to accept or decline offer

Accepting my offer
- Complying with background check and other requirements
- Hearing about next steps
  - MOMENT THAT MATTERS: The days and weeks following the acceptance of an offer are exciting times for new employees, and their experiences during this period are key to laying the foundation for their careers at VA.

Attending orientation
- Meeting other new employees
- Learning about the agency and the work I'll be doing
  - MOMENT THAT MATTERS: Orientation is pivotal for establishing a foundation for an employee's VA career. The information provided and the way it's provided are critical to how employees perceive VA as an employer.
- Selecting my benefits

Getting set up
- Getting my necessary equipment
- Coordinating with HR
- Familiarizing myself with the agency's resources
  - MOMENT THAT MATTERS: Having everything they need on a technical front creates a seamless transition from orientation to daily job duties for new employees.

Making connections
- Meeting my supervisor
  - MOMENT THAT MATTERS: Supervisors are a key guidepost and have impacts on employees' workload, career trajectory, and ability to create work–life balance.
- Meeting my colleagues
- Navigating the need for a mentor
  - MOMENT THAT MATTERS: While many employees do not have either an established or informal mentor, those that do develop a relationship with a mentor benefit from having someone to guide them throughout their VA career.

Starting my work
- Easing into federal service
- Understanding my role
  - MOMENT THAT MATTERS: How, when, and by whom a new employee is trained impacts how well they will do in their role and how they fit into established team processes.

Doing my job
- Learning by doing
- Finding the best way to get things done
- Navigating the emotional parts of my job
- Navigating my work schedule in relation to my professional and personal duties
  - MOMENT THAT MATTERS: Employees need flexibility to effectively navigate their job duties and personal responsibilities. Without flexibility, employees struggle to create work–life balance and are at higher risk for burnout.
- Navigating the chain of command in doing my daily job
- Seeing shifts in my workload based on staffing
  - MOMENT THAT MATTERS: Employees desire continuity in their workload and input into what an appropriate workload looks like, which requires receptive leadership who act on concerns around workload and burnout.

Navigating the culture
- Adapting and readapting to the culture
- Working in a mission-driven organization
- Speaking up

Seeing my value
- Seeing my part in fulfilling VA's mission
  - MOMENT THAT MATTERS: Culture is the backbone of employee experience and cannot be overlooked. Organizations need to be intentional about the culture they are, or in some cases, are not creating.
- Receiving kudos from others
  - MOMENT THAT MATTERS: Employees need to be able to see the value they bring as individuals, in addition to feeling supported as one of many contributors to VA's mission.
  - MOMENT THAT MATTERS: Attitudes towards appreciation and recognition vary by individual; it's important to understand how appreciation and recognition factor into employees' value and purpose and to take the steps needed to make them feel valued on a regular basis.

Staying in my current role
- Examining my priorities

Leaving the agency
- Expressing to my supervisor and colleagues that I will be leaving
- Getting signatures on paperwork and returning equipment
- Coordinating my benefits
- Saying goodbye
  - MOMENT THAT MATTERS: In an environment where career trajectories are seemingly valued more than maintaining and growing in one place, employees who make the choice to stay in their current role need to be recognized and valued just as much as their peers who choose to pursue new opportunities.
  - MOMENT THAT MATTERS: When employees are not given the opportunity to provide formal feedback during an exit interview, VA does not get the chance to lay the groundwork for employees to return or to understand what could be improved at VA or on the team from the exiting employee's perspective.

Maintaining my current role
- An employee may retain their current role because they decided not to pursue a new role or they were not selected. This moment feeds back into the Performing, Growing, and Adapting loop. It is an inflection point and is not marked by any sub-moments.

Collaborating with others
- Understanding my role in relation to my team and the agency
- Connecting with my colleagues on a personal level
- Aligning on team values and norms
  - MOMENT THAT MATTERS: Creating a shared understanding of team values and norms is crucial to forming strong, collaborative, and high-performing teams. Aligning on values and norms is also a key piece to resolving potential conflicts with colleagues and holding each other accountable.
- Communicating with my team
- Engaging with other teams
  - MOMENT THAT MATTERS: An openness to cross-collaboration and bridging silos starts with an organization's culture and needs to be supported by highest levels of leadership.

Learning new skills
- Finding out about trainings offered by the agency
- Coordinating with my supervisor for time to do training
  - MOMENT THAT MATTERS: Supervisors play a key role in helping employees successfully participate in trainings. Without a supervisor's support, employees are challenged to re-prioritize their job responsibilities with trainings and be fully present in the training.
- Creating a plan for growing my skills
  - MOMENT THAT MATTERS: Having a clear, codified skill development framework that aligns with their overall career development is a key piece in helping employees close skill gaps and grow.
- Applying for trainings
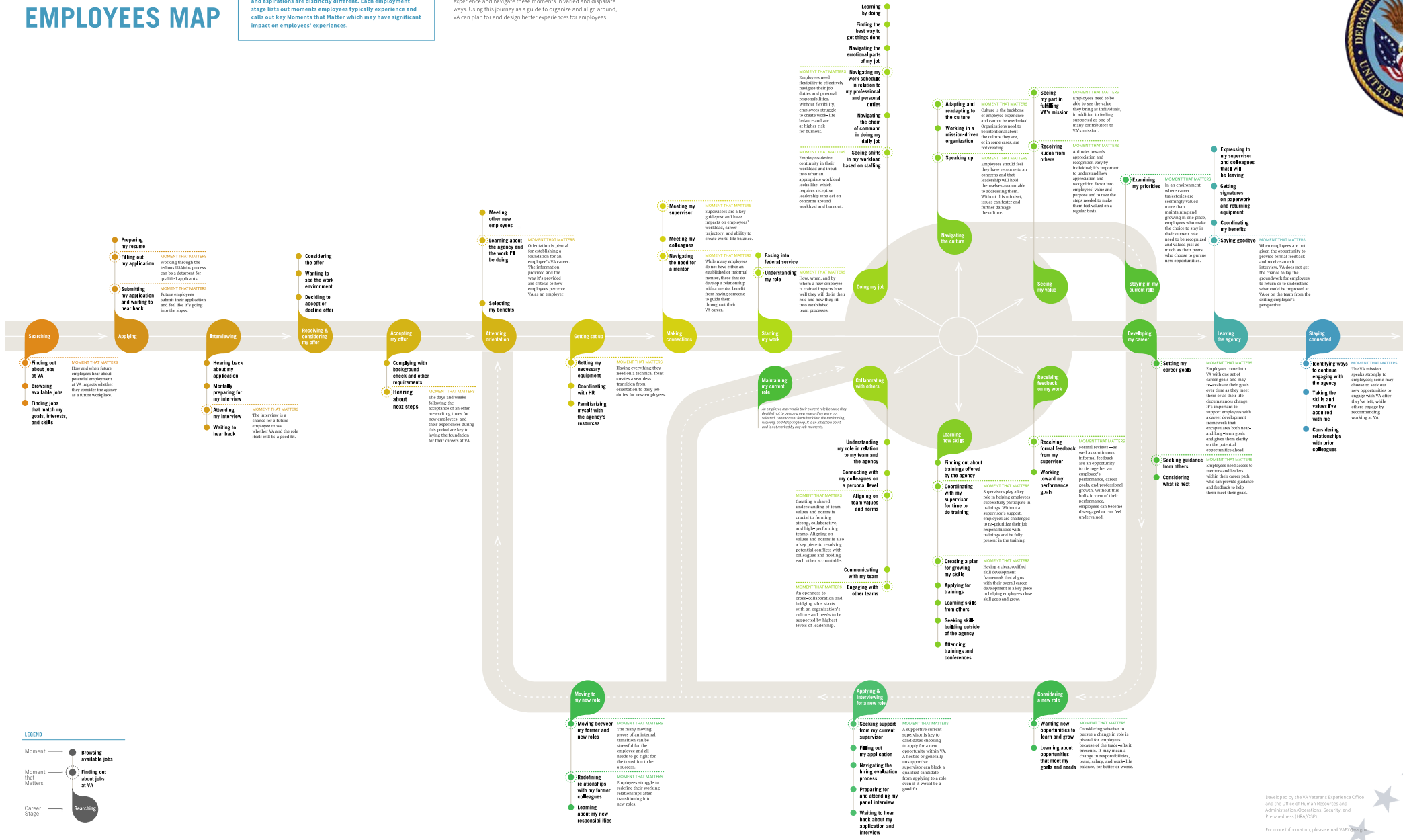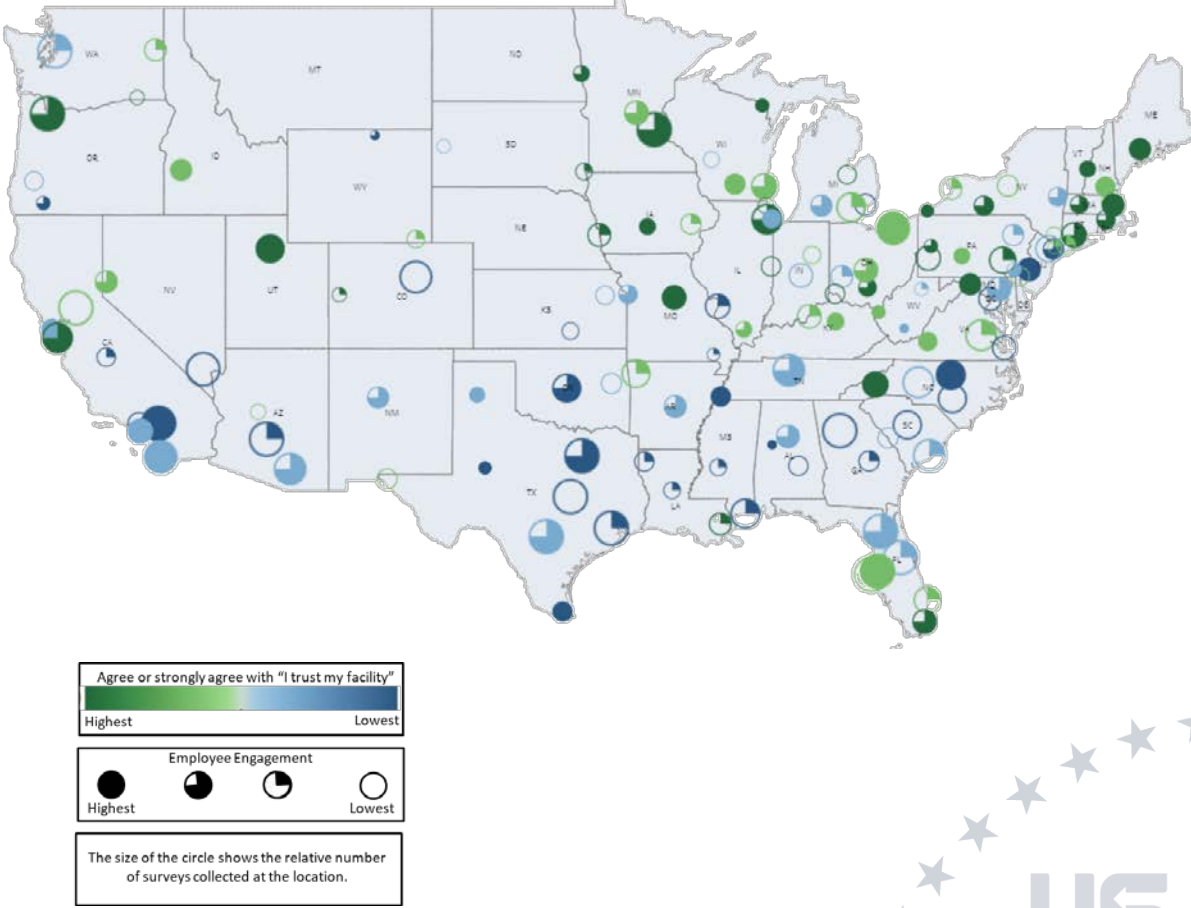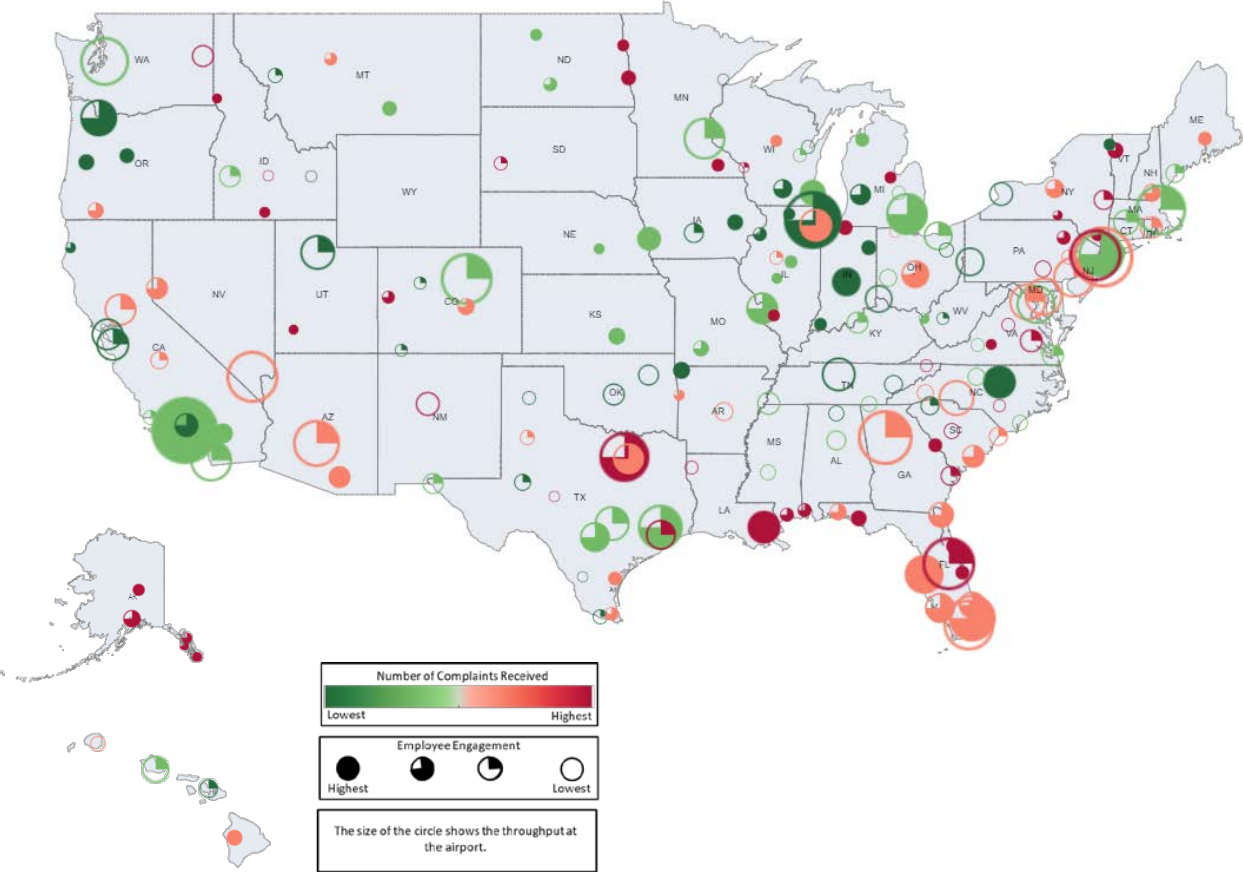- Learning skills from others
- Seeking skill-building outside of the agency
- Attending trainings and conferences

Receiving feedback on my work
- Receiving formal feedback from my supervisor
- Working toward my performance goals
  - MOMENT THAT MATTERS: Formal reviews—as well as continuous informal feedback—are an opportunity to tie together an employee's performance, career goals, and professional growth. Without this holistic view of their performance, employees can become disengaged or can feel undervalued.

Developing my career
- Setting my career goals
- Seeking guidance from others
- Considering what is next
  - MOMENT THAT MATTERS: Employees come into VA with one set of career goals and may re-evaluate their goals over time as they meet them or as their life circumstances change. It's important to support employees with a career development framework that encapsulates both near- and long-term goals and gives them clarity on the potential opportunities ahead.
  - MOMENT THAT MATTERS: Employees need access to mentors and leaders within their career path who can provide guidance and feedback to help them meet their goals.

Staying connected
- Identifying ways to continue engaging with the agency
- Taking the skills and values I've acquired with me
- Considering relationships with prior colleagues
  - MOMENT THAT MATTERS: The VA mission speaks strongly to employees; some may choose to seek out new opportunities to engage with VA after they've left, while others engage by recommending working at VA.

Moving to my new role
- Moving between my former and new roles
  - MOMENT THAT MATTERS: The many moving pieces of an internal transition can be stressful for the employee and all needs to go right for the transition to be a success.
- Redefining relationships with my former colleagues
- Learning about my new responsibilities

Applying & interviewing for a new role
- Seeking support from my current supervisor
  - MOMENT THAT MATTERS: A supportive current supervisor is key to candidates choosing to apply for a new opportunity within VA. A hostile or generally unsupportive supervisor can block a qualified candidate from applying to a role, even if it would be a good fit.
- Filling out my application
- Navigating the hiring evaluation process
- Preparing for and attending my panel interview
- Waiting to hear back about my application and interview

Considering a new role
- Wanting new opportunities to learn and grow
- Learning about opportunities that meet my goals and needs
  - MOMENT THAT MATTERS: Considering whether to pursue a change in role is pivotal for employees because of the trade-offs it presents. It may mean a change in responsibilities, team, salary, and work–life balance, for better or worse.

LEGEND
- Moment ●
- Moment that Matters ◌
- Career Stage
- Browsing available jobs
- Finding out about jobs at VA
- Searching

Developed by the VA Veterans Experience Office and the Office of Human Resources and Administration/Operations, Security, and Preparedness (HRA/OSP).

For more information, please email VAEX@va.gov.

CONSIDERING AND GETTING IN · STARTING UP · PERFORMING, GROWING, AND ADAPTING · CHANGING ROLES · MOVING ON

Putting it all together

How can we learn from more efforts like these?

Number of Complaints Received
Lowest — Highest

Employee Engagement
Highest — Lowest

The size of the circle shows the throughput at the airport.

Agree or strongly agree with "I trust my facility"
Highest — Lowest

Employee Engagement
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US

connect

Performance.gov/cx
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