

# Government's Experience with its Customers to Build Trust:

## CX/GX Success Stories and Pathways for a More Responsive Public Sector



# Table of Contents

---

## 1 Executive Summary

---

## 3 Introduction

- 4 How Will Adapting CX or GX in the Public Sector Improve Public Trust?
  - 4 Planning for CX in Government
- 

## 5 Growth of CX Initiatives in Government

- 5 How is CX Different in the Public Sector Than the Private Sector?
  - 7 What is Driving the Current Public Sector CX Initiative in the US Government
  - 8 Life Experience Projects: An Overview
- 

## 10 Capacity for Customer Experience in Agencies Today

---

## 12 Success Stories for Improving Government's Experience With Customers

- 12 Federal Emergency Management Agency (FEMA)
  - 12 Internal Revenue Service (IRS)
  - 14 National Park Service (NPS)
  - 14 Transportation Security Administration (TSA)
  - 15 Social Security Administration (SSA)
  - 16 Veteran Affairs (VA)
- 

## 17 The Role of Data in Enabling Successful CX and GX Initiatives

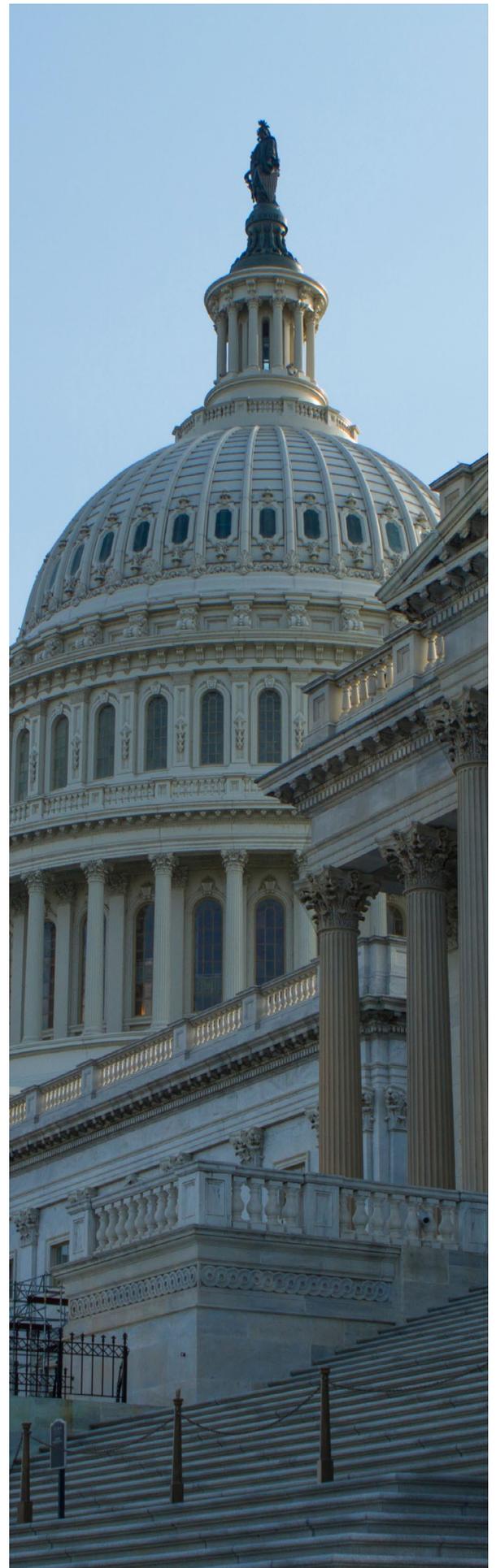
---

## 20 Recommendations, Next Steps, and Conclusions

---

## 23 Endnotes

---



# Executive Summary

The U.S. government is ever-evolving and constantly improving. An intentional focus on the customer – or how individual citizens experience their government – ensures programs are designed well with the ultimate outcomes in mind. If successful, these efforts can also protect public trust in democratic institutions by demonstrating that the government serves its people as intended.

In recent years the Executive Branch prioritized efforts to improve the customer experience (CX). Notably in 2021, President Joe Biden signed an Executive Order (EO) that placed Customer Experience at the center of many federal agencies' priorities. The EO recognized the complexity of the challenges facing the American people, and the opportunities for the government to better serve people and address various crises at the same time. In implementing the EO and other CX or government experience (GX) initiatives, agencies are prioritizing building capacity around leadership, CX strategies, resources, and communities of practice for staff. There are also identified barriers to these efforts: mission complexity, agility amidst changing trends, data sharing and collection, agency coordination, and resource gaps.

As agencies are building capacity, despite the challenges, there have been notable successes in the CX and GX stories:

- **Federal Emergency Management Agency** is implementing “enhanced applicant services” that provide additional interactions for disaster survivors, and seeks to improve applications for disaster assistance.
- **Internal Revenue Service** improved accessibility of representatives on phone lines and reduced wait times, implementing the Taxpayer Experience Office with a mission to create a positive experience for taxpayers.
- **National Park Service** has long collected information about visitor experiences using the Visitor Survey Card and various website surveys as a monitoring tool, collecting direct feedback for monitoring and improvement.

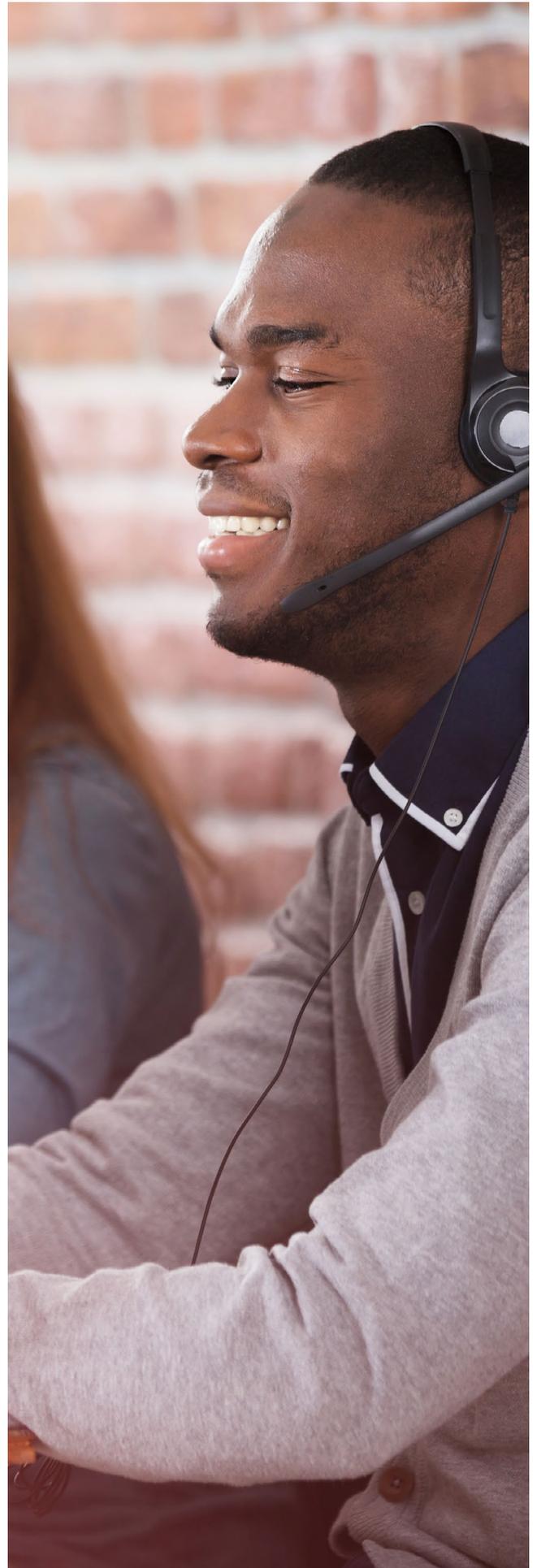
- **Transportation Security Administration** has been collecting data to better understand CX and develop a customer-centered approach, and TSA is also providing training and screening on CX across the entire workforce.
- **Social Security Administration** is redesigning its data collection and management practices to support CX activities for more real-time monitoring and feedback.
- **Veterans Affairs** launched its Veterans Experience Office to support improved veterans services and is directly providing CX resources for its staff and other agencies to use as a center of expertise.

Looking across the examples and based on interviews conducted, there are five key recommendations about implementing effective CX initiatives in government agencies today:

- **Recommendation #1:** Evaluation design experts should be consulted in the design of future CX analyses. Aligning with agency Evaluation Officers will ensure the CX activities can be part of agency evaluation plans and multi-year learning agendas and can help design data collection plans that emphasize longer-term outcomes.
- **Recommendation #2:** Agency Chief Data Officers should play a formal consultative role in the design of the CX projects. Ensuring the CDOs and the implementation of the Federal Data Strategy are prioritized as part of the overall strategy and resourcing equation will also ensure that the CX projects receive the support needed for data capabilities. In addition, agency CDOs should incorporate CX activities in agency data strategies.
- **Recommendation #3:** Consult with federal statistical officials and experts on CX survey designs. Conducting surveys and burdening the American people with data collections is not a matter of convenience – it is a priority that the information collected matters, is useful, and will be used. To improve the usefulness of CX surveys, CX teams should collaborate with the agency's statistical official to appropriately design surveys.

- **Recommendation #4:** Agencies should consider the diversity of the American public when collecting data. When agencies are collecting new data from the American public to support CX initiatives or to measure outcomes from the initiatives, they should consider specifically that there are different subpopulations of the American population.
- **Recommendation #5:** Agencies should align tools to be adaptable and ready to support adoption of artificial intelligence capabilities. With the emergence of new capabilities for artificial intelligence (AI) that are rapidly coming online in public and private sectors, agencies should prepare the CX and GX initiatives to adapt AI capabilities quickly, including by ensuring data quality and open data assets are prepared for relevant migrations.

The current efforts to promote user-center and human-centered design for CX and GX initiatives in the public sector are a promising approach for promoting public trust in democratic institutions. These approaches can still be continually strengthened. Continued efforts will be needed to ensure customers and citizens benefit and truly experience their government as intended.



# Introduction:

## Public Trust and CX

The American system of government is complex and ever-evolving. Layer on intergovernmental cooperation, multiple jurisdictions, numerous agencies, outdated systems, legal limitations, changing rules, and many actors – and it is easy to wonder whether a government “of the people, by the people, and for the people” is possible today. Indeed, it is possible! The strategies for connecting with and serving the public, including the form and substance, have evolved substantially over the years but the opportunities for serving are perhaps greater than ever with advances in technology, data, and access. Government must be prepared to harness this opportunity.

Planning for “customer experience” can help government with the *for the people* intent espoused by Abraham Lincoln in the Gettysburg Address. Much progress is currently being made in national and regional governments across the United States to do just this.

There are many bright spots and success stories about how the national government in the United States is improving, adapting, learning, and adjusting amidst pandemics, disasters, crises, and day-to-day activities.<sup>1</sup> And this should be the expectation that our government continuously works better for the American people.

Unfortunately over the past several decades there has been a well-documented decay in public trust for American institutions associated with a variety of factors, including the government doesn’t work as well as it should for everyone.<sup>2</sup> While the reasons for this critical change in trust are complex and not even completely understood, among the contributing factors are how the American public interacts with institutions on a day-to-day basis, and how members of the public individually perceive those interactions to occur.

The United States is not unique in the moderated levels of confidence and trust. When it comes to the responsiveness of democratic governments around the world in providing services, just 40 percent of respondents in member countries across the Organization of Economic Cooperation and Development (OECD) indicate a perception that public services would be improved if they registered a complaint and about as many express a belief that the public sector can actually be innovative.<sup>3</sup> This suggests a general belief that

democratic governments are not adequately responding to citizen feedback.<sup>4</sup> The survey results from the OECD provide more sweeping implications about changes in government policy. In countries where the citizenry trusts the civil service there is also trust that innovative ideas would be adopted – 70 percent suggest a confidence about public sector innovation.<sup>5</sup>

Trust is a central factor for the effective functioning of democratic society, the public sector, and business. Citizens hope and expect their government, elected officials, and civil servants are meeting needs, providing services, and fulfilling promises for the public sector that serve the public good. Similarly, consumers expect that in the private sector businesses are providing quality goods and services in exchange for fair prices in the marketplace that meet their needs and wants. Whether in the public or private sector – trust is an ingredient to the successful and sustained operation of the core principles and effective functioning of our democratic society.

Efforts big and small to regain, build, and protect trust of the American public and consumers contribute to a well-functioning society. In government – just like in business – every interaction with an individual provides an opportunity to affect this trust. Those interactions affect the experience of the “customer” and their satisfaction with the government. Thus, the so-called “customer experience” (CX) drives the overall satisfaction, or perception, interactions, and engagement with government services and goods.

Trust, like loyalty of customers, is hard to build and difficult to maintain. One survey of customers in the private sector identified that 32 percent of customers would stop interacting with private firms after a single negative incident with a brand they loved.<sup>6</sup>

Every part of government can be rethought to prioritize the customer and their interactions as part of a “government experience.” That is, when considering government services, program designers should center the public’s experience at the outset – employing a “human-centered design” process – with the goal of reducing barriers, inefficiencies, and frustrations all while improving clarity, timeliness, transparency, accountability, and satisfaction.

## How Will Adapting CX or GX in the Public Sector Improve Public Trust?

Applying customer and government experience initiatives in the public sector are built on a theory of change model that is ultimately aligned with evidence-informed policymaking and data-driven government initiatives.<sup>7</sup> That is, these initiatives seek to positively impact democratic pillars for engagement, trust, and function with better service delivery, increased citizen engagement, improved service efficiency, and better programmatic outcomes.

The theory of change for using CX or GX in the public sector strives to achieve some major impacts, which may also raise questions about whether small activities are worth the cost and effort. Small efforts and activities are critical for capacity building and may be as consequential as large efforts in accomplishing and realizing a theory of change in practice.

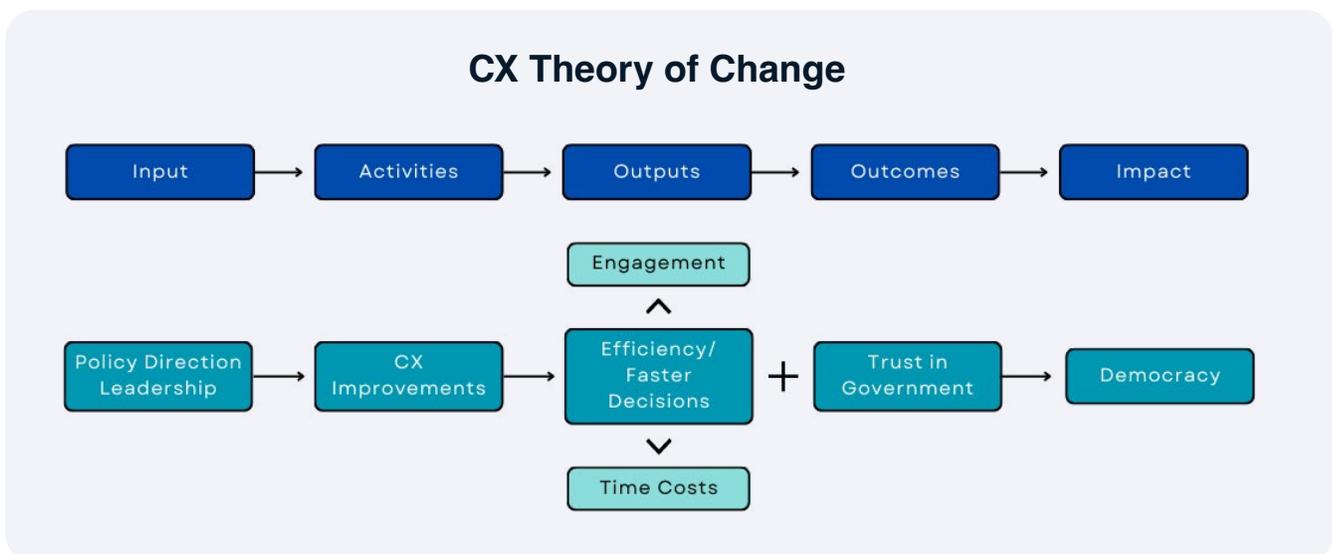
### Planning for CX in Government

To understand how well the government is engaging and responding to customer needs requires thoughtful program design that incorporates evaluation mechanisms and metrics. Data are essential to the success of implementing and measuring the success of the initiative. At the outset of designing a CX initiative, agencies should work to incorporate data into the strategy and simultaneously incorporate CX into the agency data strategy. It is appropriate to align agency evaluation plans and the multi-year learning agenda required by the Foundations for Evidence-Based Policymaking Act.

The Foundations for Evidence-Based Policymaking Act, a 2018 law focused on building a culture of evidence generation and use in the federal government to inform policy and program decisions, has improved the government's capacity and capabilities when it comes to leveraging data, many agencies now have evaluation officers, statistical officials, and chief data officers. When designing programs, or introducing changes to existing ones, this expertise can lend itself to developing high-quality, useful data collection to bolster government's analytical abilities.

Regular data collection to gauge the customers' experiences with the government can include pulse surveys, and other rapid cycle data collection mechanisms that are used to gauge input and feedback quickly. In order for these data collection mechanisms to be useful for insights into CX – or any program improvement system – public sector organizations need to establish a culture of asking questions relevant to program operations, and using the data systematically for improvement.

As agencies prioritize CX and establish specific roles, teams, and overall organizational capacity to focus on CX (discussed below), it is crucial to design for and implement effective data practices to best plan for and adapt to customer needs. Though fundamentally different, the private sector demonstrates the power of data to understand and better serve customers – with proper consideration of the legal and regulatory environment in which the government operates, the private sector can provide inspiration for the use of data to make agile, timely, and well-informed decisions.



# Growth of CX Initiatives in Government

## How is CX Different in the Public Sector Than the Private Sector?

The Forrester Customer Experience Index rates the federal government last among the sectors in the United States monitored from 2020 to 2022.<sup>8</sup> How the customer interacts with a service provider is a central tenet across sectors. However, stacking government against industry is not a fair comparison because of the unique characteristics public sector organizations face in implementing CX relative to businesses.

There are important and understandable differences in approaching CX in a public and private sector context. At the outset, recognizing these distinctions also ensures clarity about potential design features and limitations for applying CX approaches in government programs and services, where improvements may not always be legal or ethical.

Perhaps the most important distinction is that the public sector role is as a provider of goods and services that are accessible to everyone eligible as an expectation and obligation. Unlike the private sector where revenue is a major motivating factor for addressing the customer improvements – in addition to company missions and values -- for the public sector, many services lack direct revenue as a vehicle to assess improvements. Even though revenue and profit margins are not a central focus or directly related to the public's use of government services, it does not diminish the need for improving the experience of individuals and organizations interacting with the system.

As a provider of public goods in a democratic society, the public sector's activities often involve more rules and expectations for public feedback and engagement, introducing limitations that are not shared in the private sector and slowing down its ability to respond to customer needs quickly. Below are a few examples of distinctions in activity types and the additional considerations that may be considered for modifications in the public sector.



Description	Public Sector	Private Sector
<b>Streamline Information Collection</b>	<ol style="list-style-type: none"> <li>1. Agency identifies new data needs.</li> <li>2. Agency submits approval to central review based on goals of managing paperwork burden for the public, agency reviews of privacy restrictions.</li> <li>3. May require notice and public comment, including publication in public registers (e.g., Federal Register) for adjustments to an information collection request.</li> <li>4. Agency determines if data collection needs to be and can be adjusted based on feedback</li> </ol>	<ol style="list-style-type: none"> <li>1. Organization identifies new data needs.</li> <li>2. Organization manages privacy restrictions and internal reviews, determines if data collections need to be adjusted</li> </ol>
<b>Modify Hours at a Service Center</b>	<ol style="list-style-type: none"> <li>1. Agency identifies interest in modifying hours,</li> <li>2. Conducts outreach to the community including legislative offices, partners, and other key stakeholders.</li> <li>3. Based on feedback determines how to adjust hours with available resources.</li> </ol>	<ol style="list-style-type: none"> <li>1. Organization identifies interest or need to modify hours.</li> <li>2. May conduct stakeholder and community outreach, and incorporate feedback, then adjust hours.</li> </ol>
<b>Change Locations of a Service Center</b>	<ol style="list-style-type: none"> <li>1. Agency identifies interest in changing locations, closing/opening service centers, and plans as part of a multi-year appropriations and resource allocation process.</li> <li>2. Agency conducts outreach to legislative offices, core executive partners, and conducts analysis for optimal locations based on specified criteria.</li> <li>3. Based on feedback and analysis locations determined and selected with consideration of available resources and service impacts.</li> </ol>	<ol style="list-style-type: none"> <li>1. Organization identifies interest in location changes, plans as part of resource allocation process, and</li> <li>2. Makes selection based on customer impacts which may include customer surveys and feedback or market research.</li> </ol>

These differences provide opportunities and insights to gain from the private sector about effective implementation of initiatives. The important distinctions between the private and public sector give rise to a new way of considering customer experience – that of government experience.

# What is Driving the Current Public Sector CX Initiative in the Us Government?

The earliest references to government experience, or GX, derive from the need to improve government websites. For example, the Center for Digital Government launched the Government Experience Awards starting in 2017.<sup>9</sup> Much of the emphasis in the field originally focused on technological and data design improvements. Yet there are approaches and considerations for GX that extend beyond digital transformation that also involve service and process improvements.

In any of these contexts, the driving practice is about transformational change that places the user, citizen, or customer at the center of the design – not the government, bureaucratic institution, or serving organization.

There are four major policy drivers of the federal government’s mandate to pursue customer experience, or government experience, initiatives in the United States: an executive order, the President’s Management Agenda, a law, and budget guidance.

## Executive Order 14058

In December 2021, President Joe Biden signed Executive Order 14058: “Transforming the Customer Experience and Federal Service Delivery to Rebuild Trust in Government.”<sup>10</sup> The EO recognized the complexity of the challenges facing the American people, and the opportunities for government to better serve people and address various crises at the same time:

***The Federal Government must design and deliver services in a manner that people of all abilities can navigate. We must use technology to modernize Government and implement services that are simple to use, accessible, equitable, protective, transparent, and responsive for all people of the United States.... Every interaction between the Federal Government and the public, whether it involves renewing a passport or calling for a status update on a farm loan application, should be seen as an opportunity for the Government to save an individual’s time (and thus reduce “time taxes”) and to deliver the level of service that the public expects and deserves.***

The order built on an initial EO issued by then-President Bill Clinton in 1993 and another signed by then-President Barack Obama in 2011 on customer service, but shifted the emphasis to *experience* as a broader connotation about how individuals engage with their government.

EO 14058 provided direction to agencies to launch specific actions, including exploring human-centered design approaches when considering programs. The EO applies specifically for what are termed “high-impact service providers” such as the General Services Administration, Social Security Administration, and Department of Education, which are agencies that provide services with high-volume interactions with the American public. Seventeen agencies were also directed to develop 36 specific CX activities as part of their strategic and performance planning activities, priority goals, and to also identify individuals to lead CX initiatives within the agencies.

## What is human-centered design?

EO 14058 defines human-centered design as an “interdisciplinary methodology of putting people, including those who will use or be impacted by what one creates, at the center of any process to solve challenging problems.”<sup>11</sup> In practice, the approach is a common technique for placing people or users at the core of developing solutions, ensuring that the intended end-user of a product or service is appropriately considered during creation rather than only during delivery.<sup>12</sup>

Many federal agencies have explored human-centered design approaches for years. For example, the Department of Health and Human Services’ Administration for Children and Families project on Human Centered Design for Human Services (HCD4HS) was a project that reviewed approaches in coordination with Child Trends to explore potential and real applications.<sup>13</sup>

## President's Management Agenda

The President's Management Agenda is a framework used by every administration to establish core management and governance priorities. Under the current President's Management Agenda from President Biden, related to the Executive Order, customer experience is an identified priority area. This ensures high-level engagement and prioritization of senior-level officials in the Biden Administration, specifically including designated goal leaders at the General Services Administration and Department of Veterans Affairs.

A feature of inclusion in the PMA is the ability to be transparent about activities undertaken under the framework, including periodic reporting publicly. Given the role of CX in improving public trust, the transparent reporting on CX improvements provides a positive alignment to the goals of the initiative. Another core feature is that the PMA supports coordination across agencies, including through cross-agency priority goals that align with the Executive Order.

## Life Experience Projects: An Overview

Altogether the federal government launched a series of nine projects focused on "Life Experiences" in 2022 and 2023 aimed at improving or streamlining how the American public interacts with and navigates government services.<sup>14</sup> The Life Experience projects focus on key areas for facing a financial disruption, recovering from a disaster, approaching retirement, transitioning from military to civilian life, and having a child, with emphasis for low-income households.<sup>15</sup>

Each of the projects listed in the Life Experiences initiative is prospective, an example of an emerging project that is being developed or formulated, but is an ongoing initiative in design phase that has received some stakeholder engagement support and capacity. Here are several examples of activities happening under the initiative coordinated across agencies by the White House's Office of Management and Budget:

- **Facing a Financial Disruption:** Recognizing that millions of Americans can encounter economic hardships with little notice, often due to circumstances beyond their immediate control, this project seeks to answer the question: "How might we better design access to available supports to meet urgent needs and transition to long-term stability?"<sup>16</sup> A collaboration between nine federal agencies, the project team met with over 60 members of the public, 17 public administrators and 33 subject matter experts to develop two initial customer-centered solutions. The first is to improve data services for benefits delivery to include a pilot test in 2023. The second is the development of methods for accelerating procurement solutions for states. In both of these cases the immediate activities are provided to state intermediaries not directly to the customers, but with the end-goal of better serving program beneficiaries.
- **Transitioning from Military to Civilian Life:** Nearly a quarter-million members of the Armed Forces transition to civilian life each year and this transitional phase poses some challenges without adequate resources and planning. The project is addressing the question: "How might we support transitioning Service members' ability to navigate available resources and steps so they can confidently and comprehensively reintegrate into civilian life?" The initiative is primarily a collaboration of three Departments: Defense, Labor, and Veterans Affairs. Other agencies collaborating include the Departments of Education, Homeland Security, Housing and Urban Development, and the Office of Personnel Management.<sup>17</sup> The project team collaborated with 50 veterans, more than 70 transitioning Service members, and dozens of federal employees. The work culminated in an effort that is co-designing transition planning and a new digital solution for information. The team is specifically considering goals for how to measure outcomes based on Service members' confidence in transition and the trust they have in the Department of Veterans Affairs.<sup>18</sup>

## 21st Century Integrated Digital Experience Act (IDEA)

In December 2018 the President signed the 21st Century IDEA (P.L. 115-336), which strives to address gaps in the American public's digital experience with government.<sup>19</sup> The law moved unanimously through Congress – a signal about the importance of the topic and its uncontroversial status as a common-sense and necessary improvement for the American people. As one aspect of the customer experience, and an increasingly important one in the digital age, the law seeks to transform how the government uses technology with website modernization, digitalization of forms, use of e-signatures, use of shared services, and, importantly, improved customer experience.

### OMB Circular A-11, Section 280

The detailed guidance on implementing CX initiatives in government today is contained in the formal budget guidance from the White House Office of Management and Budget in Circular A-11.<sup>20</sup> The 13-page guidance document denotes that all agencies have a responsibility for CX. The guidance also delineates seven core services for CX consideration:

- Administrative
- Benefits
- Compliance
- Recreation
- Informational
- Data and Research
- Regulatory

For the High Impact Service Providers, OMB required those agencies to not only report quarterly, but to also conduct capacity assessments and action plans, reported to OMB's Performance and Personnel staff who coordinated activities government-wide. While these documents have not been made publicly available, the reports have been used to inform planning processes and public releases for projects.

## Partnership for Public Service: Designing a Government for the People

In 2022, the Partnership for Public Service identified seven key strategies for achieving modern customer experience goals in federal agencies based on the Biden Administration's Executive Order.<sup>21</sup> The research suggested that each of the characteristics could be addressed within existing agency capacity:

1. Leadership empowerment: providing senior leadership with appropriate insights using existing performance management and data systems
2. Enterprise-wide engagement and accountability: establishing expectations for senior leadership across the agency, including for example, chief financial officers
3. Knowledge mobilization: improving information accessibility that enables data and knowledge sharing
4. Data-sharing infrastructure: building resources for enabling data sharing, including legal agreements and relationships
5. Consistency for the digital enterprise: building capacity in talent, tools, and infrastructure
6. Partnerships and communication: ensuring trusted partners exist to support stakeholder engagement and communication
7. Service co-design: enabling process and service strategies that deploy best design principles and practices

While the Partnership described considerable progress underway across federal agencies in implementing customer experience goals and directives, the research noted continued room for momentum. Areas for continued emphasis identified include talent, budgets, data sharing, and regulatory design.

# Capacity for Customer Experience in Agencies Today

As agencies work to address these mandates and build the capabilities to increasingly conduct customer and government experience activities, they are also gaining – and will need – the core capacity to engage in the work. Based on interviews conducted by the Data Foundation of federal employees, there are several key capacity factors that enable agencies to support successful customer experience efforts.

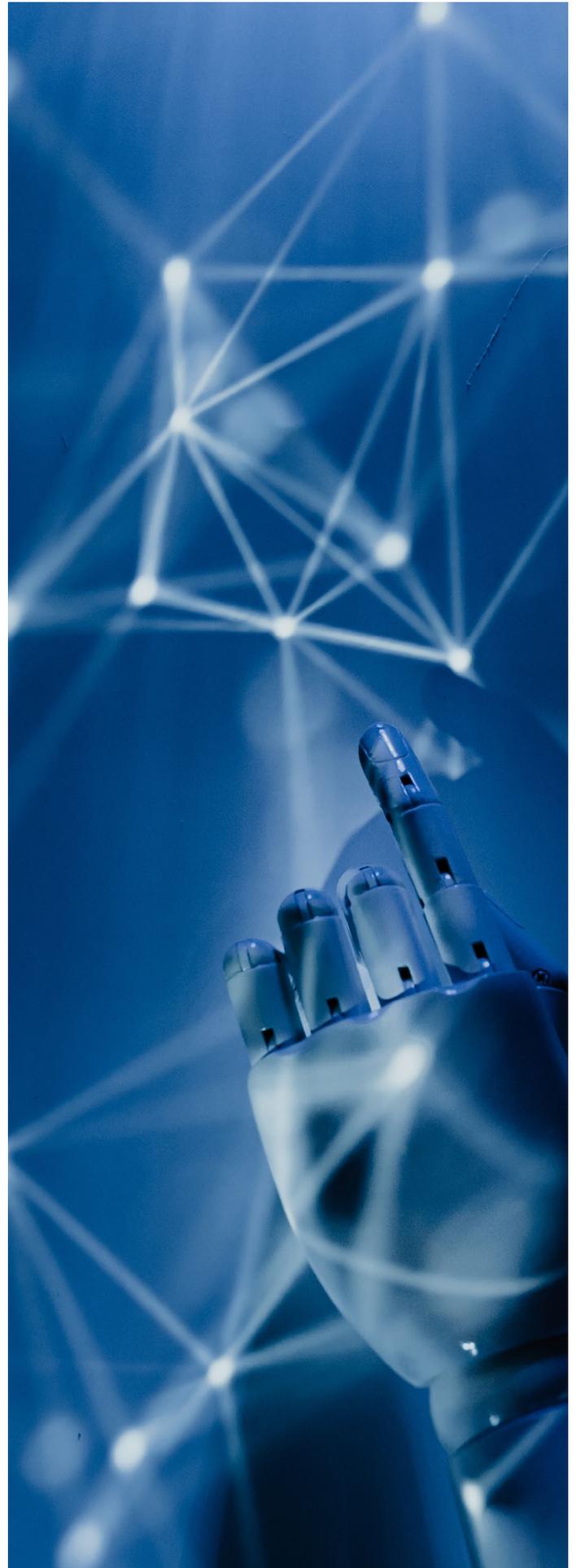
- **Government-wide Leadership** – Leadership provided through Executive Orders and the White House’s Office of Management and Budget provides overall direction for CX activities, including by setting budget targets, developing the President’s Management Agenda, and integrating CX and GX into other topics across Executive Branch priorities. These leaders are key for setting the government-wide tone and expectations.
- **Agency Leadership** – Individual agency leaders prioritize resource allocations, determine strategic priorities within the agency, and can ensure that CX activities are adequately prioritized.
- **CX Strategy** – A coordinated strategy supports alignment of the key processes, resources, access to data and technological infrastructure, in support of the leader’s direction. Of note, several CX leaders have publicly called for a government-wide strategy as well to bolster this capacity.<sup>22</sup>
- **Resources** – CX and GX initiatives cannot be successfully implemented or planned without adequate people and resources. The workforce needs appropriate knowledge, skills, and training, and sufficient time to effectively plan and implement CX activities. The workforce also requires the appropriate modern data management tools to automate and democratize data for use. To support this, agencies need sustainable funding.
- **Community of Practice** – Fostering a community of practice is a way to bolster the personnel and inform strategic growth over time. Communities of practices are being used to bridge siloes, identify and address agency challenges, share knowledge about implementation, and to maintain momentum for the initiatives in and across agencies.

In addition to identifying enabling factors, agency leaders also identified several barriers to implementation of CX activities as well as several other limitations to broader capacity-building activities. Identifying these barriers – and collaborating on solutions – can help reduce the complexity, friction, and costs for making progress with CX across agencies. Barriers include:

- **Complexity of missions and outcome measurement** – Government agencies and programs are inherently complex, often fulfilling multiple objectives on timelines that are long-term, with outcomes that may not occur for many years. The initial activities that the public observes – and that are directly affected by CX and GX initiatives – may be measured quickly in performance measures, but are more difficult to measure and monitor routinely. Assessing outcomes in addition to initial performance metrics require program evaluation and impact monitoring techniques to be paired with the initiatives.
- **Lack of agile processes** – Rapidly receiving feedback and integrating that information through feedback loops is a challenging task. Identifying more rapid feedback mechanisms to support the enterprise that are not unjustifiably inhibited by paperwork reviews, clearance processes, and other bureaucratic review steps will be necessary for ensuring adequate agility in the processes.
- **Data collection, access, sharing constraints** – In many cases new data collections may be desired to understand the state of activities to be undertaken, to target improvements to a specific subpopulation, or to evaluate how well the initiative was implemented. Data collected by other entities may also be useful. However, often the data that agencies have access to are limited, inaccessible, low quality, costly, or otherwise unavailable, in part, due to data sharing limitations. Despite the establishment of the Federal Data Strategy and implementation of the Foundations for Evidence-Based Policymaking Act, there are still limitations in data collection, access, and sharing in federal agencies that inhibit successful implementation of CX activities.

- **Cross-agency coordination** – Silos in public sector organizations impede efficient and effective collaboration. There are clear concerns and needs for coordinating with the Chief Data Officers, Evaluation Officers, Chief Financial Officers, Chief Information Officers, Chief Privacy Officers, Chief Information Security Officers, and others on CX and GX initiatives.
- **Resource gaps** – The absence of dedicated resources to support CX initiatives can be a challenge, particularly if program managers perceive that the improvements are taking resources away from service delivery.

In addressing the capacity and considering the barriers, agencies are taking different approaches and adopting various organizational models. In response to the CX EO, agencies must designate leaders, however, some agencies have established entire offices and units to implement the work. Certain offices are centrally coordinated, others federated; some are staffed at mixed levels with full-time employees and/or contractors. As the CX function in agencies matures, more analysis will be relevant to explore how these models adapt over time to align with agency missions, budgets, and outcomes.



# Success Stories for Improving Government's Experience with Customers

While government-wide efforts to improve CX are rapidly progressing, certain agencies already have numerous examples that provide useful models that can be applied to other contexts. These success stories demonstrate how agencies have established processes to collect and analyze information from customers to develop human-centered approaches to improve service delivery and interactions with government, as well as how they have focused on building leadership support and workforce capacity to do so.

## Federal Emergency Management Agency (FEMA)

Disaster assistance remains a major priority in the U.S., even though private insurance is considered the first line of defense for compensation after disasters. In 2022 alone, FEMA received more than 2 million registrations for assistance.<sup>23</sup> FEMA is also now responding to three times more disasters a year than it was a decade ago.<sup>24</sup> During the COVID-19 pandemic, FEMA simultaneously responded to declared disasters in every state and territory, 230 declared disasters total during 2020.<sup>25</sup>

As part of the CX commitment and action plan, FEMA is intentionally implementing “enhanced applicant services” that provide additional interactions for disaster survivors, and seek to improve applications for disaster assistance. The process uses a variety of communication methods, such as in-person, phone, or online outreach to meet the needs of individuals.<sup>26</sup> In addition to developing better online disaster applications, the plan makes commitments to working with states to update rules and documents for reducing burdens and improving accessibility in times of disaster.<sup>27</sup>

FEMA provides core leadership and support for integrating the programs and activities across the senior staff, technology and data teams, and field staff, including data capabilities necessary for sharing and using information under the initiative. The agency monitors feedback on disaster assistance with surveys, and holds periodic training for staff on how to collect data on CX, including on unique engagement methods for survivors after disasters.<sup>28</sup> Beginning in November 2022, FEMA started providing revised correspondence to disaster survivors

and is hoping the changes will have positive impacts on survivor satisfaction with services (which would begin to appear in Q2-2023 data).

Despite the recent emphasis on customer experience at FEMA, these activities are also not new. In fact, business and process improvements for public assistance have been underway for years.<sup>29</sup> For example, a focus on CX led to the development of services such as OpenFEMA, which allows the American public to capture photos and share information directly with FEMA through digital applications to improve responsiveness.<sup>30</sup> Operationally, FEMA also has a Grassroots CX Community which helps develop staff capacity to develop CX activities and implement them in day-to-day operations. Led through the Individual Assistance Office of Strategy and Innovation, the community formally meets on a monthly basis to build a community of practice and, for example, convenes to share department-wide updates and topics around best practices.<sup>31</sup>

## Internal Revenue Service (IRS)

The IRS is taking steps to improve how taxpayers interact with the government, with simple actions that improve access to different communities. Collecting income tax information from the American public is a major undertaking – and since the government has imposed much of this burden on the American public in the near-term (estimated at an astounding 2.2 billion hours annually for federal income taxes, with a value of \$42 billion dollars), it's an area worth exploring improvements in improving the customer experience.<sup>32</sup> In 2021, for example, the IRS published the main income tax filing form in Spanish and is now exploring other languages.<sup>33</sup> This change builds on the relatively new addition of a tax form created in 2019 to make it easier for seniors to file taxes.<sup>34</sup>

---

**“Public trust is essential in the operation of government.”**

**IRS Commissioner Danny Werfel, 2023<sup>35</sup>**

Despite these changes though, according to the IRS estimates, income tax reporting is becoming more burdensome on the American public – not less. In 2020, just after the new senior form was added, average estimated time to complete (burden) was estimated at 11.3 hours; in 2023 it is 12.8 hours.<sup>36</sup> The American public can often be frustrated navigating complex tax rules and regulations, especially when attempting to contact the IRS. Stack on state, local, or international tax rules – as well as complexities from the historic absence of free-filing – and taxes quickly become a pain point every member of the American public observes. Further, the backlogs at the IRS are well known, including the deluge of paper, long wait times on the phones, and unopened returns that led to lags in refunds. In time, the burdens may adjust based on major CX reforms underway at the IRS.<sup>37</sup>

As a high-impact service provider and recently under new leadership, the IRS in the 2022 filing season worked to improve accessibility of representatives on phone lines. With a goal of an 85 percent level of service for the tax season (compared to 15 percent the year prior), the IRS reported 2 percentage points higher in April 2023, answering 2 million calls and reduced wait times from 27 minutes to just 4 minutes.<sup>38</sup>

In order to achieve the substantial improvements in the 2022 tax season, the IRS received direction from the Secretary and Congress, as well as major investments through the Inflation Reduction Act that enabled the agency to hire an additional 5,000 staff. With those staff, the agency implemented call-back options to reduce call wait times when individuals were waiting for assistance, re-opened call centers that had been closed due to funding and pandemic constraints, focused on staff specialization on particular issues and topics to improve quality of assistance, and expanded digital approaches to eliminate paper filing options that expanded operational efficiencies.<sup>39</sup> In addition, the IRS expanded digital tax filing options by gaining approval under the Paperwork Reduction Act, in partnership with OMB, to collect certain information digitally instead of by paper for individual and business tax returns.

The IRS also established a Taxpayer Experience Office with an explicit mission to create a positive experience for taxpayers interacting with the IRS. While a challenging task given the history, the office's mission recognizes the need to align culture, mission, and day-to-day activities across every interaction for a positive experience. The Taxpayer Experience Office organizes around six

strategic priorities: expanding digital services, seamless experience, proactive outreach and education, community of partners, reaching underserved communities, and enterprise data management and analytics. The office is also staffed with a senior official who supports implementation of the priorities and the Taxpayer First Act with relevant training of the IRS staff.<sup>40</sup> Of note, IRS also has a digitalization office established in 2020 working in tandem to convert and modernize 60 legacy IT systems that will also support the initiative.

While the IRS has its dedicated CX activities, the Treasury Department is also coordinating departmental-wide activities with a small team working to support other programs and activities beyond the IRS.

## Supporting CX Through Implementation of the Taxpayer First Act

In 2019 Congress passed the bipartisan Taxpayer First Act which set the stage for major reforms to the taxpayer experience.<sup>41</sup> The law called for the IRS to implement a comprehensive “customer service” strategy (Section 1101) that includes best practices, training for IRS employees, and a long-term 10-year plan for improvements, among other provisions.<sup>42</sup>

Each year the IRS Commissioner reports to Congress on progress and planning activities. In the 250-page January 2021 Report to Congress, the IRS outlined an extensive strategy for bolstering the taxpayer experience, including allocating \$1.6 billion over a 5-year period. The plans also include references to expanded digital services, the increased use of online portals, and more self-service capabilities that improve a seamless experience for users.

## National Park Service (NPS)

America's national park system with 400 sites has nearly 300 million visitors a year, with 1.3 billion recreational hours in 2022.<sup>43</sup> In 2022, the National Parks Service was designated as a high-impact service provider because of the number of visitors who experience the system, including the ability to reach individuals increasingly in-person and through the digital experience.<sup>44</sup> Even while attending a park or monument in-person, visitors now expect access to digital resources to enhance their visits, understand the resources, and to learn about the natural environments or history. Visitors also need to be able to access integrated features for campsites and other passes available for on-site services.

The National Park Service is well-known for its customer service standards of excellence. Park Rangers, staff, and volunteers on the front line provide directions in parks, serve as guides, and access to campsites are among the common faces of the national park experience.<sup>45</sup> The National Park Service has long collected information about these experiences using the Visitor Survey Card and various website surveys as a monitoring tool, collecting direct feedback for monitoring and improvement.<sup>46</sup> The results are used to produce annual reports back to parks and an interactive dashboard that provides an iterative feedback loop about users and their experiences at the parks.<sup>47</sup>

For the National Park Service, the capacity to support CX is bolstered by direct statutory mandates that provide a history and modern framework for operating. Title 54 of the U.S. Code includes two sections that direct the National Park Service to "continually improve" and to use the "highest quality science and information."<sup>48</sup>

As part of the effort to improve overall experiences at the National Park Service, its CX team includes coordination with the budget formulation and strategic planning units to identify challenges and solutions. One of the challenges at the agency has been the breadth of units and programs involved in implementing the services, in addition to deploying modern technologies as the pace of technological development rapidly advances. To help overcome these challenges, the National Park Service partners with other organizations to ensure it can improve the online experience for visitors, modernize payment systems, and enhance cybersecurity protections in tandem.

## Transportation Security Administration (TSA)

At more than 400 airports across the country, the Transportation Security Administration screens 2 million passengers each day. The TSA screens and interacts with even more passengers in the network of rails, roadways, ports, and other transportation activities across the country. TSA must balance the CX activities with providing adequate and necessary levels of security in airports. While travelers may be frustrated by the checkpoints, addressing the efficiency and clarity of the system improves the positive perspectives for the customer experience.

Based on a 2022 review of passenger survey data, where 21 percent of respondents indicated that additional screenings had not been explained by TSA agents, TSA began to take steps to improve communication of enhanced screenings. TSA concluded that the lack of explanations deteriorated the experience with TSA – working with the CX and Customer Service Branch, the training units, public affairs, and communications staff aligned to improve operations. The activities to improve the public's screening experience were then monitored with additional surveys.<sup>49</sup>

Other services that the agency employs to enhance CX include TSA PreCheck, reducing wait times in the TSA customer service line, response times in the emails to the contact center, and accessibility of information available at TSA.gov. Beginning in 2021, the TSA designed new systems and approaches for managing its capacity in addressing customer support and experiences. TSA has 175 customer support managers within its Customer Service Branch, serving on the front line for customer experiences at airports around the country and providing a CX community of practice at the agency. In addition, TSA provides some workforce training and screening on CX across the entire workforce.<sup>50</sup>

TSA has been collecting data to better understand CX and develop a customer-centered approach. For example, since 2021 TSA has been collecting single-group post-test data from individuals who reach out to the TSA Contact Center. While the available data are unable to summarize an individual's perceptions prior to contact, individuals who contact the center by phone generally have positive perceptions on average about key metrics of satisfaction, transparency, helpfulness, ease, quality, and trust, while individuals who contact the service centers by email have

more neutral perceptions on average.<sup>51</sup> Importantly, TSA indicates a methodological change in its data collections from a survey-based approach prior to 2023 with 1-in-4 contacts receiving the survey, to 100 percent invitations in 2023 and beyond (i.e., a census of respondents) along with other methodological adjustments.<sup>52</sup>

## TSA: Explaining the Difference Between Customer Service and Customer Experience

In 2022, TSA took time to explain the important relationship – and differences – between the concepts of customer experience and customer service.<sup>53</sup> CX focuses on the touchpoints between an individual and the services throughout a relationship, while customer service is the assistance provided to use the services.

In airport security and passenger screening this example is clear: customer experience at TSA a screening may involve walking through an airport checkpoint quickly, including a metal detector, a closer inspection, waiting in line with a bag, but involves the totality of the experience; the discussion with a TSA agent about what should be placed on a baggage belt or what can be included in a carry-on bag is how TSA provides customer service.

## Social Security Administration (SSA)

The Social Security Administration interacts with nearly every worker in the United States and serves 65 million retirees and dependents with benefits each year. The Old Age Survivors Insurance and Disability Insurance Trust Funds collectively provide \$1 trillion in benefits payments on an annual basis to American families and workers. Designated as a high-impact service provider, the SSA has three unique services included in the suite of activities that involve applying for social security cards to designate the official numbers assigned to individuals, and separate application processes for workers with disabilities and retirement benefits.

SSA has field offices and representatives scattered throughout the country, a national 1-800 number, and a suite of online services. The 1-800 number alone processes more than 30 million calls each year. In 2019, SSA had an average call wait time of approximately 40 minutes and reduced that time to 15 minutes in 2020 and 2021. SSA is working to continue reducing wait times. Part of the improvements involve technological updates, and others involve training for staff enabling new employees to begin working with the public sooner.<sup>54</sup> SSA is also transitioning the entire platform to a new telecommunication platform in 2023.<sup>55</sup> Ensuring individuals can access SSA services remotely or digitally has the benefit of also reducing wait times in the field offices, where some services must still be conducted in-person. In 2022, SSA was prioritizing access to online services such as mySocialSecurity, and other digital changes like address changes and scheduling.

SSA established a CX team and is investing resources in expanding its capabilities and expertise.<sup>56</sup> In 2023, SSA hired an expert from industry to lead its CX efforts with an emphasis on redesigning processes that support CX.<sup>57</sup> The agency's CX team supports agency-wide activities through development of guides, education for agency staff, and coordination of standards.<sup>58</sup>

As part of the agencies' revision of its CX processes, SSA is also redesigning its data collection and management practices to support CX activities for more real-time monitoring and feedback. Starting in 2023, claimants are asked to submit feedback to SSA after submitting claims online. During the Q1 of FY 2023, retirement claimants had a 91 percent satisfaction rate, however, SSA acknowledges the survey does not allow SSA to identify challenges for those claimants who are unsuccessful



in completing the claims.<sup>59</sup> Similarly, 82 percent of applicants for replacement social security cards indicated they were satisfied during the same period, yet customers who did not successfully complete an application were not surveyed.<sup>60</sup> While a high priority service, no data were available for disability benefits over the same time period.

## Veterans Affairs (VA)

The Department of Veterans Affairs' Veterans Health Administration operates more than one thousand facilities across the country that serve nine million veterans. The VA has long been seeking targeted improvements to address efficiencies for veterans and to also bolster trust. The VA launched its Veterans Experience Office in 2015, and VA's customer experience activities and principles are articulated under the Code of Federal Regulations in Title 38, based on a final rule that was published in 2019.<sup>61</sup> The regulation amended the VA's Core Values and Characteristics to apply the customer experience concepts, applying the principles to all VA employees. Those principles include ease, effectiveness, and emotion.

VA is actively developing a range of resources for staff across the Department and other agencies to use. Examples include the customer experience guidebook, a community engagement playbook, the veteran journey map, and a welcome kit for veterans.<sup>62</sup>

### The CX Cookbook: Learning from the VA Experience with CX

VA's established Customer Experience Office is also a leading unit for other federal agencies. In 2020, in coordination with OMB and cross-agency collaborators, VA published *The CX Cookbook: A Collection of Key Ingredients and Recipes for Embedding Customer Experience in Federal Services*.<sup>63</sup> The Cookbook calls on agencies to devise plans in eight key areas for implementing CX initiatives: strategy, operations, funding, organization, culture, incentives, partnerships, and capabilities.

The VA launched its Veterans Experience Office and has undertaken numerous efforts to improve programs, including developing a community of practice on customer experience, development of resources for VA staff and stakeholders, and collection of new data assets.<sup>64</sup> For example, VA's CX team leveraged survey data to identify challenges and implement specific changes to improve

scheduling appointments, identifying which facility to visit, and navigating facilities. The CX surveys through VSignals have also been used to support direct health care services. Using this data, VA has been able to better serve veterans. For example, VSignals responses that indicate risks of suicide or homelessness are flagged to additional providers and led to hundreds of referrals of veterans to additional services.

VA is also implementing action centers that unite resources from the Department with state, local, and non-profit resources.<sup>67</sup> VA's CX team also hosts virtual events that are intended to provide information about eligibility, enrollment, claims, appeals, and other services, and also provide direct connections to local providers.

---

**“Veterans have a difficult time navigating the Department and sometimes their experiences have not been that great. My team is devoted to making sure any interaction with the VA makes them feel really valued, is easy and makes them feel good about engaging with us.”**

**Barbara Morton, Veterans Affairs Deputy Chief Veterans Experience Officer<sup>68</sup>**

The Department of Veterans Affairs reported in 2022 that its customer experience campaign resulted in marked improvements in satisfaction among veterans over multiple years – with 78 percent satisfaction reported in 2022 compared to 55 percent satisfaction in 2016.<sup>69</sup> In addition, the Department implemented the VA Trust Report, which collects insights from 1 million veterans annually on interactions about care and service. With a 16 percent response rate, the VSignals data used in the VA Trust Report suggests a consistent upward trend in veterans' experience with the agency. The report also includes data stratified by gender, age, and race/ethnicity, but the survey does not provide statistical representations for representativeness of its sample from the population of respondents.<sup>70</sup>

Within the VA, the Veterans Health Administration acknowledges it is operating under a 5-year plan for improving patient experiences but that there are challenges with legal requirements, appropriations, contracts, and integration of platforms. Despite those limitations, VHA and the Veterans Experience Office partnered together on deployment of VSignals and continue to collect insights about care and service.<sup>71</sup>

# The Role of Data in Enabling Successful CX and GX Initiatives

The above examples highlight how agencies can leverage data to improve the American public's experience with the federal government and overall mission execution. However, CX activities are largely disconnected with agencies' data and evidence activities. Data have the power and capability to connect people, organizations, and entities across government programs and services. But this can only be achieved if the government operates seamlessly, collecting and sharing information responsibly and with reasonable safeguards for intended purposes. For customer experience and government experience initiatives, the collection, analysis, and use of data are critical for success to pilot, implement, and evaluate the efforts.

In 2019, the federal government published a 10-Year Federal Data Strategy that identified key principles and practices that all agencies were expected to adhere to.<sup>72</sup> Many of the actions and implementation steps have now been transferred to individual agencies, which are also developing their own data strategies. The strategy highlighted the need for a coordinated effort to organize governance and data management activities not just within agencies, but also across agencies.

In support of CX and GX initiatives, data management and governance activities are also central. High quality, accessible data for programs and operations are also highly relevant in order to assess the characteristics of a problem, modify operational issues in real-time, and then to evaluate impacts. In some cases, this information may be accessible as open data, but for many public sector activities the administrative records necessary for CX and GX initiatives will be restricted or may be confidential records.

CX teams need to collaborate closely with relevant data experts within agencies to ensure appropriate access to relevant data, and compliance with relevant privacy, confidentiality, and cybersecurity protocols. Relevant offices and officials may include the Chief Information Officer, Evaluation Officer, Statistical Official, Chief Data Officer, Chief Information Security Officer, and Senior Agency Official for Privacy, among others.

## Private Sector Example

### Informatica: Leading the CX Norm to Use Data in the Private Sector

Informatica believes that placing data at the center of the customer experience is critical to success for CX leaders. Informatica developed a resource for leaders to identify key objectives and business drivers, then build a use case and road map for putting a CX plan into practice using data. For Informatica's approach, the CX strategy all starts with a business need but just like in the public sector fleshes out a plan that asks about stakeholders and resources.

In practice, Informatica is applying these principles in the post-Covid-19 world as people and companies seek out more virtual services, personalization and digital interactions, and home-based experiences. These all require investments in customer data and tools to manage data well, meaning information is both accessible and trustworthy. Applying enterprise cloud data management practices and tools for data quality, data governance, data privacy and security ensures data remain at the center of the new norm to use data for CX activities.

---

**"...agencies should coordinate their service delivery to achieve an integrated experience that meets customer needs through the exchange of data with appropriate privacy protections."**

**Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government, Sec. 5**

When planning for and implementing CX activities, agencies need to determine what data are relevant, including whether those data are within the domain or control of the agency or program, need to be accessed from other sources or programs, or may need to be newly collected. Programs may also need to engage relevant stakeholders to determine what appropriate data should be collected to effectively implement the program and measure relevant outcomes.<sup>73</sup>

## 5 key data considerations for CX initiatives:

1. What data are needed to understand the problem, population, and to support the program or service delivery? Every successful initiative needs trusted operational and administrative data to be effective – and planning this discovery and collection correctly to ensure quality, reliable, and timely information are available for the project are essential.
2. Where can existing data be accessed to supplement new data collections, if necessary? While there may be a tendency to propose new data collections, imposing new burdens on the American public – especially with improving customer experiences – programs must be mindful of how information can be shared or combined responsibly to minimize burdens. In some cases, administrative records may be accessible within existing privacy laws.
3. How will data be managed to maximize effectiveness, efficiency, usefulness, and security? Planning in advance for how data will be used and for what purposes, while also protecting relevant information ensures that any burden imposed on the data providers for any purpose is reasoned. Agencies should consider how data modifications for the purposes of CX initiatives results in program effectiveness, and other operational changes carefully – including to enforce relevant data security and privacy protocols.
4. How will data and relevant systems be integrated to promote interoperability? Because the customer experience with the government is rarely about a single program or operation, increasingly the questions being raised involve multiple programs working together. The life experience pilots and multiple case studies explored in this report involve numerous agencies collaborating, including sharing data across systems. Agencies must consider how data will be shared – which includes whether relevant data standards can be established in administrative systems and whether data sharing arrangements are possible to achieve implementation

of initiatives. Leveraging ongoing work to inventory and catalog agency data as required by the Foundations for Evidence-Based Policymaking Act of 2018 will assist this effort.

5. How will initiatives be evaluated using relevant data from administrative systems and new collections? Many CX initiatives are already collecting data from post-test surveys from users of websites and programs monitoring perspectives and perceptions of outputs, agencies also need to consider how to collect and manage relevant data for evaluating outcomes of CX and GX initiatives. Typically, outcomes in public sector programs may be short- or long-term, some may be years or decades long.

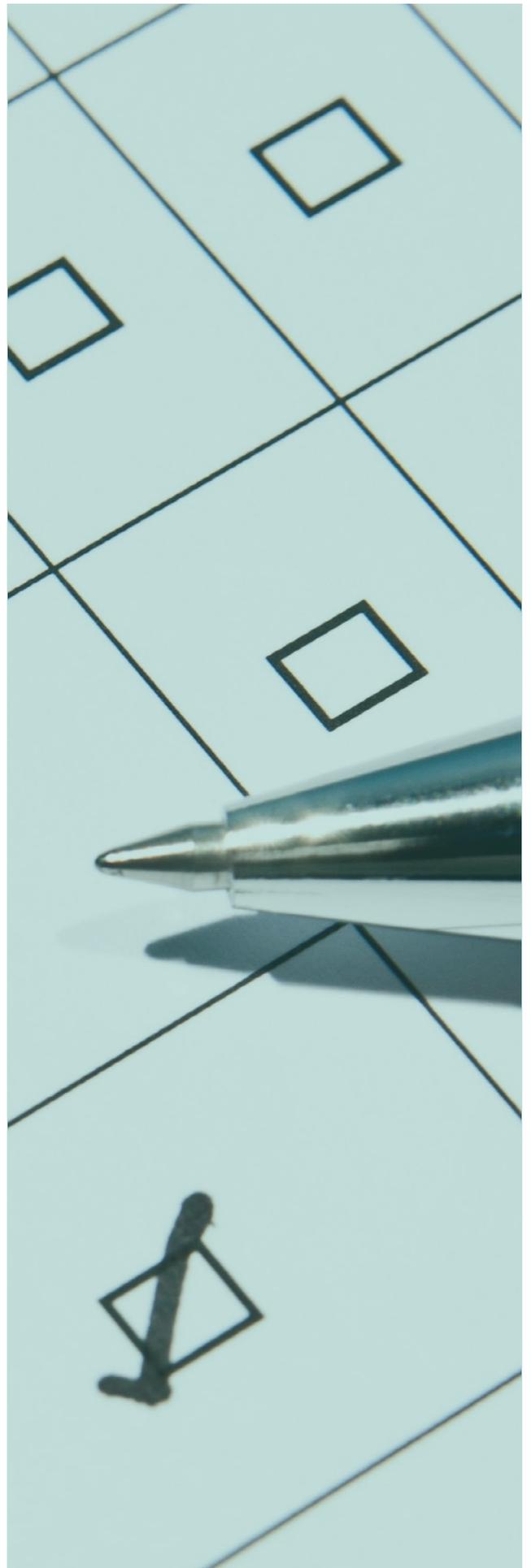
There are early indicators of modest success of the federal government’s intentional focus on customer experience efforts, including improvements in public trust in government. In 2023, nearly 30 federal programs were asking at least one question about trust as part of the CX initiatives and surveys for the American public. However, there are limitations to the datasets available via Performance.gov in tracking trust longitudinally for most of the initiatives, and therefore in measuring the extent to which all of the initiatives and projects are impacting trust across-the-board. Yet, among the early indicators are the following:

Between Q1 2022 and 2023, the TSA demonstrated a 21 percent improvement in its average trust score among respondents who contacted at TSA service center for assistance. This was the largest change of any program reported in the federal dataset over the time period, and then sustained over time. But this was reflected only in one mode of communication, phone; a corresponding increase was not observed in email contacts to TSA.

The Department of Housing and Urban Development experienced a 10 percent improvement in reported trust for federal housing administration loans, when asking the question to individuals seeking additional details and information about FHA programs. The Veterans Benefit Administration Education Service reported a 7 percent increase in trust, U.S. Patent and Trademarks a similar increase for its mobile website, and the list goes on.

There were, however, decreases reported in average trust scores as well. The Office of Personnel Management’s Services Online (SOL) for individuals applying for retirement benefits had respondents indicate a net 13 percent reduction in the trust measure from Q1-2022 to Q1-2023, the largest among reporting agencies.

What all of these indicators and changes of trust across time lack is a sophistication in evaluation for pre-test, post-test comparisons that also have group comparisons for individuals receiving services compared to those who did not. In other words, the individuals responding to these surveys are all of one group, those who received a service. From an evaluation perspective, this greatly limits the causal conclusions that can be drawn from the information about trust. However, the indicators provide a baseline measure of trust for programs that can provide a useful metric for agencies to monitor over time. These indicators should not replace more robust evaluation activities that include counterfactuals and comparison groups, especially for important concepts like public trust.



# Recommendations, Next Steps, and Conclusions

While existing customer experience and government experience initiatives have made tremendous progress in recent years, there are clear areas for improvement that align with data and evidence capabilities. The following recommendations are intended to promote the continued progress of the initiatives and efforts already underway and to support future initiatives, recognizing that CX and GX initiatives are a means to productively align certain existing management and operational initiatives.

**Recommendation #1: Evaluation design experts should be consulted in the design of future analyses.** While elements of evaluative thinking are being used in considering the data collection and analytics for the CX efforts, there are limitations in the ability to use available data for evaluative purposes. Nearly all collected data from the CX initiatives to date are single-group, post-test only analyses. These analyses also include substantial non-response or participation biases that pose unacknowledged threats to validity and reliability in the data analyses for agency reporting. For efforts aimed at improving public trust and bolstering capabilities, the data and evidence reported from the initiatives should also be trustworthy. Aligning with agency evaluation officers will ensure the CX activities can be part of agency evaluation plans and multi-year learning agendas and can help design data collection plans that emphasize longer-term outcomes.

**Recommendation #2: Agency Chief Data Officers should play a formal consultative role in the design of the CX projects.** Despite the role of data governance, open data, administrative records, and other important data themes, the statutory role of chief data officers was sparsely mentioned by the White House or agencies in the CX activities. Ensuring the CDOs and the implementation of the Federal Data Strategy are prioritized as part of the overall strategy and resourcing equation will also ensure that the CX projects receive the support needed for data capabilities. In addition, agency CDOs should incorporate CX activities in agency data strategies. In order to accomplish this responsibility, CDOs must also be provided adequate resources to support CX projects.

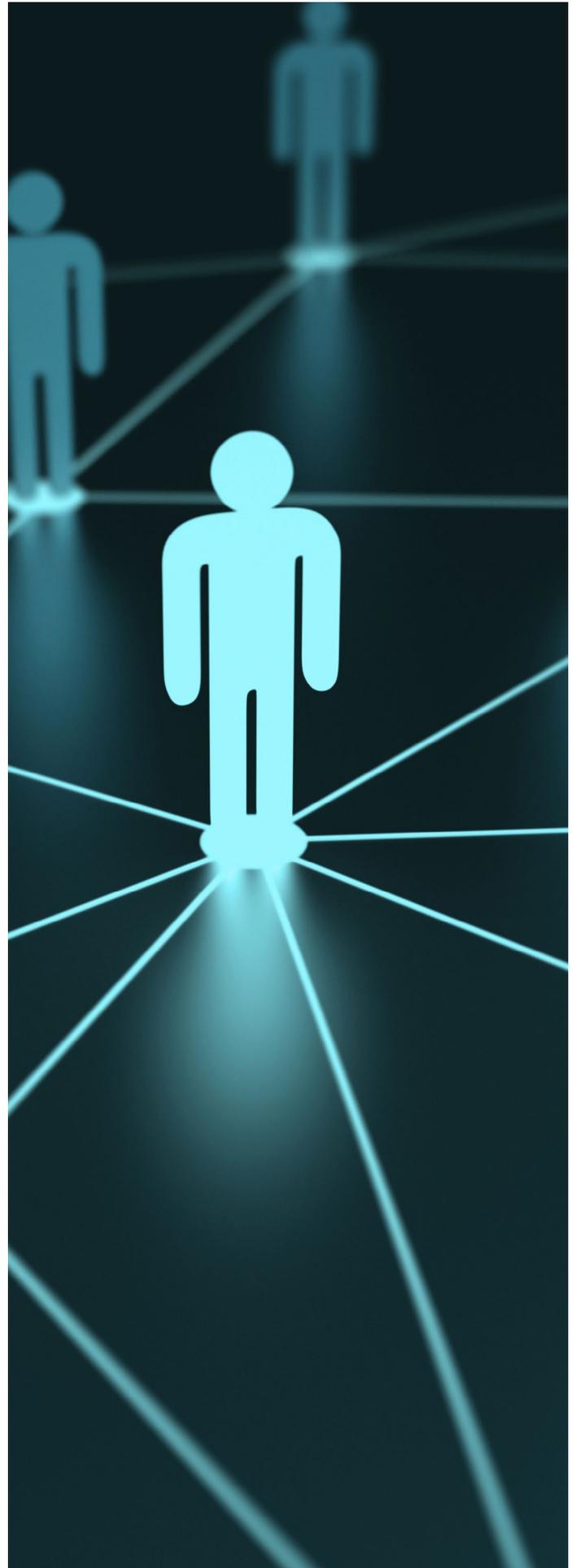
**Recommendation #3: Consult with federal statistical officials and experts on CX survey designs.** In certain cases, surveys are failing to report relevant statistical details for assessing subpopulations, quality, and other key characteristics. Conducting surveys and burdening the American people with data collections is not a matter of convenience – it is a priority that the information collected matters, is useful, and will be used. Unfortunately, some CX data collected and reported on Performance.gov is low quality and unusable, and some agencies are reportedly concerned about oversaturation from data collections.<sup>74</sup> To improve the usefulness of CX surveys, CX teams should work with the agency’s statistical official to appropriately design surveys.

Further, there are many CX surveys now in the field that are actually censuses. OMB and agencies should resist the temptation to “survey” every potential respondent when samples can satisfy the purpose of a data collection for the specified purpose, consistent with the Fair Information Practice Principles and data minimization principles. OMB should consider guidance for agencies on practices that consider when data should – and should not – be collected from the American people to support CX activities, including to ensure satisfaction of the Information Quality Act and other relevant principles of data quality. Guidance from OMB could include, for example, cognitive testing requirements for CX initiatives and questionnaires.

**Recommendation #4: Agencies should consider the diversity of the American public when collecting CX data.** When agencies are collecting new data from the American public to support CX initiatives or to measure outcomes from the initiatives, they should consider specifically that there are different subpopulations of the American population. For example, some populations may need translations of surveys to different languages, or experience questions in different ways from surveys and data collections or other engagements. CX activities should aim to improve experience with government for all, and for agencies to understand the various needs of the American people, data collection efforts must plan for how to appropriately gather feedback from diverse perspectives.

**Recommendation #5: Agencies should align tools to be adaptable and ready to support adoption of artificial intelligence capabilities.** With the emergence of new capabilities for artificial intelligence (AI) that are rapidly coming online in the public and private sectors, agencies should prepare the CX and GX initiatives to adapt AI capabilities quickly, including by ensuring data quality and open data assets are prepared for relevant migrations. AI may transform quickly to improve and accelerate the initiatives. Well-managed and effectively-governed data will enable agencies to adopt AI technologies as they develop, providing opportunities to streamline service delivery, improve productivity, and empower CX staff to spend more time designing activities and meaningfully engaging with their customers.

The current efforts to promote user-centered and human-centered design for CX and GX initiatives in the public sector are promising approaches for promoting public trust in democratic institutions. While there are opportunities to align data more within the current framework, the ever-evolving institutions in the United States benefit from an intentional focus on the customer, and improvements to the experience of citizens with their government. Fortunately, progress is being made in the national and local efforts across the country – and data are clearly prioritized as part of the initiatives based on the reviewed success stories. Continued efforts will be needed to ensure customers and citizens benefit and truly experience their government as intended.



# Project Team

**Nick Hart, Ph.D.**

President & CEO  
Data Foundation

**Lori Gonzalez, Ph.D.**

Senior Policy and  
Research Analyst  
Data Foundation

**Katie O'Toole**

Policy and Research Analyst  
Data Foundation

**Carrie Myers**

Project Associate  
Data Foundation

**Joe Ilardi**

Operations Analyst  
Data Foundation

**Andrea Chavez**

Project Associate  
Data Foundation

**Sherry Bennett, Ph.D.**

Chief Data Scientist  
TD Synnex  
Public Sector

**Blair Maradin**

Marketing Campaign  
Manager  
TD Synnex  
Public Sector

**Michael Anderson**

Chief Strategist  
Informatica  
Public Sector

**Rachael Hendrickson**

Associate Director  
Informatica  
Public Sector



The Data Foundation is a non-profit think tank based in Washington, D.C. that seeks to improve government and society by using data to inform public policymaking. Our research and educational activities proactively and rapidly address relevant, emerging data-related needs in the country with the goal of devising realistic solutions, accelerating policy coordination, and advancing innovation. The Data Foundation values diversity and transparency in pursuit of an equitable, data-informed society.



At Informatica, we believe data is the soul of public sector transformation. That's why we help agencies bring data to life by modernizing themselves from simple binary information-based to extraordinary innovation to better serve their constituents. With the Informatica Intelligent Data Management Cloud™, powered by AI, it's the only cloud dedicated to managing data of any type, pattern, complexity, or workload across any location—all on a single platform. Whether agencies are driving next-gen analytics, delivering perfectly timed public citizen experience, or ensuring governance and privacy, agencies can always know their data is accurate, their insights are actionable, and their possibilities are limitless. Informatica. Cloud first. Data always.



TD SYNnex Public Sector is the premier government solutions aggregator that specializes in understanding the IT needs and solving the challenges of the federal, state, local and education markets. TD SYNnex Public Sector helps simplify the process and removes barriers for independent infrastructure and software technology vendors, federal systems integrators and value-added resellers doing business in the public sector. Our *AI Accelerator* program is laser focused on enabling our technology partners, and their public sector customers, to mature their use of data and modernize their information architecture, with the end goal to develop and support critical AI workloads that are necessary to achieve mission operations.

**Disclaimer**

This paper is a product of the Data Foundation, sponsored by Informatica and TD Synnex. The findings and conclusions do not necessarily reflect the views or opinions of the Data Foundation, its funders and sponsors, or its board of directors.

© 2023 Data Foundation. All rights reserved. This content is for general informational purposes only and should not be used as a substitute for consultation with professional advisors.

# Endnotes

1. Our Public Service. (2021). Bright spots in government: A call for collaboration and innovation. Retrieved from <https://ourpublicservice.org/wp-content/uploads/2021/02/Bright-Spots.pdf>
2. Pew Research Center. (2022). Public trust in government: 1958-2022. Retrieved from <https://www.pewresearch.org/politics/2022/06/06/public-trust-in-government-1958-2022/>
3. Organisation for Economic Co-operation and Development (OECD). (2021). Government at a glance 2021. Retrieved from <https://www.oecd-ilibrary.org/sites/72888d1b-en/index.html?itemId=/content/component/72888d1b-en#section-d1e4608>
4. Note the US did not participate in the OECD survey.
5. Organisation for Economic Co-operation and Development (OECD). (2021). Government at a glance 2021. Retrieved from <https://www.oecd-ilibrary.org/sites/72888d1b-en/index.html?itemId=/content/component/72888d1b-en#figure-d1e4810>
6. PWC
7. ACT-IAC. CX playbook. Retrieved from [https://www.actiac.org/system/files/CX\\_Playbook.pdf](https://www.actiac.org/system/files/CX_Playbook.pdf)
8. Performance.gov. Data. Retrieved from <https://www.performance.gov/pma/cx/data/#section-1>
9. Government Technology. (2017). Government experience awards 2017 inaugural winners announced. Retrieved from <https://www.govtech.com/cdg/government-experience/government-experience-awards-2017-inaugural-winners-announced.html>
10. Federal Register. (2021). Transforming federal customer experience and service delivery to rebuild trust in government. Retrieved from <https://www.federalregister.gov/documents/2021/12/16/2021-27380/transforming-federal-customer-experience-and-service-delivery-to-rebuild-trust-in-government>
11. Federal Register. (2021). Transforming federal customer experience and service delivery to rebuild trust in government. Retrieved from <https://www.federalregister.gov/documents/2021/12/16/2021-27380/transforming-federal-customer-experience-and-service-delivery-to-rebuild-trust-in-government>. See Sec. 3(f).
12. Harvard Business School Online. What is human-centered design? Retrieved from <https://online.hbs.edu/blog/post/what-is-human-centered-design#>
13. Administration for Children and Families. (2018). Human-centered design: State of the field. Retrieved from <https://www.acf.hhs.gov/sites/default/files/documents/opre/OPRE-HCD-State-of-Field.pdf>
14. The White House. (2023). Fact sheet: Biden-Harris administration launches nine life experience projects to streamline service delivery for the American people. Retrieved from <https://www.whitehouse.gov/omb/briefing-room/2023/03/03/fact-sheet-biden-harris-administration-launches-nine-life-experience-projects-to-streamline-service-delivery-for-the-american-people/>
15. Performance.gov. (2022). CX 2022 life experience initiative: Overview. Retrieved from <https://assets.performance.gov/cx/files/life-experiences/2022/CX-2022-Life-Experience-Initiative-Overview-OnePager.pdf>
16. Performance.gov. Facing a financial shock. Retrieved from <https://www.performance.gov/cx/life-experiences/facing-a-financial-shock/#project-documentation>
17. Performance.gov. (2023). CX 2023 navigating transition life experience design project summary. Retrieved from [https://assets.performance.gov/cx/files/life-experiences/2023/CX-2023\\_Navigating-Transition\\_Life-Experience\\_Design-Project-Summary.pdf](https://assets.performance.gov/cx/files/life-experiences/2023/CX-2023_Navigating-Transition_Life-Experience_Design-Project-Summary.pdf)
18. Performance.gov. Navigating the transition to civilian life. Retrieved from <https://www.performance.gov/cx/life-experiences/navigating-the-transition-to-civilian-life/>
19. U.S. Government Publishing Office. (2018). Public law 115-336. Retrieved from <https://www.congress.gov/115/plaws/publ336/PLAW-115publ336.pdf>
20. Performance.gov. (2022). OMB circular A-11, section 280. Retrieved from <https://www.performance.gov/cx/assets/files/2022-OMB-Circular-A11-Section-280.pdf>
21. Our Public Service. Designing a government for the people. Retrieved from <https://ourpublicservice.org/publications/designing-a-government-for-the-people/>
22. FCW. (2023). Stakeholders wonder how sustain CX momentum long-term. Retrieved from <https://fcw.com/digital-government/2023/04/stakeholders-wonder-how-sustain-cx-momentum-long-term/385061/>. See remarks in webinar.

23. Performance.gov. Service 12: Trusted traveler programs. Retrieved from <https://www.performance.gov/cx/agencies/dhs/#service-12>
24. Performance.gov. Recovering from a disaster. Retrieved from <https://www.performance.gov/cx/life-experiences/recovering-from-a-disaster/>
25. Performance.gov. DHS CX dashboard. Retrieved from <https://www.performance.gov/cx/agencies/dhs/>
26. Our Public Service. (2022). Individual assistance disaster relief programs. Retrieved from <https://ourpublicservice.org/our-solutions/customer-experience/y2022/individual-assistance-disaster-relief-programs/#Customer-Insights>
27. Performance.gov. 2021 HISP action plan for DHS FEMA. Retrieved from <https://www.performance.gov/cx/dashboard/actionplans/2021/2021-hisp-action-plan-dhs-fema.pptx>
28. Performance.gov. Service 12: Trusted traveler programs. Retrieved from <https://www.performance.gov/cx/agencies/dhs/#service-12>
29. FEMA.Improve customer experience. Retrieved from [https://emilms.fema.gov/is\\_1001/groups/10.html](https://emilms.fema.gov/is_1001/groups/10.html)
30. FedScoop. Accenture tech brief: FEMA. Retrieved from [https://www.accenture.com/\\_acnmedia/pdf-69/accenture-techbrief-fema.pdf](https://www.accenture.com/_acnmedia/pdf-69/accenture-techbrief-fema.pdf)
31. FEMA. (2021). FEMA private sector advisory update. Retrieved from <https://content.govdelivery.com/accounts/USDHSFEMA/bulletins/311f01f>
32. U.S. Government Publishing Office. OMB control number 1545-0074. Retrieved from <https://www.reginfo.gov/public/do/PRAOMBHistory?ombControlNumber=1545-0074>
33. [Performance.gov](https://www.performance.gov)
34. Forbes. (2019). Surprising tax changes from the IRS you should know. Retrieved from <https://www.forbes.com/sites/bobcarlson/2019/09/23/surprising-tax-changes-from-the-irs-you-should-know/?sh=39dd4a756833>
35. Senate Finance Committee. (2023). Daniel Werfel Senate Finance Committee QFR's - February 24, 2023. Retrieved from [https://www.finance.senate.gov/imo/media/doc/Daniel Werfel Senate Finance Committee QFR's - February 24, 2023.pdf](https://www.finance.senate.gov/imo/media/doc/Daniel%20Werfel%20Senate%20Finance%20Committee%20QFR's%20-%20February%2024,%202023.pdf)
36. U.S. Government Publishing Office. (2022). OMB control number 1545-0080. Retrieved from [https://www.reginfo.gov/public/do/PRAViewICR?ref\\_nbr=202210-1545-008](https://www.reginfo.gov/public/do/PRAViewICR?ref_nbr=202210-1545-008)
37. Performance.gov. Service 59: Retirement benefits. Retrieved from <https://www.performance.gov/cx/agencies/usdt/#service-59>
38. U.S. Department of the Treasury. (2022). Treasury to provide automatic COVID-19 relief to nearly 1 million borrowers. Retrieved from <https://home.treasury.gov/news/press-releases/jy1421>
39. U.S. Department of the Treasury. FAQs for the emergency rental assistance program. Retrieved from <https://home.treasury.gov/news/press-releases/jy1421>
40. Internal Revenue Service. (2021). IRS creates new chief taxpayer experience officer position; Ken Corbin to lead new focus to improve service to taxpayers. Retrieved from <https://www.irs.gov/newsroom/irs-creates-new-chief-taxpayer-experience-officer-position-ken-corbin-to-lead-new-focus-to-improve-service-to-taxpayers>
41. U.S. Government Publishing Office. (2019). Public law 116-25. Retrieved from <https://www.congress.gov/116/plaws/publ25/PLAW-116publ25.pdf>
42. Internal Revenue Service. (2023). Taxpayer First Act provisions. Retrieved from <https://www.irs.gov/newsroom/taxpayer-first-act-provisions>
43. National Park Service. Annual summary report (1904 - last calendar year). Retrieved from [https://irma.nps.gov/Stats/SSRSReports/National Reports/Annual Summary Report \(1904 - Last Calendar Year\)](https://irma.nps.gov/Stats/SSRSReports/National%20Reports/Annual%20Summary%20Report%20(1904%20-%20Last%20Calendar%20Year))
44. Performance.gov. Department of the Interior CX dashboard. Retrieved from <https://www.performance.gov/cx/agencies/doi/>
45. National Park Service. About us: Customer service. Retrieved from <https://www.nps.gov/aboutus/customer-service.htm>
46. UMB. (2023). OMB control number 1024-0277. Retrieved from [https://www.reginfo.gov/public/do/PRAViewICR?ref\\_nbr=202008-1024-001](https://www.reginfo.gov/public/do/PRAViewICR?ref_nbr=202008-1024-001)
47. National Park Service. Socioeconomic monitoring and visitor surveys. Retrieved from <https://www.nps.gov/subjects/socialscience/socioeconomic-monitoring-visitor-surveys.htm>

48. U.S. Government Publishing Office. 54 USC Sec 100701 and 100702. Retrieved from <https://www.reginfo.gov/public/do/DownloadDocument?objectID=103409301>. See remarks.
49. Performance.gov. (2021). 2021 HISP action plan for DHS TSA. Retrieved from <https://www.performance.gov/cx/dashboard/actionplans/2021/2021-hisp-action-plan-dhs-tsa.pptx>
50. Performance.gov. (2021). 2021 HISP action plan for DHS TSA. Retrieved from <https://www.performance.gov/cx/dashboard/actionplans/2021/2021-hisp-action-plan-dhs-tsa.pptx>
51. Performance.gov. Service 72: Aviation security. Retrieved from <https://www.performance.gov/cx/agencies/dhs/#service-72>
52. Performance.gov. Service 72: Aviation security. Retrieved from <https://www.performance.gov/cx/agencies/dhs/#service-72>
53. U.S. Department of Homeland Security. (2022). There difference between customer service and customer experience. Retrieved from <https://www.dhs.gov/news/2022/03/28/there-difference-between-customer-service-and-customer-experience>
54. Performance.gov. (2021). 2021 HISP action plan for SSA OO. Retrieved from <https://www.performance.gov/cx/dashboard/actionplans/2021/2021-hisp-action-plan-ssa-oo.pptx>
55. Social Security Administration. (2023). FY 2024 justifications of estimates for appropriations committees: Limitation on administrative expenses. Retrieved from <https://www.ssa.gov/budget/assets/materials/2024/FY24-JEAC.pdf>
56. Social Security Administration. (2023). FY 2024 justifications of estimates for appropriations committees: Limitation on administrative expenses. Retrieved from <https://www.ssa.gov/budget/assets/materials/2024/FY24-JEAC.pdf>
57. Social Security Administration. (2023). FY 2024 justifications of estimates for appropriations committees: Limitation on administrative expenses. Retrieved from <https://www.ssa.gov/budget/assets/materials/2024/FY24-JEAC.pdf>
58. Social Security Administration. FY 2024 justifications of estimates for appropriations committees: Limitation on administrative expenses. Retrieved from <https://www.ssa.gov/budget/assets/materials/2024/FY24-JEAC.pdf>
59. Performance.gov. Social Security Administration CX dashboard. Retrieved from <https://www.performance.gov/cx/agencies/ssa/>
60. Performance.gov. Social Security Administration CX dashboard. Retrieved from <https://www.performance.gov/cx/agencies/ssa/>
61. Federal Register. (2019). Core values, characteristics, and customer experience principles of the Department of Education. Retrieved from <https://www.federalregister.gov/documents/2019/05/20/2019-10261/core-values-characteristics-and-customer-experience-principles-of-the-department>
62. U.S. Department of Veterans Affairs. VA customer experience. Retrieved from <https://department.va.gov/veterans-experience/>
63. U.S. Department of Veterans Affairs. VA customer experience cookbook. Retrieved from <https://www.va.gov/ve/docs/cx/customer-experience-cookbook.pdf>
64. Department of Veterans Affairs. (2023). Veterans Experience Office. Retrieved from <https://department.va.gov/administrations-and-offices/veterans-experience-office/>
65. Performance.gov. Department of Veterans Affairs CX dashboard. Retrieved from <https://www.performance.gov/cx/agencies/va/>
66. U.S. Department of Veterans Affairs. VA customer profile: Veterans signals programs recognized by FedHealthIT. Retrieved from <https://news.va.gov/61703/va-customer-profile-veterans-signals-programs-recognized-fedhealth/>
67. U.S. Department of Veterans Affairs. Veterans Experience Action Centers. Retrieved from <https://www.va.gov/initiatives/veterans-experience-action-centers/>
68. Service to America Medals. (2022). Barbara C. Morton. Retrieved from <https://servicetoamericamedals.org/honorees/barbara-c-morton/>

69. GovernmentCIO Media. VA sees returns on yearslong customer experience campaign. Retrieved from <https://governmentciomedia.com/va-sees-returns-yearslong-customer-experience-campaign>
70. U.S. Department of Veterans Affairs. (2023). VA FY2023 Q1 Trust Report. Retrieved from <https://department.va.gov/veterans-experience/wp-content/uploads/sites/2/2023/02/VA-FY2023-Q1-Trust-Report-V2.23.23-1005hrs.pdf>
71. Performance.gov. (2021). 2021 HISP action plan for VA VHA. Retrieved from <https://www.performance.gov/cx/dashboard/actionplans/2021/2021-hisp-action-plan-va-vha.pptx>
72. Office of Management and Budget (OMB). (2019). Federal Data Strategy – A Framework for Consistency (M-19-18). Washington, D.C.: White House Office of Management and Budget. Available at: <https://www.whitehouse.gov/wp-content/uploads/2019/06/M-19-18.pdf>.
73. Data Foundation. (2023). Stakeholder Engagement Toolkit. Retrieved from <https://www.datafoundation.org/stakeholder-engagement-toolkit-for-evidence-building-introduction>
74. Performance.gov. (2021). 2021 HISP action plan for VA VHA. Retrieved from <https://www.performance.gov/cx/dashboard/actionplans/2021/2021-hisp-action-plan-va-vha.pptx>